



This slide show is used to map out the general flow on how the aide care plan, schedule and billing works. The following instructions are helpful for those agencies who use the aide care plan to generate schedules, and uses the schedules to generate charges. In order for this feature to work properly, do not use any other schedule features along with these instructions. If you would like to use another feature in Barnestorm, contact us to find out if it will impact your process.





The first couple of steps that need to happen before you can generate the aide care plan are:

- Entering the patient referral
- Entering the authorized hours

We will not go over these details in this slide show. You can review the article links below, as needed.

[Enter Patient Referral](#)

[Patient Authorization Article](#)



Create Aide Care Plan

- From the Main Menu in Barnestorm Office click on Aide Activity, then click on Aide Plan tab.
- Click the New button
- Click the drop down box for Assigned Aide and select the aide assigned to the patient.
- Click the drop down box for Case Manager and select the patient's *assigned aide or case manager*.
- Key in the Start date. This should be the patient's admit date.
- Key in the End date. This will be the patient's authorization thru date.
 - *For your convenience, the authorization hours are located on the main Aide Plan screen.*

A screenshot of a software window titled "Aide Plan for TEST PATIENT (888888)". The window has a blue header bar with four tabs: "Scheduled Tasks", "Current Status and Precautionary Info", "Vital Sign Parameters to notify Case Manager", and "Special Instructions". Below the tabs, there are several input fields and buttons. The "Assigned Aide" field is set to "WATERMAN, EMPLOYEE" with a dropdown arrow. The "Start" date is "07/01/2016" with a dropdown arrow, and the "Weeks" field is "1" with a dropdown arrow. To the right of these fields are three buttons: "Review" (with a green checkmark icon), "Print", and "Save". Below these, the "Case Manager" field is also set to "WATERMAN, EMPLOYEE" with a dropdown arrow. The "End" date is "05/31/2017" with a dropdown arrow, and the "Freq." field is empty. At the bottom, there are two "Start" fields: "08:00 AM" and "08:30 AM", both with dropdown arrows, followed by a "00.50" field and a checked "Update Schedule" checkbox.



Create Aide Care Plan

- Click the Set Times button.
- Select the Time In and Time Out for each day the patient is seen.
- Select the Set Times button to hide the screen.

Week Times			
	Time In	Time Out	Totals
Sunday:	08:00 AM	08:30 AM	
Monday:	10:00 AM	11:30 AM	01.50
Tuesday:	10:00 AM	11:30 AM	01.50
Wednesday:	01:30 AM	03:00 PM	13.50
Thursday:	01:30 PM	03:00 PM	01.50
Friday:	10:00 AM	11:30 AM	01.50
Saturday:	08:00 AM	08:30 AM	
		Total:	19.5 hr(s)



Create Aide Care Plan

- Click the Set Pro/Job button. This is required when importing schedules to billing.
- Select the Job Code and Visit Status code to be used.
- Click the Set Pro/Job button to hide the screen.

Billing Info		
Program/Payer	01/001 - IN HOME CARE - ADULT	
Job Code:	001	IN HOME CARE - ADULT
Visit Status:	001	CHARGEABLE

Click 'Set Pro/Job' button again to hide

Set Times **Set Pro/Job** Clear



Create Aide Care Plan

As needed, complete the additional tabs at the top of the screen:

- Current Status and Precautionary Info
- Vital Sign Parameters to notify Case Manager
- Special Instructions

The screenshot shows a software window titled "Aide Plan for TEST PATIENT (888888)". The window has four tabs: "Scheduled Tasks", "Current Status and Precautionary Info", "Vital Sign Parameters to notify Case Manager", and "Special Instructions". The "Scheduled Tasks" tab is active. It contains the following fields and controls:

Assigned Aide	WATERMAN, EMPLOYEE	Start	07/01/2016	Weeks	1	<input checked="" type="checkbox"/> Review	Print	Save
Case Manager	WATERMAN, EMPLOYEE	End	05/31/2017	Freq.	6 x wk / 1 wks			
		Start	08:00 AM	End	08:30 AM	00.50	<input type="checkbox"/> Update Schedule	



Create Aide Care Plan

- Click the Save button once documentation has been keyed.
- Click the Print button.
- As needed, select which preview you need to print.
- The Week View is the same as the 21.13 Print Aide Time Sheets report.

Barnestorm, Inc.						
Week View for TEST PATIENT (888888)						
07-31-16						6:27 PM
Friday	Saturday	Sunday	Monday	Tuesday	Wednesday	Thursday
<input type="checkbox"/> Tub bath or shower-upper	<input type="checkbox"/> Tub bath or shower-upper		<input type="checkbox"/> Tub bath or shower-upper	<input type="checkbox"/> Tub bath or shower-upper	<input type="checkbox"/> Tub bath or shower-upper	<input type="checkbox"/> Tub bath or shower-upper
<input type="checkbox"/> Tub bath or shower-lower	<input type="checkbox"/> Tub bath or shower-lower		<input type="checkbox"/> Tub bath or shower-lower	<input type="checkbox"/> Tub bath or shower-lower	<input type="checkbox"/> Tub bath or shower-lower	<input type="checkbox"/> Tub bath or shower-lower
<input type="checkbox"/> Tub/shower transfer/position	<input type="checkbox"/> Tub/shower transfer/position		<input type="checkbox"/> Tub/shower transfer/position	<input type="checkbox"/> Tub/shower transfer/position	<input type="checkbox"/> Tub/shower transfer/position	<input type="checkbox"/> Tub/shower transfer/position
<input type="checkbox"/> Change linens	<input type="checkbox"/> Change linens		<input type="checkbox"/> Change linens	<input type="checkbox"/> Change linens	<input type="checkbox"/> Change linens	<input type="checkbox"/> Change linens
<input type="checkbox"/> Make bed	<input type="checkbox"/> Make bed		<input type="checkbox"/> Make bed	<input type="checkbox"/> Make bed	<input type="checkbox"/> Make bed	<input type="checkbox"/> Make bed
<input type="checkbox"/> Tidy/clean bathroom	<input type="checkbox"/> Tidy/clean bathroom		<input type="checkbox"/> Tidy/clean bathroom	<input type="checkbox"/> Tidy/clean bathroom	<input type="checkbox"/> Tidy/clean bathroom	<input type="checkbox"/> Tidy/clean bathroom
<input type="checkbox"/> Laundry	<input type="checkbox"/> Laundry		<input type="checkbox"/> Laundry	<input type="checkbox"/> Laundry	<input type="checkbox"/> Laundry	<input type="checkbox"/> Laundry
<input type="checkbox"/> Don clothing/socks/shoes	<input type="checkbox"/> Don clothing/socks/shoes		<input type="checkbox"/> Don clothing/socks/shoes	<input type="checkbox"/> Don clothing/socks/shoes	<input type="checkbox"/> Don clothing/socks/shoes	<input type="checkbox"/> Don clothing/socks/shoes
<input type="checkbox"/> Remove clothing/socks/shoes	<input type="checkbox"/> Remove clothing/socks/shoes		<input type="checkbox"/> Remove clothing/socks/shoes	<input type="checkbox"/> Remove clothing/socks/shoes	<input type="checkbox"/> Remove clothing/socks/shoes	<input type="checkbox"/> Remove clothing/socks/shoes
<input type="checkbox"/> Clothing and shoe fasteners	<input type="checkbox"/> Clothing and shoe fasteners		<input type="checkbox"/> Clothing and shoe fasteners	<input type="checkbox"/> Clothing and shoe fasteners	<input type="checkbox"/> Clothing and shoe fasteners	<input type="checkbox"/> Clothing and shoe fasteners
<input type="checkbox"/> Hang/retrieve clothing	<input type="checkbox"/> Hang/retrieve clothing		<input type="checkbox"/> Hang/retrieve clothing	<input type="checkbox"/> Hang/retrieve clothing	<input type="checkbox"/> Hang/retrieve clothing	<input type="checkbox"/> Hang/retrieve clothing
<input type="checkbox"/> Transfer to/from bed	<input type="checkbox"/> Transfer to/from bed		<input type="checkbox"/> Transfer to/from bed	<input type="checkbox"/> Transfer to/from bed	<input type="checkbox"/> Transfer to/from bed	<input type="checkbox"/> Transfer to/from bed
<input type="checkbox"/> Transfer to/from chair	<input type="checkbox"/> Transfer to/from chair		<input type="checkbox"/> Transfer to/from chair	<input type="checkbox"/> Transfer to/from chair	<input type="checkbox"/> Transfer to/from chair	<input type="checkbox"/> Transfer to/from chair
<input type="checkbox"/> Ambulation room to room	<input type="checkbox"/> Ambulation room to room		<input type="checkbox"/> Ambulation room to room	<input type="checkbox"/> Ambulation room to room	<input type="checkbox"/> Ambulation room to room	<input type="checkbox"/> Ambulation room to room
<input type="checkbox"/> Clear pathways / minimize clutter	<input type="checkbox"/> Clear pathways / minimize clutter		<input type="checkbox"/> Clear pathways / minimize clutter	<input type="checkbox"/> Clear pathways / minimize clutter	<input type="checkbox"/> Clear pathways / minimize clutter	<input type="checkbox"/> Clear pathways / minimize clutter
<input type="checkbox"/> Remove/Pull up/fasten garments	<input type="checkbox"/> Remove/Pull up/fasten garments		<input type="checkbox"/> Remove/Pull up/fasten garments	<input type="checkbox"/> Remove/Pull up/fasten garments	<input type="checkbox"/> Remove/Pull up/fasten garments	<input type="checkbox"/> Remove/Pull up/fasten garments
<input type="checkbox"/> Hygiene after toileting/incontinence	<input type="checkbox"/> Hygiene after toileting/incontinence		<input type="checkbox"/> Hygiene after toileting/incontinence	<input type="checkbox"/> Hygiene after toileting/incontinence	<input type="checkbox"/> Hygiene after toileting/incontinence	<input type="checkbox"/> Hygiene after toileting/incontinence
<input type="checkbox"/> Transfer to/from BSC or toilet	<input type="checkbox"/> Transfer to/from BSC or toilet		<input type="checkbox"/> Transfer to/from BSC or toilet	<input type="checkbox"/> Transfer to/from BSC or toilet	<input type="checkbox"/> Transfer to/from BSC or toilet	<input type="checkbox"/> Transfer to/from BSC or toilet
<input type="checkbox"/> Assist with cutting food	<input type="checkbox"/> Assist with cutting food		<input type="checkbox"/> Assist with cutting food	<input type="checkbox"/> Assist with cutting food	<input type="checkbox"/> Assist with cutting food	<input type="checkbox"/> Assist with cutting food
<input type="checkbox"/> Clean meal service area	<input type="checkbox"/> Clean meal service area		<input type="checkbox"/> Clean meal service area	<input type="checkbox"/> Clean meal service area	<input type="checkbox"/> Clean meal service area	<input type="checkbox"/> Clean meal service area
Sched: 30m	Sched: 30m		Sched: 30m	Sched: 30m	Sched: 30m	Sched: 30m
8:00 - 8:30 AM	8:00 - 8:30 AM		8:00 - 8:30 AM	8:00 - 8:30 AM	8:00 - 8:30 AM	8:00 - 8:30 AM
Actual: _____	Actual: _____		Actual: _____	Actual: _____	Actual: _____	Actual: _____
Initials: _____	Initials: _____		Initials: _____	Initials: _____	Initials: _____	Initials: _____
EMPLOYEE WATERMAN	EMPLOYEE WATERMAN		EMPLOYEE WATERMAN	EMPLOYEE WATERMAN	EMPLOYEE WATERMAN	EMPLOYEE WATERMAN



Edit Aide Care Plan

From time to time, you may need to edit the aide care plan if information was mis-keyed.

- From the Aide Plan screen select the current aide plan
- Click the Edit button
- Modify the information as needed
- You'll see a checkbox for Update Schedule, this will be used when updating specific information:
 - Assigned Aide
 - Start or End time
 - Set Times
 - Set Pro/Job

A screenshot of a software interface for editing an aide care plan. The interface has a light blue header with four tabs: 'Scheduled Tasks', 'Current Status and Precautionary Info', 'Vital Sign Parameters to notify Case Manager', and 'Special Instructions'. The 'Current Status and Precautionary Info' tab is active. Below the header, there are several input fields and buttons. The 'Assigned Aide' field is set to 'WATERMAN, EMPLOYEE'. The 'Start' date is '11/02/2015' and 'Weeks' is '1'. The 'Case Manager' field is also 'WATERMAN, EMPLOYEE'. The 'End' date is '10/31/2016' and 'Freq.' is '6 x wk / 52 wks'. At the bottom, there are 'Start' and 'End' time fields set to '08:00 AM' and '08:30 AM' respectively, and a duration field set to '00.50'. A checkbox labeled 'Update Schedule' is checked and highlighted with a red box. To the right of the form are buttons for 'Review', 'Print', and 'Save'.

- After editing the care plan, click on Save
- If the Update Schedule was checked, the patient's schedule will be updated to the new information



Edit Aide Care Plan

The Update Schedule button will update any current scheduled items to reflect the new information. It will not duplicate entries.

Times when you do not need to check this box:

- Updating the Case Manager (not the assigned aide)
- Updating the Precautionary Info, Vital Signs, Special Instructions tab

Scheduled Tasks	Current Status and Precautionary Info	Vital Sign Parameters to notify Case Manager	Special Instructions
Assigned Aide	WATERMAN, EMPLOYEE	Start 11/02/2015	Weeks 1
Case Manager	WATERMAN, EMPLOYEE	End 10/31/2016	Freq. 6 x wk / 52 wks
		Start 08:00 AM	End 08:30 AM 00.50 <input type="checkbox"/> Update Schedule

Review Print Save



Expiring Aide Care Plan

When an aide care plan is due to expire, you will need to create a new care plan. You may also need to create a new authorization as well. Do not use any other feature to update the aide plan or schedule.

- Pull up the patient's aide care plan
- Click the New button
- The information will copy forward
- Update any of the information as needed
- Follow the original notes on creating an aide care plan
- Click on Save
- A new set of scheduled entries will generate for the care plan time frame



Schedule Calendar

The schedule can be found under:
 Aide Activity > Aide Schedule or
 Employee Activity > Schedule
 Once you save the Aide Care Plan with the appropriate fields completed, it will generate a schedule for the assigned aide.

Schedule Entry | Day View | Week View | Month View | Directions/Map | Case Load | Settings

Aug 1 - 8, 2016 31 Print Schedule Patient: 888888 PATIENT, TEST

Day Week Month Custom Print Grid Print Text Employee Patient Show All Show Comments

Add Schedule Items Copy Schedule

Chart	Patient	Emp	Employee	Date	Time In	Time Out	Pr	Pay	Job	Vst
888888	PATIENT, TEST	1912	WATERMAN, EMPLOYEE	08/01/2016	08:00 AM	08:30 AM	01	001	001	001
888888	PATIENT, TEST	1912	WATERMAN, EMPLOYEE	08/02/2016	08:00 AM	08:30 AM	01	001	001	001
888888	PATIENT, TEST	1912	WATERMAN, EMPLOYEE	08/03/2016	08:00 AM	08:30 AM	01	001	001	001
888888	PATIENT, TEST	1912	WATERMAN, EMPLOYEE	08/04/2016	08:00 AM	08:30 AM	01	001	001	001
888888	PATIENT, TEST	1912	WATERMAN, EMPLOYEE	08/05/2016	08:00 AM	08:30 AM	01	001	001	001
888888	PATIENT, TEST	1912	WATERMAN, EMPLOYEE	08/06/2016	08:00 AM	08:30 AM	01	001	001	001
888888	PATIENT, TEST	1912	WATERMAN, EMPLOYEE	08/08/2016	08:00 AM	08:30 AM	01	001	001	001
Total Scheduled										
7										

Scheduled Tasks: Current Status and Precautionary Info Vital Sign Parameters to notify Case Manager Special Instructions

Assigned Aide: WATERMAN, EMPLOYEE Start: 07/01/2016 Weeks: 1 Review Print Save

Case Manager: WATERMAN, EMPLOYEE End: 05/31/2017 Freq: 6 x wk / 1 wks

Start: 08:00 AM End: 08:30 AM :00.50 Update Schedule

Scheduled Tasks to be Performed by Aide

Tub bath or shower-upper	Skin care	Laundry	Assist with prosthetics	Turn/reposition	Empty trash, dispos
Tub bath or shower-lower	Nail care	Don clothing/socks/shoes	Hang/retrieve clothing	Clear pathways / minimize clutter	Assist with cutting f
Tub/shower transfer/position	Mouth/oral/denture care	Remove clothing/socks/shoes	Transfer to/from bed	Retrieve / return equipment	Assist with feeding
Bed bath	Shave	Clothing and shoe fasteners	Transfer to/from chair	Remove/Pull up/fasten garments	Assist with utensil u
Change linens	Assist with TEDs	Ambulation room to room	Hygiene after toileting/incontinence	Lift limb to mouth	
Make bed	Assist with braces/splints	Assist with stairs	Transfer to/from BSC or toilet	Tube feeding	
Tidy/clean bathroom	Assist with binders	ROM	Clean BSC / urinal / bedpan / toileting area	Clean meal service	

to the appropriate day below Drag all Set Times Set Pro/Job Clear

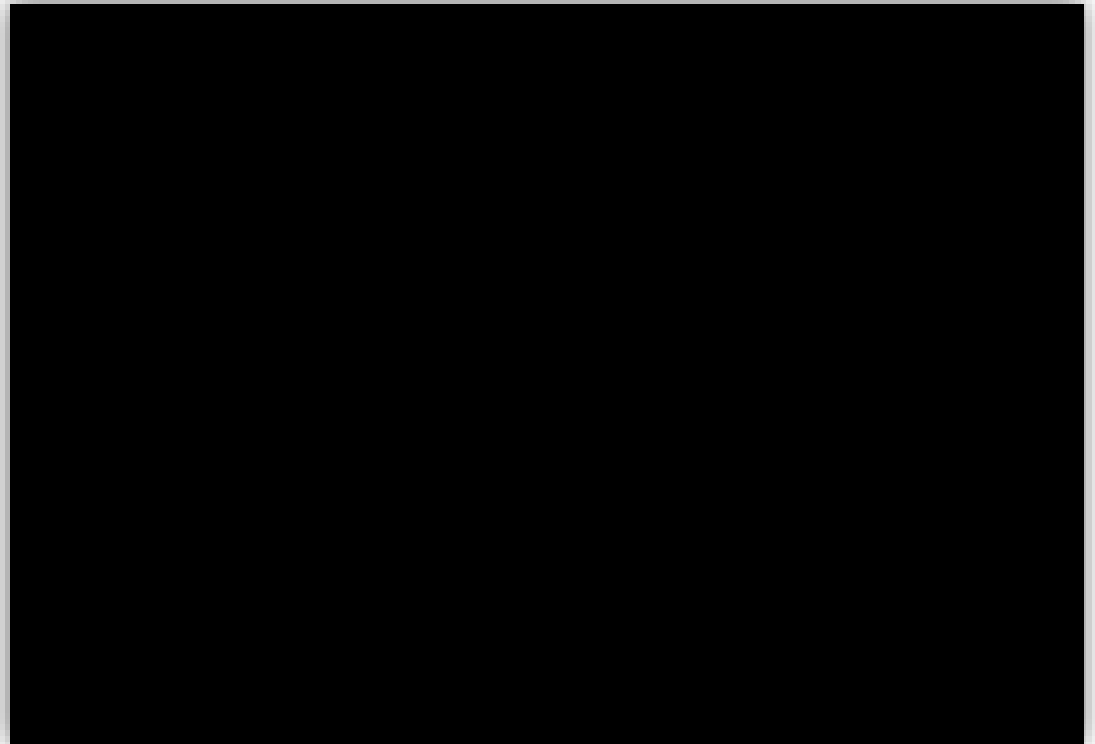
	Sun	Mon	Tue	Wed	Thu
or shower-		Tub bath or shower-	Tub bath or shower-	Tub bath or shower-	Tub bath or shower-
or shower-		Tub bath or shower-	Tub bath or shower-	Tub bath or shower-	Tub bath or shower-
er		Tub/shower	Tub/shower	Tub/shower	Tub/shower
nens		Change linens	Change linens	Change linens	Change linens
		Make bed	Make bed	Make bed	Make bed
h bathroom		Tidy/clean bathroom	Tidy/clean bathroom	Tidy/clean bathroom	Tidy/clean bathroom
		Laundry	Laundry	Laundry	Laundry
		Don	Don	Don	Don
		Remove	Remove	Remove	Remove



Schedule Calendar

Scheduled entries are generated using the following pieces of information from the aide plan:

- Start and End dates = Creates scheduled entries on and between dates
- Assigned Aide = Assigns this aide to the scheduled entries
- Set times = Is used for starting and ending visit time
- Set Pro/Job = Allows you to automatically assign a job code and visit code for billing purposes





Schedule Calendar

As needed, you can edit the schedule to reflect the correct visit information. For example, if a “fill in” aide visited a patient instead of the assigned aide, you can update a single visit entry to reflect the correct information.

- Go to Aide Activity > Aide Schedule
- Either pull up the aide or the patient from the top panel
- Navigate to the date that needs modified and select the entry
- Update the information and click on Save and Close

Chart	Patient	Emp	Employee	Date	Time In	Time Out	Pr	Pay	Job	Vst
888888	PATIENT, TEST	1912	WATERMAN, EMPLOYEE	08/01/2016	08:00 AM	08:30 AM	01	001	001	001
888888	PATIENT, TEST	1912	WATERMAN, EMPLOYEE	08/02/2016	08:00 AM	08:30 AM	01	001	001	001
888888	PATIENT, TEST	1912	WATERMAN, EMPLOYEE	08/03/2016	08:00 AM	08:30 AM	01	001	001	001
888888	PATIENT, TEST	1912	WATERMAN, EMPLOYEE	08/04/2016	08:00 AM	08:30 AM	01	001	001	001
888888	PATIENT, TEST	1912	WATERMAN, EMPLOYEE	08/05/2016	08:00 AM	08:30 AM	01	001	001	001
888888	PATIENT, TEST	1912	WATERMAN, EMPLOYEE	08/06/2016	08:00 AM	08:30 AM	01	001	001	001
888888	PATIENT, TEST	1912	WATERMAN, EMPLOYEE	08/07/2016	08:00 AM	08:30 AM	01	001	001	001

Add/Edit Schedule	
<input checked="" type="radio"/> Patient Related	<input type="radio"/> Non-Patient Related
Employee:	0012 BRIARPATCH, EMPLOYEE
Patient:	888888 PATIENT, TEST
Program/Payer:	01/001 - MY PAYER
Job Code:	001 IN HOME CARE - ADULT
Visit Status:	001 CHARGEABLE
Visit Type:	
Time In:	08/02/2016 08:00 AM
Time Out:	08/02/2016 08:30 AM 00.50
<input type="checkbox"/> Mon 01 <input checked="" type="checkbox"/> Tue 02 <input type="checkbox"/> Wed <input type="checkbox"/> Thu 04 <input type="checkbox"/> Fri 05 <input type="checkbox"/> Sat 06 <input type="checkbox"/> Sun 07	

+ Add Comments



Schedule Calendar

IMPORTANT STEP: If an unexpected visit was done you can add a scheduled entry and assign it to the aide plan. Assigning the new scheduled entry to the aide plan will allow the entry to appear on the Week View print out.

- Go to Aide Activity > Aide Schedule
- Either pull up the aide or the patient from the top panel
- Navigate to the date that needs an entry added
- Click on Add Schedule Items
- Complete the fields: Employee, Patient, Program, Job Code, Visit Status
- Check the box for Part of Aide Plan and then select the aide plan date
- Click on Save and Close

A screenshot of the 'Add/Edit Schedule' software interface. The window title is 'Add/Edit Schedule'. At the top, there are radio buttons for 'Patient Related' (selected), 'Non-Patient Related', and 'Unassigned', along with a checked 'Save and Close' checkbox. The main form contains several fields: 'Employee: 1912 WATERMAN, EMPLOYEE', 'Patient: 888888 PATIENT, TEST', 'Program/Payer: 01/001 - MY PAYER', 'Job Code: 001 IN HOME CARE - ADULT', 'Visit Status: 001 CHARGEABLE', and 'Visit Type:'. Below these are 'Time In: 08/07/2016 08:00 AM' and 'Time Out: 08/07/2016 08:30 AM' with a duration of '00.50'. On the right side, there are buttons for 'Save and Close', 'Save', 'Remove Appointment', 'Set Reminder', and 'Recurrence'. At the bottom, there is a row of checkboxes for days of the week: 'Mon 01', 'Tue 02', 'Wed', 'Thu 04', 'Fri 05', 'Sat 06', and '07/01/2016' (which is highlighted in blue).



Schedule Calendar

You can view a monthly calendar for a patient to view the scheduled hours and authorized hours to see how much time remains.

- Go to Aide Activity > Aide Schedule
- First, go to the Settings tab for a one time setup
- Make sure the Include trailing days is unchecked
- Go to the Month View and pull up the patient from the top
- Check the bullet Print Calendar and then click on Print Schedule
- The bottom of the page shows the total time

Schedule for Chart# 010008 - HURST, EDDIE
July 2016

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
				Jul 1 MAPLE, EMPLOYE...	2 MAPLE, EMPLOYE...	3 MAPLE, EMPLOYE...
			7 OYE ...	8 MAPLE, EMPLOYE...	9 MAPLE, EMPLOYE...	10 MAPLE, EMPLOYE...
			14 OYE ...	15 MAPLE, EMPLOYE...	16 MAPLE, EMPLOYE...	17 MAPLE, EMPLOYE...
18 MAPLE, EMPLOYE...	19 MAPLE, EMPLOYE...	20 MAPLE, EMPLOYE...	21 MAPLE, EMPLOYE...	22 MAPLE, EMPLOYE...	23 MAPLE, EMPLOYE...	24 MAPLE, EMPLOYE...
25 MAPLE, EMPLOYE...	26 MAPLE, EMPLOYE...	27 MAPLE, EMPLOYE...	28 MAPLE, EMPLOYE...	29 MAPLE, EMPLOYE...	30 MAPLE, EMPLOYE...	31 MAPLE, EMPLOYE...

Summary: Scheduled: 71 hrs Auth:71h /mo Remaining: 0 hr 00 m

08/09/2016 08:41 AM

Print in color
 Print Comments
 Print in Landscape
 Include trailing days

Reminder Time (min)
15

Use Week View as my default screen
 Use Schedule Entry as my default screen



Schedule Reports

You will want to update the schedules daily as they occur to help with keeping the record accurate.

Once the entire billing week has been updated you can run reports for audit purposes.

The following reports will cover:

- How to find incomplete schedules entries
- View schedules entries by employee or patient with total hours
- View schedules ready to be imported into billing



Schedule Reports

This report is the most important report. It will find incomplete scheduled entries that will NOT import into billing for charges. Scheduled entries must have: employee, patient, program/payer, job code and visit status to be a complete entry.

- Go to Employee Activity > Import Schedules
- Select your billing From and Thru dates
- Select the Find Incomplete Schedules button
- A list of incomplete schedules entries will appear
- Select the entry and click the Edit Highlighted Schedule button to edit and complete the entry
- Click Save once the entry is complete

A screenshot of the "Edit Assessment/Visit Data" form. The form has a light blue header and a white body. It contains several fields for data entry:

- Employee:** 2835 FARMHOUSE, EMPLOYEE
- Patient:** 011501 LEMON, LEONARD
- Program/Payer:** 01/001 - MY PAYER (dropdown menu)
- Job Code:** (empty field)
- Visit Status:** (empty field)
- Time In:** 07/25/2016 08:00 AM (dropdown for date and time)
- Time Out:** 07/25/2016 10:15 AM (dropdown for date and time)
- Hours:** 2.25 (text input field)
- Save** button
- Rounding options:** Round Hours to nearest .05, Round Hours to nearest .25, No rounding of calculated hours



Schedule Reports

This report will show you the scheduled entries keyed by patient and the total number of scheduled hours, with the scheduled details.

- Go to Employee Activity > Schedule Entry
- Select the billing From and Thru dates at the bottom
- Uncheck Page Break
- Check Subtotals
- Check Sort by Patient
- Click on Refresh
- Click on Print

View Schedules		Date	Chart#	Pt Name	Emp#	Emp1 Name	Pr	Pay	Job	Vst	Tm In	TmOut	Hours	Type
Employee:		Mo 08/01/16	012516	APPLESEED, AERON	0502	HURST, EMPLOYEE	01	001	001	001	08:00A	12:00P	4.00	
<input type="checkbox"/> Page Break	<input checked="" type="checkbox"/> Subtotals	Tu 08/02/16	012516	APPLESEED, AERON	0502	HURST, EMPLOYEE	01	001	001	001	08:00A	12:30P	4.50	
Patient:		We 08/03/16	012516	APPLESEED, AERON	0502	HURST, EMPLOYEE	01	001	001	001	08:00A	12:00P	4.00	
Program:		Th 08/04/16	012516	APPLESEED, AERON	0502	HURST, EMPLOYEE	01	001	001	001	08:00A	01:00P	5.00	
Job Code:		Fr 08/05/16	012516	APPLESEED, AERON	0502	HURST, EMPLOYEE	01	001	001	001	08:00A	12:00P	4.00	
Team:		Sa 08/06/16	012516	APPLESEED, AERON	0502	HURST, EMPLOYEE	01	001	001	001	08:00A	12:30P	4.50	
<input type="button" value="Print"/>	<input type="button" value="Refresh"/>	Su 08/07/16	012516	APPLESEED, AERON	0502	HURST, EMPLOYEE	01	001	001	001	08:00A	12:00P	4.00	
<input type="checkbox"/> Sort by Employee		**	012516	APPLESEED, AERON									30.00	7 visits
<input checked="" type="checkbox"/> Sort by Patient		Mo 08/01/16	013209	APPLESEED, CHRIS	0502	HURST, EMPLOYEE	01	001	001	001	08:00A	10:30A	2.50	
<input type="checkbox"/> Don't print phone#s		Tu 08/02/16	013209	APPLESEED, CHRIS	0502	HURST, EMPLOYEE	01	001	001	001	08:00A	10:45A	2.75	
<input type="checkbox"/> Don't print addresses		We 08/03/16	013209	APPLESEED, CHRIS	0502	HURST, EMPLOYEE	01	001	001	001	08:00A	10:45A	2.75	
From: 8/ 1/2016		Th 08/04/16	013209	APPLESEED, CHRIS	0502	HURST, EMPLOYEE	01	001	001	001	08:00A	10:45A	2.75	
Thru: 8/ 7/2016		Fr 08/05/16	013209	APPLESEED, CHRIS	0502	HURST, EMPLOYEE	01	001	001	001	08:00A	10:45A	2.75	
<input type="button" value="-1 Week"/>	<input type="button" value="+1 Week"/>	Sa 08/06/16	013209	APPLESEED, CHRIS	0502	HURST, EMPLOYEE	01	001	001	001	08:00A	10:30A	2.50	
		Su 08/07/16	013209	APPLESEED, CHRIS	0502	HURST, EMPLOYEE	01	001	001	001	08:00A	10:30A	2.50	
		**	013209	APPLESEED, CHRIS									18.50	7 visits
		Mo 08/01/16	000121	APPLESEED, DANAY	2876	WATERMAN, EMPLOYEE	01	001	001	001	08:00A	10:45A	2.75	
		Tu 08/02/16	000121	APPLESEED, DANAY	2876	WATERMAN, EMPLOYEE	01	001	001	001	08:00A	10:45A	2.75	
		We 08/03/16	000121	APPLESEED, DANAY	2876	WATERMAN, EMPLOYEE	01	001	001	001	08:00A	11:00A	3.00	
		Th 08/04/16	000121	APPLESEED, DANAY	2876	WATERMAN, EMPLOYEE	01	001	001	001	08:00A	10:45A	2.75	



Import Schedules

This will be the last step before converting (or importing) the scheduled entries into billable charges to will copy over to the Visit Entry screen. If any edits were made to the scheduled entries, we recommend running the Find Incomplete Schedules report again.

- Go to Employee Activity > Import Schedules
- Select the billing From and Thru dates
- Click View Schedules
- From here you can review the list of scheduled entries or print them by clicking Print Detail List
- If the entries are correct click the Create Visit Charges button
- A report of the entries will generated, click Print as needed

Create Visit Charges From Schedules
 Set the dates and click the View Schedules button. Click the Create Visit Charges button to create charges. [Click here for instructions.](#)

Round .05
 Round .25
 N/A

Sort by Patient
 Employee
 Date

 From: 7/31/2016 Thru: 8/ 6/2016

When the code is missing,
 Use Visit Status Code:

Chart#	Patient's Name	Date	Time In-Out	Hours	Emp#	Payer	Job	Visit Status
012516	APPLESEED, AERON	07-31-16	08:00-12:00	4.00	0502	01/001 MY PAYER	001 IN HOME CARE - ADULT	001 CHARGEABLE
012516	APPLESEED, AERON	08-01-16	08:00-12:00	4.00	0502	01/001 MY PAYER	001 IN HOME CARE - ADULT	001 CHARGEABLE
012516	APPLESEED, AERON	08-02-16	08:00-12:30	4.50	0502	01/001 MY PAYER	001 IN HOME CARE - ADULT	001 CHARGEABLE



Import Schedules

Once the Import Schedules process has been completed, the charges will appear on the Visit Entry screen. When creating claims, the charges are pulled from the Visit Entry screen, not the Schedule screen. Only visits that have a chargeable visit status code and hours will appear on the claim.

- Go to Employee Activity > Visit Entry
- Select the billing From and Thru dates
- Click on Refresh
- You will now see the visit charges for billing

9999 Most Recent Visits															
<input type="button" value="Refresh"/>	<input type="button" value="Print"/>	<input type="checkbox"/>	Lock Dates												
From	8/ 1/2016														
Thru	8/ 7/2016														
Show last	9999														
Employee	<input type="text"/>														
Patient	<input type="text"/>														
Program	<input type="text"/>														
Payer	<input type="text"/>														
Job Code	<input type="text"/>														
Visit Status	<input type="text"/>														
<input type="checkbox"/>	Sort by Pt Name														
<input type="checkbox"/>	Sort by Employee														
08/04/16	011501	LEMON, LEONARD	2835	01	001	001	001	0599	08:00	am	10:15	am	2.25	31.23	
08/04/16	013712	MAPLE, DANAY	3001	01	001	001	001	0599	08:00	am	09:30	am	1.50	20.82	
08/03/16	013332	BRIARPATCH, AER	0037	01	001	001	001	0599	08:00	am	09:00	am	1.00	13.88	
08/03/16	010998	JANUARY, CHRIS	0061	01	001	001	001	0599	08:00	am	09:00	am	1.00	13.88	
08/03/16	013695	CORNFLAKE, TERR	1136	01	001	001	001	0599	08:00	am	09:00	am	1.00	13.88	
08/03/16	012061	CORNFLAKE, LEON	1292	01	001	001	001	0599	08:00	am	10:45	am	2.75	38.17	
08/03/16	012243	RUDOLPH, KEVIN	1508	01	001	001	001	0599	05:45	pm	07:45	pm	2.00	27.76	
08/03/16	000034	MAPLE, LEONARD	1738	02	001	001	001	0599	08:00	am	10:00	am	2.00	27.76	
08/03/16	011501	LEMON, LEONARD	2835	01	001	001	001	0599	08:00	am	10:15	am	2.25	31.23	
08/03/16	013712	MAPLE, DANAY	3001	01	001	001	001	0599	08:00	am	09:45	am	1.75	24.29	
08/02/16	013332	BRIARPATCH, AER	0037	01	001	001	001	0599	08:00	am	09:00	am	1.00	13.88	
08/02/16	010998	JANUARY, CHRIS	0061	01	001	001	001	0599	08:00	am	09:00	am	1.00	13.88	
08/02/16	013695	CORNFLAKE, TERR	1136	01	001	001	001	0599	08:00	am	09:00	am	1.00	13.88	
08/02/16	012061	CORNFLAKE, LEON	1292	01	001	001	001	0599	08:00	am	10:45	am	2.75	38.17	
08/02/16	012243	RUDOLPH, KEVIN	1508	01	001	001	001	0599	05:45	pm	08:00	pm	2.25	31.23	
08/02/16	000034	MAPLE, LEONARD	1738	02	001	001	001	0599	08:00	am	10:45	am	2.75	38.17	
08/02/16	011501	LEMON, LEONARD	2835	01	001	001	001	0599	08:00	am	10:15	am	2.25	31.23	
08/02/16	013712	MAPLE, DANAY	3001	01	001	001	001	0599	08:00	am	09:30	am	1.50	20.82	
08/01/16	010998	JANUARY, CHRIS	0061	01	001	001	001	0599	08:00	am	09:00	am	1.00	13.88	
08/01/16	013695	CORNFLAKE, TERR	1136	01	001	001	001	0599	08:00	am	09:00	am	1.00	13.88	
08/01/16	012061	CORNFLAKE, LEON	1292	01	001	001	001	0599	08:00	am	10:30	am	2.50	34.70	
08/01/16	012243	RUDOLPH, KEVIN	1508	01	001	001	001	0599	05:45	pm	08:00	pm	2.25	31.23	
08/01/16	000034	MAPLE, LEONARD	1738	02	001	001	001	0599	08:00	am	10:00	am	2.00	27.76	
08/01/16	011501	LEMON, LEONARD	2835	01	001	001	001	0599	08:00	am	10:15	am	2.25	31.23	
08/01/16	013712	MAPLE, DANAY	3001	01	001	001	001	0599	08:00	am	09:30	am	1.50	20.82	
												171	Visits	386.25	5,028.03

BARNESFORM

HOME HEALTH SOFTWARE

The screenshot displays the BarnesForm Home Health Software interface. On the left is a vertical navigation menu with the following items: Select Patient, Referrals, Background/Envmnt, Patient Info, Patient Histories, Search, 485, Orders, Care Coordination, Aide Activity, Mailings, Messaging, Employee Activity, Supplies, Audits, Billing, Accounts Receivable, Reports, Admin, Codes, Billing Inquiry, Help, and Exit. The main content area is divided into three sections. The top-left section, titled 'Selected Patient', shows patient ID 888888, name PATIENT, TEST, address 700 GEORGES FORK ROAD, BURNSVILLE, 28714, phone 919-123-4567, and insurance information: 01/001... ELITE...MY PAYER, NO DOCTOR ASSIGNED, and Active status. Below this is a search section with a text input field, radio buttons for 'Last Name' (selected) and 'First Name', and radio buttons for 'Active' (selected) and 'Inactive'. There are also radio buttons for '0-90 Days', '0-365 Days', and '0-9999 Days', and a checkbox for 'Save These Settings'. The top-right section, titled 'Version 1.2016.0804.10', contains buttons for 'Expiring 485s', 'Schedules', 'Look Fwd 7', '485 Recert Worksheet', '485 Calendar', 'Next Cert', 'Print Med Sheets', and 'Print Pt/Dr/Empi Labels'. The bottom section contains buttons for 'Recent Visits', 'Recent Orders', 'Pending', 'Print Visit', 'Recent CCNs', 'Recent Referrals', 'Look Back 14', and 'Print'. A mouse cursor is visible in the center of the main content area.

Here is a short clip to show how the scheduled items get imported into visit charges.



Other Reports

This report will show you the authorization hours compared to the scheduled or visit hours keyed to look for patients that are over or under hours.

- Go to Patient Histories > CAP/PCS Authorizations
- Select the 17.34 Auth Used Tab

This report will show you patient's with expiring authorizations coming up.

- Go to Patients Histories > CAP/PCS Authorizations
- Select the 17.35 Expiring Auth tab

- Reports > Patient > 01.38 Expiring Aide Plans

This report will show you patient's with expiring aide care plans.

- Reports > Billing > 02.34 Match Charges/Patients

This report will show you patient's without visit charges for a time frame.