nHome Complete

CLIENTS MODULE

Quick Guide

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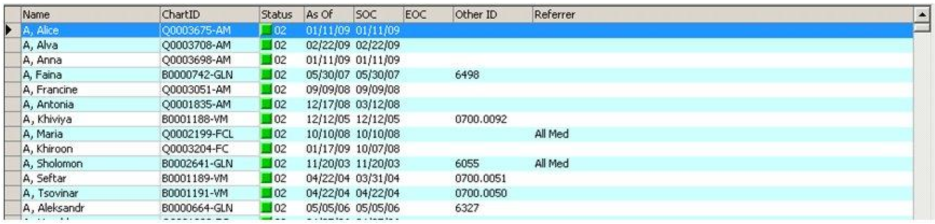
CLIENTS MODULE

Understanding the Results List

The bottom part the screen will list clients that meet the criteria of the Search Filters displaying Name, Chart ID, Status, As Of (effective date), SOC (Start of Care), EOC (End of Care), Other ID and Referrer.



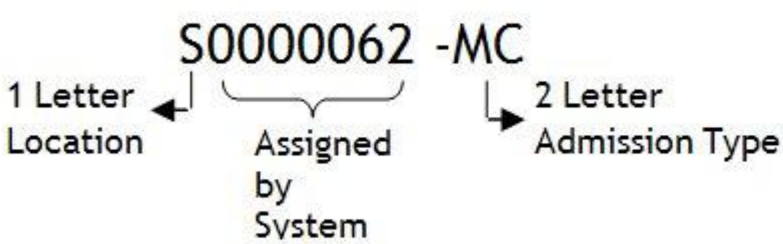
Name	ChartID	Status	As Of	SOC	EOC	Other ID	Referrer
A, Alice	Q0003675-AM	02	01/11/09	01/11/09			
A, Alva	Q0003708-AM	02	02/22/09	02/22/09			
A, Anna	Q0003698-AM	02	01/11/09	01/11/09			
A, Faina	B0000742-GLN	02	05/30/07	05/30/07		6498	
A, Francine	Q0003051-AM	02	09/09/08	09/09/08			
A, Antonia	Q0001835-AM	02	12/17/08	03/12/08			
A, Khiviya	B0001188-VM	02	12/12/05	12/12/05		0700.0092	
A, Maria	Q0002199-FCL	02	10/10/08	10/10/08			All Med
A, Khiroon	Q0003204-FC	02	01/17/09	10/07/08			
A, Sholomon	B0002641-GLN	02	11/20/03	11/20/03		6055	All Med
A, Seftar	B0001189-VM	02	04/22/04	03/31/04		0700.0051	
A, Tsovinar	B0001191-VM	02	04/22/04	04/22/04		0700.0050	
A, Aleksandr	B0000664-GLN	02	05/05/06	05/05/06		6327	

The Other ID field is only used if you have upgraded from a prior version of nHome.

If a client has more than one Chart ID all of them will be displayed, sorted by effective date (As Of field).

The Chart ID is the identification number associated for a specific client for each admission type that applies to that client.

The Chart ID has 10 positions arranged in a way that make for faster identification. See the example below:



The Status field is a numeric value but it has been also assigned a color for easier identification. Though your agency can modify the colors at any given time, the table below lists the defaults:

Status Name	Status Code	Status Color
Pending	01	Yellow
Active	02	Green
Hold	03	Orange
InActive	04	Red
Cancelled	05	Grey

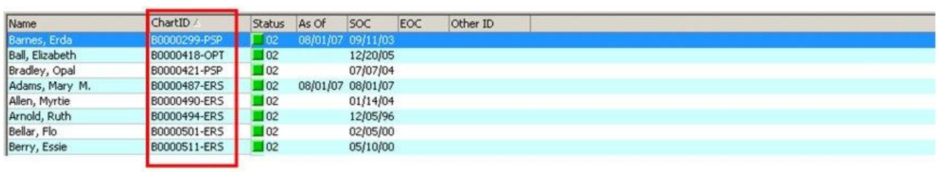
Your agency can customize the color associated to each status to better suit your needs.

Your agency can modify the name of the Status Name but not its meaning. For example: instead of "Pending", it can be re-labeled "Referred". Modifying it to "Cancelled" will not change the system's behavior.

SORTING THE RESULTS LIST

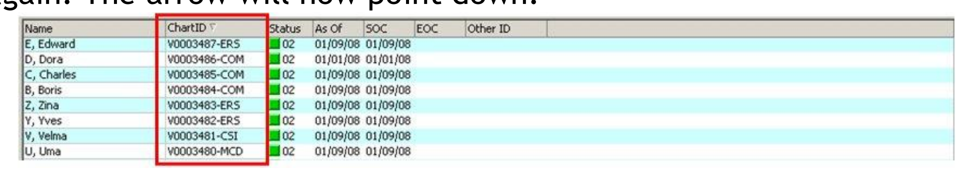
By default, the results list is sorted by *Name*; however any column can be chosen to sort. To do this, click on the column header of the field that you would like to sort by. For example, to sort by *Chart ID*, click on its header.

The column used to sort by is shown with a blue background. The list will be sorted in ascending order (a-z, 0…999) and an arrow pointing up displays next to the column header.



Name	ChartID	Status	As Of	SOC	EOC	Other ID
Barnes, Erda	B0000299-PSP	02	08/01/07	09/11/03		
Ball, Elizabeth	B0000418-OPT	02		12/20/05		
Bradley, Opal	B0000421-PSP	02		07/07/04		
Adams, Mary M.	B0000487-ERS	02	08/01/07	08/01/07		
Allen, Myrtie	B0000490-ERS	02		01/14/04		
Arnold, Ruth	B0000494-ERS	02		12/05/96		
Bellar, Flo	B0000501-ERS	02		02/05/00		
Berry, Essie	B0000511-ERS	02		05/10/00		

To sort in descending order (z-a, 999..0), click on the same column header once again. The arrow will now point down.



Name	ChartID	Status	As Of	SOC	EOC	Other ID
E, Edward	V0003487-ERS	02	01/09/08	01/09/08		
D, Dora	V0003486-COM	02	01/01/08	01/01/08		
C, Charles	V0003485-COM	02	01/09/08	01/09/08		
B, Boris	V0003484-COM	02	01/09/08	01/09/08		
Z, Zina	V0003483-ERS	02	01/09/08	01/09/08		
Y, Yves	V0003482-ERS	02	01/09/08	01/09/08		
V, Velma	V0003481-CSI	02	01/09/08	01/09/08		
U, Uma	V0003480-MCD	02	01/09/08	01/09/08		

UNDERSTANDING THE ELECTRONIC HEALTH RECORD SCREEN

Client

This section contains an overview of the client, personal information, contacts (if any), medical information (such as allergies) and directions to the client's location.

Chart

The client's chart includes information relating to a particular admission type such as status, payor information, physician, etc.

Period #

Detailed information for each date range during which the client is authorized to receive care. The system will keep a history of all periods.

Quick Reports

This section lists all reports available for this section, including documents associated to this client.

Warnings

A special Warnings section will display in case required information is missing from the client's profile. A list will be provided by positioning the mouse over this section and the required fields will be displayed with a pink background on each of the screens that require them.

PRINTING A CLIENT LIST

Step	Description
1.	On the Client Search screen, use the filters to narrow down the results list, or remove all filters to print a complete client list. To remove all filters, tap the <F5> key.
2.	Click on the Print button, located in the toolbar.

CREATING A NEW CLIENT

Step	Description
1.	Click on the New Client button.
2.	The New Client Wizard is displayed. Type the personal information of the client. The only required fields are First Name and Last Name.
3.	If the system finds an existing client with the same or similar name as the one we are entering, the system will identify it and display the following message:
4.	Click on the name of the Company that the client will be associated to and click on Next.

5.	Click on the Location the client will be admitted to and click on Next.
6.	Click on the Admission Type and click on Next.
7.	This is the last screen of the Wizard. You may click on < Previous to revise what you have entered. To finish the wizard click on Finish.

VIEWING AN INDIVIDUAL ELECTRONIC HEALTH RECORD

Step	Description
1.	From the Clients Search Screen, use the filter area to narrow down the results to search for the client, as shown in the example.
2.	Double click on the name of the client to open its Electronic Health Record (EHR).

Adding a New Address

Step	Description
1.	On the client's Personal screen, locate the Addresses section and click on the Add button.
2.	A new address record will be created, changing the header to "Previous".
3.	Enter the name this address will be identified with in the Name field.
4.	Enter the street address in the Address field. You can also specify the apartment number in the Apt. field.
5.	Entering the zip code in the Zip field will auto populate the City, County and State fields, as well as the "+4" digits of the zip code.
6.	Enter the phone numbers for this location in the Phone Numbers, Etc. section. You can record up to 3 phone numbers (home, mobile, work), a fax number and an email address. If the Mobile that was entered has Email

	capabilities, check the Mobile Email box.
7.	Click on Set As Current if you want this address to be displayed in the Personal screen. This will change the header to "Current Address", as shown below:
8.	Click on Set As Billing if you would like to bill to this address. The header will change to include the words "Billing Address".

Viewing all Recorded Addresses

Step	Description
1.	On the client's Personal screen, locate the Addresses section and click on the More Options button.
2.	All the addresses that have been saved for this client will be displayed. The current address will be indicated by an icon left to its name.
3.	Click on the address you would like to see.