finalehealth

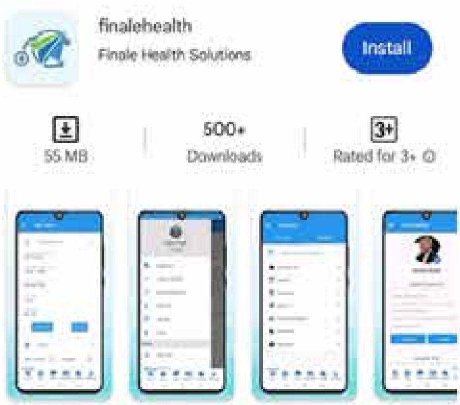
Training Manual

Contact Us 909 346-1820 support@finalehealth.com

Training Module 1: Overview and Admin

To access Finale Health:

- Download and Install Finale Health App.
- **For Mobile**: Go to Play Store or App Store and search for "Finale Health". Click install and wait for it to be completed.



- **For Web:** You can use any web browser and go to app.finalehealth.com.

- Preferred browsers:

To open Finale Health:

- Type in **app.finalehealth.com** and you will be directed to the login page. Type in your email address and password.

Homepage Overview:

- This is the homepage of Finale Health:

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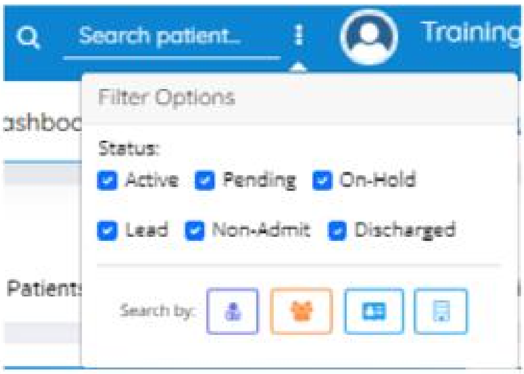
Homepage Features:

1. **Search Bar:** For searching patients within the system:

You also have the **Filter Options**: Click the **3 dots** next to the search bar to filter patients by status.

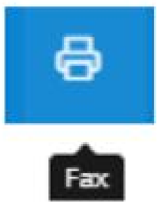


2. **Switch Agency:** Allows you to switch between agencies if you are enrolled in multiple agencies that uses Finale.

3. **Bell Icon:** To access your notifications.

4. **Envelope Icon:** To send and access emails.

5. **Printer Icon:** Fax (inbound or outbound).



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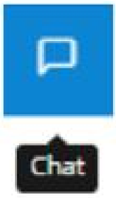
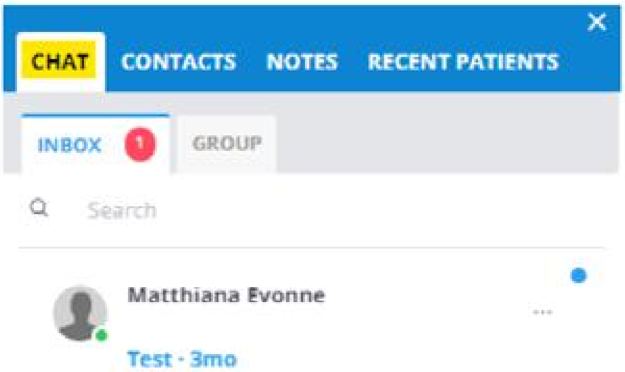
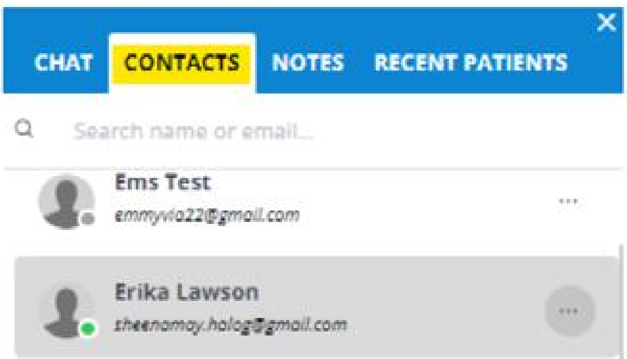
6. **Message Icon:** Chats within the agency (search contacts).



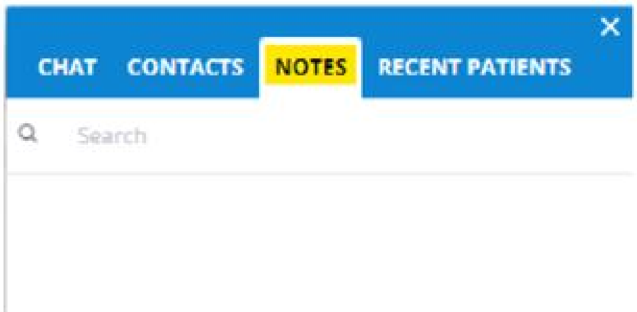
When you click the message icon, the **chat window** will appear. This is where you can see the list of the people you've message within your database,



Beside the chat button is the **contacts button.** This is where you can see the list of the people inside your database.



Beside the contacts button is the **notes button.** You can add personal notes here.



7. **Care Coordination Icon:** This is where you can see the list of patients assigned to you. This is where you can coordinate care with other clinicians of the patients.

When you click the **Care Coordination Icon**, it will direct you to this page. You can select a patient to start a collaboration with other clinicians. You can send messages and attach files.

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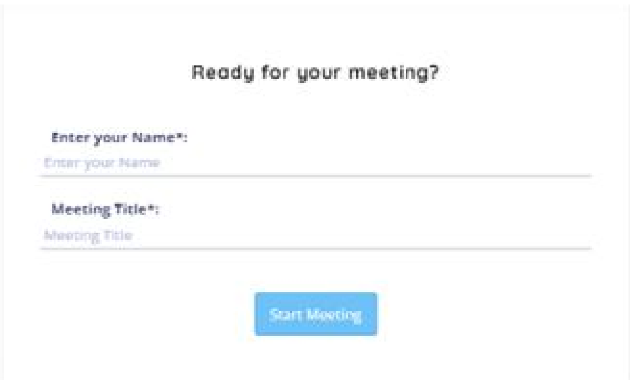
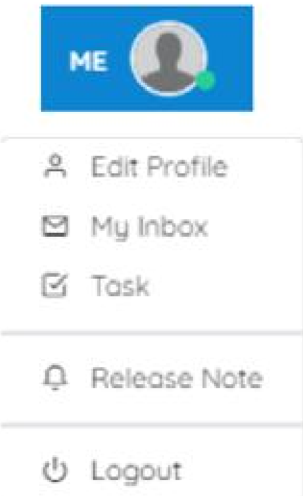
8. **Video Icon:** This is where you can start or join video meetings.

When you click the **Video Icon**, it will direct you to this page:



8. **Profile Icon:** Ths is where you can edit your profile, check your inbox, manage tasks, check the enhancements in the system and log out.



When you click **Edit Profile**, this is where you can update your password and e-pin. This

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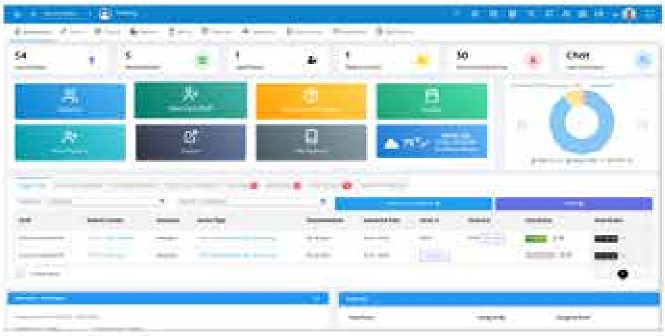
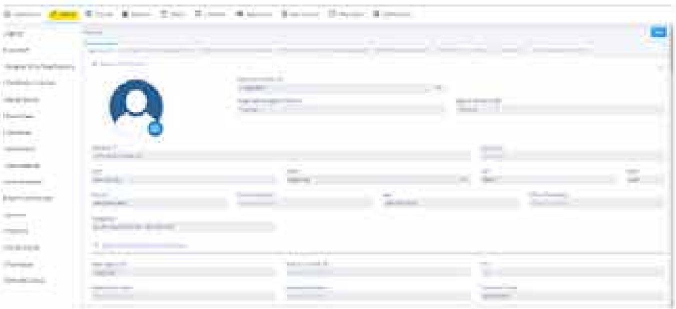
Main Tabs Overview:

1. **Dashboard:** Provides a snapshot of key metrics and recent activities.



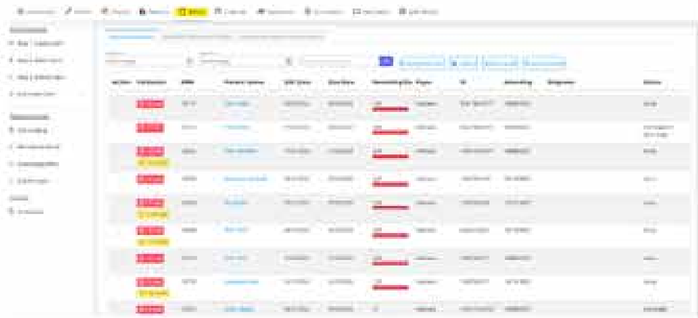
2. **Admin:** Manage administrative settings and configurations.



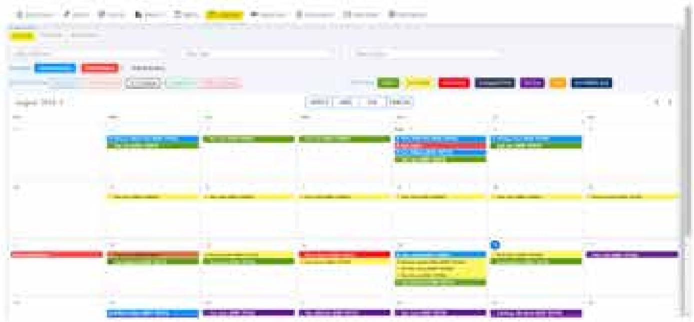
3. **Payroll:** Access and manage payroll information.

4. **Reports:** Generate and review various reports.

5. **Billing:** Manage billing processes and claims.



6. **Calendar:** View the visit/s of your clinicians. You can filter the main calendar by staff, by date, by documents.



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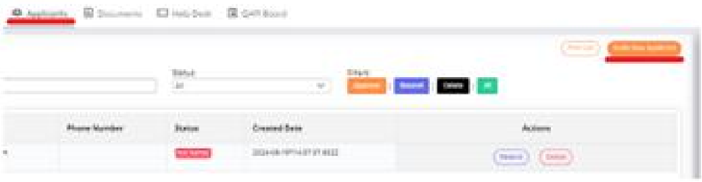
Training Module 1: Overview and Admin

7. **Applicants:** Manage job applicants and hiring processes.

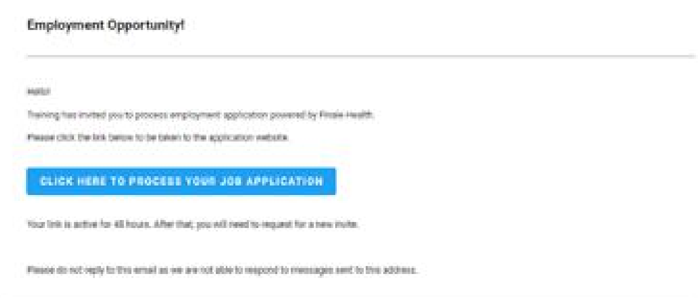
How to invite new applicant:

1. Click the **"Invite New Applicant"** button.



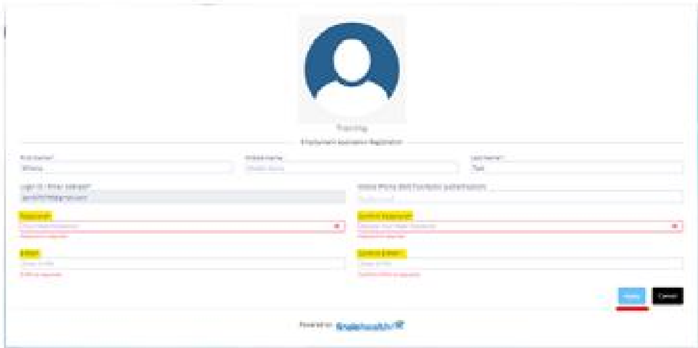
2. Fill out the necessary information. Hit Send.

3. The applicant will receive and email. It should look like this:

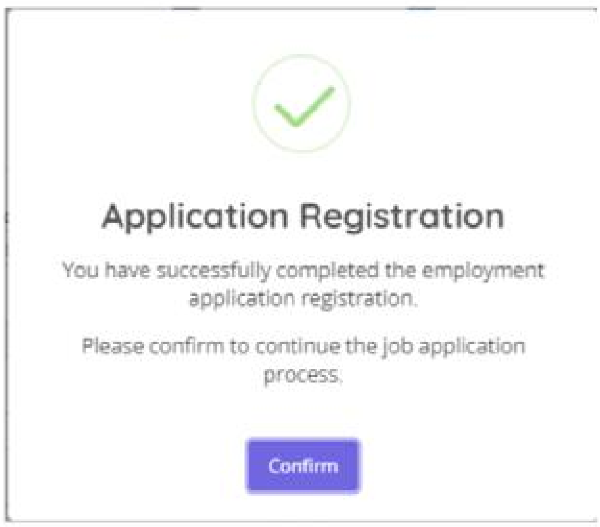


Click the button that says **"Click Here to Process Your Job Application"**.

After clicking the **"Click Here to Process Your Job Application"** button, the system will direct you **"Employment Application Registration"**.



4. Type in your **"New Password"** and **"New E-pin"**. Hit apply. The system will prompt you to hit **"Confirm"**.



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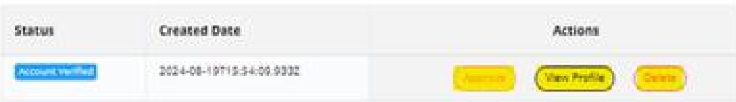
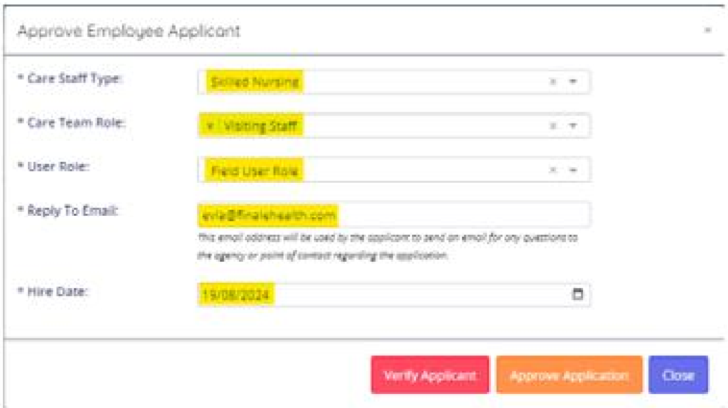
5. The applicant will be asked to fill out 7 steps to finish their Employment Application Registration.
Please fill out the required fields.

6. After the Employment Application has been filled out, the applicant's account is verified, you should choose from the actions below:



7. Once you approve the applicant, fill out the necessary fields.



8. Automatically, the applicant will be added to Users.

9. **Documents:** Access and manage important documents.

10. **Help Desk:** Create and track support tickets for technical issues. Notifications and updates regarding your tickets will appear here.

How to create a ticket?

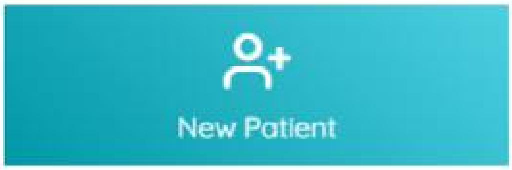
1. Click the create ticket button.
2. Fill out the required field such as "Requested by. Issue summary, and Issue Details."
3. It is suggested to attach files (screenshots, screen recording of the reported errors).
4. Hit submit.

Training Module 1: Overview and Admin

Key boxes and features:

1. **Patients:** View and manage the list of patients and their details.

2. **New Patient**: Intake wizard. Fill out the 7 steps to add a new patient. Enter all required information, especially fields highlighted in red.



3. **New Care Staff:** Add necessary information for new care staff, focusing on fields highlighted in red, then click **Save**.

4. **Export:** Export OASIS data (must be locked and ready for export) and HHCAHPS surveys.

5. **Document Tracking:** Track notes and orders related to patient care.

6. **File Upload:** Upload files that need to be accessible to everyone.

Training Module 1: Overview and Admin

7. **Events:** Add and view events related to the agency.

8. **Weather:** Check weather information relevant to your location.

Additional Tabs:

1. **Today's Visit:** View details of today's patient visits. In this tab, the clinicians can clock in and clock out. Clinician can also view the visit status and note status.

2. **Currently Hospitalized:** Check the list of patients currently hospitalized.

3. **Daily Eligibility:** Verify patient eligibility on a daily basis.

4. **Patient Alerts/Notifications**: Review and manage any alerts or notifications related to patient care.

5. **Birthdays:** Track and acknowledge patient or staff birthdays.

6. **Daily PECOS:** Check and manage daily PECOS (Provider Enrollment, Chain, and Ownership System) updates.

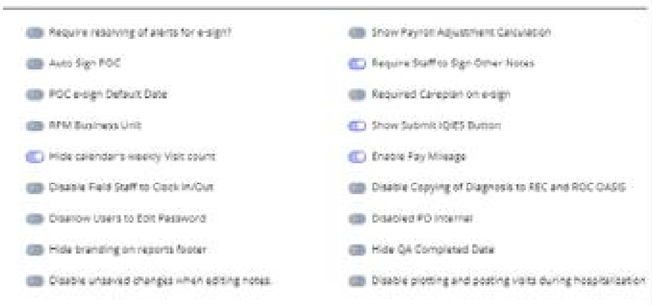
7. **OASIS 30 Days:** Review OASIS assessments and requirements due within the last 30 days.

Training Module 1: Overview and Admin

Admin Tab:

1. **Agency:** This has all the information about the agency. Agency tab includes various functionalities related to user management, settings, and system configurations.

Inside the agency tab, you have the liberty to edit the settings of your agency. You can enable/disable agency settings.



2. **Care Staff:** Manage the care staff of the agency. This is where you can check all the care staff of the agency. You can add care staff here as well.

How to add a care staff:

1. Click "Add New Clinical Staff" on the upper right corner.
2. Fill out the necessary information of the care staff.

3. **Caregiver Skills/Qualifications:** Library of skills and qualifications of the care staff.

4. **Certificates/Licenses:** Library of required certificates and licenses for care staff.

5. **Market Source:** Information on where patients are referred from

6. **Event Types:** Manage and define various events for the agency.

7. **Insurances:** Library of patient insurance details.

8. **Supply Items:** Library of supplies and equipment available in the agency.

9. **Intermediaries:** List of intermediary contacts and information.

10. **Note Templates:** Manage templates for notes. You can view the list of templates, search for specific templates and add new templates.

Training Module 1: Overview and Admin

11. **Health Care Facilities:** List of healthcare facilities associated with patients.

12. **Care Plan:** This is the library of your care plan. This is where you can edit the default templates for the problems, goals, and interventions.

13. **Physicians:** This shows you the list of the physicians associated with your agency. You can provide the NPI of the physician to auto populate the required fields needed. You can also check if they're still PECOS enrolled.

14. **Clinical Lookup:** This is your clinical lookup library. You can add or edit a clinical lookup.

15. **Service Type:** Manage and define different types of services (e.g., visit types)

16. **QA Checklist:** This is where you can edit the list of your QA checklist.

17. **Types of Care:** This serves as your library of the types of care. This is where you can also add more types of care.

18. **Roles:** This lets you manage the level of access a user or staff will have while accessing your agency's database. The roles help to limit the access they can have may it be : has access, read only, and no access.

19. **Hashtags:** This lets you manage and add hashtags to help categorize patients and color label them.

20. **Users:** This is where you manage the users in your database. Allows you to restrict their usage from other IP addresses if you wanted to. This is where they can edit their passwords and e-pins.

How to add users in your database:

1. Go to the users tab.
2. Click add on the upper right corner of the screen.
3. Fill out the necessary information.
4. Hit save.

* Make sure that the accounts of your users are verified.

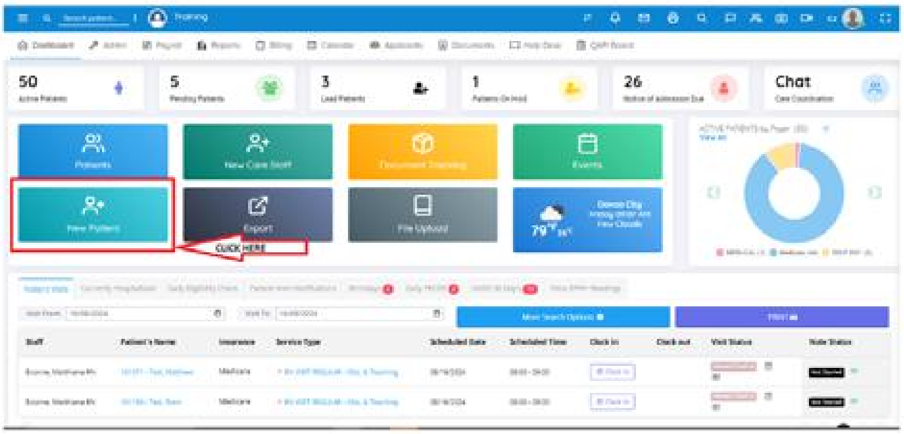
21. **User Logs:** Real-time tracking of user activities within the system.

Training Module 2: Clinical and Intake

Intake

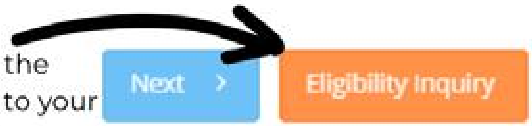
How to add new patient:

1. Click the “New Patient” button.
2. You will be directed to “Intake Wizard”
3. You have to fill out



Enter Required Fields

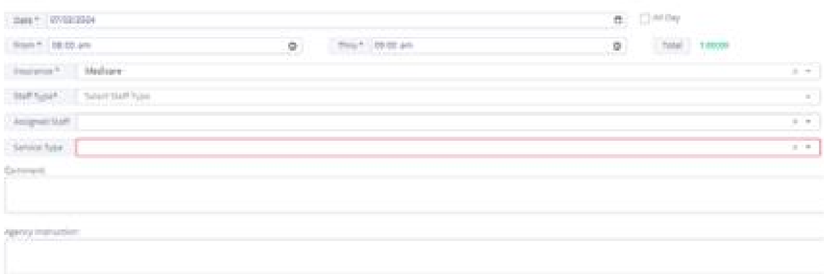
- **Personal Information:**
  - **Birthday:** Enter the correct year to ensure the age is accurately calculated.
  - **Address:** Start typing the street name and select the correct option from the dropdown list. This will automatically populate the county and zip code fields.
- **Insurance:**
  - Add the insurance name (e.g., Medicare).
- **Check Eligibility:**
  - Ensure that eligibility for the insurance is verified according to your system's procedures.



These next 3 steps you can skip if not applicable.

- **Prior Authorization:**
  - Note that prior authorization is only necessary for patients with private insurance.
- **Diagnosis:**
  - Input the patient’s previous diagnosis history prior to being admitted to home health if available.
- **Patient Condition:**
  - Input the patient’s previous medical condition if available.

- **Schedule Visit**
  - Input the initial visit and it will also generate SOC OASIS.



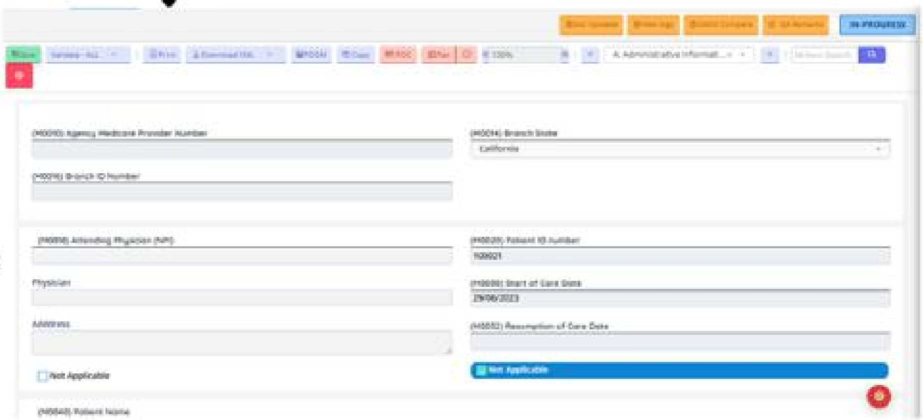
Please note: Input all the required fields highlighted in RED or the one with asterisk.

Training Module 2: Clinical and Intake

OASIS

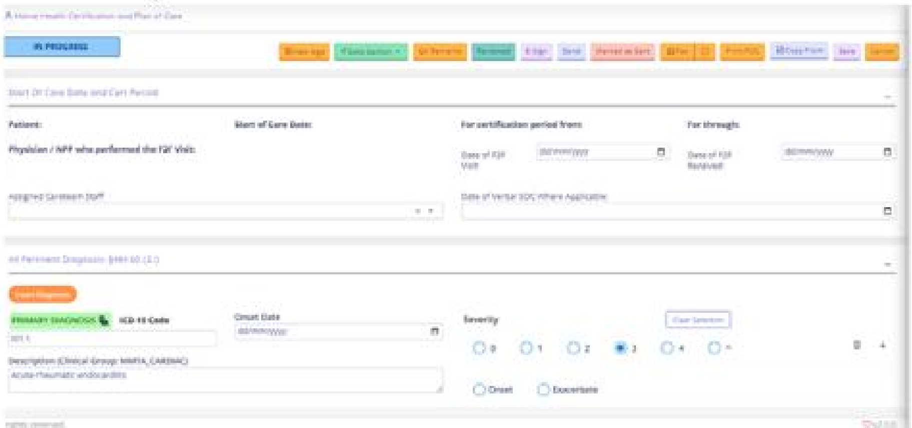
- Open OASIS:
- Navigate to the OASIS section within the patient's documentation.
- Verify and Validate Information:
- Check each field to ensure the information is correct.
- Validate the OASIS form. The system will flag any errors or omissions. Correct these as needed.
- Lock OASIS:
- Once all information is verified and no errors are present, lock the OASIS form.

Note that OASIS must be locked before it can be exported.



PLAN of CARE (POC)

- Open POC
- Navigate to the POC section within the patient's documentation.
- Click SAVE once done
- Check each field to ensure the information is correct.

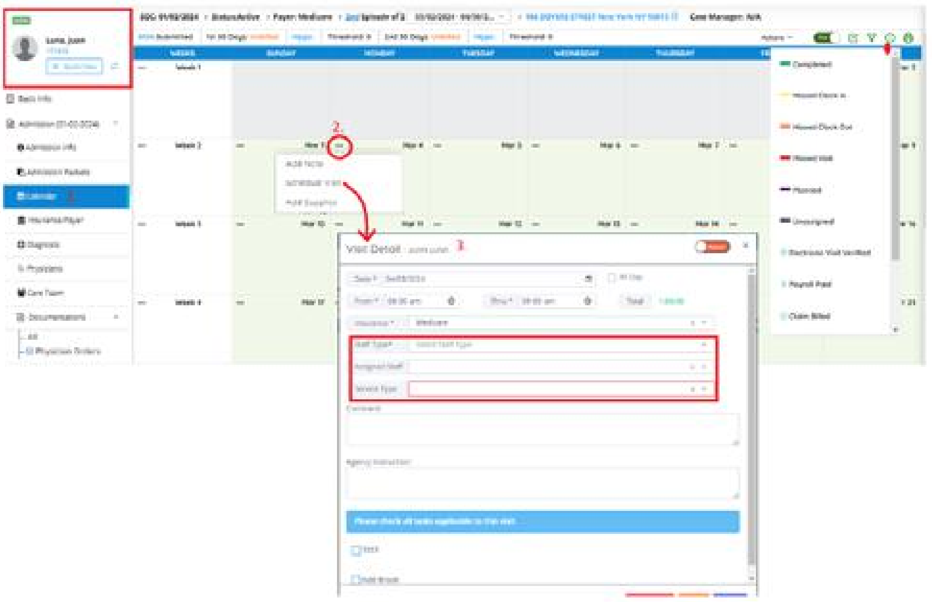


Training Module 3: Calendar

CALENDAR

1. Accessing the Patient Schedule:

- Go to the homepage and click the Patient tab.
- Find the patient needing a visit and click the calendar icon.



2. Scheduling a Visit:

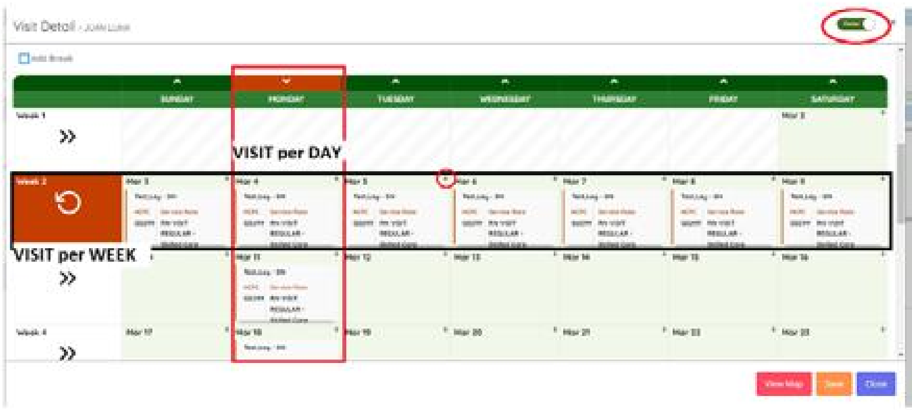
- In the calendar view, click the three dots (usually found in the top right corner).
- Select Schedule Visit.
- Fill in the required information:
  - **STAFF TYPE**
  - **ASSIGNED STAFF**
  - **SERVICE TYPE** (Ensure this matches the code in the template to avoid errors)
- Click **SAVE**

3. Visit Time Management:

- The default time will be displayed; this can be adjusted later when the visit is completed.
- Enter clock-in and clock-out times as needed.
- Ensure correct SERVICE TYPE for payroll purposes.

4. Plotting Visits on Multiple Dates:

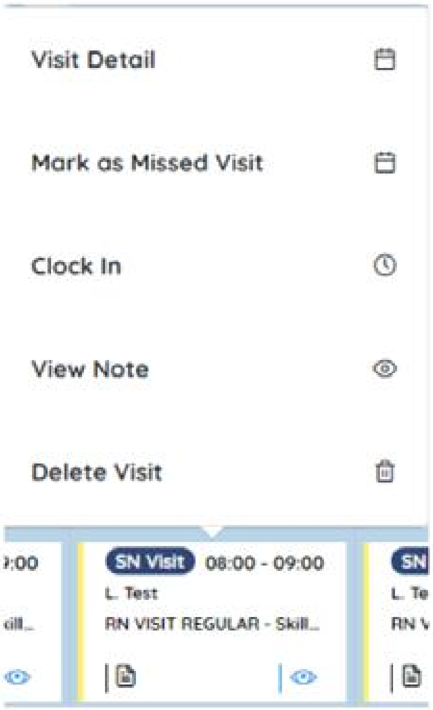
- Click the Plotter.
- Scroll down and click the plus sign to add visits on different dates to the calendar.



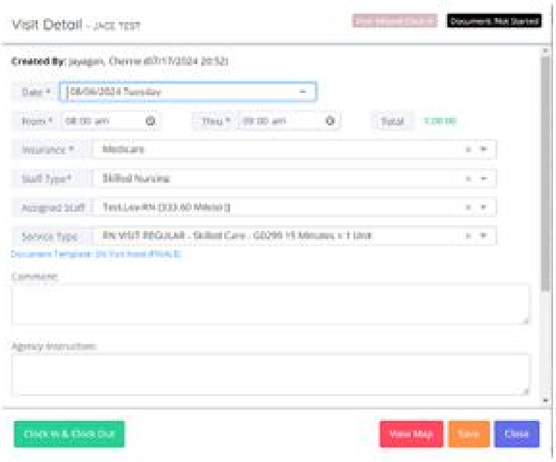
Training Module 3: Calendar

5. Managing Scheduled Visits:

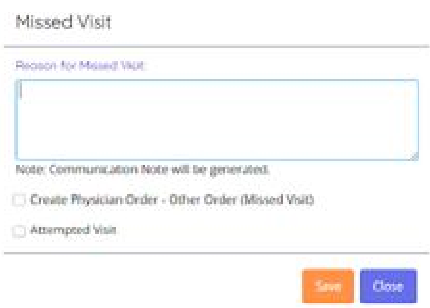
- **Click on the visit to view options:**



- **VISIT DETAILS**



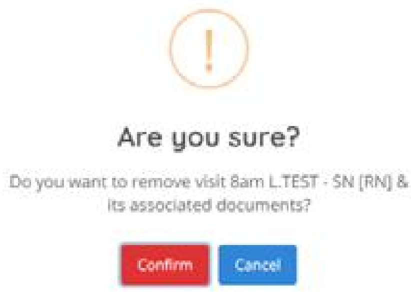
- **MARK AS MISSED VISIT (if the care staff cannot make it)**



- **CLOCK IN / OUT (for logging time)**

- **VIEW NOTE (to see any added notes)**

- **DELETE VISIT (if scheduled by mistake or incorrect)**



Training Module 3: Calendar

6. Editing Visits:

- Drag and drop visits to reschedule within the same week.
- For changes falling into the next week, submit an order to the physician to adjust the visit frequency.

7. Calendar Overview and Filtering:

- The main calendar shows all scheduled visits for the current day or month.
- Use color-coded features for quick status identification.
- Filter by staff or patient and adjust the view to month, week, date, or timeline.

8. Finalizing Visit Details:

- After the visit, input the actual clock-in and clock-out times.
- Click Batch Post to finalize and save the visit details.

This guide should help streamline the scheduling and management of patient visits within FINALE.

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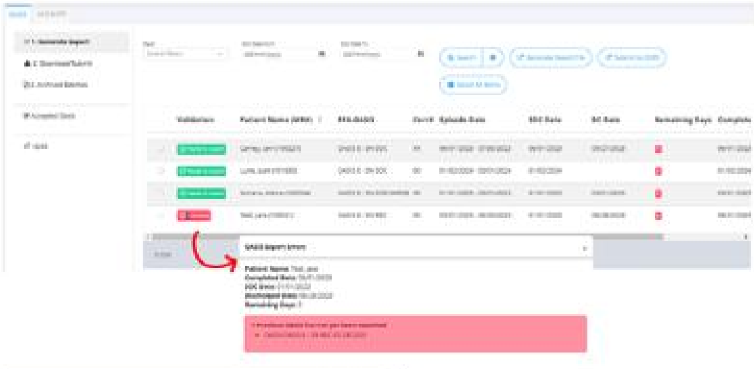
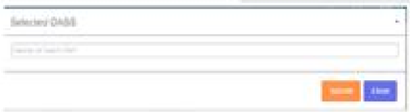
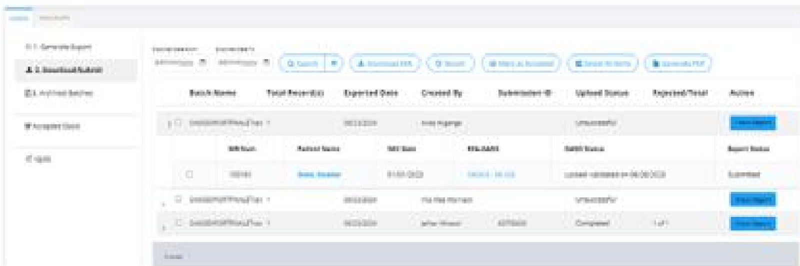
Training Module 4:
EXPORT, PAYROLL AND BILLING

EXPORT

1. **Generate Export:**
   - Access the export tool.
   - Set the payer option and SOC date range.
   - Generate the export file and select all items for export.
2. **Download/Submit:**
   - Define the date range for the exported data.
   - Download the XML file.
   - Revert if necessary and mark the export as accepted.
   - Select all items and generate a PDF if required.
3. **Manage Archived Batches:**
   - Specify the date range for archived data.
   - Download the XML file of archived batches and revert if needed.







HHCAHPS

4. **Batch Surveys >Payer Option> Month > Year**
5. **Download/Mark As Submitted> Refresh > Un batch> Mark As Submitted**
6. **All Submitted Surveys**

Tips:

- Double-Check Dates: Ensure the SOC and exported dates are accurate to avoid exporting incorrect data.
- Validate Before Export: Validate the data before generating the export file to ensure correctness.
- Keep Records: Maintain records of downloads and submissions for future reference and compliance.
- Monitor Status: Regularly check the status of exports and updates to ensure proper processing and acceptance.

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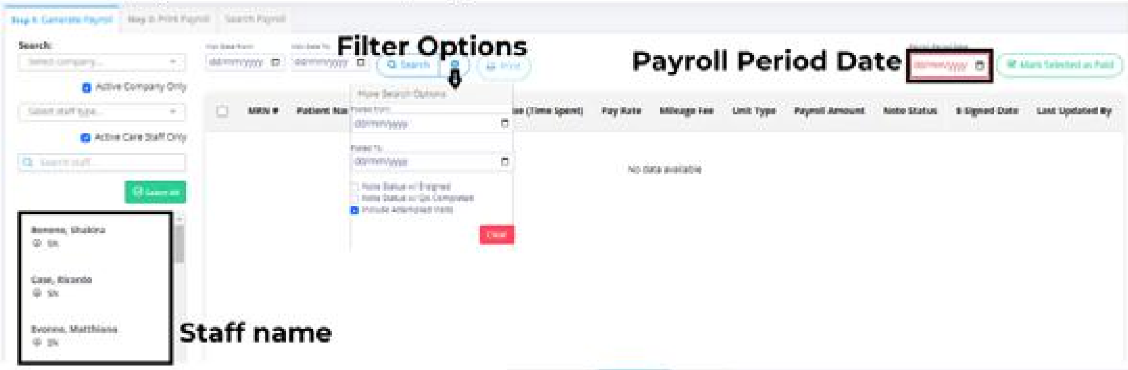
Training Module 4:
EXPORT, PAYROLL AND BILLING

PAYROLL

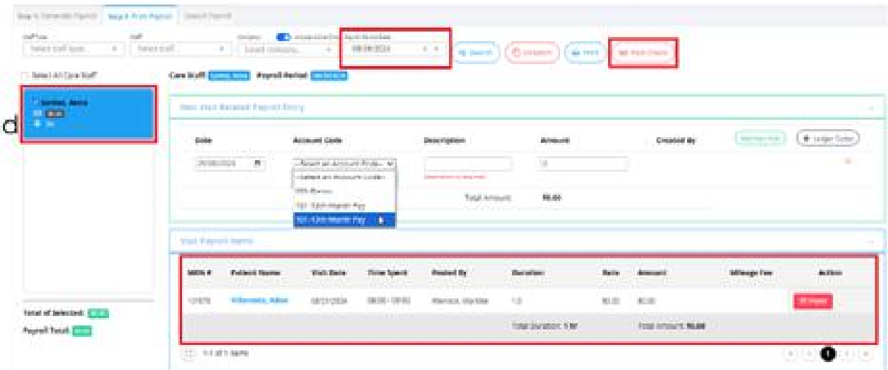
1. **Generate Payroll:**

- Set the visit date range and payroll period date.
- Select and mark items as paid.
- Print the payroll for record-keeping.



2. **Print Payroll:**

- Choose criteria based on staff type, specific staff members, company, and payroll period date.



3. **Search Payroll:**

- Use filters for staff type, specific staff, and payroll period date to locate specific payroll records.

Tips:

1. Double-Check Dates: Ensure that visit dates and payroll period dates are accurate to avoid errors in payroll calculations.
2. Review Records: Before printing or finalizing payroll, review records to confirm all entries are correct and complete.
1. Use Filters Effectively: Utilize search filters to efficiently find and manage payroll records.

Training Module 4:
EXPORT, PAYROLL AND BILLING

BILLING

Step 1: Create Claim

Billing

1. **Create Claim:**
- Navigate to the claim creation section.
- Enter SOC (Start of Care) Dates: Specify the "From" and "To" dates for the SOC period.

2. **Claim Type Selection:**
- Choose the type of claim you are processing (NOA Claim or Medicare Claim).

3. **Validation:**
- NOA Claim/Medicare Claim - Validate:
    - Errors: Must be corrected before proceeding. Errors typically block the claim from moving forward.
    - Warnings: May not prevent submission but should be reviewed and addressed as needed.

4. **Generate NOA Claim:**
- Click "Generate NOA Claim" to create the claim once validated.

5. **Resolve Issues:**
- Address any validation errors or warnings as indicated.
- If resolved, proceed to Step 2.

6. **Submit to DDE:**
- For Medicare claims, ensure submission to the Direct Data Entry (DDE) system if required.

7. **Mark as Submitted:**
- After submission, update the claim status to "Submitted."

8. **Export Data:**
- For documentation or record-keeping, export the claim data as needed:
  - Download as PDF or Excel.

Training Module 4:
EXPORT, PAYROLL AND BILLING

Step 2: Batch Claim

1. **Active Payer/Insurance:**
- Ensure that the payer or insurance is active and correctly configured for batch processing.

2. **Batch Claim:**
- Process claims in batches if applicable.
- Handling Incorrect Claims:

- Click **"Delete Claim"** if a claim or part of the batch is incorrect.

- Use the **Pen and Paper Icon** to edit and correct any issues with the claims.

3. **Printing:**
- Click the **red PDF icon** to print the batch claim if needed.

Step 3: Submit Claim

1. **Unbatch Claim:**
- Prepare the claim for submission by un-batching it if necessary.

2. **Submit Claim:**
- Choose your submission method:

Manual Submit: Submit the claim manually if required.

Electronically Submit: Use the electronic submission option if available.

3. **Export Data:**
- Export the claim submission data in the desired format: CSV or Excel.

SYSTEM BEHAVIOR

PHYSICIANS ORDER

1. RECERTIFICATION
RC

- Once order is created system will create REC OASIS with RC tagging.
- Within 5 day window before the episode ends

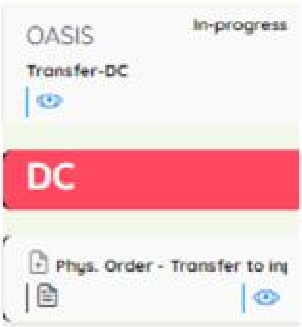
2. RESUMPTION OF CARE
ROC

- Can be created if there is previous transfer in facility not discharge order with ROC tagging.
- It will generate ROC OASIS

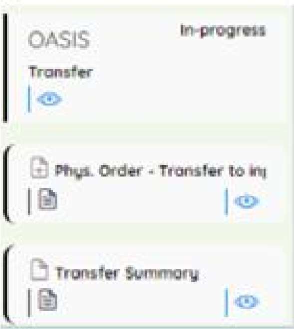
Transfer to inpatient facility Discharge

3.TRANSFER
Transfer to inpatient facility not Discharge

- Once created will generate Transfer OASIS and ***Transfer Summary.**
- Transfer to inpatient facility Discharge

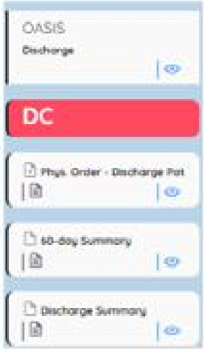


- Transfer to inpatient facility not Discharge



5. DISCHARGE

- It will generate Discharge OASIS,***(60 Day Summary and Discharge Summary)**
- 3 Different orders



4. RESUMPTION of CARE/ RECERTIFICATION
ROC/REC

- Once created it will generate ROC OASIS
- Order type will show once it falls within 5 day window before the episode ends and patient needs to resume care.

***auto create notes- can be enable under ADMIN> Service Type> update auto create other notes.**

Note that enabling this feature might depend on your agency's specific preferences or guidelines. This means that while the feature can be turned on, how and when notes are created automatically may vary based on your agency's needs or policies.

SYSTEM BEHAVIOR

EXPORT

- Once OASIS is already exported, unlock choose options
  - Option 2 Non keyfields- Re-export
  - Option 3 Create duplicate

  Export XX