Today’s Webinar

Presenters: Lorraine Welty, Christine Austin, Misty Duff, Jason Donahoe, Kathryn Rigda
Moderator: Misty Duff

Recordings will be available on the User Group website

- Ask questions through the Q & A Panel
  - 10:00 - 10:10 Announcements / Upcoming Topics / Polls
  - 10:10 - 11:00 Today’s Topic - Ideas in Action
User Groups Sandbox

- Access User Group Sandbox from the Downloads Tab to see features from the Early Adopter Service Packs.
Upcoming Topics

▶ Today’s Topic: Ideas in Action
▶ March 1, 2019 - 8:00 am PST - Reports Edition
▶ March 5, 2019 - 10:00 am PST - Ledger Payments and Remittance Options
▶ March 8, 2019 - 8:00 am PST - Reports Edition
- Updated F1 Help is available for
- Authorizations
- Follow-up Actions
- Dashboard - Billing review vs. Posting Review
- User Preferences
- EOD Blind Drop option
In addition, a PDF is prepared to allow you to preview features from the upcoming 2019.1 Release.

Scheduled for release March 11, 2019.
Many of these will be demonstrated today

Major new features and changes

- "Billing Review" has been renamed to "Posting Review" to better represent the essence of the process.
- Multiple enhancements to authorizations. See "Payor - Authorization" for more details.
- Multiple enhancements to the scheduler. See "Scheduler" for details.
- The payment check number in ledger can now contain up to 50 characters.
- Various insurance appeal and denial forms.
- Ability to archive patient information. When you archive a patient, only the basic information about the patient is kept; other data is compressed into a ZIP file and then deleted from Raintree. The data can also be restored from the ZIP file.
- You can now print EMR lists in the order you sorted them.
- Print Preview for RTF documents is multiple times faster.
- Support for MIPS reporting.

Scheduler

- Scheduler now supports provider teams (same as dashboard). The TEAM appointment view displays the schedules for all team members; you can switch between or edit your team using the new button in the scheduler toolbar.
- The work schedule and applied schedule lists now display who and when modified or applied the schedule. Setting [Scheduler] SingleWorkScheduleLog=Y in global.ini will log all changes into a single workschedule.log file instead of creating a separate log for each workstation.
- New global ini setting [Scheduler] SingleDayBookingPatient=warning allows displaying a warning when you try to schedule a patient appointment and the patient already has an appointment for that day. You can also set this to disable to prevent booking multiple appointments on the same day.
- The Missed Appointments tab in patient appointment history now displays information whether the appointment was rescheduled.
- When printing appointment statistics in the scheduler, you can now filter the appointments by multiple statuses.
See Raintreeinc.com User Group site for complete download

Raintree Live!

- 2019.1 Standard Service Pack Release Notes (367.3 KB)
- 02/15/2019 Raintree Live! Reports Edition (63.8 MiB)
- 02/15/2019 Raintree Live! Reports Edition - Slides (3.9 MiB)
Creating new ways to submit ideas by adding a link from the F6 Go To Menu

This is a shortcut to the Idea Scale login
Idea #1356 Setup Option for EOD Require scanned document in scan deposit

- This feature provides a way of enforcing documentation when closing an EOD
- Requires EOD package #141826, available in the Standard Service Pack
- See Setup Option #17
This feature provides a way of enforcing documentation when closing an EOD.
The provider check in pop up feature simply notifies the provider on the appointment when the patient checks in.

Requirements

- Install the Handoff (SU package # 142593 [500 branch] or higher)
- Install the Wake Client App (SU package # 142436 [500 branch] or higher)
- Verify that the service version is 10.2.700 build 91 or higher
- Verify that the agent version is 10.2.500 build 3015 or higher
- Verify that the client version is 10.2.500 build 1357 or higher
The checkin process can pop up an alert, in addition to updating icons.
The checkin process can pop up an alert, in addition to updating icons.

This is in addition to the Dinging to aid users that may have speakers turned off.

We are thinking it would be helpful to have raintree send an automatic alert to a therapist once their client has been checked in at the front desk. This will minimize the amount of times our front desk staff need to go back and alert them that their patient has checked in if they are late.
Idea #1640 Color Change in Scheduler App for Confirmed or Cancelled Appts

- Requires Web Client
- Provider Applets Package #144666
- Grey = booked
- Red = cancelled

It would be great if when an appointment was cancelled or confirmed if the appointment changed color or had a different flag, as it does in Raintree. That would greatly add functionality to the web app.
Idea #1640 Color Change in Scheduler App for Confirmed or Cancelled Appts

Please contact your CRM for details

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EASP 3041 (2991.13)

Changed the screen design for clarity

F9 is set up in the sandbox area
We have divided the save button into 2 buttons.

Send, to send the messages

Options, where you can select a patient, add an audio clip, set an alarm with date and time; set the status to private and/or indicate the message needs follow-up
**F9 Requirements**
Agent 10.2.500.2776+  Client
10.2.500.1255+  Standard
Screens 140640+ Service
10.2.500.572+

**Global.ini set up**
[InternalEmail]
IsPublicByDefault = Y
MarkReadOnOpen = Y
Standalone = N
MultiUserSend = N
UseNew = Y
Idea #1738 Need More Details Included in Provider Setup Print Out

The Provider Report includes the MIPS settings for reference.
Go to Main Menu > Tables > Providers > P to Print > List
Include Provider Setup

### Provider Setup

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2 features:

- Sign off individual users
- Sign off on certain notetypes
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- Sign off individual users
- Sign off on certain notetypes

Sign off for individual users:

This is defined by the options available in the provider table and can vary by provider, location & payor if needed.
2 features:
- Sign off individual users
- Sign off on certain notetypes

Sign off for certain notetypes:

If co-sign is required, but only for certain notetypes, you can use setup option 29 to exclude the items that do not need co-sign.

This is available for TVIST, LTNOT & ENOTE.
The Provider Library Package #143579 offers better clarity with Yes and No radio options for the Provider Setup.

Upon Add of a new provider, the Valid Billing Provider default to Yes, but can be changed.
TVIST and LTNOT Option in current Release Specialty Packs

Progress Notes

Medicare requires progress notes every 10 visits. It would be very helpful if Raintree would pop a warning when scheduling visit 10, 20, etc. to let you know that the progress note is due. Right now we have to count prior visits and often it gets missed. This is really a problem if the patient has been scheduled with an assistant on the day the progress note is due but should have been scheduled with a therapist.
- Available in TVIST & LTNOT
- Setup options #18 & 20
- Provides Warning:
  - Can be set as hard stop
  - Can verify appointment is scheduled with provider with correct credentials.
Case Load - Column Selection

I would like to be able to select columns when utilizing the caseload tab in the same manner that columns can be selected in the Waitlist feature.

Adding a "re-eval date" column would also be helpful as an option.
New option for views toggle:

- Full View
- Plan View
- Progress View
- Custom View
Idea #1621 KPI More Specific Fields

- Requires KPI Package #144123
- Provider KPI now offers reports to show source data, similar to End of Day

RAINTREE IDEAS

Therapy Advisors (@therapyadvisor)
3 months ago
Assigned to Therapy Advisors 3 months ago

KPIs, more specific fields

For provider KPIs, there are currently the following fields. Would like these to be subdivided to provide more specificity, as many of our newer therapists require cosigns and send all notes to billing review, so should not be penalized if they have done their parts (signed but cosigner has not, or sent to billing review but not posted yet). This would also help to serve as an alert for the cosigners, which is something we are really needing.

- Notes pending signature - break down into two boxes
  1. pending signature
  2. pending cosignature

- Unposted service tickets - break down into two boxes
  1. unposted, not in billing review
  2. unposted, in billing review
Provider KPI now offers reports to show source data, similar to End of Day.

The feature to display more detail will be opt-in:

- Notes pending signature breakdown
- pending signature
- pending cosignature
- Unposted service tickets - breakdown
- unposted, not in billing review
- unposted, in billing review
The Applied Work Schedule screen has been expanded to show days of the week for better filtering and management.
The Applied Work Schedule screen has been expanded to show days of the week for better filtering and management.

Current Release Version:
This Idea Scale request has been addressed in our Standard Service Pack.

When an auth meets the warning threshold by INS or FC, but a subsequent auth is valid, the warning is suppressed.
In this example, the threshold is met by an auth, but the second auth has been added to cover the next period.

Before:
There are settings we can turn on in the EMR Plugins - LIB_Scheduler (Library - Scheduler) & Auth (Authorization) - setup options - that will govern if the Scheduler will allow an appointment to be added based on the patient having an active payor and/or authorization.

These setup options do not work effectively if the primary payor (typically 'A' billcode payor)/authorization is not valid, but the patient has a valid secondary payor/authorization (typically 'B' billcode payor). Raintree will allow the appointment to be scheduled as it reads the secondary payor info. instead.

Raintree Scheduler should not look any further than the 'primary payor' to allow scheduling appointments while the above setup options are turned on.
The Authorization Requests Package #142169 and Authorization Appeals Package #144874 contain updated forms.

These forms can be accessed from the Patient Chart and now from the Authorization record.
REV-Edition Customer Feedback has provided several Ideas for refinement

Latest Rev-Edition Package #144820

**Posting Review/Review before Billing/Review after Transfer**
- Review before billing to trigger red exception billbar with follow up note attached either patient or insurance billing.
- Can also create red exception billbar on transfer to secondary or patient.
- Actions to approve or process these exceptions.

**Tracking Patient Statement**
- NORSP notes on patient billbars.
- Patient payments to close these notes.

**Remittance**
- Better error handling, fixing.
- Remittance to create follow up notes for issues.
- Simplify consolidation process.

**Actions**
- More actions to support mass actions.
- Refine what actions are available when.
- Continue developing Appeal forms.
- Ability to load FFACT setups.
Upcoming Topics

- March 1, 2019 - 8:00 am PST - Reports Edition
- March 5, 2019 - 10:00 am PST - Ledger Payments and Remittance Options
- March 8, 2019 - 8:00 am PST - Reports Edition
Thank you for attending this event.

We look forward to seeing you next time!

Raintree
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