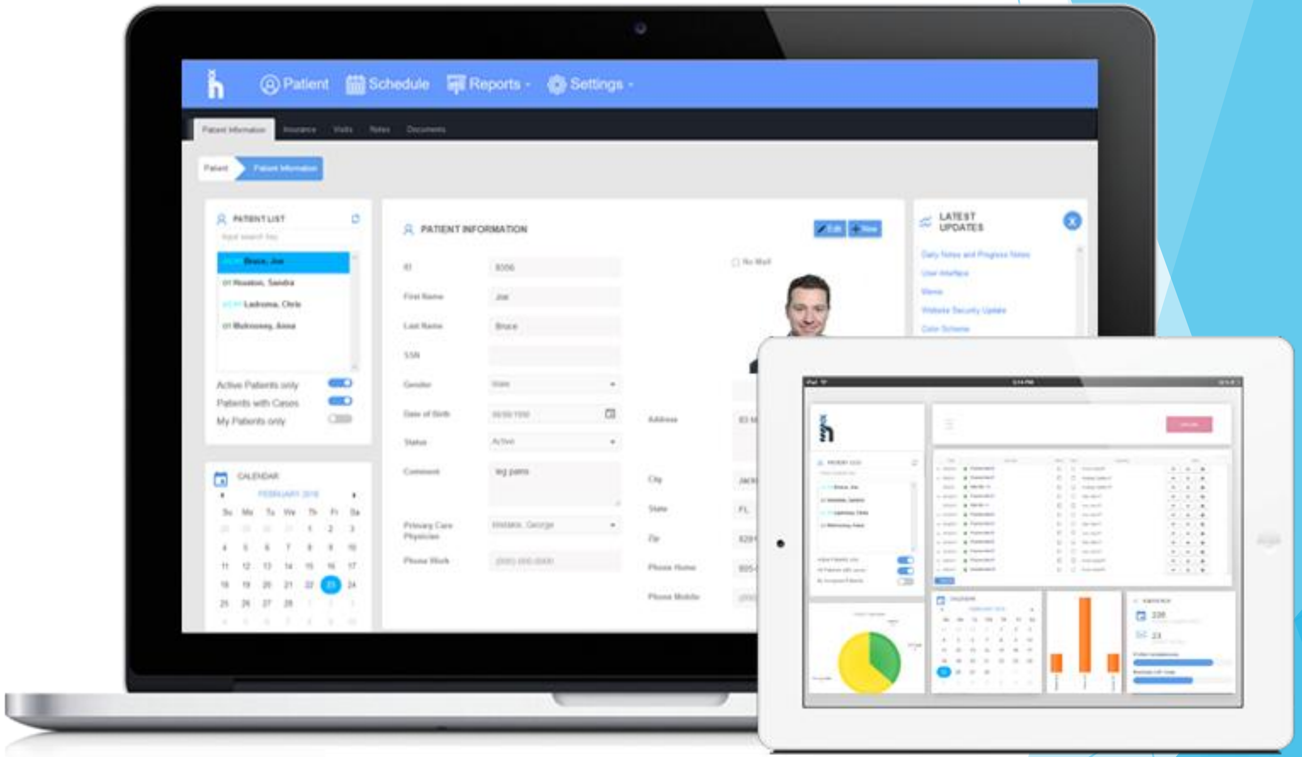
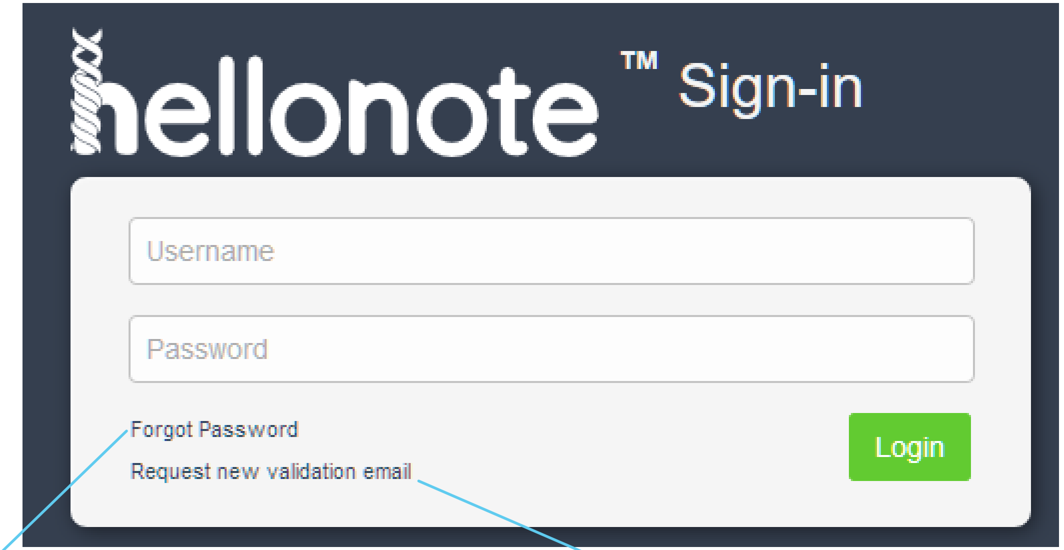


Admin and Therapist Training Guide

2020

Login Info



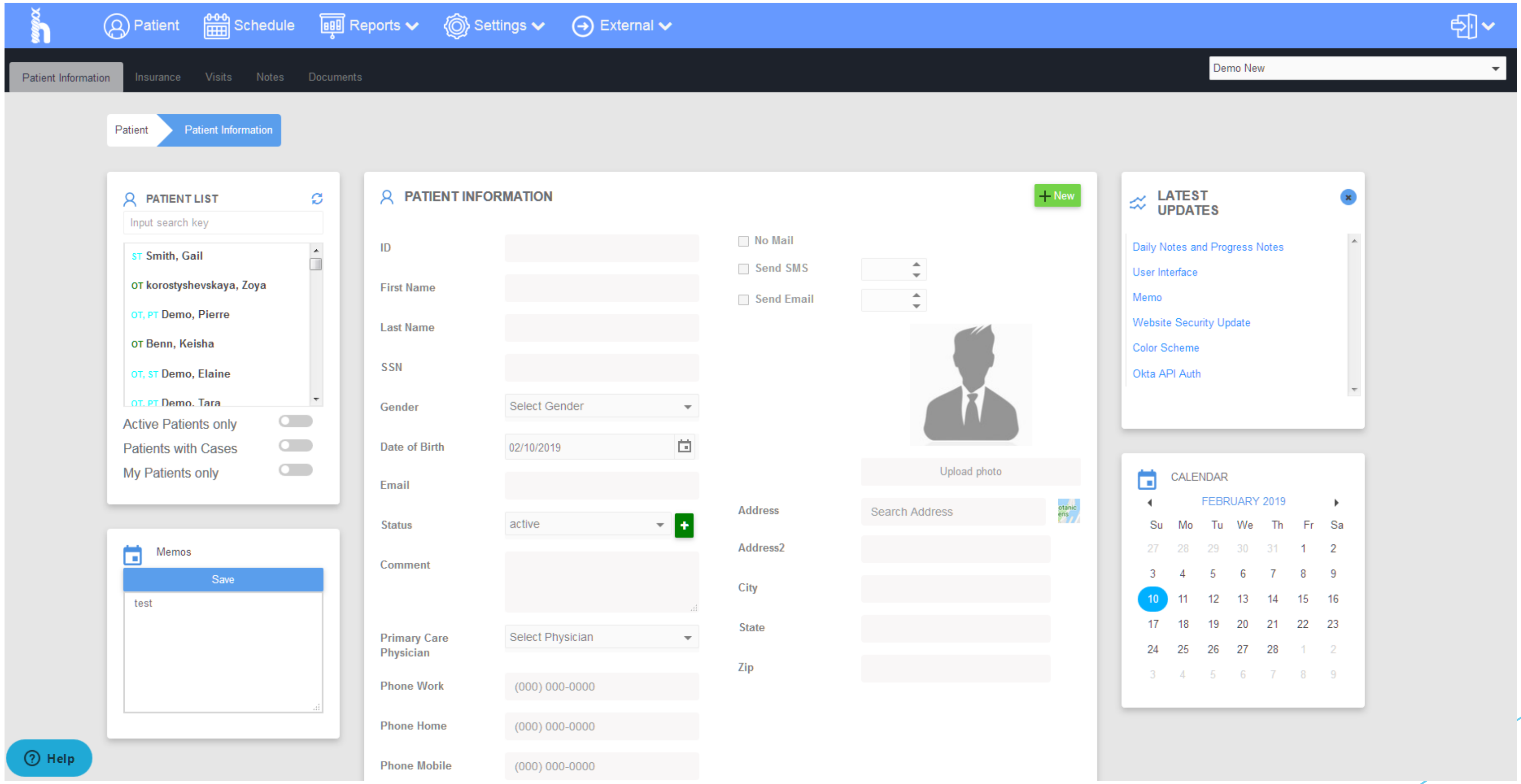
- Login URL: https://app.hellonote.com
- Username is lowercase
- Password is case sensitive

Use this if you need to reset your password

Use this if you didn't click on the Email verification link within 24 hours

Main Interface

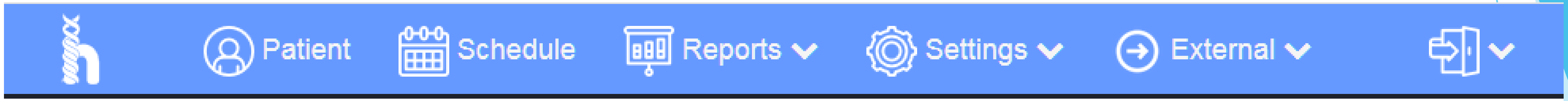
- The zoom setting on the browser should be 100% or less depending on the size of your monitor and device.
  - Smaller devices and smaller monitors, you should zoom out, the screen should not be distorted and look like so:



- HelloNote works on all browsers, however Google Chrome is recommended for best compatibility and speed
  - Chrome is available on all devices, including Windows and Apple/Mac

Navigation Bars

Main



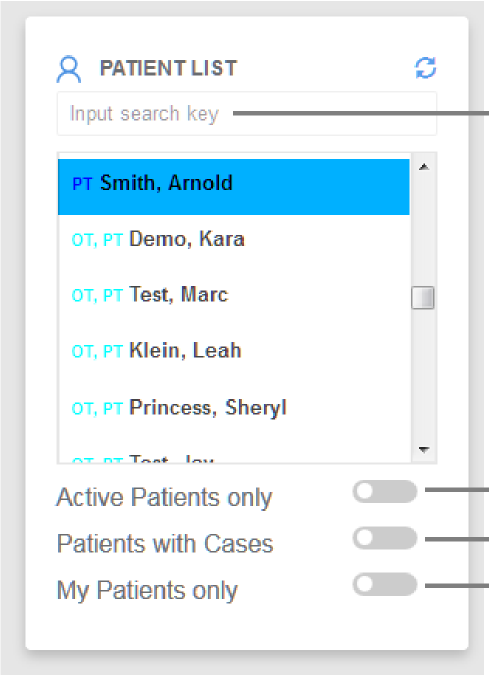
- Patient – Demographics, Insurance Information, Payments/Credit Card Processing, Visits, Notes, Documents, Patient Signatures
- Schedule – Calendar with appointments
- Reports – Invoicing tool
- Settings
  - User Account – Change password
  - Autocomplete – Add user defined smart-phrases

Subtabs

- Patient Information – Demographics, Emergency Contact, Referral Information, Events/Reminders
- Notes – Documentation
- Documents – Cloud based file storage

Interface Cards

Patient List



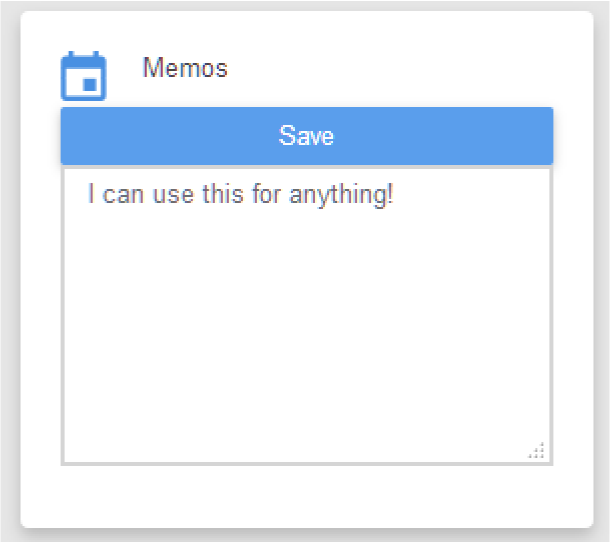
Input name search string

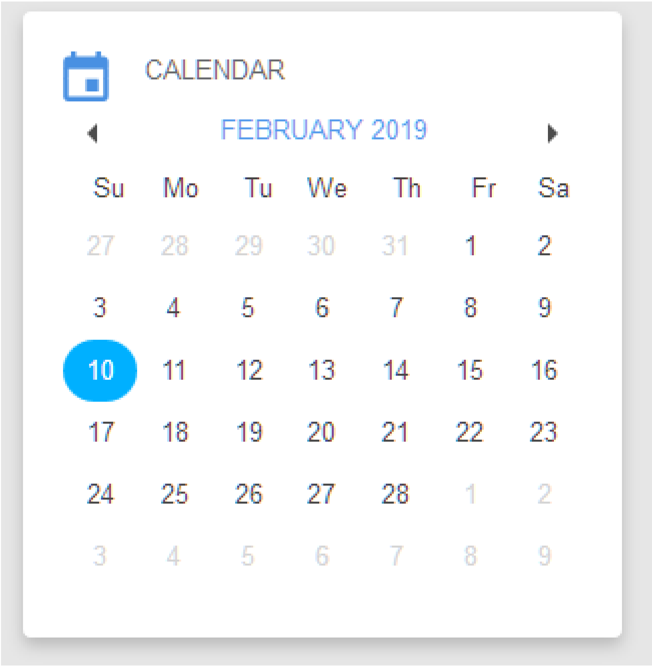
Filter for active patients

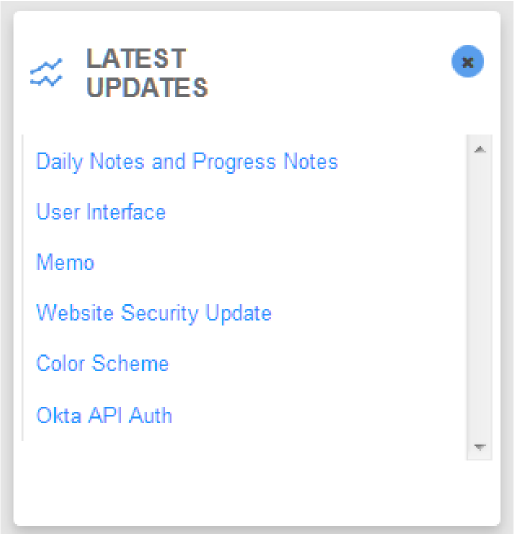
Filter for patients with open cases (non D/C)

Filter for patients assigned to you

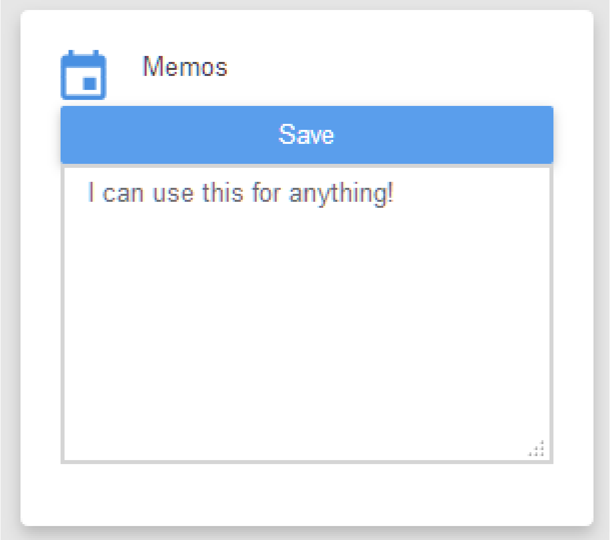
Interface Cards





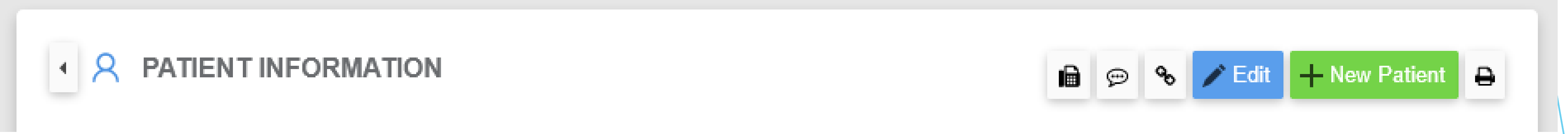


Interface Cards: Memos



- The comment box is per individual account, and is not shared with any other accounts.
- Clear the memo by putting a blank space in the comment, and clicking “Save”
- Useful for “To do” lists, templates, and quick reminders

Patient Information: Functional Buttons



Referral Request: eFax an automatic referral request to the medical provider of your choice

Send your clinic review link to your patients phone via text message

- Link to your review page (Google, Facebook, etc.) can be sent to us for implementation

Patient Portal Enrollment: Enroll a patient into the portal

- Email and Mobile Phone number are required

Print Facesheet of the patient demographics

New Patient Add a new patient to the database, a unique ID will be generated

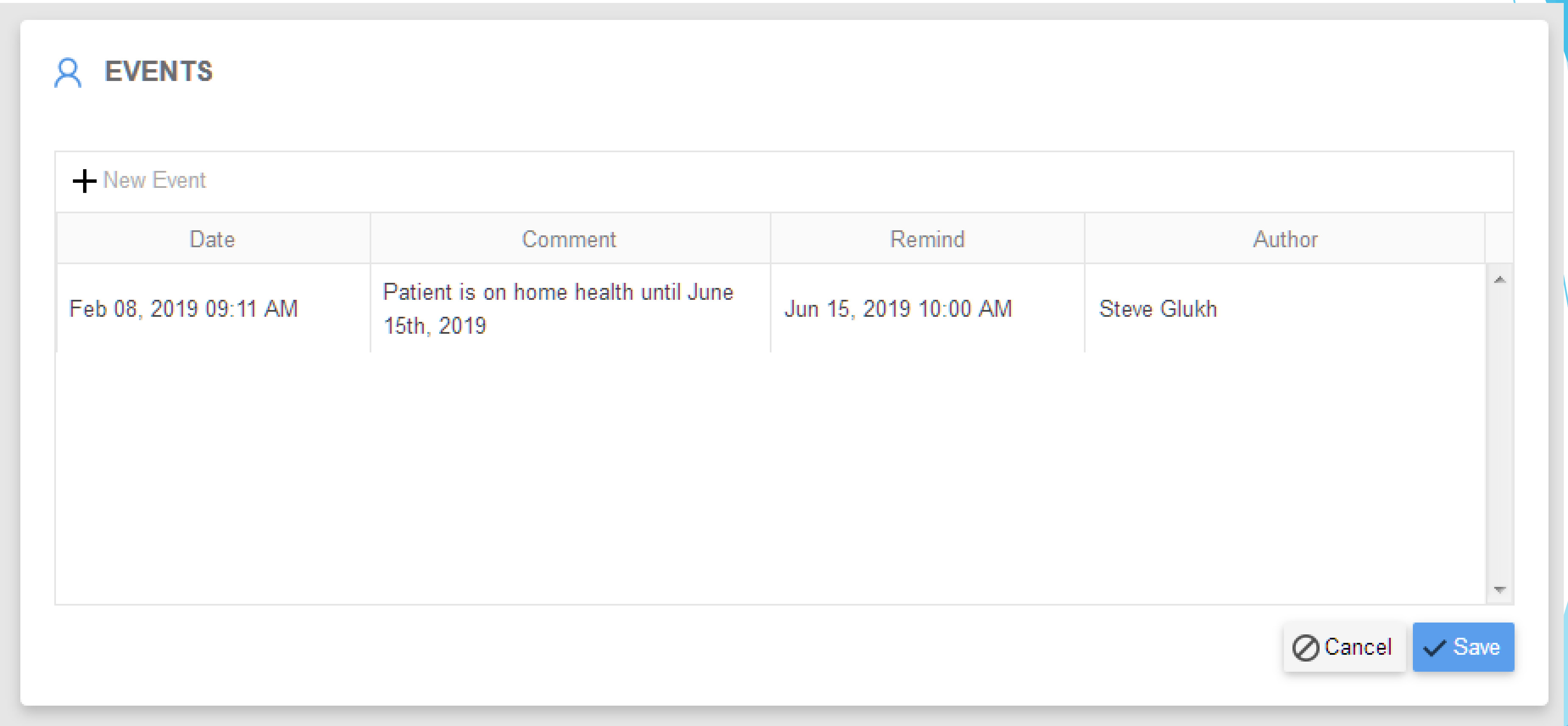
- First and Last name are required fields

Edit Edit existing patient demographics

- Admins can modify First and Last names

When finished updating, click the Save button found at the top or bottom

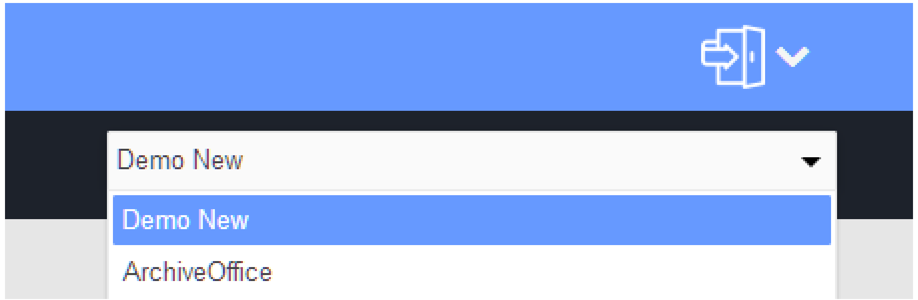
Patient Events



- Internal communication between facility
    - Author will be automatically stamped along with date
    - Comment and Reminder date is set by user

Switching Offices

- If your account is assigned to multiple locations

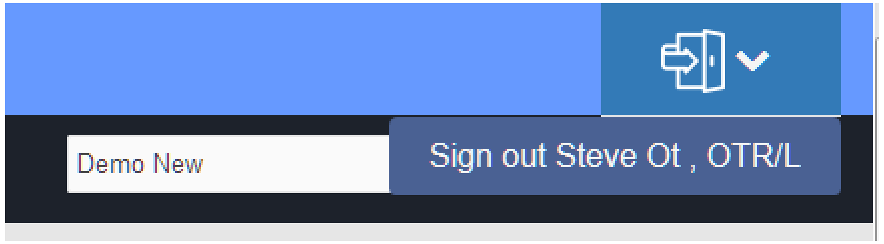


Note: Your primary office will be set by the administrator and upon every login, you will be logged into the primary office

Please make sure you close all other tabs before switching offices!

Logging out

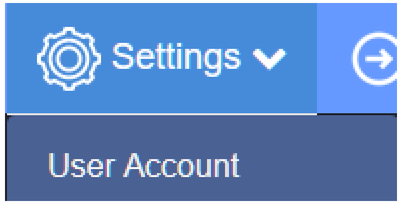
- Once you are finished with your session, please log out by clicking on the “door” icon at the top right and then clicking “sign out..”

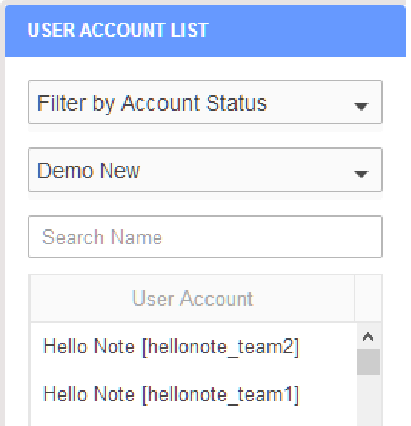


Note: You will be automatically logged off due to inactivity after 60 minutes

Changing Password

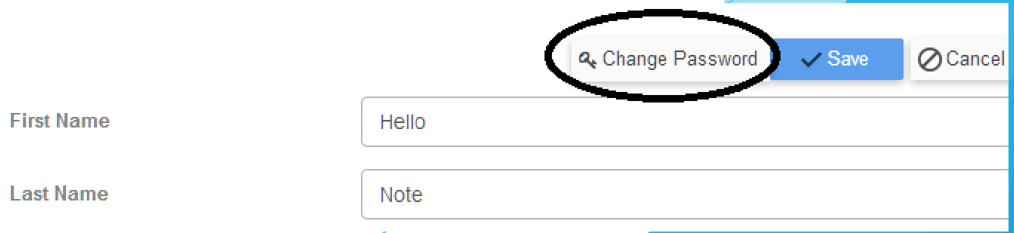
- Navigate to Settings -> User Account





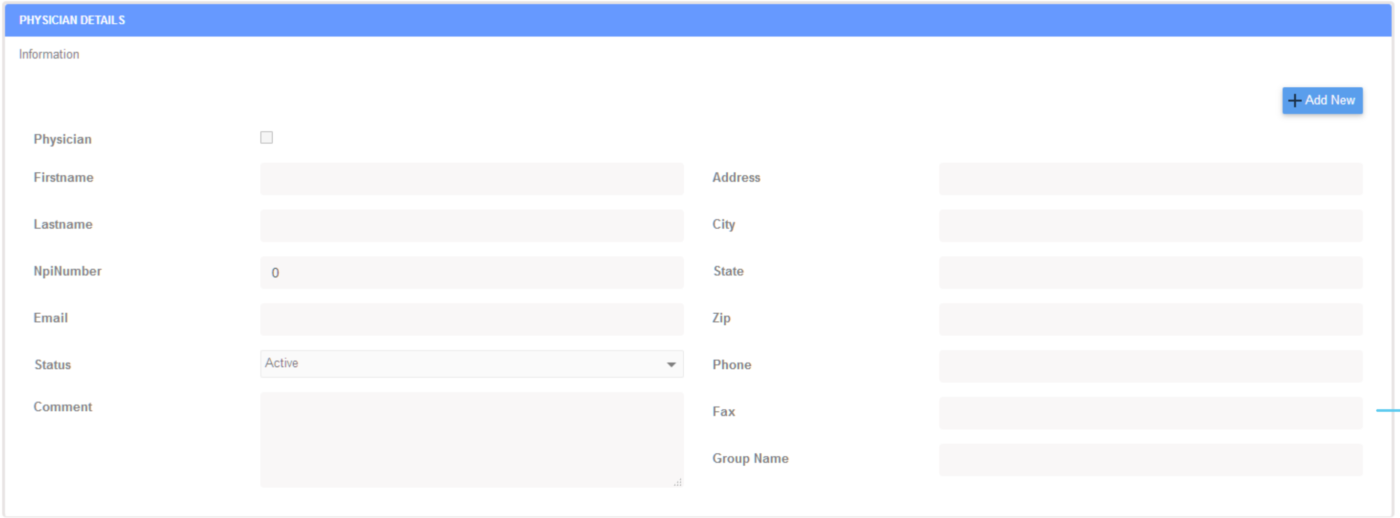
Click your username on the left side

Then click the “Change Password” button on the right



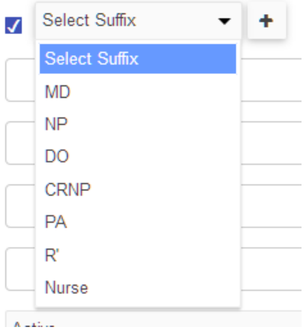
Adding PCP/Referral Information

- Settings ->PCP/Referral



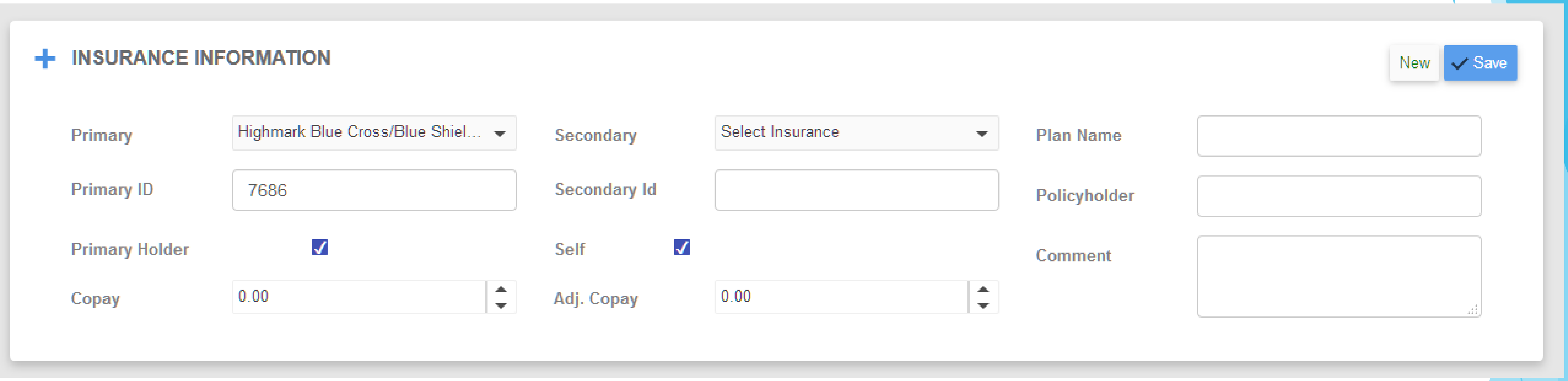
Fill in Fax# if you want to eFax

- If referral is a medical provider, click the box next to Physician and select appropriate designation



- First Name, Last Name, NPI is required.
  - For non-medical, leave NPI as 0

Insurance: Adding Insurance Information



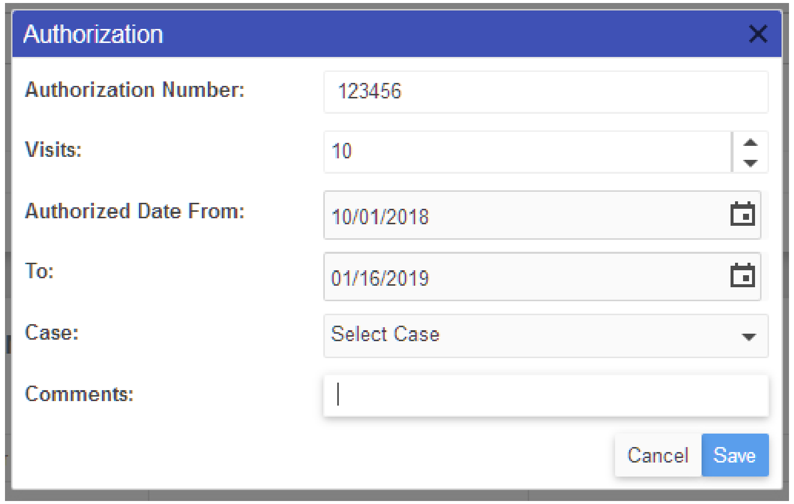
- Clicking "New" button will allow you to add a new insurance to the office database
- Required fields are Primary Insurance and Primary ID#

Insurance Tab: Adding Authorizations

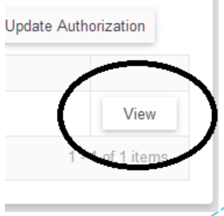
- Once insurance information is saved, check off authorization required

- Click “Add Authorization” button

- Input pertaining information

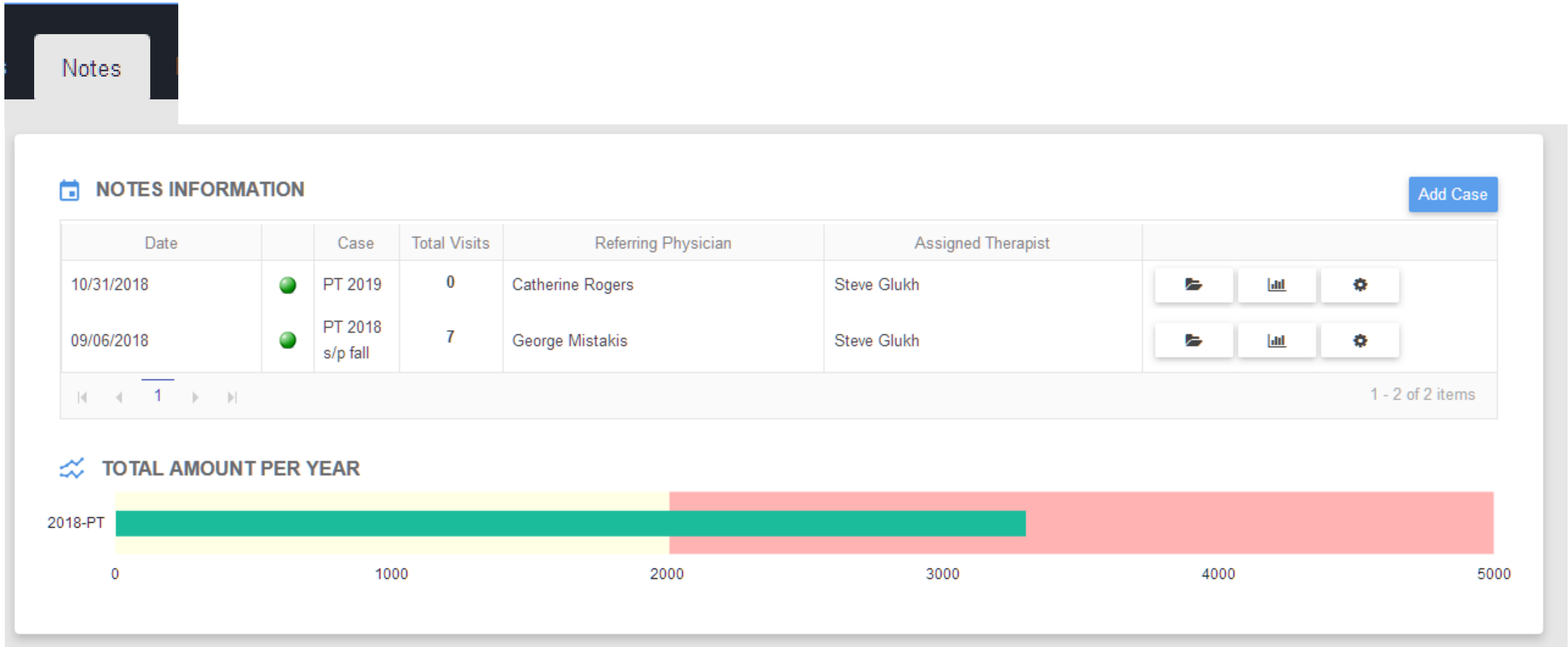


- Edit existing authorization by clicking “View” at the corresponding row



Notes/Documentation: Cases

Click on the “Notes” tab under the “Patient” tab



- Cases will be displayed pertaining to the corresponding patient selected
  - Date: Date of the case (user controlled)
  - Case: Title of the case
  - Referring Physician
  - Assigned Therapist

Cases: Manually Open/Close(D/C) Existing Cases

- When a case is opened, the green icon will be shown and an “X” will be shown to the right of the case

- When a case is close/discharged, the red icon will be shown and a check will be shown to the right of the case

02/05/2019	Speech Test 2/5/19	0	George Mistakis	Candice Asalange	×
02/04/2019	Speech2	0	George Mistakis	Steve Speech	✓
	Speech	0			

- The icon will change after confirmation of opening/closing the case

Notes/Documentation: Open/Closed Cases

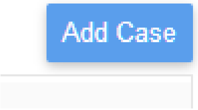
NOTES INFORMATION

Date		Case
07/13/2017	🔴	Test 7/14
05/16/2017	🔴	Case 1
04/11/2017	🔴	abc
04/05/2017	🔴	hip pain

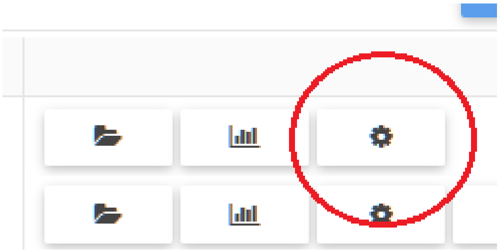
- The green indicator shows case as open
  - Currently is an active case without any discharge notes
  - Can be manually closed by administrator
- The red indicator shows case as closed
  - Case will be automatically discharged once discharge note is input
  - Can be re-opened

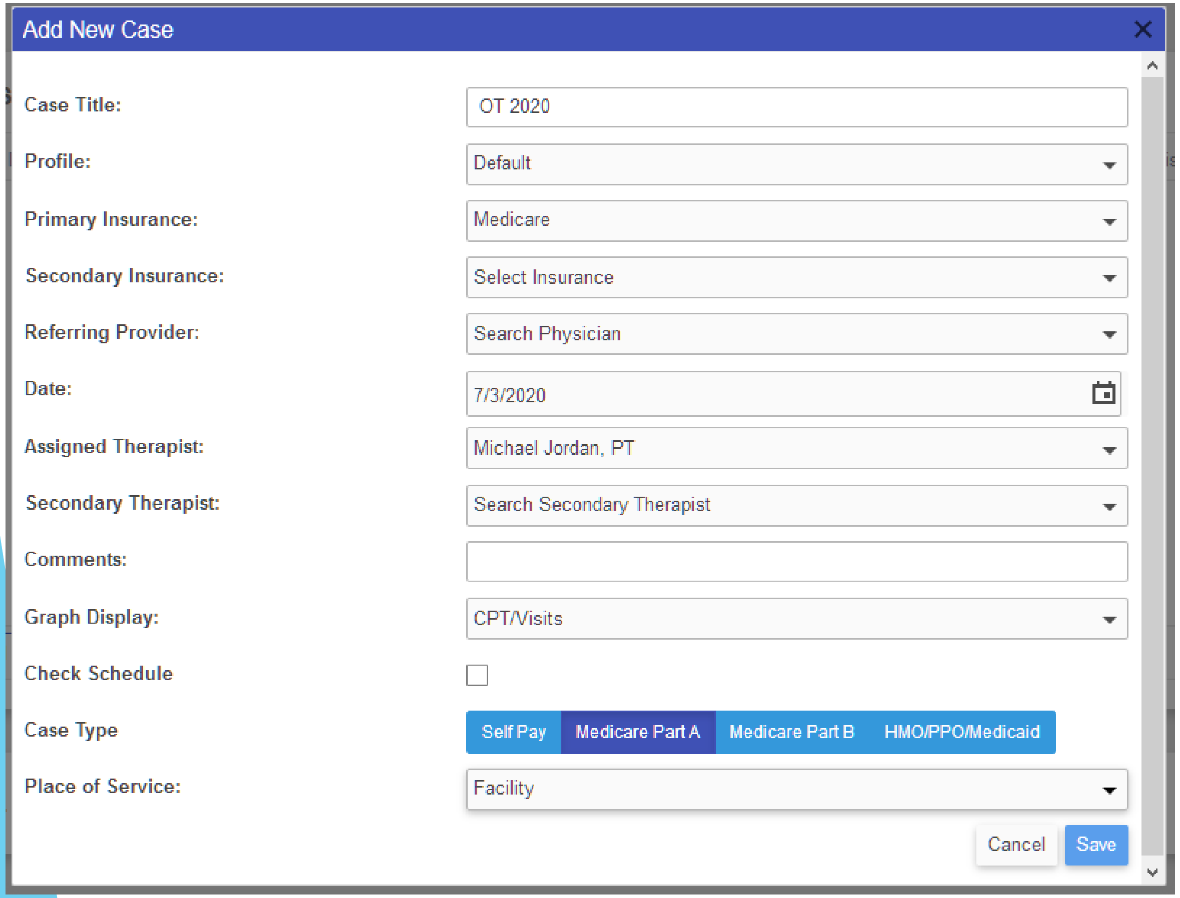
Notes/Documentation: Adding/Editing a Case

To add a new case:
Click “Add Case”



To Edit existing case
Click the “Gears” icon

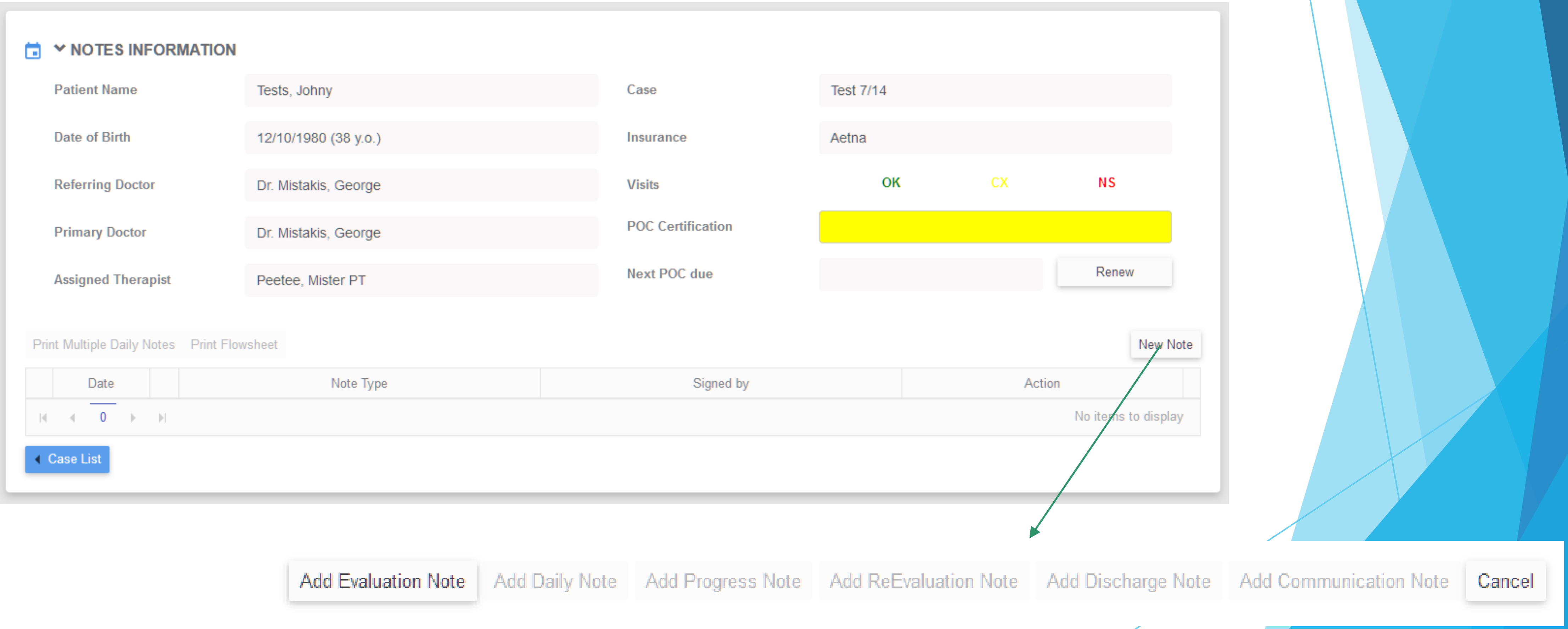




- Title: Input a title for this case
    - Example: OT 2019, HIP PAIN, s/p fall
- Profile:
    - Default for insurance based cases -> Recommended for Med A and Med B
    - Pediatric for pediatric based cases -> Recommended for all Pediatric cases
- Primary and Secondary Insurance: Carry from insurance tab
- Referring physician
- Date: Case date (should not be after evaluation)
- Assigned Therapists
- Comments
- Case Type:
    - Self-Pay: Cash based
    - Medicare A: Med A cases
    - Medicare B: Med B cases
    - HMO/PPO/Medicaid: Private insurances and Medicaid

Notes/Documentation: Creating Notes

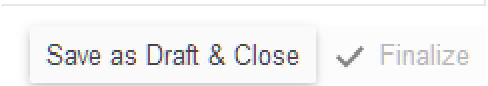
- Click the “Folder” icon corresponding to the case you want to open



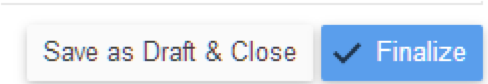
- Note that if the case has no existing notes, only the Evaluation note will be selectable

Notes/Documentation: Saving Notes

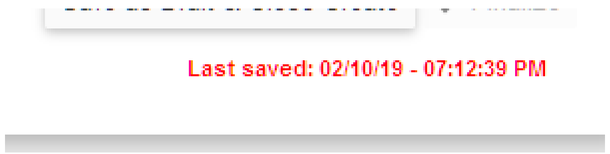
- Save as Draft



- Finalize is only available from the "Billing" tab

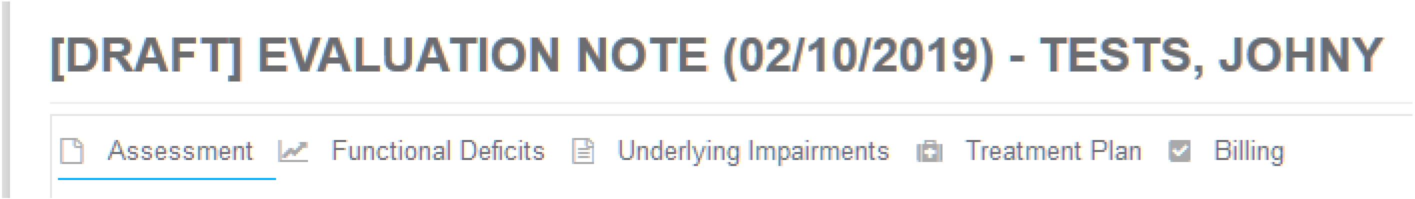


- Autosave kicks in periodically when system notices a change
  - Good practice is to glance at the time/date stamp to ensure saving

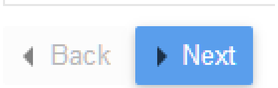


Notes/Documentation: Navigating Sections

- Click the section you want to access at the top of the notes



- Use the Back/Next button at the bottom of the page



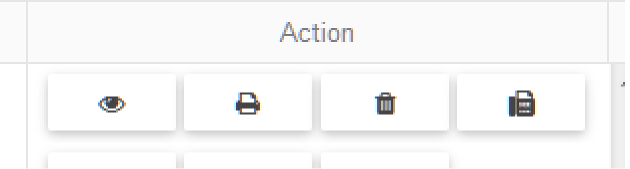
Notes/Documentation: Note Types

01/07/2019		ReEvaluation Note / Daily Note - 13
01/07/2019		Progress Note / Daily Note - 12
12/26/2018		Daily Note - 11
12/25/2018		Daily Note - 10
12/25/2018		Daily Note - 9
12/25/2018		Daily Note - 8
12/25/2018		Daily Note - 7
12/25/2018		Daily Note - 6
12/24/2018		ReEvaluation Note / Daily Note - 5
12/24/2018		Progress Note / Daily Note - 4
12/24/2018		Communication Note
12/10/2018		ReEvaluation Note / Daily Note - 3
12/09/2018		Progress Note / Daily Note - 2
12/09/2018		Evaluation Note / Daily Note - 1

Green Check Icon: Finalized Note
Blue Check Icon: Draft Note
Purple Check Icon: Communication Note
Yellow Check Icon: Pending Co-signature

- Evaluation Note
- Progress Note
- ReEvaluation Note
- Daily Note -> Includes Missed/Canceled Visits
- Communication Note
- Discharge Note
  - Quick -> When a D/C is needed and no visit was done
  - Full -> When a full D/C with session note is needed

Notes/Documentation: Note Actions



Eye: Open existing note in edit mode
Print: Print Note

- Different notes have different print options
  - Evaluation note will allow you to print Plan of Case, Full Note, Daily Note

Trash: Delete note (only available for drafts)
Fax

Notes/Documentation: Note Locking 48 HOURS *OPTIONAL*

	Date		Note Type	Signed by	Action
	07/07/2020		Discharge Note / Daily Note - 3	Jordan, Michael PT	
	07/07/2020		Progress Note / Daily Note - 2	Jordan, Michael PT	
	07/07/2020		Evaluation Note / Daily Note - 1	Jordan, Michael PT	

Upon starting a draft, the system will give you 48 hours to finalize the note before it is locked

The green "clock" icon will let you know the note is open

The clock icon turns red when the note is locked -> 05/15/2020 Progress Note / Daily Note - 2

You must ask the facility administrator or your supervisor to unlock the note back

Check the "time left" of the note before locking by clicking on the icon

Info

45.5 hour(s) left before note is locked.

OK

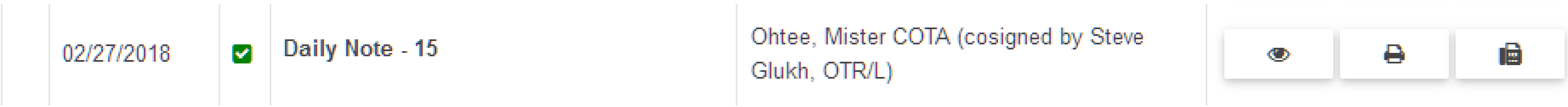
Notes/Documentation: Creating Addendums

When opening an existing finalized note, the “Finalize” button will be replaced with “Create Addendum”

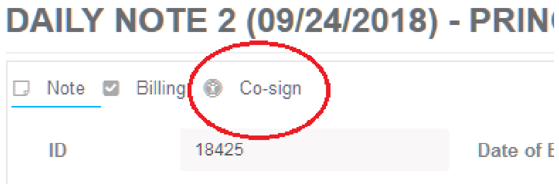
Clickable only in the “Billing” section

Notes/Documentation: Co-Signing Notes

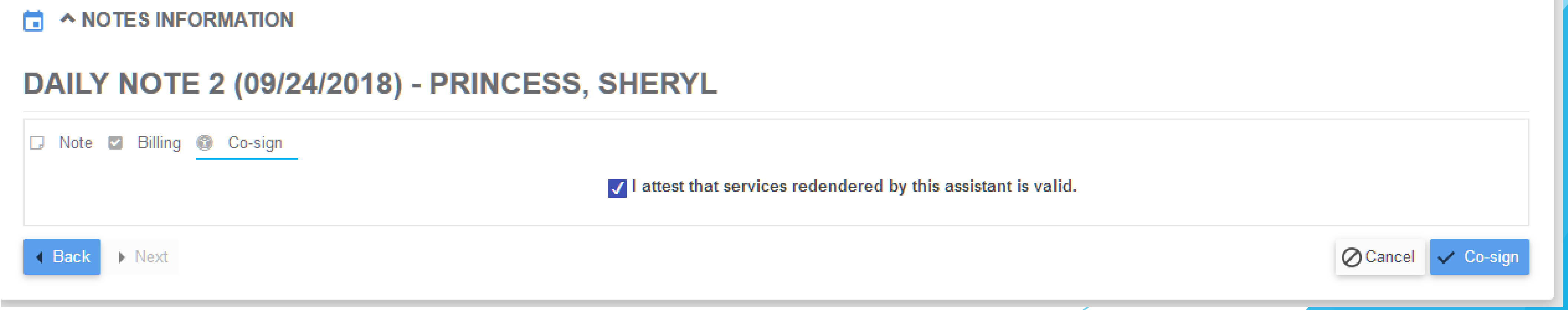
Open a note that has a "Yellow" check icon



The note will have a "Co-sign" tab

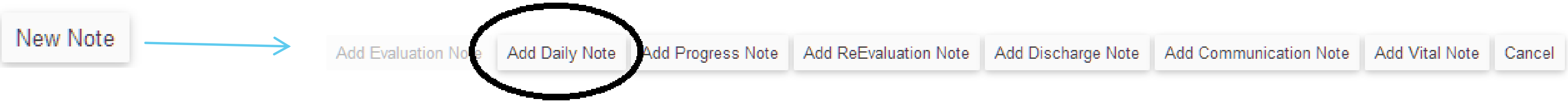


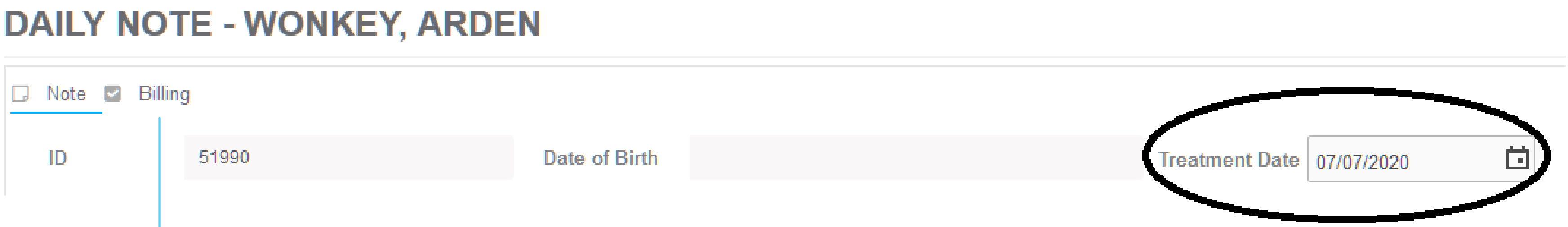
Must click the "Attest" checkbox and then the "Co-sign" button will be clickable



Notes/Documentation: Missed and Canceled Notes

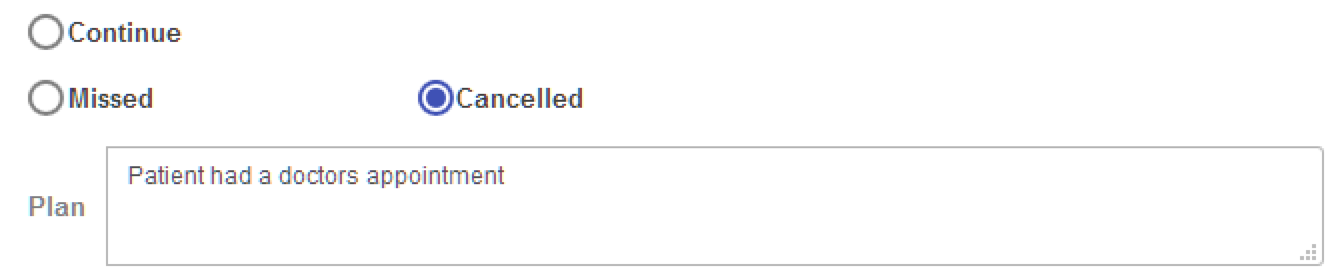
Open a Daily Note by clicking



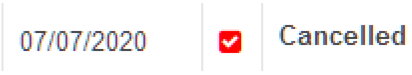


Change the Treatment Date to the date of the missed/canceled visit

Click the "Billing" tab and scroll down to:



Finalize the note and it will be designated as so:



Plan of Care: Renewing Certification

- When inside a case, click on “Renew” button

POC Certification

Next POC due 5/06/2019 Renew

- All finalized note types that have a POC will be shown
  - Evaluation, Progress Notes, ReEvaluation
  - Terms are calculated by the duration of the corresponding note
    - 12 weeks will show 84
- Mark off “Sent” to record POC as sent
- Mark off “Received” to record POC as received

POC Certification

Date	POC Type	Select Signed POC	Terms	Received	Sent
02/11/2019	Evaluation Note		84	☐	☐

Save

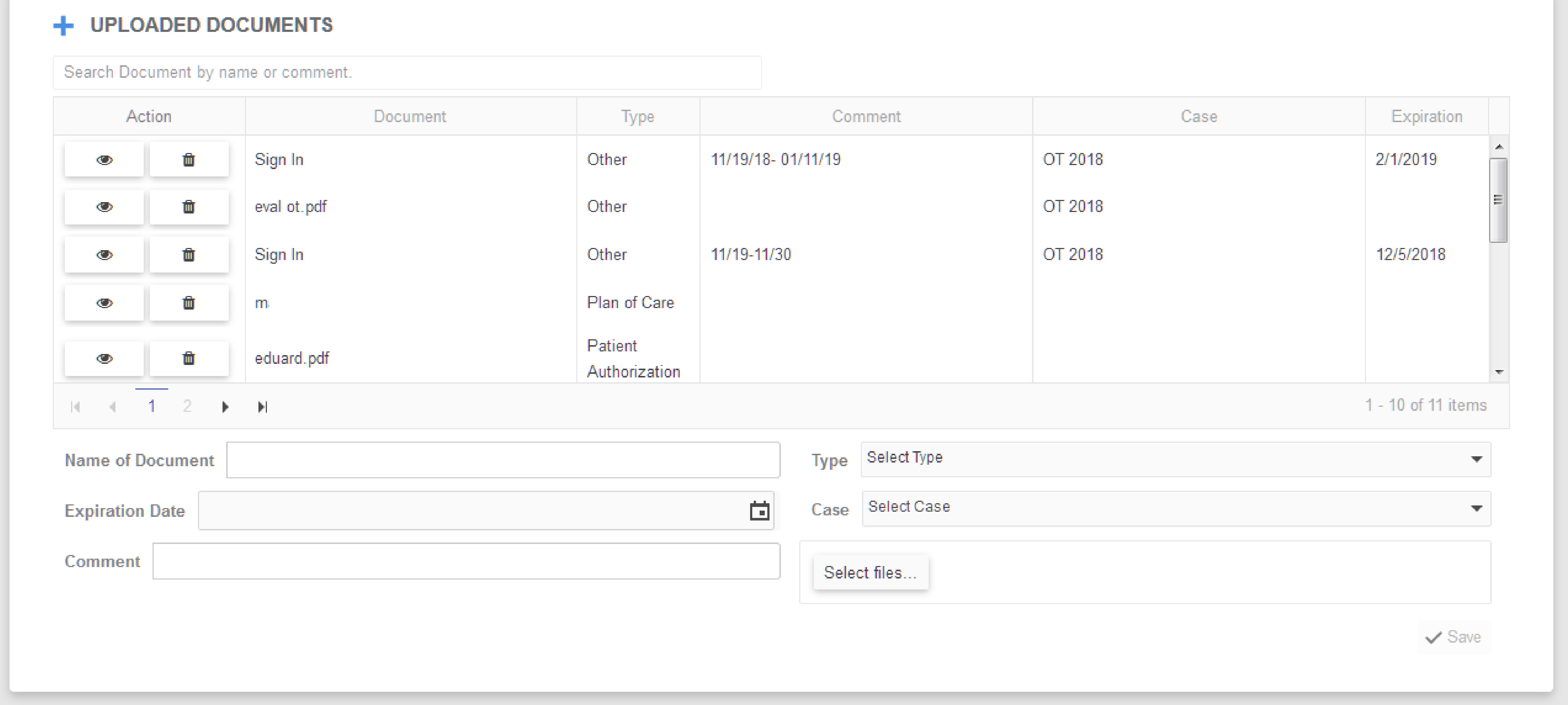
POC Certification — Evaluation Note 02/11/2019 sent on 02/12/2019

POC Certification — (Sent: 02/12/2019)2/11/2019 - 5/06/2019

- Once sent or received is checked, the POC indicator icon will be removed

Evaluation Note / Daily Note -

Uploading Documents



UPLOADED DOCUMENTS

Search Document by name or comment.

Action	Document	Type	Comment	Case	Expiration
	Sign In	Other	11/19/18- 01/11/19	OT 2018	2/1/2019
	eval ot.pdf	Other		OT 2018	
	Sign In	Other	11/19-11/30	OT 2018	12/5/2018
	m	Plan of Care			
	eduard.pdf	Patient Authorization			

1 2

1 - 10 of 11 items

Name of Document

Type Select Type

Expiration Date

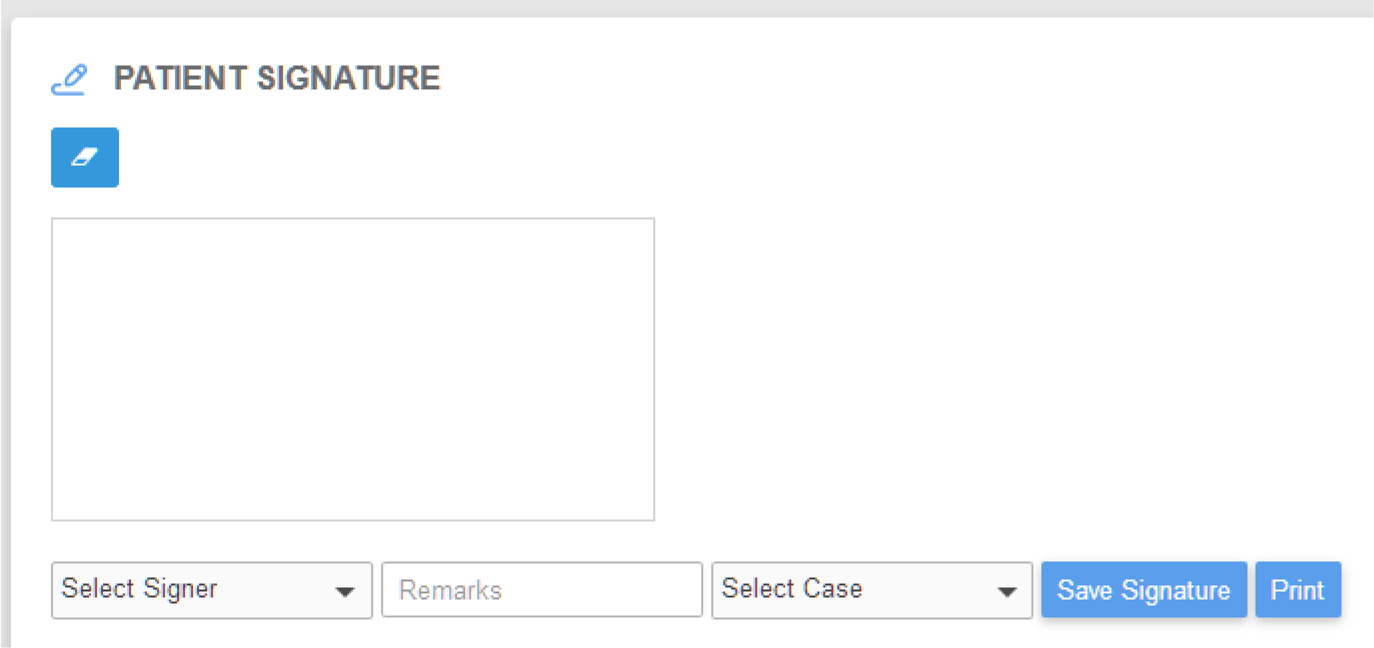
Case Select Case

Comment

Select files...

Save

Signature Tab

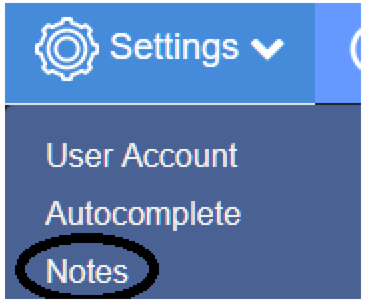


Patient can sign in the white box

Signer: Choose who the signer was at the time of visit (ex: Self, Aid, Family, etc.)
Remarks: Input any comments, including name of signer
Select Case: Select the case that matches yours

Dates CANNOT be changed. The system stamps the date that the signature was captured

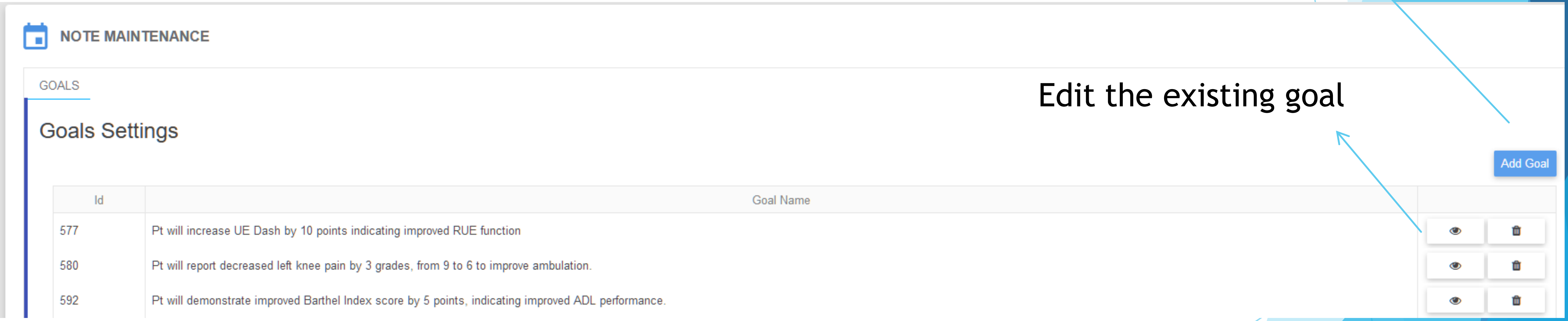
Adding Goals to Your Bank (STG/LTG)



Click on Settings -> Notes

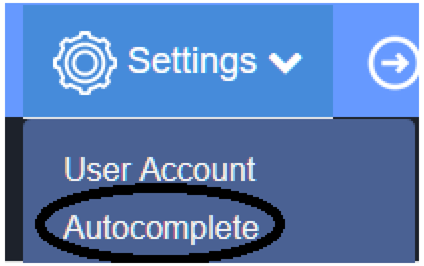
Add a new goal to your bank

Edit the existing goal

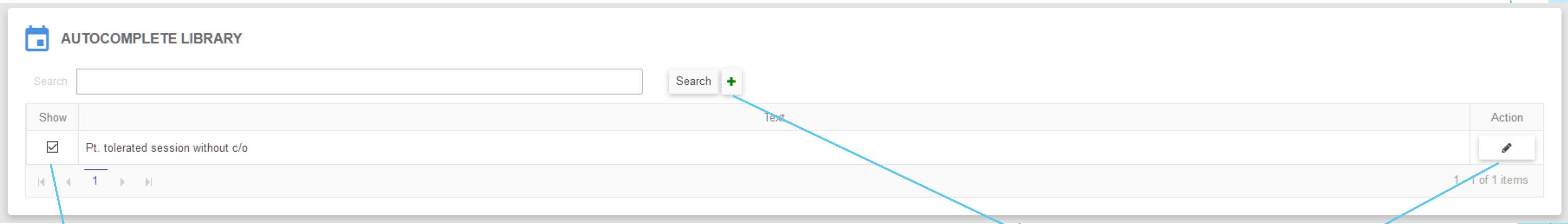


Goals from this bank can be selected from the “Treatment Plan” tab of your note
By clicking the “Select Goal” to the right of the goal list

Autocomplete (Smart Phrases)



Click on Settings -> Autocomplete



To add a new phrase to your library, click on the green + button

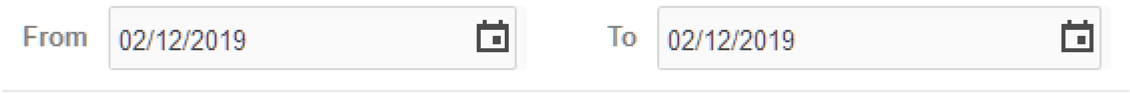
To edit an existing phrase, click on the icon to the right of the phrase

Hide phrases by unchecking the box to the left of the phrase

Reports

- Most reports have a graph along with a grid of records

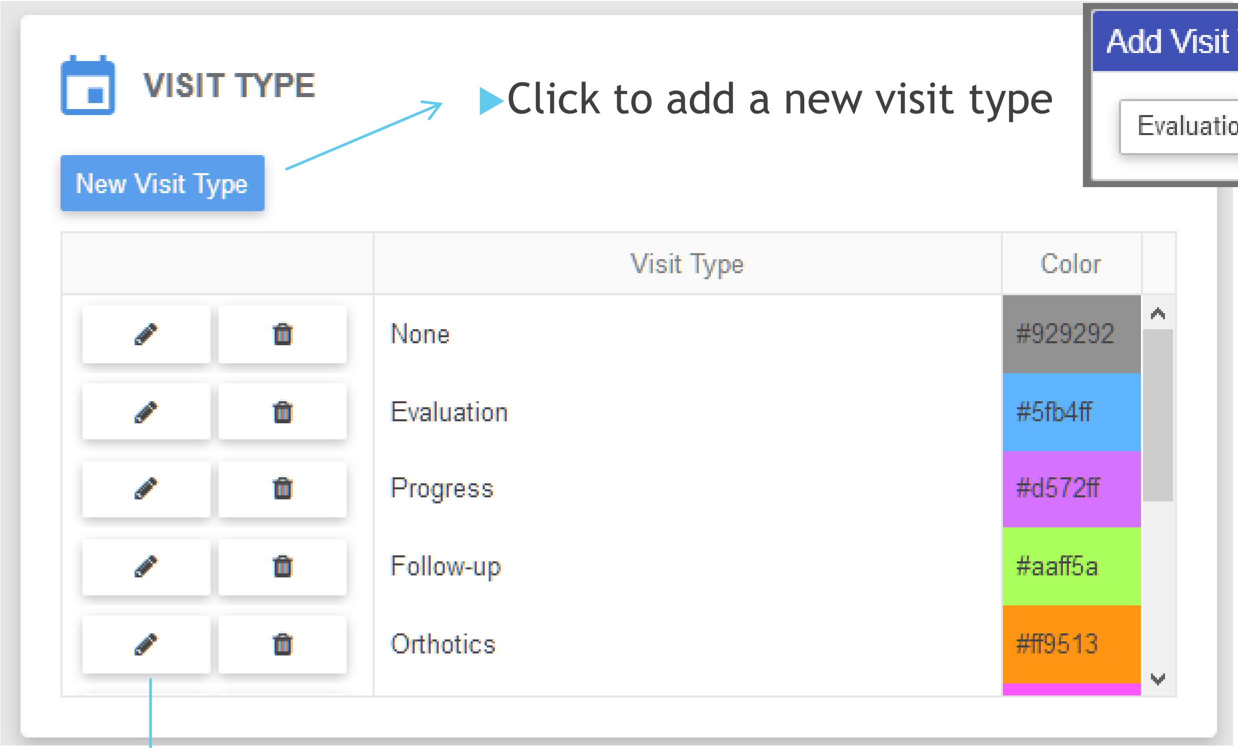
- After filling out filters, click on "Generate"



- Use the "Export to Excel" button to export

Visit Types: Adding and Editing

- Settings -> Visit Type



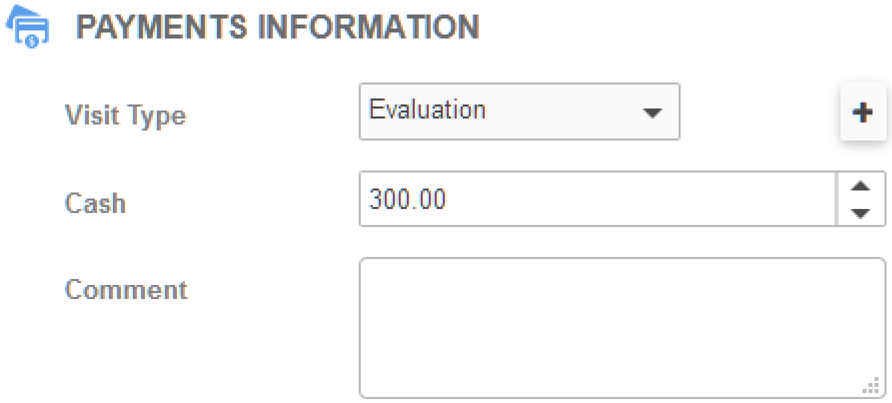
- Click to add a new visit type

- Click to Change Color (on scheduler

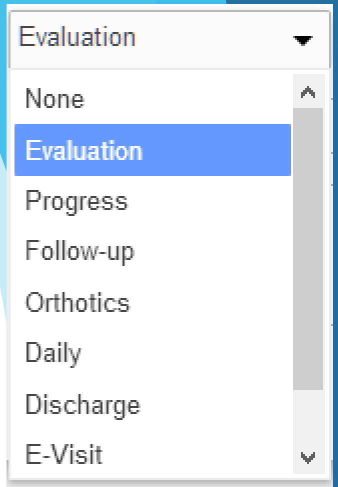
- Choose color, click “Apply”, then “Add”

- Edit an existing visit name and/or color

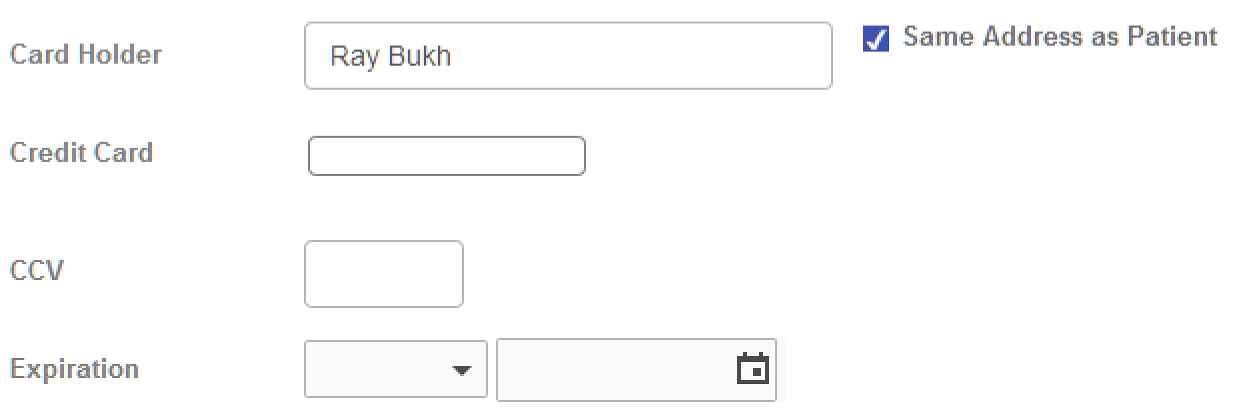
Payments Subtab: Attaching Amounts to Visits



- Select the Visit Type from the Dropdown
  - Each Visit Type can have a unique cash value
  - Cash amount is per patient
- Input the "Cash" amount for this visit
- Input Comments if needed
- Click ✓ Save after each change



- Credit Card processing available to the right
- Must be enrolled with CardConnect
  - Preferred pricing with HelloNote
  - Contact us for enrollment
- Patient can also pay using the Patient Portal



Visits Subtab: Viewing Scheduled Visits

CALENDAR BASED VISIT

Year: All Years | Case: All Cases | Print All | Print

Instruction: [Shift] + [Left Click] to multi-select rows.

Date/Time	Case	Provider	Visit Type	Attendance	Payment Due	Extra Service	Auth #	Cash Paid	Ins. Payment	Pt. Rspblty	ADJ	Write-Off	Balance	Action
06/03/2020-12:00P	OT 2020	Support Team	Evaluation	CX	0	0		0	0	0	0	0	0	
05/27/2020-10:15A	OT 2020	Support Team	Follow-up		0	0		0	0	0	0	0	0	
05/26/2020-12:45P	OT 2020	Support Team	Follow-up		0	0		0	0	0	0	0	0	
05/19/2020-9:30A	Demo 4/9/20	Michael Jordan	Daily	CX	0	0		0	0	0	0	0	0	
04/14/2020-7:30A	OT 2020	Support Team	Evaluation	OK	0	0		0	0	0	0	0	0	$
04/09/2020-7:30A	Demo 4/9/20	Support Team	Evaluation	OK	255	0		10.23	11.14	1	243.86	18.56	215.07	$
04/02/2020-8:30A	OT 2020	Support Team	Progress	OK	0	0		0	0	0	0	0	0	$

1   1 - 7 of 7 items

*Visit not matching any note.

Total Visits

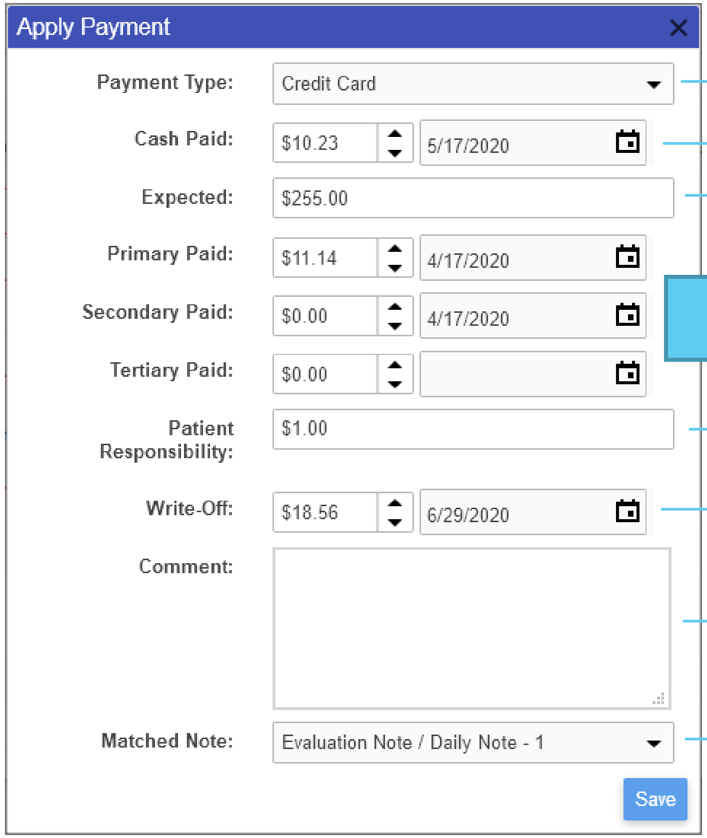
Total OK Visits	Total NS Visits	Total CX Visits	Total No Attendance Value	Balance Due
3	0	2	2	215.07

- Visits from the calendar will appear on this list
- Visits in red indicate no matched note (from the Notes tab)

Visits Subtab: Posting Payments

04/09/2020-7:30A	Demo 4/9/20	Support Team	Evaluation	OK	255	0		10.23	11.14	1	243.86	18.56	215.07	$

- Click on the $ button to the right of the visit to open the Apply/Post payment window
  - The button will only be available if the patient is checked in with an "OK" status



Select how a cash payment was made

Input how much cash was paid, along with payment date

How much you billed (gross amount) based on CPT fee schedule -> pulled from the notes tab

Insurance Primary, Secondary, and/or Tertiary payment amounts, including payment date if needed

How much patient owes on top of expected amount (deductibles, copays, co-insurance, extra services)

Any write-off amounts, including discounts and to zero-out the balance

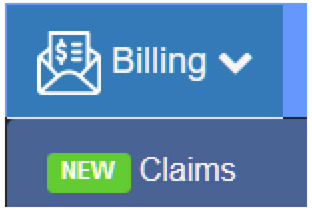
Comments and memo's for recording payments

Manually match visit and note if necessary

Visits Subtab: Printing Receipts and Superbills

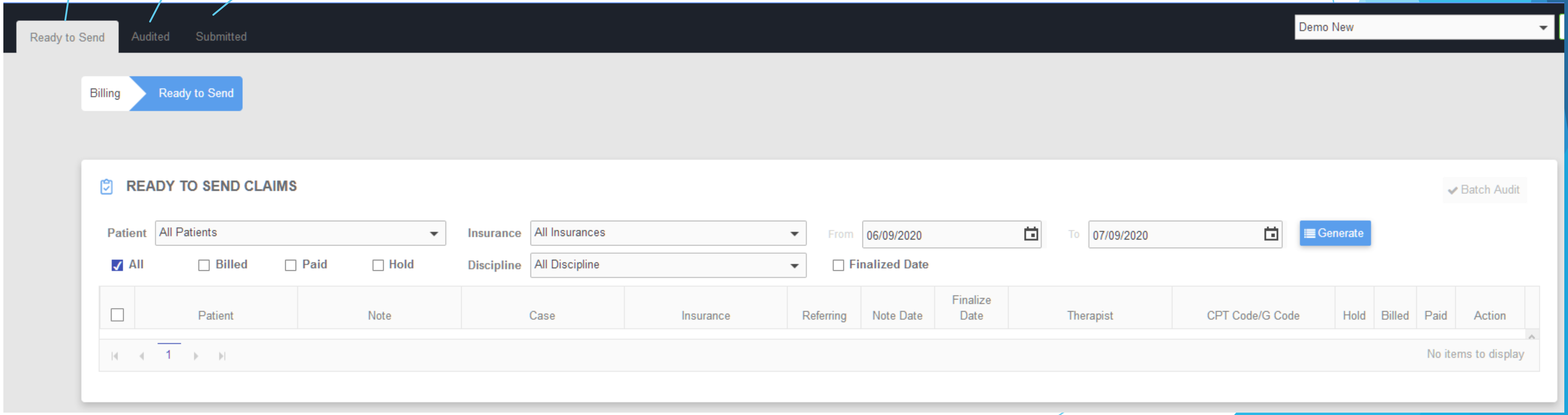
- Select the visit you want to print to highlight it in blue
- Click on the Print button on the right
- 3 Pages will be generated
  - 1. Receipt with a summary of the visit, along with paid in full or payment due amount
  - 2. Scheduled Visits log -> including any past and future visits
  - 3. Superbill generated based on the note that was created for this visit.
    - This will populate based on the CPT codes, units, and fee schedule from your note
- To print a receipt/superbill with more than one date, click the Print All button
  - This will only print visits marked with a checked in (OK attendance) status.

Integrated Billing: Overview



- From your administrator or billing account, navigate to Billing -> Claims

- Claims that have been finalized by the therapist
- Claims that have passed the internal audit of required fields
- Claims that have been sent to the clearinghouse



Integrated Billing: Generating/Auditing Claims

- Once you have adjusted your filters, click on the Generate button

☐	Patient	Note	Case	Insurance	Referring	Note Date	Finalize Date	Therapist	CPT Code/G Code	Hold	Billed	Paid	Action
☐	Ray Bukh	Evaluation Note / Daily Note-1	Medicare Case	Medicare	Dr. Mistakis	06/16/2020	06/16/2020	Michael Jordan	GP:59:97140(1), 97530(2), 97110(1), 97161(1)	☐	☐	☐	›
☐	Ray Bukh	Addendum Daily Note-2	OT 2020 3	Anthem BCBS	Dr. Mistakis	06/16/2020	06/16/2020	Michael Jordan	GP:97140(1)	☐	☐	☐	›
☐	Ray Bukh	Daily Note-2	OT 2020 3	Anthem BCBS	Dr. Mistakis	06/16/2020	06/16/2020	Michael Jordan	GP:97140(1), 97535(1)	☐	☐	☐	›

- Claims with a YELLOW background indicate that an addendum exists
  - Bright yellow indicates the addendum note
  - Dark Yellow indicates the parent note
    - Parent notes can be placed on HOLD so they do not appear in the claim list (to prevent duplicate billing)

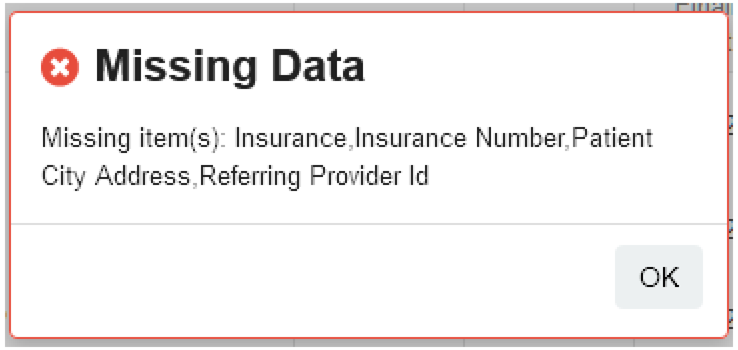
- To AUDIT an individual claim, click on the rightmost arrow: ›

- To BATCH AUDIT click on the SELECT ALL button on the top left, and then the ✔ Batch Audit button to the right

Integrated Billing: Auditing Failure

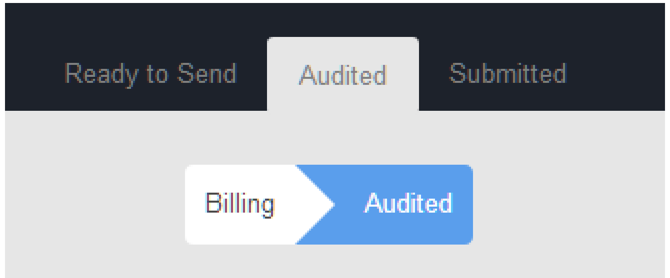
- Once you AUDIT a claim, it will check to make sure the following fields are correct:
  - Patient Names -> First and Last name
  - Patient DOB
  - Patient Address -> Full street, city, state, and zip code
  - Billing Provider NPI -> Located in Settings -> User Account -> Other Information
  - Referring Provider NPI -> Located in Settings -> PCP/Referral
  - PayerID -> Internal to the system, contact us if this error comes up

- If an Audit failure occurs, a popup will be issued, and you must fix the issues before auditing:

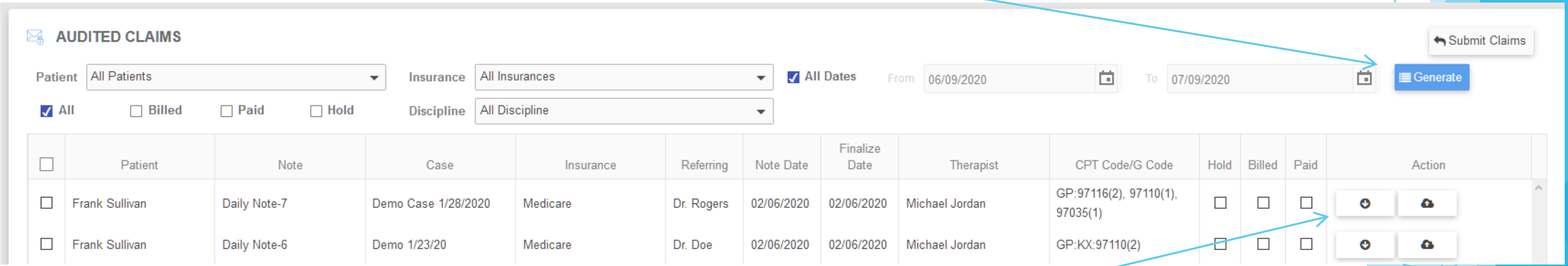


Integrated Billing: Submitting to Clearinghouse

- Once a claim passes an Audit, click on the 2nd tab called "Audited"

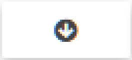
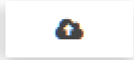


- Click "Generate" to load all claims that have passed the audit



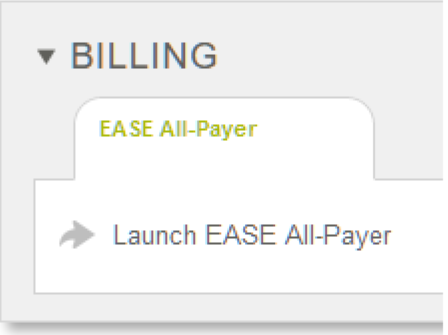
	Patient	Note	Case	Insurance	Referring	Note Date	Finalize Date	Therapist	CPT Code/G Code	Hold	Billed	Paid	Action
	Frank Sullivan	Daily Note-7	Demo Case 1/28/2020	Medicare	Dr. Rogers	02/06/2020	02/06/2020	Michael Jordan	GP:97116(2), 97110(1), 97035(1)				
	Frank Sullivan	Daily Note-6	Demo 1/23/20	Medicare	Dr. Doe	02/06/2020	02/06/2020	Michael Jordan	GP:KX:97110(2)				

- Filters can be applied, or left as "All Dates" to show all claims

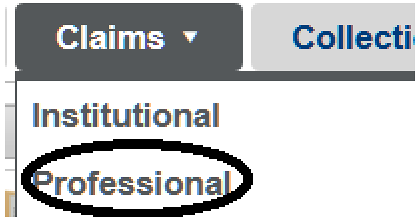
- Download an 837p file by clicking the  button if you need to upload manually
- Submit a claim individually by clicking the  button
- Submit claims as a batch by clicking select all on the left and the Submit Claims button on the right

Integrated Billing: Ability: Releasing Claims

- Login to the Ability portal, then click on "EASE All-Payer" and then "Launch EASE All-Payer"



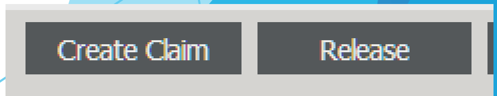
- Navigate to Claims -> Professional



- Use the Action Button on the right: to open the claim

- Validate the claim by navigating to Transaction -> Save and Validate:

- Release the claim by clicking the checkbox to the left of the claim and then click RELEASE:



  - Make sure to ONLY RELEASE A CLAIM THAT HASN'T ALREADY BEEN RELEASED/SUBMITTED

- Status indicators: ERROR, VALIDATED, QUEUED, TRANSMIT, ACK_PENDING, ACK_FINAL, REJECTED, PAID

Help Center

Online Ticket: Click the blue “Help” icon on the bottom left of any screen

Email Support: support@hellonote.com

Phone Support: (877) 805-7880 (for urgent matters)