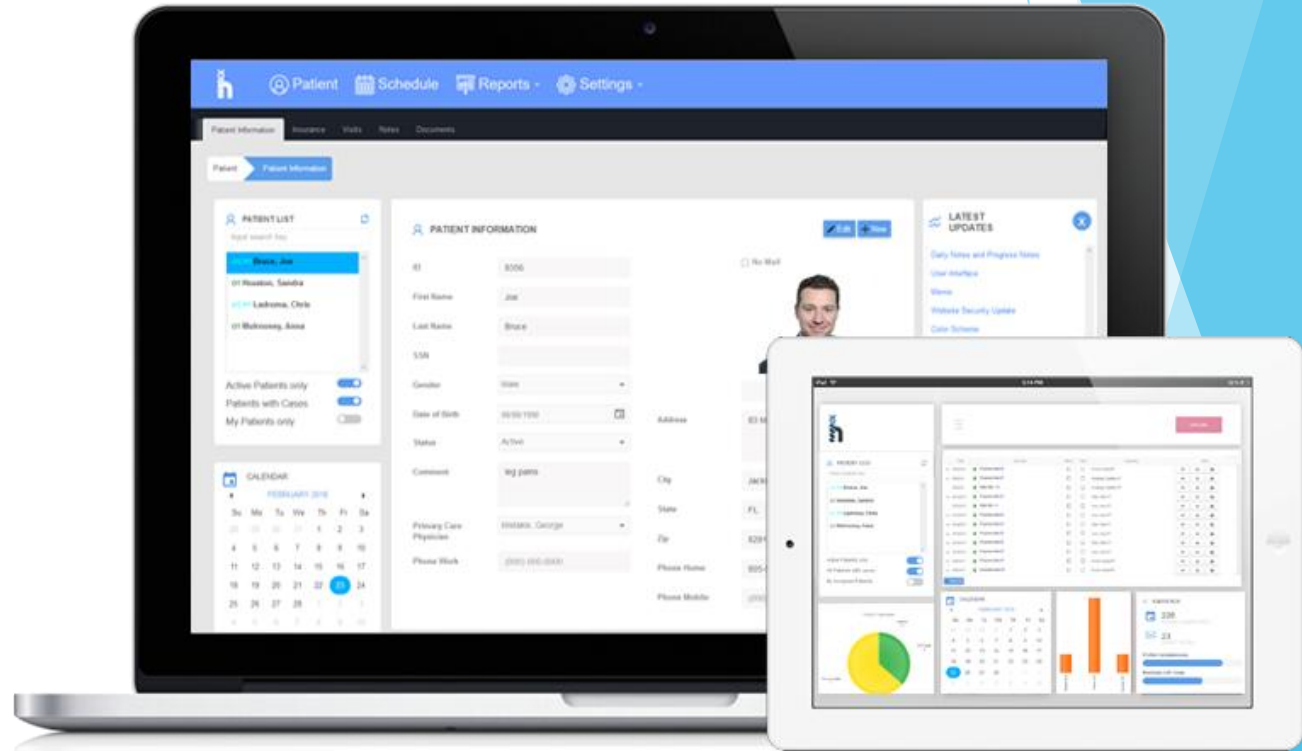
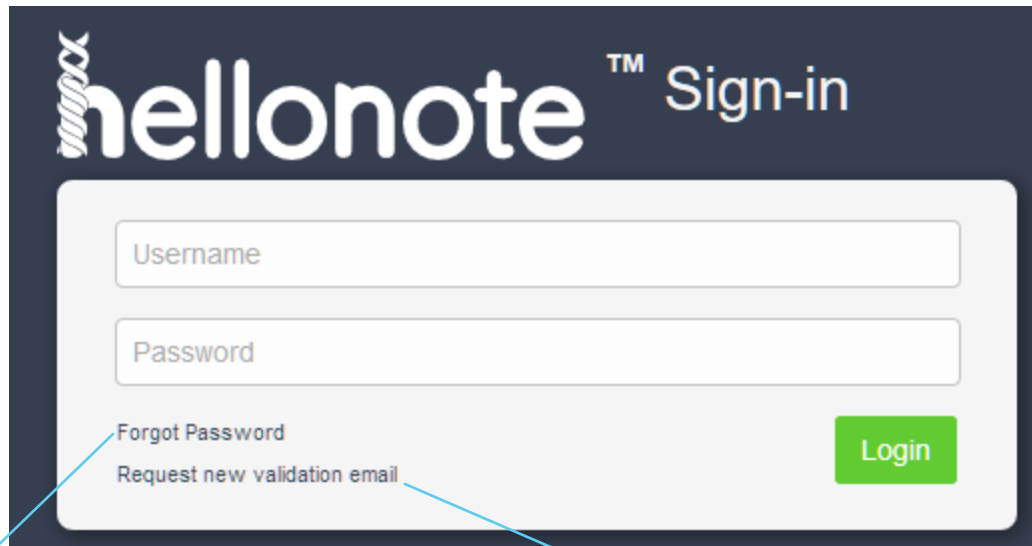




Admin and Therapist Training Guide



Login Info



The screenshot shows the 'hellonote' Sign-in page. It features a dark blue header with the 'hellonote' logo and 'Sign-in' text. Below the header is a light gray box containing two input fields: 'Username' and 'Password'. To the left of the 'Password' field are two links: 'Forgot Password' and 'Request new validation email'. To the right of these links is a green 'Login' button. Two blue arrows point from the text below to the links: one from 'Use this if you need to reset your password' to 'Forgot Password', and another from 'Use this if you didn't click on the Email verification link within 24 hours' to 'Request new validation email'.

▶ 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:

The screenshot displays the HelloNote web application interface. At the top is a blue navigation bar with icons and labels for Patient, Schedule, Reports, Settings, and External. Below this is a dark grey bar with tabs for Patient Information, Insurance, Visits, Notes, and Documents, and a search bar containing 'Demo New'. The main content area is divided into several sections:

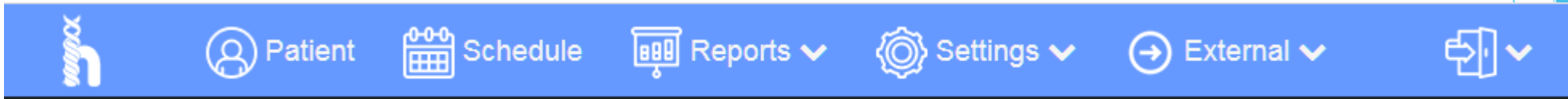
- Patient List:** A sidebar on the left with a search bar and a list of patients including 'ST Smith, Gail', 'OT korostyshevskaya, Zoya', 'OT, PT Demo, Pierre', 'OT Benn, Keisha', 'OT, ST Demo, Elaine', and 'OT, PT Demo, Tara'. It also has filters for 'Active Patients only', 'Patients with Cases', and 'My Patients only'.
- Patient Information:** A central form for editing patient details. Fields include ID, First Name, Last Name, SSN, Gender (dropdown), Date of Birth (calendar), Email, Status (dropdown), Comment, Primary Care Physician (dropdown), Phone Work, Phone Home, and Phone Mobile. There are also checkboxes for 'No Mail', 'Send SMS', and 'Send Email', and a photo upload section.
- Latest Updates:** A sidebar on the right with a list of updates including 'Daily Notes and Progress Notes', 'User Interface', 'Memo', 'Website Security Update', 'Color Scheme', and 'Okta API Auth'.
- Calendar:** A calendar widget showing February 2019 with the 10th highlighted.
- Memos:** A small section at the bottom left with a 'Save' button and a text area containing 'test'.

A 'Help' button is located in the bottom left corner of the main content area.

- ▶ 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

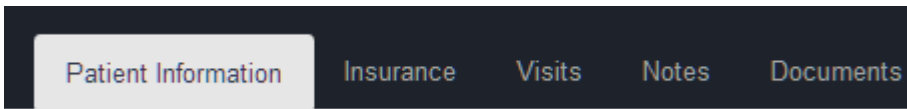
Navigation Bars

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

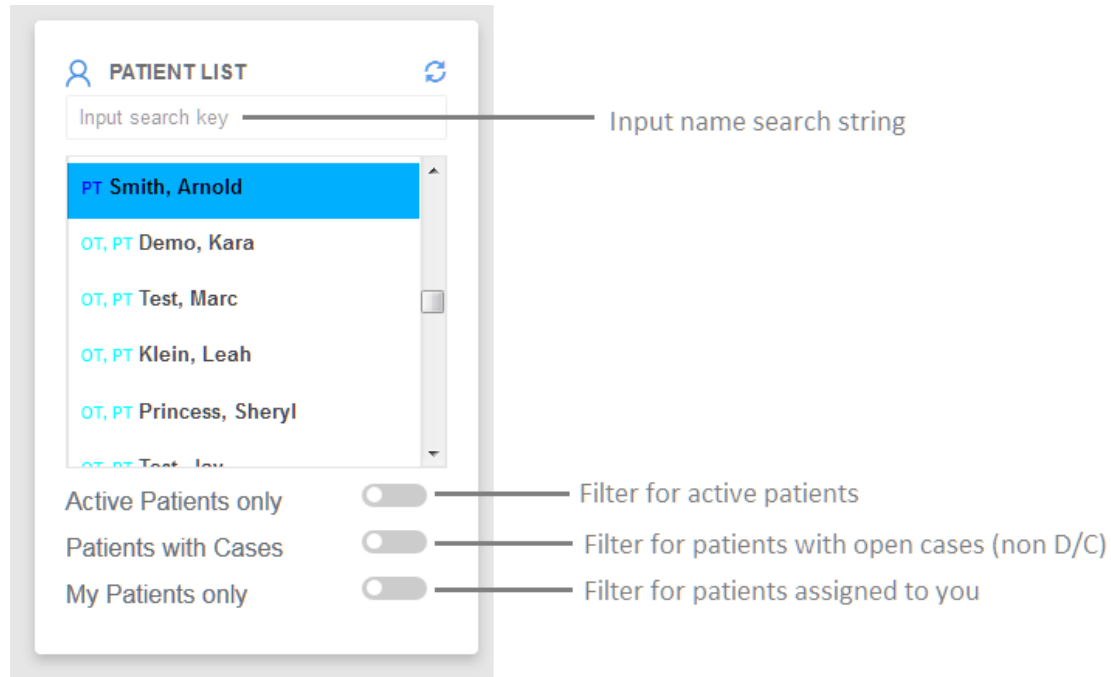
Subtabs




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

Interface Cards

Patient List




Interface Cards

 Memos



Save

I can use this for anything!

 CALENDAR

◀ FEBRUARY 2019 ▶

Su	Mo	Tu	We	Th	Fr	Sa
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	1	2
3	4	5	6	7	8	9

 **LATEST UPDATES** 

Daily Notes and Progress Notes

User Interface

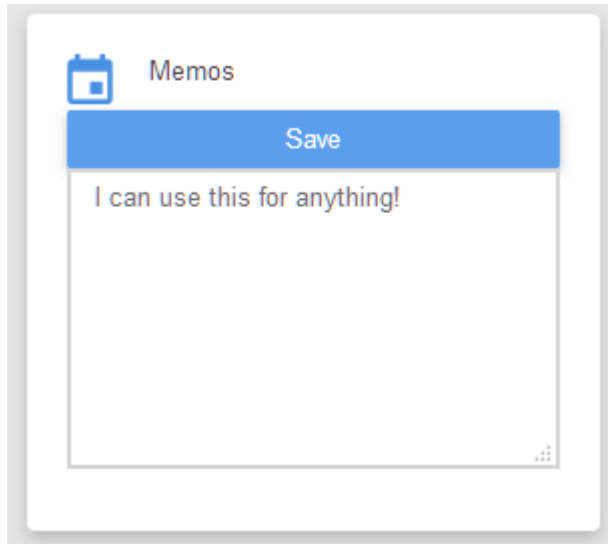
Memo

Website Security Update

Color Scheme

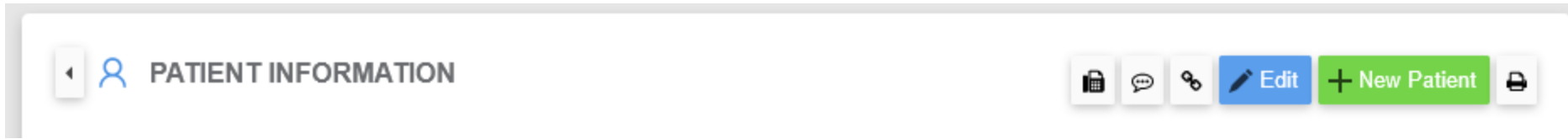
Okta API Auth





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

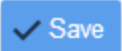
Patient Information: Functional Buttons




-  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

-  Add a new patient to the database, a unique ID will be generated
 - ▶ First and Last name are required fields

-  Edit existing patient demographics
 - ▶ Admins can modify First and Last names


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


Patient Events

 **EVENTS**

New Event

Date	Comment	Remind	Author
Feb 08, 2019 09:11 AM	Patient is on home health until June 15th, 2019	Jun 15, 2019 10:00 AM	Steve Glukh

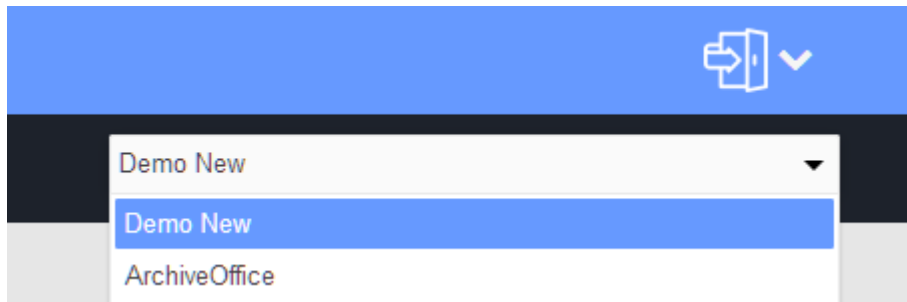
 Cancel

 Save

- 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

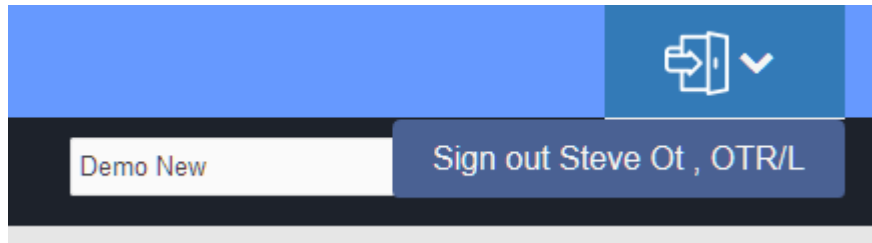


Note: Your primary office will be set by the administrator and upon every login, you will be logged into the primary office

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

Logging out

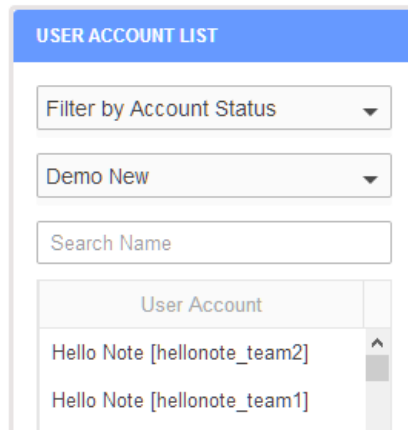
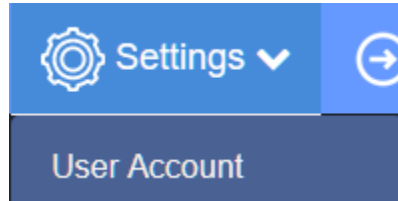
- Once you are finished with your session, please log out by clicking on the “door” icon at the top right and then clicking “sign out..”



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

First Name

Last Name

A screenshot of a user profile form. At the top right, there are three buttons: 'Change Password' (with a magnifying glass icon and circled in black), 'Save' (with a checkmark icon), and 'Cancel' (with a close icon). Below the buttons are two input fields. The first field is labeled 'First Name' and contains the text 'Hello'. The second field is labeled 'Last Name' and contains the text 'Note'.

Adding PCP/Referral Information

► Settings ->PCP/Referral

PHYSICIAN DETAILS

Information

+ Add New

Physician ☐

Firstname

Lastname

NpiNumber

Email

Status

Comment

Address

City

State

Zip

Phone

Fax

Group Name

Fill in Fax# if you want to eFax

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

Select Suffix

Select Suffix

MD

NP

DO

CRNP

PA

R

Nurse

► First Name, Last Name, NPI is required.

► For non-medical, leave NPI as 0

Insurance: Adding Insurance Information

INSURANCE INFORMATION

New Save

Primary	Highmark Blue Cross/Blue Shiel...	Secondary	Select Insurance	Plan Name	
Primary ID	7686	Secondary Id		Policyholder	
Primary Holder	<input checked="" type="checkbox"/>	Self	<input checked="" type="checkbox"/>	Comment	
Copay	0.00	Adj. Copay	0.00		

- ▶ 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

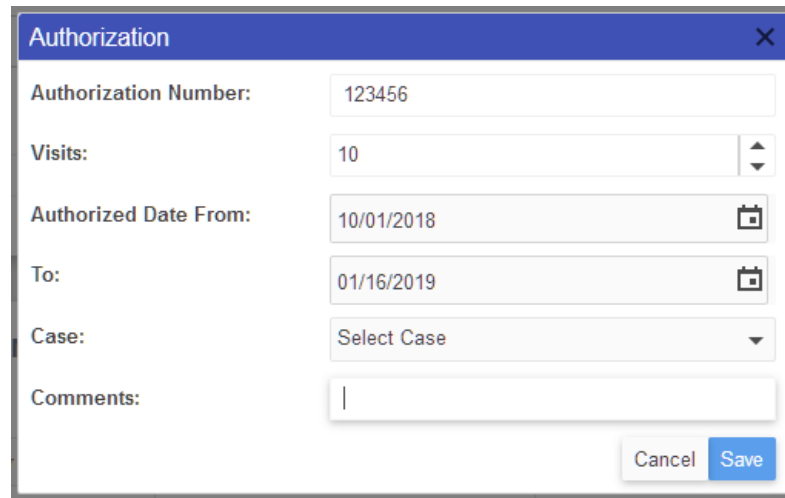
- ▶ Once insurance information is saved, check off authorization required

☒ Authorization Required

- ▶ Click “Add Authorization” button

Add Authorization

- ▶ Input pertaining information

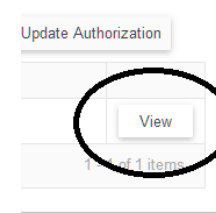


The 'Authorization' dialog box contains the following fields:

- Authorization Number: 123456
- Visits: 10
- Authorized Date From: 10/01/2018
- To: 01/16/2019
- Case: Select Case
- Comments: (empty text area)

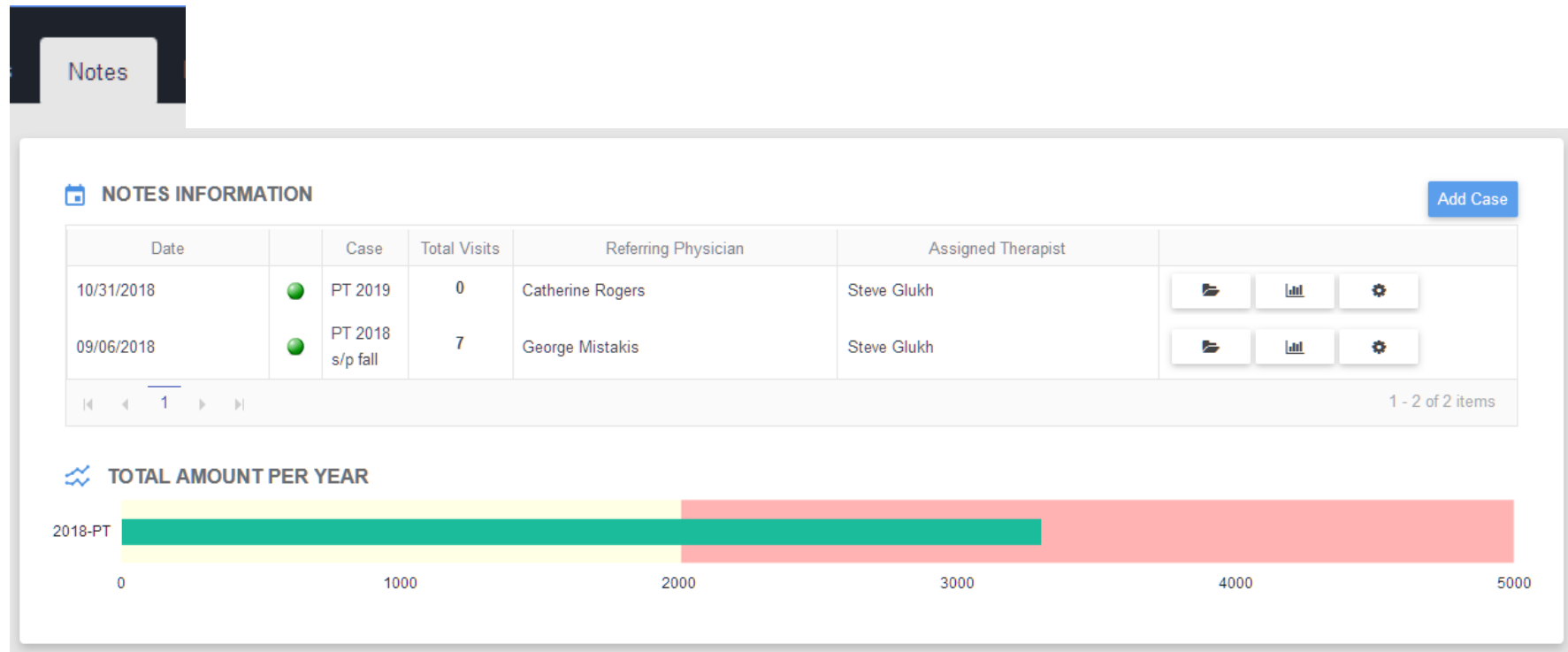
Buttons: Cancel, Save

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



Notes/Documentation: Cases

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






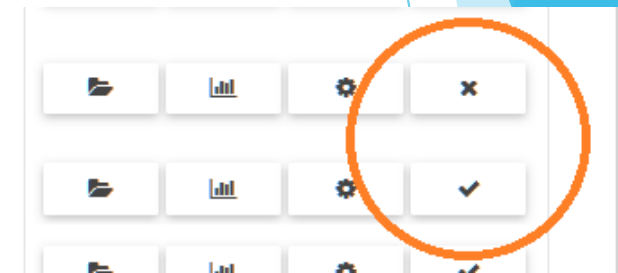
► Cases will be displayed pertaining to the corresponding patient selected

- Date: Date of the case (user controlled)
- Case: Title of the case
- Referring Physician
- Assigned Therapist

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

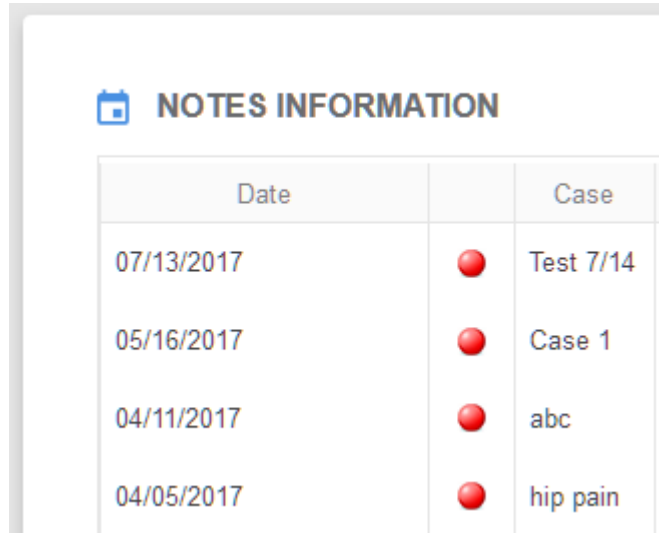
- ▶ When a case is opened, the green icon will be shown and an “X” will be shown to the right of the case
- ▶ When a case is close/discharged, the red icon will be shown and a check will be shown to the right of the case

02/05/2019		Speech Test 2/5/19	0	George Mistakis	Candice Asalange
02/04/2019		Speech2	0	George Mistakis	Steve Speech
02/01/2019		Speech	0	George Mistakis	Steve Dama



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

Notes/Documentation: Open/Closed Cases



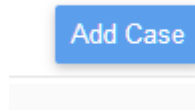
The screenshot shows a software interface with a header 'NOTES INFORMATION' and a calendar icon. Below it is a table with three columns: 'Date', a status indicator (a red circle), and 'Case'. The table contains four rows of data.

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

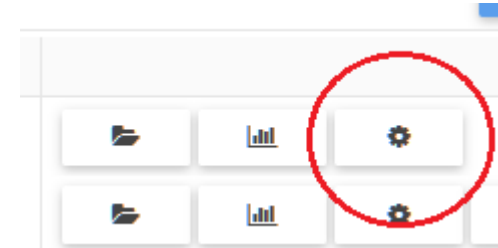
- ▶ The green indicator shows case as open
 - ▶ Currently is an active case without any discharge notes
 - ▶ Can be manually closed by administrator
- ▶ The red indicator shows case as closed
 - ▶ Case will be automatically discharged once discharge note is input
 - ▶ Can be re-opened

Notes/Documentation: Adding/Editing a Case

To add a new case:
Click “Add Case”



To Edit existing case
Click the “Gears” icon



Add New Case [X]

Case Title:

Profile:

Primary Insurance:

Secondary Insurance:

Referring Provider:

Date: [Calendar Icon]

Assigned Therapist:

Secondary Therapist:

Comments:

Graph Display:

Check Schedule ☐

Case Type:

Place of Service:

- ▶ 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

NOTES INFORMATION

Patient Name	Tests, Johnny	Case	Test 7/14
Date of Birth	12/10/1980 (38 y.o.)	Insurance	Aetna
Referring Doctor	Dr. Mistakis, George	Visits	OK CX NS
Primary Doctor	Dr. Mistakis, George	POC Certification	
Assigned Therapist	Peetee, Mister PT	Next POC due	Renew

Print Multiple Daily Notes Print Flowsheet

New Note

Date	Note Type	Signed by	Action
0			

No items to display

◀ Case List

Add Evaluation Note

Add Daily Note

Add Progress Note

Add ReEvaluation Note

Add Discharge Note

Add Communication Note

Cancel

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

Notes/Documentation: Saving Notes

► Save as Draft

Save as Draft & Close ✓ Finalize

► Finalize is only available from the “Billing” tab

Save as Draft & Close ✓ Finalize

► Autosave kicks in periodically when system notices a change




► Good practice is to glance at the time/date stamp to ensure saving

Last saved: 02/10/19 - 07:12:39 PM



Notes/Documentation: Navigating Sections

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















[DRAFT] EVALUATION NOTE (02/10/2019) - TESTS, JOHNY

 Assessment  Functional Deficits  Underlying Impairments  Treatment Plan  Billing

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

 Back  Next

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

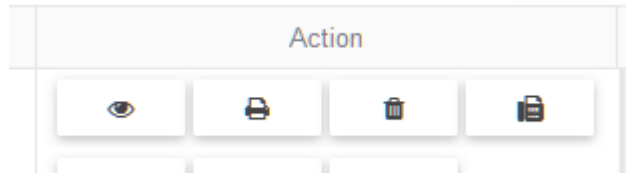
Blue Check Icon: Draft Note

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	  

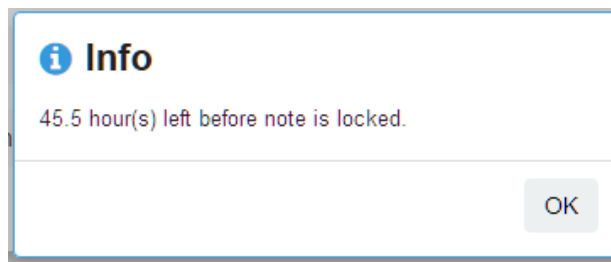
Upon starting a draft, the system will give you 48 hours to finalize the note before it is **locked**

The **green** “clock” icon will let you know the note is **open**

The clock icon turns **red** when the note is **locked** -> 

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



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

02/27/2018		Daily Note - 15	Ohtee, Mister COTA (cosigned by Steve Glukh, OTR/L)	  
------------	---	-----------------	---	---

The note will have a “Co-sign” tab

DAILY NOTE 2 (09/24/2018) - PRINCESS, SHERYL

<input type="checkbox"/> Note	<input checked="" type="checkbox"/> Billing	<input checked="" type="checkbox"/> Co-sign
ID	18425	Date of E

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

^ NOTES INFORMATION

DAILY NOTE 2 (09/24/2018) - PRINCESS, SHERYL

<input type="checkbox"/> Note	<input checked="" type="checkbox"/> Billing	<input checked="" type="checkbox"/> Co-sign
<input checked="" type="checkbox"/> I attest that services redendered by this assistant is valid.		
< Back	Next >	Cancel Co-sign

Notes/Documentation: Missed and Canceled Notes

Open a Daily Note by clicking

New Note → Add Evaluation Note Add **Daily Note** Add Progress Note Add ReEvaluation Note Add Discharge Note Add Communication Note Add Vital Note Cancel

DAILY NOTE - WONKEY, ARDEN

☐ Note ☒ Billing

ID 51990 Date of Birth Treatment Date 07/07/2020

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

Click the “Billing” tab and scroll down to:

☐ Continue

☐ Missed

☒ Cancelled

Plan

Patient had a doctors appointment

Finalize the note and it will be designated as so:

07/07/2020



Cancelled

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

Date	POC Type	Select Signed POC	Terms	Received	Sent
02/11/2019	Evaluation Note		84	<input type="checkbox"/>	<input type="checkbox"/>

Save

POC Certification

POC Certification

Evaluation Note 02/11/2019 sent on 02/12/2019

(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 - 10 of 11 items

Name of Document

Expiration Date 

Comment

Type

Case

Select files...

✓ Save

Signature Tab



The screenshot shows a web interface for a 'PATIENT SIGNATURE' tab. At the top left, there is a blue pencil icon followed by the text 'PATIENT SIGNATURE'. Below this is a small blue square icon with a white pencil. A large, empty white rectangular box is positioned in the center, intended for the patient's signature. At the bottom of the interface, there are three input fields: a dropdown menu labeled 'Select Signer', a text box labeled 'Remarks', and another dropdown menu labeled 'Select Case'. To the right of these fields are two blue buttons: 'Save Signature' and 'Print'.

Patient can sign in the white box

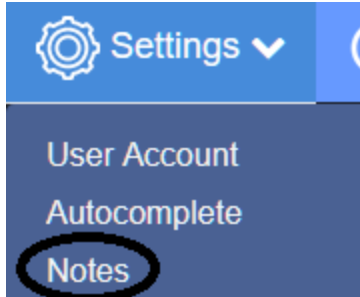
Signer: Choose who the signer was at the time of visit (ex: Self, Aid, Family, etc.)

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

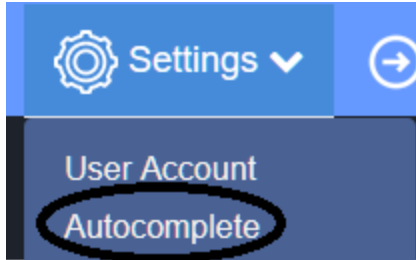
A screenshot of the 'NOTE MAINTENANCE' interface. It features a 'GOALS' tab and a 'Goals Settings' section. Below this is a table with three columns: 'Id', 'Goal Name', and a set of action icons. The table contains three rows of goal data. To the right of the table is an 'Add Goal' button. An arrow points from the text 'Edit the existing goal' to the action icons of the first goal in the table.

Id	Goal Name	
577	Pt will increase UE Dash by 10 points indicating improved RUE function	 
580	Pt will report decreased left knee pain by 3 grades, from 9 to 6 to improve ambulation.	 
592	Pt will demonstrate improved Barthel Index score by 5 points, indicating improved ADL performance.	 

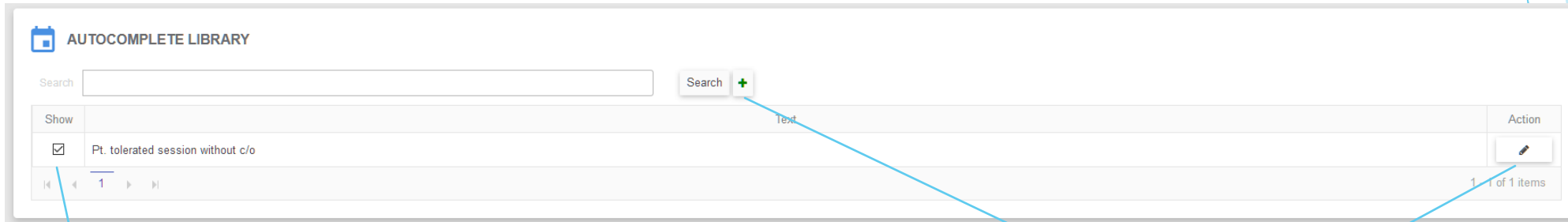
Edit the existing goal

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”

From  To 











▶ Use the “Export to Excel” button to export

Visit Types: Adding and Editing

► Settings -> Visit Type


 **VISIT TYPE**

New Visit Type ► Click to add a new visit type

	Visit Type	Color
 	None	#929292
 	Evaluation	#5fb4ff
 	Progress	#d572ff
 	Follow-up	#aaff5a
 	Orthotics	#ff9513

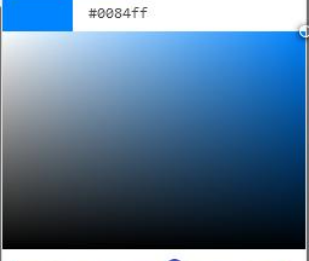
► Edit an existing visit name and/or color

Add Visit Type [X]

Evaluation|  **Add**

► Click to Change Color (on scheduler

#0084ff




Apply **Cancel**

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


Payments Subtab: Attaching Amounts to Visits


PAYMENTS INFORMATION


Visit Type 

Cash

Comment

- ▶ 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  after each change

Evaluation 

None 

Evaluation


Progress

Follow-up

Orthotics

Daily

Discharge


E-Visit 

- ▶ 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

Card Holder

Credit Card

CCV

Expiration 

☒ Same Address as Patient

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 - 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

Apply Payment

Payment Type:

Credit Card

Cash Paid:

\$10.23

5/17/2020

Expected:

\$255.00

Primary Paid:

\$11.14

4/17/2020

Secondary Paid:

\$0.00

4/17/2020

Tertiary Paid:

\$0.00

Patient Responsibility:

\$1.00

Write-Off:

\$18.56

6/29/2020

Comment:

Matched Note:

Evaluation Note / Daily Note - 1

Save

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


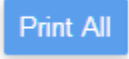
How much patient owes on top of expected amount (deductibles, copays, co-insurance, extra services)

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

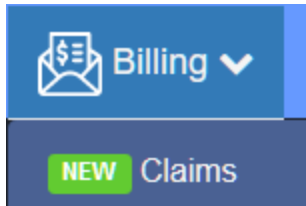
Comments and memo's for recording payments

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  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  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


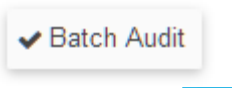
► Claims that have been sent to the clearinghouse

A screenshot of a web application interface for 'Ready to Send Claims'. The interface includes a top navigation bar with 'Ready to Send', 'Audited', and 'Submitted' tabs. Below this is a 'Billing' section with a 'Ready to Send' button. The main area is titled 'READY TO SEND CLAIMS' and contains a 'Batch Audit' checkbox. There are filters for 'Patient' (All Patients), 'Insurance' (All Insurances), 'From' (06/09/2020), 'To' (07/09/2020), and 'Generate' button. Below these are checkboxes for 'All', 'Billed', 'Paid', 'Hold', 'Discipline' (All Discipline), and 'Finalized Date'. A table with columns: Patient, Note, Case, Insurance, Referring, Note Date, Finalize Date, Therapist, CPT Code/G Code, Hold, Billed, Paid, and Action is shown. The table is currently empty, displaying 'No items to display'. Annotations with arrows point from the text above to the 'Ready to Send', 'Audited', and 'Submitted' tabs.

Integrated Billing: Generating/Auditing Claims

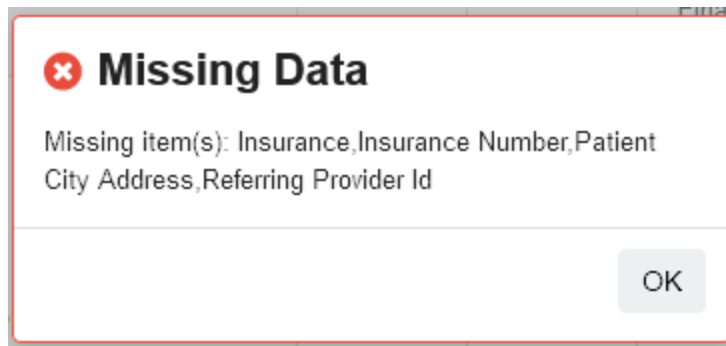
► Once you have adjusted your filters, click on the  button

<input type="checkbox"/>	Patient	Note	Case	Insurance	Referring	Note Date	Finalize Date	Therapist	CPT Code/G Code	Hold	Billed	Paid	Action
<input type="checkbox"/>	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)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	>
<input type="checkbox"/>	Ray Bukh	Addendum Daily Note-2	OT 2020 3	Anthem BCBS	Dr. Mistakis	06/16/2020	06/16/2020	Michael Jordan	GP:97140(1)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	>
<input type="checkbox"/>	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)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	>

- 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  button to the right

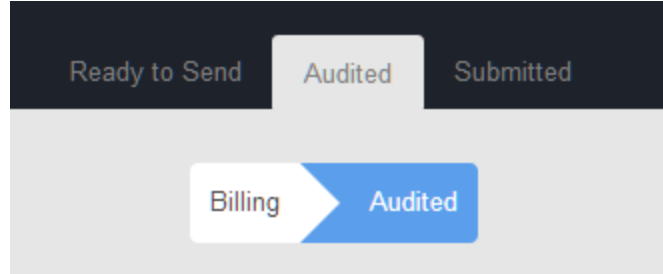
Integrated Billing: Auditing Failure

- ▶ 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

A screenshot of the 'AUDITED CLAIMS' section in a software interface. It includes filters for Patient (All Patients), Insurance (All Insurances), All Dates (checked), From (06/09/2020), To (07/09/2020), and Discipline (All Discipline). There are checkboxes for All, Billed, Paid, and Hold. A 'Generate' button is visible. Below the filters is a table with columns: Patient, Note, Case, Insurance, Referring, Note Date, Finalize Date, Therapist, CPT Code/G Code, Hold, Billed, Paid, and Action. Two claims are listed for Frank Sullivan. The 'Action' column for each claim has two buttons: a download icon (837p file) and a submit icon (cloud upload).

<input type="checkbox"/>	Patient	Note	Case	Insurance	Referring	Note Date	Finalize Date	Therapist	CPT Code/G Code	Hold	Billed	Paid	Action
<input type="checkbox"/>	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)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Frank Sullivan	Daily Note-6	Demo 1/23/20	Medicare	Dr. Doe	02/06/2020	02/06/2020	Michael Jordan	GP:KX:97110(2)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

- ▶ Filters can be applied, or left as “All Dates” to show all claims

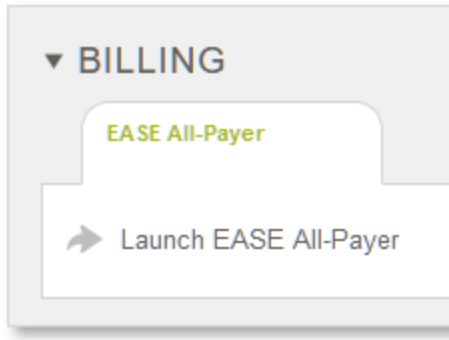
- ▶ Download an 837p file by clicking the button if you need to upload manually

- ▶ Submit a claim individually by clicking the button

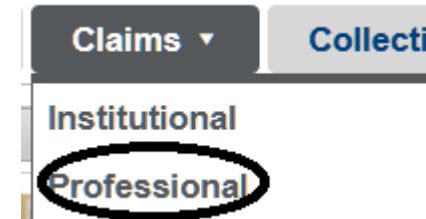
- ▶ Submit claims as a batch by clicking select all on the left and the button on the right

Integrated Billing: Ability: Releasing Claims

- ▶ Login to the Ability portal, then click on “EASE All-Payer” and then “Launch EASE All-Payer”

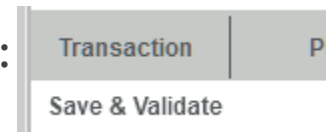


- ▶ Navigate to Claims -> Professional

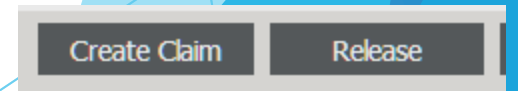


- ▶ Use the Action Button on the right:  to open the claim

- ▶ 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)

