



nH Discharge

User Guide

Version 2.1

For the following users:

- Direct Login
- Epic
- SmartConnect Midas+

Date April 2021

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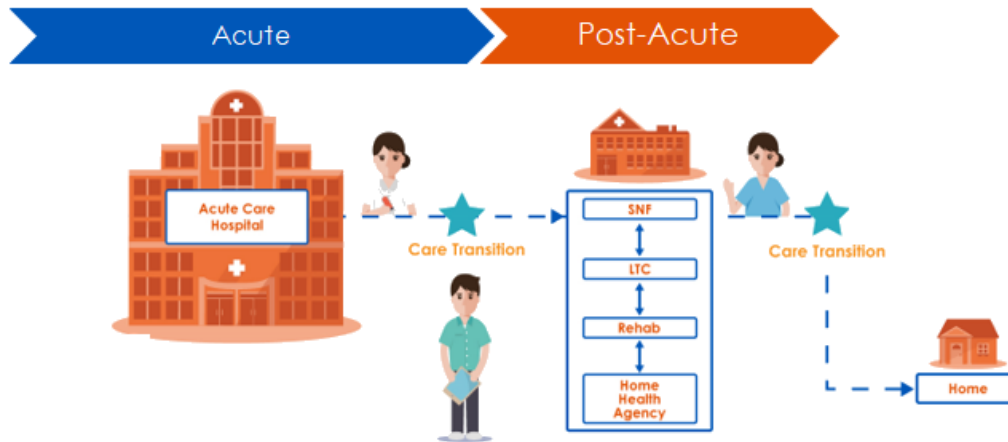
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Welcome to nH Discharge

nH Discharge is designed to dramatically reduce manual, administrative tasks by automating and standardizing much of the patient care transition process — so clinicians can focus more on patient care. **nH Discharge** receives clinical patient data from your hospital's Electronic Medical Records (EMR) system.



nH Discharge is the industry-leading Web-based application that streamlines the patient-transition process.

Be more efficient and productive.

By spending less time on the phone and at the fax machine, you will be able to focus more on patient care than paperwork. For example, you will be able to send multiple documents and your notes with just one click.

Achieve better outcomes.

With less time spent on redundant, manual tasks, you will be better able to provide patient choice and a smooth transition, and thereby help increase patient satisfaction.

With **nH Discharge**, you are able to perform the following:

- Build Referral Packets and refer your patient to Post-Acute Care (PAC) providers.
- Communicate with **nH Intake** PAC providers.
- Maintain your user account settings.

Methods for Accessing nH Discharge

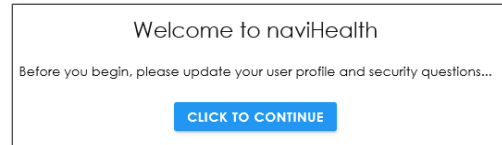
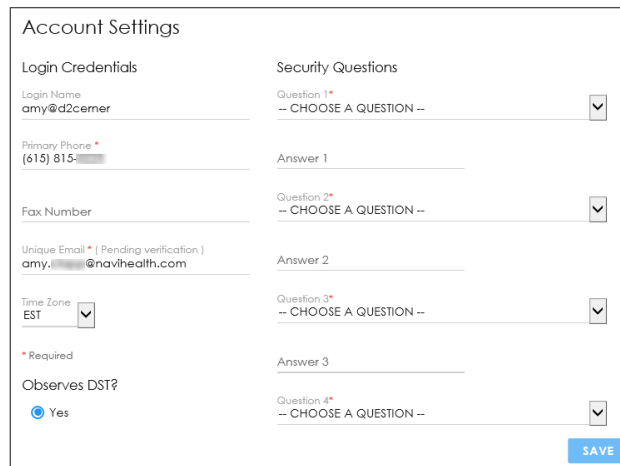
Method	Procedure
Direct Login	<ol style="list-style-type: none"> 1. Open an Internet Explorer® web browser and enter the following URL within the Address Bar https://network.curaspan.com/connect/commonservices/. 2. Press the [Enter] key on your keyboard. 3. Enter your username and password. 4. Click the Log In button. <p>Once logged in, the Workbook screen displays.</p>
Launching from EPIC	<p>Nothing has changed with this process for accessing nH Discharge.</p> <ol style="list-style-type: none"> 1. Access the patient's chart in Epic. 2. From the Case Management navigator, click the naviHealth link. 3. Click the appropriate option to launch into nH Discharge. <ul style="list-style-type: none"> • The first person to launch a patient into nH Discharge <u>automatically</u> becomes the Primary Contact. • Once you launch into nH Discharge, the BUILD screen displays.
Launching from Midas	<p>Nothing has changed with this process for accessing nH Discharge.</p> <ol style="list-style-type: none"> 1. Access nH Discharge the same way you do now. 2. Identify the patient encounter. 3. Click the Save and Launch Web Query button. <ul style="list-style-type: none"> • The first person to launch a patient into nH Discharge <u>automatically</u> becomes the Primary Contact. • Once you launch into nH Discharge, the BUILD screen displays.

Accessing nH Discharge the First Time

A **Welcome to naviHealth** window displays, inviting you to update your user profile and security questions.

1. Click the **CLICK TO CONTINUE** button.

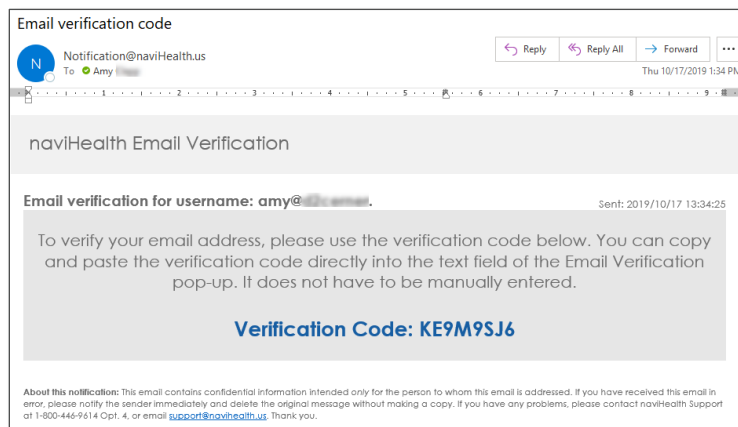
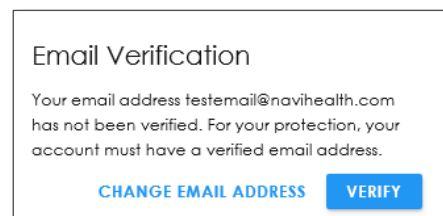
The **Account Settings** window displays, where you can update your user profile and provide answers to the security questions.

2. If the email address in your profile is not correct, then click the **CHANGE EMAIL ADDRESS** link and follow the prompts.

Otherwise, click the **VERIFY** button.

nH Discharge sent an email to the address provided in your profile, which contains a verification code.



3. Enter the verification code you received where indicated and click the **VERIFY** button.
4. If you did not receive a verification code, then click the **SEND NEW VERIFICATION CODE** link.
5. Check your **SPAM** folder if you do not see the email in your Inbox.
6. Enter the verification code and click the **VERIFY** button.

The **Notifications** window displays, where you can choose the notifications you want to receive.

NOTE: The Verification and Notifications windows **only** display the **first time** you log into **nH Discharge**.

Primary Contacts and Subscribers

While any **nH Discharge** user can work on any patient case, there is generally one lead user who “owns” the case and is referred to as the Primary Contact.

When other users need to access or contribute to the same case, they can become Subscribers.

- Receives notifications about the case.
- Sees the case within their Workbook.
- Performs any action the Primary Contact can, including discharge.

nH Intake versus QuickCase™ Providers

Provider Type	Description
nH Intake	Providers are part of naviHealth's electronic network, which allows all the following to be handled securely within nH Discharge : <ul style="list-style-type: none"> • Messaging • Booking requests • Document transfers
QuickCase™	Providers receive referrals via QuickCase™ , a secure system that delivers a one-page fax to the provider with login credentials to retrieve patient documentation.

NOTE: For additional information, refer to the [Appendix C: QuickCase™](#) section.

nH Discharge Workflow

nH Discharge has a four-phase workflow, each with its own screen. You can access each screen from the [Workbook](#) or by clicking navigation tabs elsewhere in the application.

- Patient intake is handled outside of **nH Discharge**, though you can click a patient's name from the Workbook to see their [Patient Summary](#) screen, where you may verify patient information received from your hospital's ADT feed.
- From your Workbook, click **START WORKFLOW** within a patient's card to begin the patient workflow and access the [BUILD](#) screen.

[BUILD](#)

The **BUILD** screen is where you create one or more [Referral Packet](#) for [Points of Service](#) (POS) and the patient's required [Level of Care](#) (LOC). Additionally, you can add forms and documents to include in the patient's Referral Packet, which can be shared with potential providers from the [REFER](#) screen.

[REFER](#)

nH Discharge's **REFER** screen provides extensive search and filtering tools to help you find providers that are best qualified to care for your patient.

CONNECT

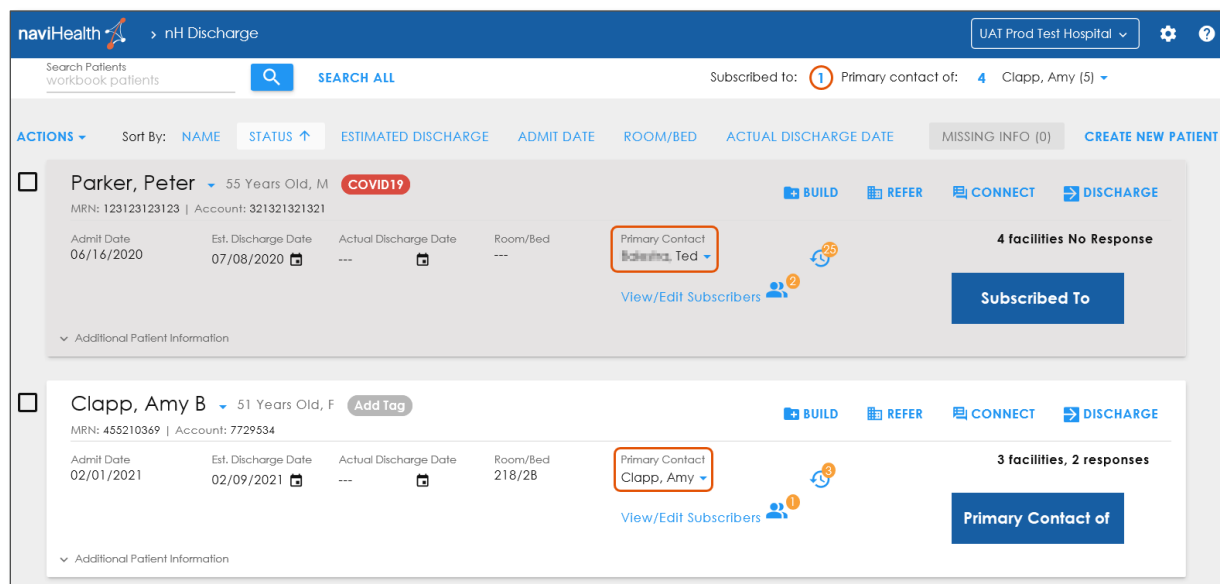
The **CONNECT** screen allows you to communicate electronically with **nH Intake** providers until you decide which can provide care for the patient after discharge. This is the place where you can keep track of communications between you and the **nH Intake** providers considering your patient as a potential admission, and ultimately book referrals for your patients.

DISCHARGE

The **DISCHARGE** screen is the final step in discharging a patient from the hospital.

Workbook

When a **Direct Login** user logs into the **nH Discharge** application, the **Workbook** displays. This is your **Home** base, and you will use it most often to monitor your active caseload as you move patients through the **nH Discharge** workflow.



The screenshot shows the nH Discharge Workbook interface. At the top, there is a search bar for "workbook patients" and a "SEARCH ALL" button. The interface displays a list of patient cards. Two cards are visible:

- Parker, Peter**: 55 Years Old, M, COVID19. MRN: 123123123123 | Account: 321321321321. Admit Date: 06/16/2020, Est. Discharge Date: 07/08/2020. Primary Contact: Ted. 4 facilities, No Response. Status: Subscribed To.
- Clapp, Amy B**: 51 Years Old, F. MRN: 455210369 | Account: 7729534. Admit Date: 02/01/2021, Est. Discharge Date: 02/09/2021, Room/Bed: 218/28. Primary Contact: Clapp, Amy. 3 facilities, 2 responses. Status: Primary Contact of.

Each card includes buttons for BUILD, REFER, CONNECT, and DISCHARGE, along with a "View/Edit Subscribers" link and a subscriber count icon.

Each **nH Discharge** user has a **unique Workbook**, which only displays the patients with whom they are the Primary Contact for or ones to which they are subscribed.

NOTE: By default, the Workbook displays **up to 30** patient cards.

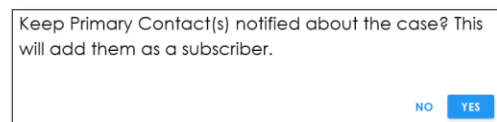
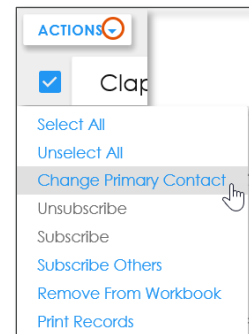
Actions Field's Drop-Down Menu

Select the checkbox to the left of one or more patients to apply options from the **ACTIONS** field's drop-down menu.

CHANGE PRIMARY CONTACT

Displays the **Change Primary Contact** window where you can select and assign another user to the patient.

1. Enter a colleague's name in the **USER NAME** field.
2. Select the radio button to the left of the desired colleague's name.
3. Click **SAVE**.
4. Click the **YES** button to keep the prior Primary Contact as a Subscriber.

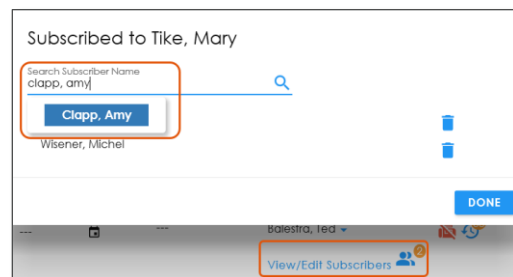


UNSUBSCRIBE

Unsubscribes you from the selected patient(s) (if subscribed) and removes them from your Workbook.

SUBSCRIBE

When viewing another user's Workbook, you can subscribe yourself by selecting patient(s) and adding them to your Workbook.



SUBSCRIBE OTHERS

Displays a pop-up with all **nH Discharge** users within your organization.

1. Select a user (you may filter the list by typing in the **Subscriber Name** field).
2. Click the **SUBSCRIBE** button to subscribe them.
3. If you added a user by mistake, then click the **trash can** icon.

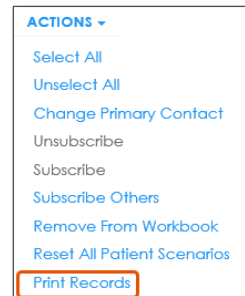
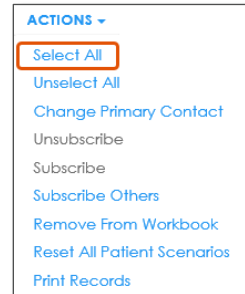
REMOVE FROM WORKBOOK

Prompts you to confirm that you want to remove the patient from your Workbook. You can find this patient by using the **Search** feature.

PRINT RECORDS

1. Select the checkbox to the left of each patient name(s) you would like to include in the [Workbook](#) printout.
2. Click the **down caret** icon to the left of the **ACTIONS** field. Several options display within the drop-down menu.

If...	Then...
You want to print only the patient(s) you selected,	Click the Print Records option from the drop-down menu that displays.
You want to print all the patients on your Workbook,	Click the Select All option within the drop-down menu that displays.
You are using Internet Explorer® as your browser,	The Print dialog box displays.
You are using Google Chrome™ as your browser,	The Print dialog box displays. The patients you selected display within the left-hand side as a print preview.



Navigation

nH Discharge's blue navigation bar across the top of the window remains the same, regardless of the screen within the application.

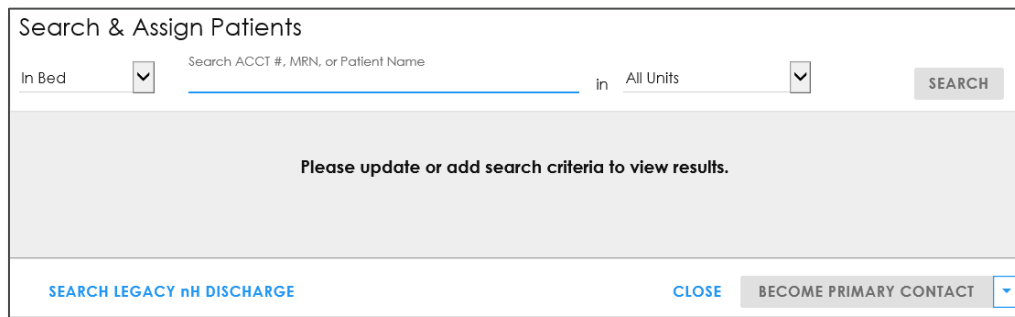


Direct Login: Searching for a Patient

There are two ways for a **Direct Login** user to search for a patient, which are outlined below.

Searching the Entire Patient Census

1. Click the **SEARCH ALL** button in the top-left corner of your screen.
2. Enter or select appropriate options within the **Search & Assign Patients** window that displays.



Fields within the Search & Assign Patients Window

Field Name	Procedure
Drop-down menu with In Bed selected by default.	<p>From the drop-down menu, select the desired option.</p> <p>In Bed Patient assigned to a bed.</p> <p>All Patients Patient who is archived or in the ER.</p>
ACCT # MRN Patient Name	<p>Enter at least five (5) characters of the patient's:</p> <p>account number,</p> <ul style="list-style-type: none"> • MRN, • First name, or • Last name.
All Units	<p>From the drop-down menu, select a specific unit or keep the default selection of All Units.</p>

3. Once search criteria are entered or selected, click the blue **SEARCH** button.

4. Select the **checkbox** to the **left** of the patient's name.
5. Choose one of the following options from the drop-down menu, located in the bottom right-hand corner.
 - BECOME PRIMARY CONTACT
 - ASSIGN PRIMARY CONTACT
 - SUBSCRIBE
 - SUBSCRIBE OTHERS
6. Click the **CLOSE** button to return to the [Workbook](#).

You can elect to **Subscribe** yourself **or** others to a patient record **or** become the **Primary Contact**.

Search & Assign Patients

In Bed ▼ Search ACCT #, MRN, or Patient Name b in All Units ▼ SEARCH

Sort By: NAME ADMIT DATE ↑ ACTUAL DISCHARGE DATE ESTIMATED DISCHARGE DATE ROOM/BED

<input checked="" type="checkbox"/>	Phelps, Brad Add Tag			
MRN	Account #	Admit Date	Est. Discharge Date	Actual Discharge Date
1759376	8703965986	02/10/2021	02/13/2021	-
Class	Unit	Room/Bed	Payer	Primary Contact
-	Surgical	3/N	AETNA, BLUECROSS	TeJuana Holmes

<input type="checkbox"/>	Roberts, Bob Add Tag			
MRN	Account #	Admit Date	Est. Discharge Date	Actual Discharge Date
900900900	0999099009	01/07/2021	01/10/2021	-
Class	Unit	Room/Bed	Payer	Primary Contact
I	001	29/29	BCBS	TeJuana Holmes

SEARCH LEGACY nH DISCHARGE
CLOSE

BECOME PRIMARY CONTACT ▼
 SUBSCRIBE
 ASSIGN PRIMARY CONTACT
 SUBSCRIBE OTHERS

If you change the [Primary Contact](#), you are **prompted** to keep the existing record on your [Workbook](#) as a [Subscriber](#).

Taking this action places the patient's record on your Workbook.

Keep Clapp, Amy notified about the case? This will add them as a subscriber.

NO YES

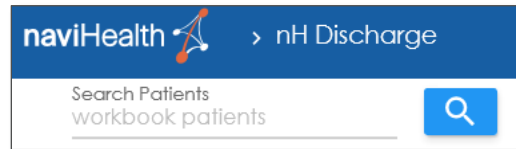
7. Click the **YES** button.

Performing a Workbook-Specific Search

Limit your search to patients within your [Workbook](#) by using the **Search Patients** field located just below the naviHealth logo in the upper left-hand corner of the screen.

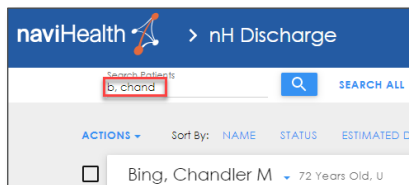
Search by a patient's:

- First name
- Last name
- MRN **or**
- Account number



NOTE: Additionally, you can search for patients on your Workbook by entering **partial names** as displayed in the following three examples.

Last Initial, Partial First Name



First Initial, Last Name

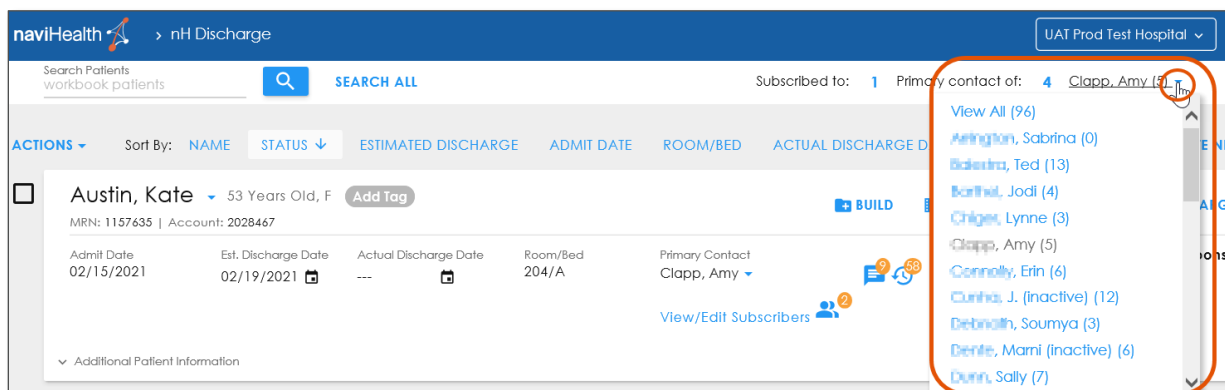


First Initial, Last Initial



Viewing a Patient's Case in a Colleague's Case List

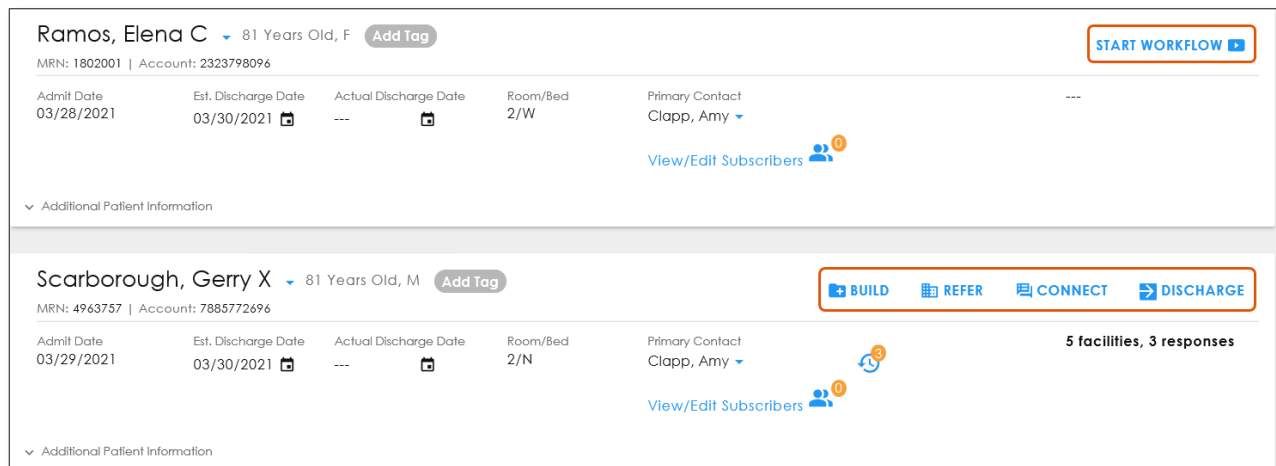
1. Click the **down arrow icon** to the right of your name to view a list of your facility's colleagues.



2. Select a colleague's name from the drop-down menu to view his or her Case List.

The nH Discharge Workflow

Within the [Workbook](#), each patient card contains a **mini navigation bar** (located within the far right) with access to each step of the workflow.



The screenshot shows two patient cards. The top card is for Elena C. Ramos, 81 Years Old, F. It includes fields for Admit Date (03/28/2021), Est. Discharge Date (03/30/2021), Actual Discharge Date (---), Room/Bed (2/W), and Primary Contact (Clapp, Amy). A 'START WORKFLOW' button is visible in the top right. The bottom card is for Gerry X. Scarborough, 81 Years Old, M. It includes fields for Admit Date (03/29/2021), Est. Discharge Date (03/30/2021), Actual Discharge Date (---), Room/Bed (2/N), and Primary Contact (Clapp, Amy). A mini navigation bar with four buttons: BUILD, REFER, CONNECT, and DISCHARGE is visible in the top right. Below the buttons, it says '5 facilities, 3 responses'.

Workflow Options

Option	Description
Start Workflow	Indicates no action has been taken for the patient.
Four buttons/tabs	When four buttons/tabs display within the mini navigation bar, it indicates you or a colleague began the discharge process for the patient.

Case List and Patient Cards


The Workbook's Case List displays patient cards with key information and controls for each patient for whom you are the [Primary Contact or Subscriber](#).

The main feature of the [Workbook](#) is the **Case List**, a collection of Patient Cards – both for patients for whom you are the Primary Contact, as well as other cases for which you are a Subscriber.

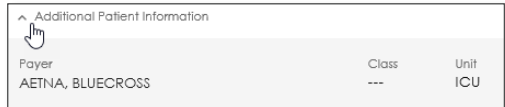




naviHealth enables you to quickly view patient information regardless of where you are in the **nH Discharge** workflow.



Parts of a Patient Card

Part	Description
Checkbox	Select one or more patient checkboxes to apply an option from the ACTIONS drop-down menu. <ul style="list-style-type: none"> Unselect All Change Primary Contact Unsubscribe Subscribe Subscribe Others Remove from Workbook Print Records
▼ Menu Drop-down	Click the down arrow icon to view/select the options within the drop-down menu. <ul style="list-style-type: none"> Case History Patient Summary IBF Cover Sheet Pin a patient to Workbook
Key Data	Displays key information for the patient.
START WORKFLOW 	For patients on whom no action has been taken, click the START WORKFLOW button to place the patient into the Discharge workflow and assign yourself as the Primary Contact . Navigate to the BUILD , REFER , CONNECT , or DISCHARGE screens.

Parts of a Patient Card, continued

Part	Description
View/Edit Subscribers	<ol style="list-style-type: none"> 1. Hover over the number to view the subscribed users. 2. Enter a colleague's name to add him or her as a subscriber. 3. Click the blue trash can icon to remove a subscribed user.
Primary Contact	<ul style="list-style-type: none"> • Displays the patient's Primary Contact. • To reassign the patient, choose another colleague's name from the drop-down menu that displays.
Status	<ul style="list-style-type: none"> • Displays the patient's status, if any. • Hover over any status message to preview it in a tooltip.
Additional Patient Information	<ul style="list-style-type: none"> • Displays a patient's Payer information, Patient Class and Unit (location).  <ul style="list-style-type: none"> • The Payer and Patient Class information is transmitted via your hospital's ADT feed and if available, populates in nH Discharge. • Edit a patient's Unit (location) if necessary, within the patient's Patient Details screen.
	<p>Access the CONNECT screen.</p> <ul style="list-style-type: none"> • A blue message  icon indicates the number of unread messages. • The grayed-out message  icon indicates there are no unread messages.
	This icon displays if a QuickCase™ failed to send.

NOTE: The [Workbook](#) screen displays the **total** number of unread messages, while the **CONNECT** screen displays the number of unread messages per each facility.

EXAMPLE:

- Referrals were sent to **five** SNF facilities and **two** messages were received from each facility, none of which have been opened.
- The Workbook screen displays a count of ten total messages.
- The [CONNECT](#) screen displays a count of two for each of the different facilities.

Creating an IBF Coversheet from the Workbook

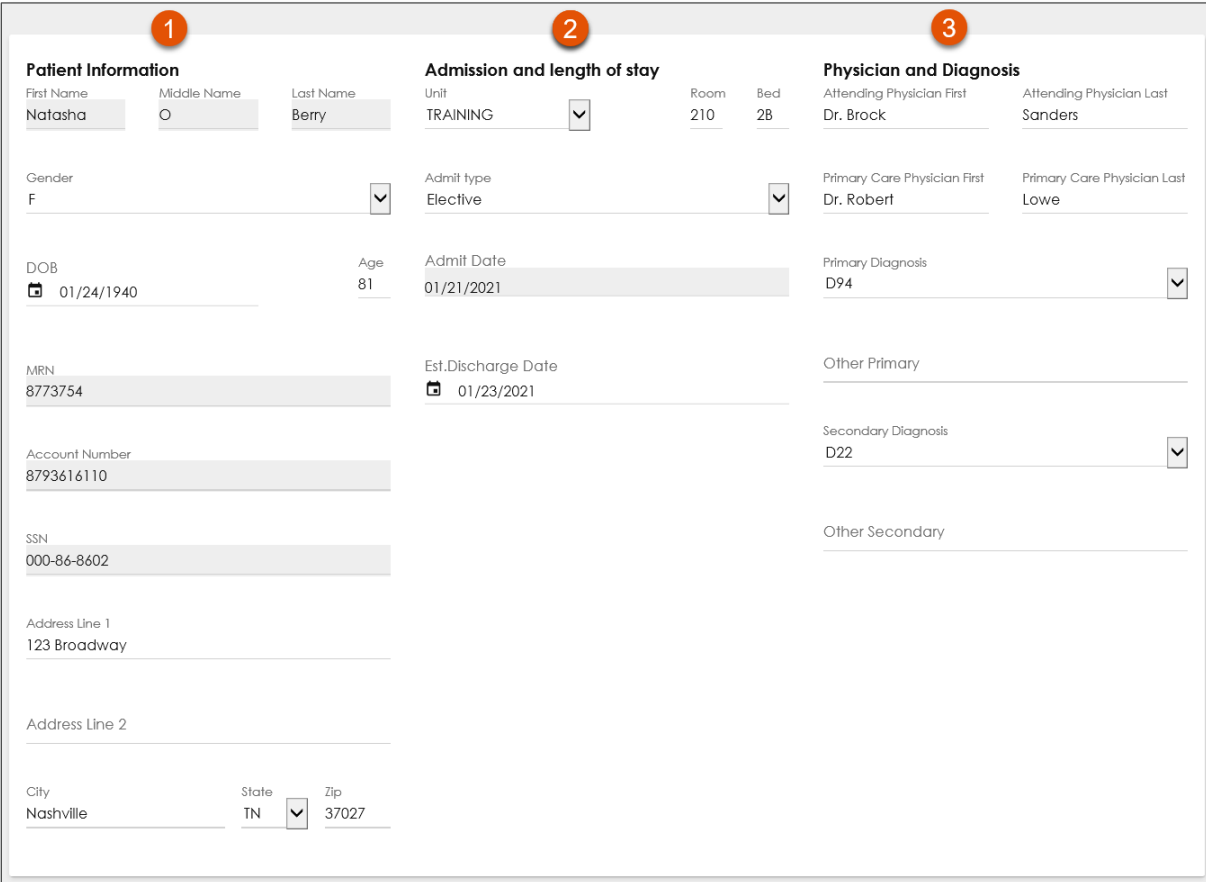
Click the blue **down arrow** icon to the right of the patient's name and select the **IBF Cover Sheet** option from the drop-down menu that displays. The [Inbound Fax Cover Sheet](#) displays.



NOTE: Refer to the [Inbound Fax \(IBF\)](#) section within this guide for additional details.

Viewing Patient Details

Quickly access patient records from the Workbook, which contain information pre-populated from the EMR system. Display patient demographic information by clicking a patient's name within the [Patient Card](#).



1 Patient Information			2 Admission and length of stay			3 Physician and Diagnosis	
First Name Natasha	Middle Name O	Last Name Berry	Unit TRAINING	Room 210	Bed 2B	Attending Physician First Dr. Brock	Attending Physician Last Sanders
Gender F			Admit type Elective			Primary Care Physician First Dr. Robert	Primary Care Physician Last Lowe
DOB 01/24/1940	Age 81	Admit Date 01/21/2021				Primary Diagnosis D94	
MRN 8773754		Est. Discharge Date 01/23/2021				Other Primary	
Account Number 8793616110						Secondary Diagnosis D22	
SSN 000-86-8602						Other Secondary	
Address Line 1 123 Broadway							
Address Line 2							
City Nashville	State TN	Zip 37027					

Sections of the Patient Record

Section	Description
1 Patient Information	The first section contains the patient's name and key data such as the patient's: <ul style="list-style-type: none"> Account Number Medical Record Number (MRN) SSN Date of birth
2 Admission and Length of Stay	This second section includes the patient's: <ul style="list-style-type: none"> Hospital Admit Date and Type Location (unit, room number, bed identification) Primary Contact's name and telephone number
3 Physician and Diagnosis	And finally, the third section includes physician names and patient diagnoses.

NOTE: The bottom of the window contains the patient's **payer** information.

Patient Header

naviHealth enables you to quickly view patient information regardless of where you are in the **nH Discharge** workflow.

The Patient Header is a snapshot of the patient's data on the [Workbook](#) and is visible throughout all four screens.

Annotations for the Patient Header:

- Click to return to your Workbook.
- Click to view menu options for accessing Case History and Patient Summary.
- Patient's MRN
- Patient's Account Number
- Patient's Admit Date
- Patient's Estimated Discharge date from the acute facility; could change any time.
- Current Screen
- Professional, patient-centered notes between acute facility team members.

Sorting and Filtering Your Workbook

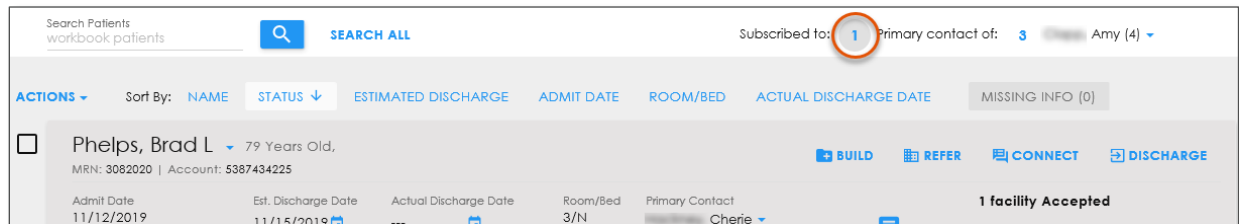
There are several sort options within the Workbook, making it quick and easy to locate patients.

By default the [Workbook](#) is sorted by the patient's **status** in **descending** order.

1. Sort the **Case List** by choosing one of the tabs/links to the right of the **ACTIONS** drop-down menu.

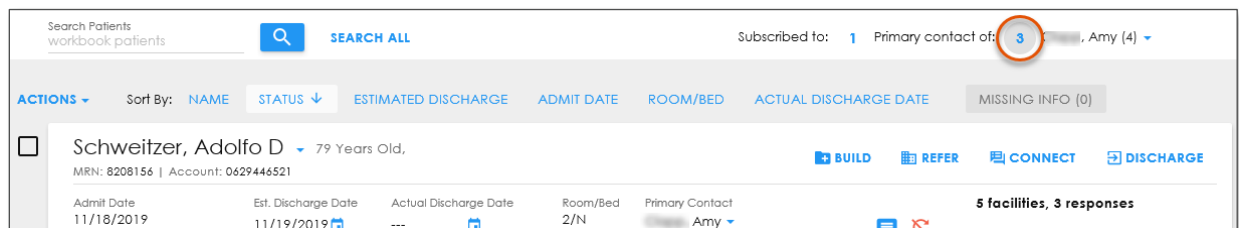


2. Click the **Subscribed to:** number to display only those patient cards.



NOTE: Notice the patient card is shaded **gray**, indicating you are a [Subscriber](#) to this patient's record.

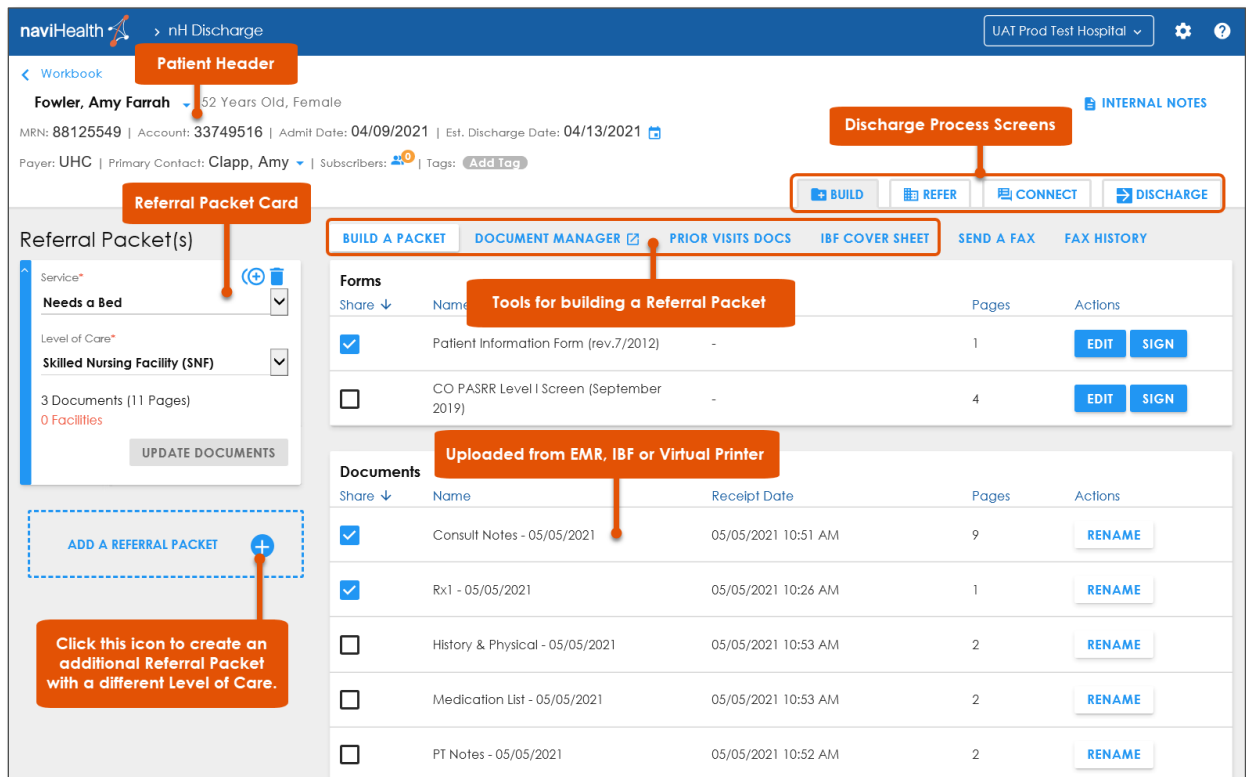
3. Click the number again to clear the filter.
4. Click the **Primary Contact of:** number to display only those patient(s) cards.



5. Click the number again to clear the filter.

BUILD Screen

The primary goal of the **BUILD** phase is to compile a patient's case-related records into Referral Packet(s) to share with providers to continue the patient's care after his or her discharge from the hospital.



Creating Referral Packets

A Referral Packet within **nH Discharge** is a “container” for forms and documents to be shared with providers.

NOTE: By default, the first Referral Packet is built for you.

- The Service is **Needs a Bed**, and the Level of Care is **Skilled Nursing Facility**.
- Change the default settings by choosing different selections using the drop-down menus.

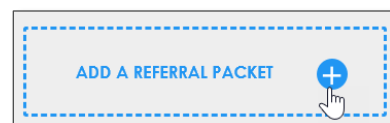
When creating a Referral Packet, select the **Service** the patient requires and the **Level of Care** (a specific description of the type of care the patient requires from a potential provider).

Points of Service (POS) and Corresponding Levels of Care (LOC)

Point of Service	Corresponding Levels of Care
Needs a Bed	<ul style="list-style-type: none"> • SNF/Chronic • SNF/Long Term Care • SNF/Rehab • Assisted Living • Acute Rehabilitation Facility (IRF) • Psychiatric Hospital or Unit • Critical Access Hospital • Swing Bed/Hospital • Acute Care • Acute Care/Pediatric • Long Term Care Hospital (LTCH) • Hospice/Inpatient • Intermediary Care/Long Term Care
Home Services	<ul style="list-style-type: none"> • Home Health Agency • DME Supplier • Infusion/Home • Home Care/Non-Medical • Hospice/Home • Home Based Medical Care
Outpatient Services	<ul style="list-style-type: none"> • Dialysis • Infusion • Outpatient Clinic • Behavioral Health • Substance Abuse
Community / Other	<ul style="list-style-type: none"> • Community Services • Clinical Programs
Care Intermediary	<ul style="list-style-type: none"> • Payer Navigator • Placement Agency

CREATING AN ADDITIONAL REFERRAL PACKET

Create additional Referral Packets using different [Service](#) and [Levels of Care](#) options.



1. Click **ADD A REFERRAL PACKET** below the initial Referral Packet.

The **Define Service and Level of Care** window displays.

2. Select a **Service** type and a **Level of Care** appropriate for the patient.

Define Service and Level of Care

Please select Service and Level of Care for this packet before updating documents.

Service*

SELECT SERVICE TYPE

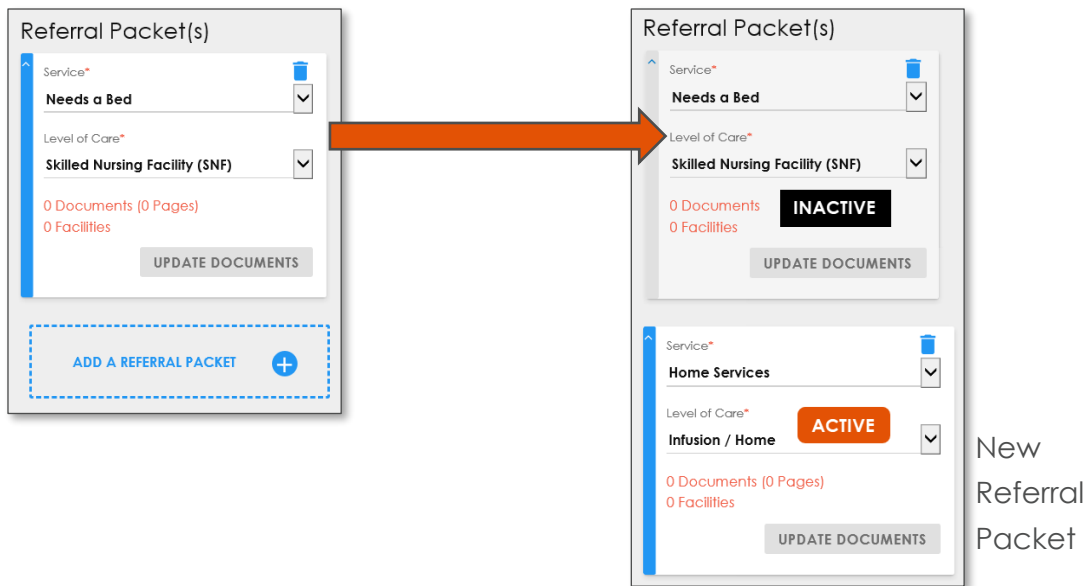
Level of Care*

SELECT LEVEL OF CARE

+ Or, copy an existing packet

SELECT AN EXISTING PACKET

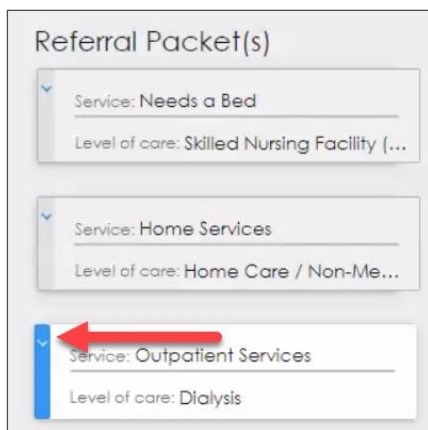
At this point the Referral Packet is **defined** — you may begin adding forms and documents to it or create additional Referral Packets using different criteria.



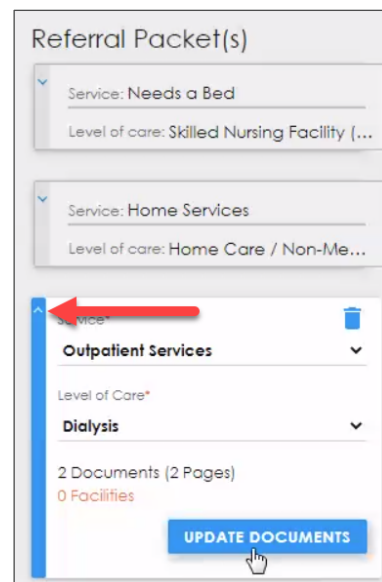
Collapsible Referral Cards

The Referral Packets displayed on both the [BUILD](#) and [REFER](#) screens are collapsible and expandable.


COLLAPSED VIEW



EXPANDED VIEW



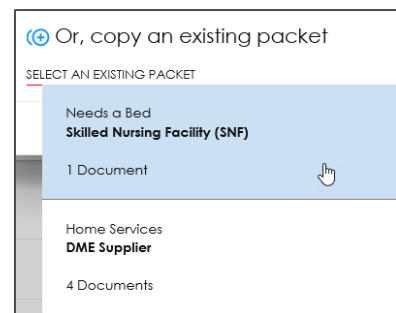
COPYING AN EXISTING REFERRAL PACKET

1. Click the **Copy Packet**  button within the first Referral Packet to create a new Referral Packet for your patient by copying an existing Referral Packet.

All forms and documents associated with the original packet remain selected, enabling you to duplicate an existing Referral Packet.

The Define Service and Level of Care window displays.

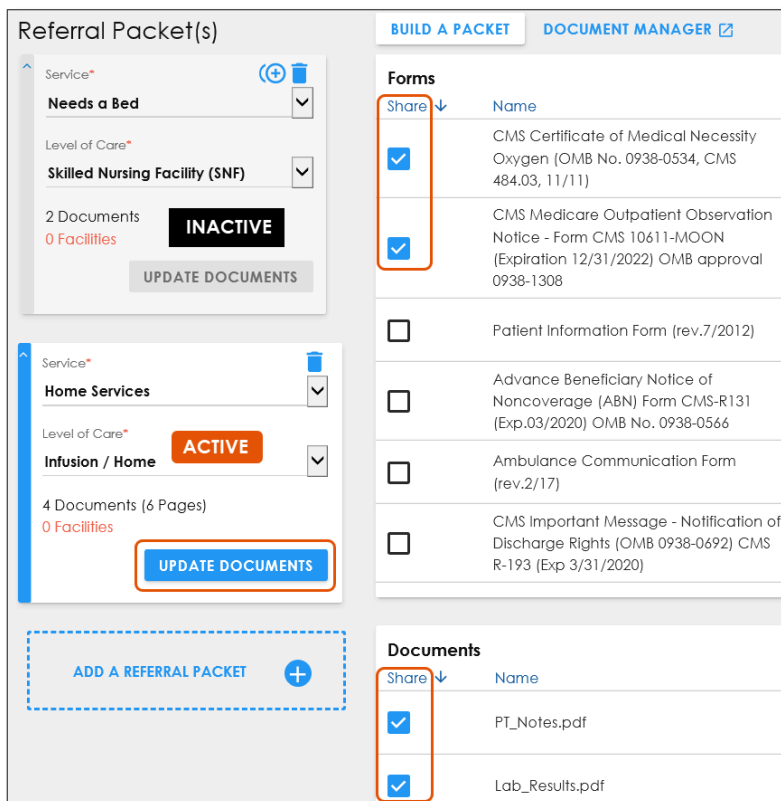
2. Select the **Service Type** from the drop-down menu.
3. Select the **Level of Care** from the drop-down menu.
4. If you want to **copy** an existing Referral Packet with all the documents you added, then select the packet you want to copy.



5. Select a new **Level of Care** that corresponds with the existing/copied packet.

The new Referral Packet displays.

6. To add/share the forms and documents within the copied packet, click the **UPDATE DOCUMENTS** button within the lower right-hand side of the new Referral Packet .



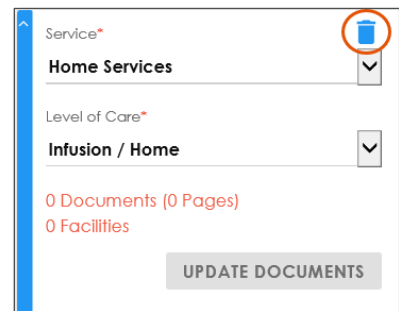
DELETING A REFERRAL PACKET

You may delete a Referral Packet any time **before sending** it to a provider.

1. To delete a Referral Packet, click the blue **trash can** icon.

A dialog box displays, asking if you are sure you want to delete the Referral Packet.

2. Click the **YES** button.



NOTE: Once a Referral Packet has been **shared** with providers, it **cannot** be deleted. The **blue** trash can icon turns **gray**.

Forms and Documents

Each Referral Packet created represents a patient referral for a given [Service](#) and [Level of Care](#). Add forms and documents to the Referral Packet and share it with providers when you send it from the [REFER](#) screen.

Forms and Documents

Item	Description
Forms	<ul style="list-style-type: none"> • Predetermined templates that are readily available within nH Discharge to be added to the patient's record. • The ADT feed pre-populates forms with the patient's demographic information.
Documents	Paper documents from the patient's chart or digital documents from another clinical application.

1. Select the **ACTIVE** Referral Packet to which you want to add forms and documents.
2. Select the checkbox(es) within the **Share** column to the left of form(s) and document(s) to include as part of the patient's Referral Packet .
3. Click the **UPDATE DOCUMENTS** button within the **ACTIVE** Referral Packet .

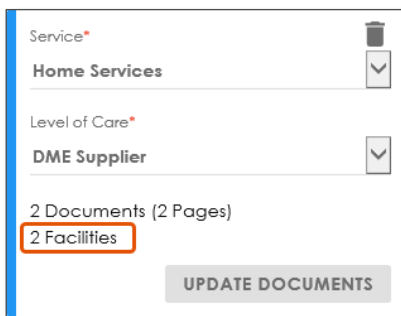
The **Documents** section of the [BUILD](#) screen sorts by the **Receipt Date** column header from the most recent to the oldest.

Documents are not readily available in **nH Discharge**, but can be easily added using one of the following two methods:

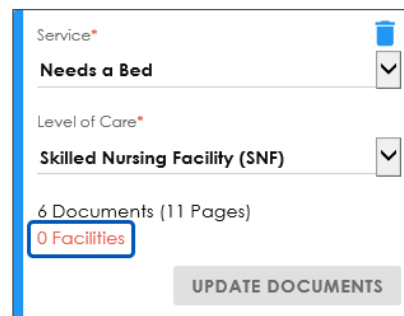
- **Paper** documents can be added by using the [Inbound Fax](#) feature.
- **Digital** documents from other clinical applications can be added using a [Virtual Printer](#) solution.

Additional documents can be added to the Referral Packet s **after** the packet has been shared with a Post-Acute Provider.

This Referral Packet **has** been shared with a PAC Provider.



This Referral Packet has **not** been shared with a PAC Provider.



Renaming Documents

Rename documents from either the [BUILD](#) screen or by using the [Document Manager](#) feature by selecting from a predefined list of options **or** by entering the name of your choice.

BUILD SCREEN

1. Within the **Documents** section, click the **RENAME** button in the **Actions** column.

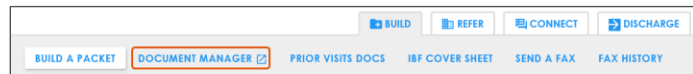
Documents				
Share ↓	Name	Receipt Date	Pages	Actions
<input type="checkbox"/>	Face Sheet - 01/26/2021	01/26/2021 09:18 AM	7	RENAME

2. Click inside the field and enter a name.
3. Click the **SAVE** button.
4. Click the **BACK TO [PATIENT NAME]** tab located in the upper left-hand corner of the screen.

DOCUMENT MANAGER

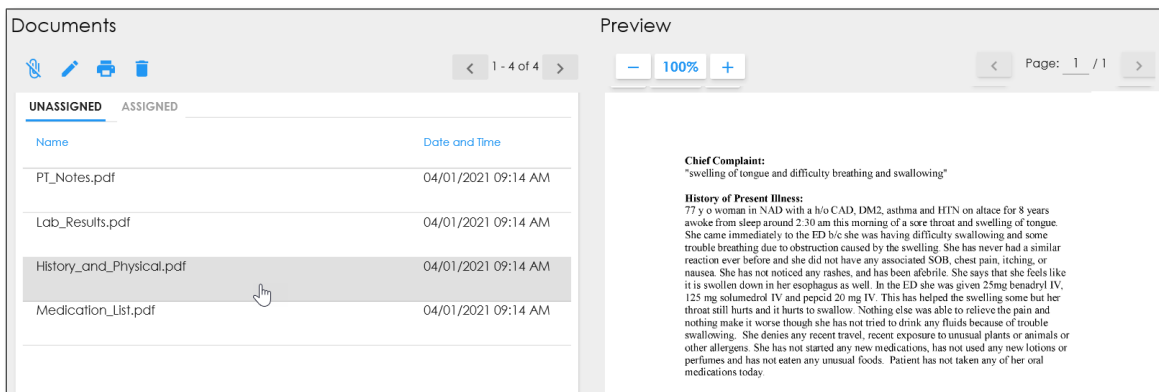
Occasionally, the system is unable to identify a document and therefore, is not be able to assign it to the patient's record. When this happens, the document displays within the **UNASSIGNED** list of the **Document Manager** screen.

The Document Manager feature provides the ability to manage unidentified documents submitted by an [Inbound Fax](#) or a [Virtual Printer](#).



1. Click the **DOCUMENT MANAGER** tab within the [BUILD](#) screen.

The **Documents** window displays with the **UNASSIGNED** tab selected by default.



"Lost documents" display within the left-hand side of the window within the **UNASSIGNED** tab.

NOTE: This could be the result of an [Inbound Fax](#) not placed in the correct patient's record due to the QR codes being compromised on the *Cover Sheet*.

2. Select a row containing the name you gave your document to view a preview of the document.
3. Refer to the following **action icons** in the upper left-hand corner above the **Documents** pane.

-  Attach the document to patient.
-  Print a hard copy of the document.
-  Rename the document.
-  Remove the document from the list.

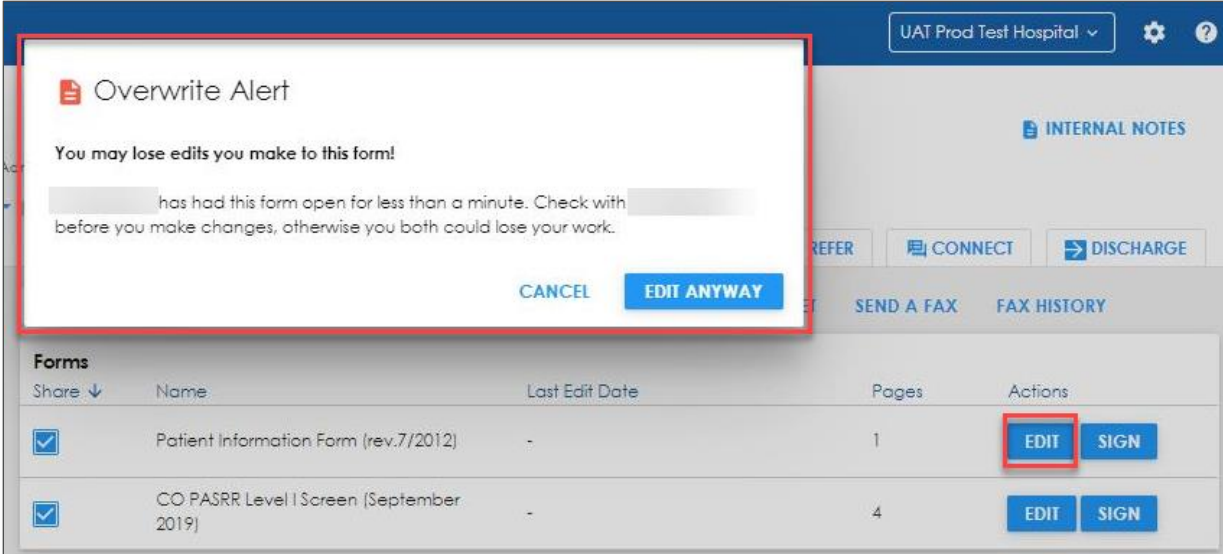
4. Click the **BACK TO [PATIENT NAME]** tab located in the upper left-hand corner of the screen.

Prior Visits Docs

If the patient has been admitted to your facility in the past for the same or similar condition, then click the **PRIOR VISITS DOCS** button. Select any documents of relevance to be added to the patient's current record.

Simultaneous Form Editing

If you attempt to update a form from the [BUILD](#) screen, a pop-up window may display if another colleague is currently editing the form.



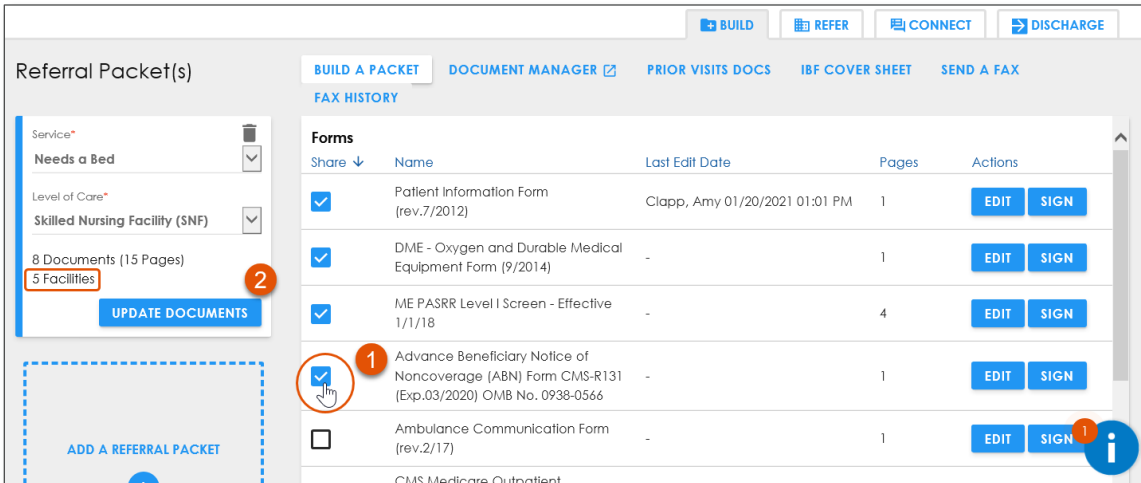
The screenshot shows a software interface with a blue header bar containing 'UAT Prod Test Hospital' and a settings icon. Below the header, there are buttons for 'INTERNAL NOTES', 'REFER', 'CONNECT', and 'DISCHARGE'. A table titled 'Forms' is visible, with columns for 'Share', 'Name', 'Last Edit Date', 'Pages', and 'Actions'. The table contains two rows of form data. The 'EDIT' button in the 'Actions' column of the first row is highlighted with a red box. An 'Overwrite Alert' dialog box is overlaid on the table, with a red border. The dialog box contains the following text: 'Overwrite Alert', 'You may lose edits you make to this form!', and a message: '_____ has had this form open for less than a minute. Check with _____ before you make changes, otherwise you both could lose your work.' Below the message are 'CANCEL' and 'EDIT ANYWAY' buttons.

Share	Name	Last Edit Date	Pages	Actions
<input checked="" type="checkbox"/>	Patient Information Form (rev.7/2012)	-	1	EDIT SIGN
<input checked="" type="checkbox"/>	CO PASRR Level I Screen (September 2019)	-	4	EDIT SIGN

NOTE: Editing and saving forms within is **ONLY** available when using IE®. Always click the **SAVE MY WORK** button to avoid any confusion.

Updating Documents for Existing Referrals

1. Select the checkbox to the left of the form or document to add to the existing referral.



The screenshot shows the 'Referral Packet(s)' interface. On the left, there are dropdown menus for 'Service*' (Needs a Bed) and 'Level of Care*' (Skilled Nursing Facility (SNF)). Below these, it says '8 Documents (15 Pages)' and '5 Facilities' (highlighted with a red box and a '2'). There is an 'UPDATE DOCUMENTS' button. On the right, there is a 'Forms' table with columns: Share, Name, Last Edit Date, Pages, and Actions. The table lists several forms, including 'Patient Information Form (rev.7/2012)', 'DME - Oxygen and Durable Medical Equipment Form (9/2014)', 'ME PASRR Level I Screen - Effective 1/1/18', 'Advance Beneficiary Notice of Noncoverage (ABN) Form CMS-R131 (Exp.03/2020) OMB No. 0938-0566', and 'Ambulance Communication Form (rev.2/17)'. A red circle with '1' highlights the checkbox for the ABN form. A red circle with '2' highlights the 'UPDATE DOCUMENTS' button. There are also 'EDIT' and 'SIGN' buttons for each form.

The Referral Packet was initially shared with **five** providers.

A dialog box displays a message indicating the form(s) and/or document(s) selected will be shared with all providers for which there is an open referral.

2. Click the **OKAY** button.

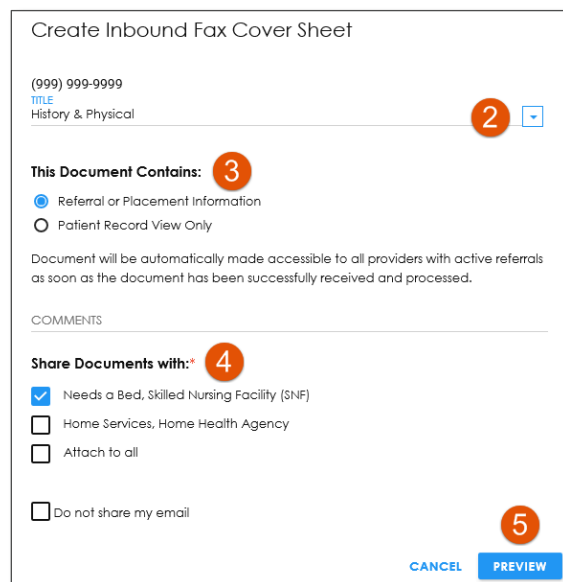
Creating an Inbound Fax (IBF) Cover Sheet

Inbound faxing is the process of “faxing” a paper document to the patient's record, which creates a PDF version you can add to the electronic Referral Packet.

1. Click the **IBF COVER SHEET** button under the navigation bar.

The **Create Inbound Fax Cover Sheet** window displays.

2. In the **Title:** field, enter the document name **or** select an option from the field's drop-down menu.



The screenshot shows the 'Create Inbound Fax Cover Sheet' dialog box. At the top, it says '(999) 999-9999'. Below that is the 'TITLE' field, which is set to 'History & Physical' (highlighted with a red circle and '2'). Underneath is the 'This Document Contains:' section (highlighted with a red circle and '3'), with radio buttons for 'Referral or Placement Information' (selected) and 'Patient Record View Only'. Below that is a note: 'Document will be automatically made accessible to all providers with active referrals as soon as the document has been successfully received and processed.' There is a 'COMMENTS' section. Underneath is the 'Share Documents with:' section (highlighted with a red circle and '4'), with checkboxes for 'Needs a Bed, Skilled Nursing Facility (SNF)' (checked), 'Home Services, Home Health Agency', and 'Attach to all'. At the bottom, there is a checkbox for 'Do not share my email' and a 'PREVIEW' button (highlighted with a red circle and '5').

3. Select a radio button option.

Referral or Placement Information (default selection)

The document(s) are shared with all notified providers once assigned.

Patient Record View Only

The document(s) are assigned to the patient's record but are not automatically shared with notified providers.

4. Select the checkbox(es) to designate which Referral Packet(s) to share the inbound faxed document(s).

5. Click the **PREVIEW** button.

The **Inbound Fax Cover Sheet** displays.

TestMBHHSptINew
275 Grove St.,
CURASPAN CITY, CURASPAN, ZZ, 99999
Phone (999) 999-9999

Inbound Fax Cover Sheet

Patient Summary

Patient:	Carrie Weber	Episode:	3216461555
MRN:	321654613201	DOB:	06/01/1956

Document Abstract

Document Name: **History & Physical**
Prepared by: **Amy Clapp**
Comments:

Document Contents

The attached document contains:

Referral or Placement Information. *** RELEASE OF INFORMATION NOTICE
 Patient Record or View Only.
 *** Document will be automatically made accessible to all providers with active referrals as soon as the document has been successfully received and processed

Instructions for Sender

- Place this cover sheet on top of document set (ONE COVER SHEET REQUIRED PER PATIENT PACKET).
- Fax complete package to (999) 999-9999.
- PDF version of this document will be loaded into our secure Curaspan application after the fax transmission has been successfully completed. This upload and conversion process could take several minutes.




Patient Health Information Legal Disclosure: This facsimile transmission contains confidential information, some or all of which may be protected health information as defined by HIPAA (the Federal Health Insurance Portability & Accountability Act) or personal information protected by state data privacy or security laws. This transmission is intended for the exclusive use of the individual or entity to whom it is addressed and may contain information that is proprietary, privileged, confidential and/or exempt from disclosure under applicable law. If you are not the intended recipient (or an employee or agent responsible for delivering this facsimile transmission to the intended recipient), you are hereby notified that any disclosure, dissemination, distribution or copyright of this information is strictly prohibited and may be subject to legal restriction or sanction. If you received this in error, please notify **Amy Clapp** at phone (555) 555-5555 or email at amy.clapp@navihealth.com to arrange the return or destruction of the information and all copies.

This information has been disclosed to you from records protected by federal confidentiality rules (42 CFR part 2). The federal rules prohibit you from making any further disclosure of information in this record that identifies a patient as having or having had a substance use disorder either directly, by reference to publicly available information, or through verification of such identification by another person unless further disclosure is expressly permitted by the written consent of the individual whose information is being disclosed or as otherwise permitted by 42 CFR part 2. A general authorization for the release of medical or other information is NOT sufficient for this purpose (see § 2.31). The federal rules restrict any use of the information to investigate or prosecute with regard to a crime any patient with a substance use disorder, except as provided at §§ 2.12(a)(8) and 2.65.

CANCEL
PRINT

6. Click the **PRINT** button, located in the **bottom right** of the screen.

FAXING THE DOCUMENT(S)

1. Assemble the paper document(s) you want to bring into **nH Discharge**.
2. Place the [Cover Sheet](#) on top of the document(s) and fax to the number listed in **step 2** within the **Instructions for Sender** section.

Each facility has its own unique fax number.

NOTE: While you can include multiple documents of any length in a fax, the best practice is to send each document set **separately**, so they display as individual documents on the [BUILD](#) screen.

3. Add the [Cover Sheet](#) you just printed as the first page of your document package.

NOTE: The **QR codes** on the cover sheet assist **nH Discharge** in adding the faxed document to the correct patient record. A separate cover sheet is required for **each** individual patient.

4. Fax the complete package to the designated toll-free fax number on the *Cover Sheet*.
5. In a few minutes, a PDF of the faxed document(s) (without the *Cover Sheet*) displays within the **Documents** panel.

Documents				
Share	Name	Receipt Date	Pages	Actions
<input checked="" type="checkbox"/>	Medication_List.pdf	08/20/2019 09:54 AM	1	RENAME

NOTE: Documents faxed to your **nH Discharge** number without a *Cover Sheet* display in the Document Manager's Unassigned Documents list.

Using the Virtual Printer

If your facility uses a naviHealth virtual printer to “print” electronic documents into **nH Discharge**, then click either of the following links to learn more:

[Appendix B: Virtual Printer – LPR](#)

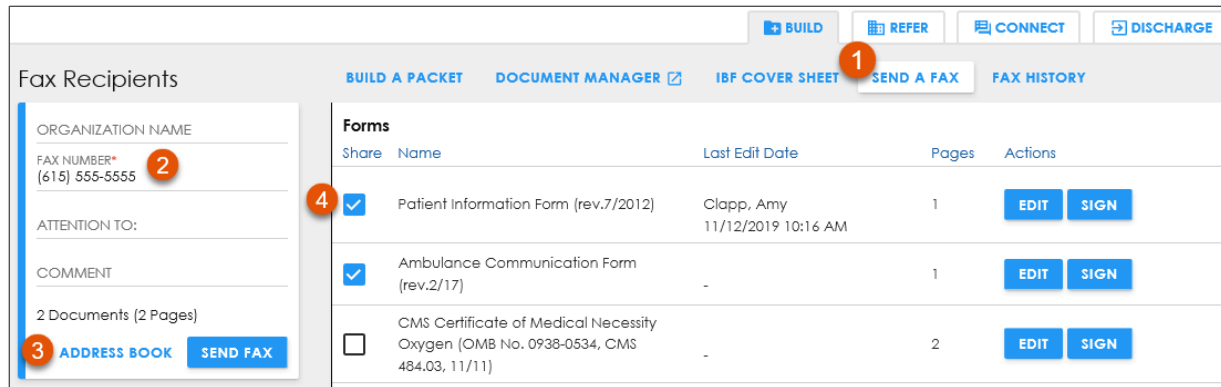
[Appendix B: Virtual Printer – PrinterQv4](#)

[Appendix B: Virtual Printer – nH Print](#)

Sending an Outbound Fax (OBF)

Forms and Documents currently residing on the [BUILD](#) screen can be shared with other parties, such as primary care physicians or pharmacies, using the **Outbound Fax** feature.

1. Click the **SEND A FAX** button below the navigation bar.



Fax Recipients

ORGANIZATION NAME

FAX NUMBER* (615) 555-5555

ATTENTION TO:

COMMENT

2 Documents (2 Pages)

ADDRESS BOOK **SEND FAX**

Forms

Share	Name	Last Edit Date	Pages	Actions
<input checked="" type="checkbox"/>	Patient Information Form (rev.7/2012)	Clapp, Amy 11/12/2019 10:16 AM	1	EDIT SIGN
<input checked="" type="checkbox"/>	Ambulance Communication Form (rev.2/17)	-	1	EDIT SIGN
<input type="checkbox"/>	CMS Certificate of Medical Necessity Oxygen (OMB No. 0938-0534, CMS 484.03, 11/11)	-	2	EDIT SIGN

NOTE: The **Fax Recipients** section temporarily replaces the Referral Packet area to the left.

2. Enter the fax number of the recipient in the required field **or** use the **ADDRESS BOOK** to find frequently used outbound fax numbers.

If you add a fax number known in the **nH Discharge** system, a dialog box displays the provider name listed for the entered fax number.



Fax Number Match

✓ Your Fax Number matches a provider in the naviHealth network.

Fax Number 111-111-1111

Provider Name 3G - Advanced Mobility Solutions
2001 S Woodruff Ave, IDAHO FALLS, ID, 83404

Level of Care DME Supplier

OK

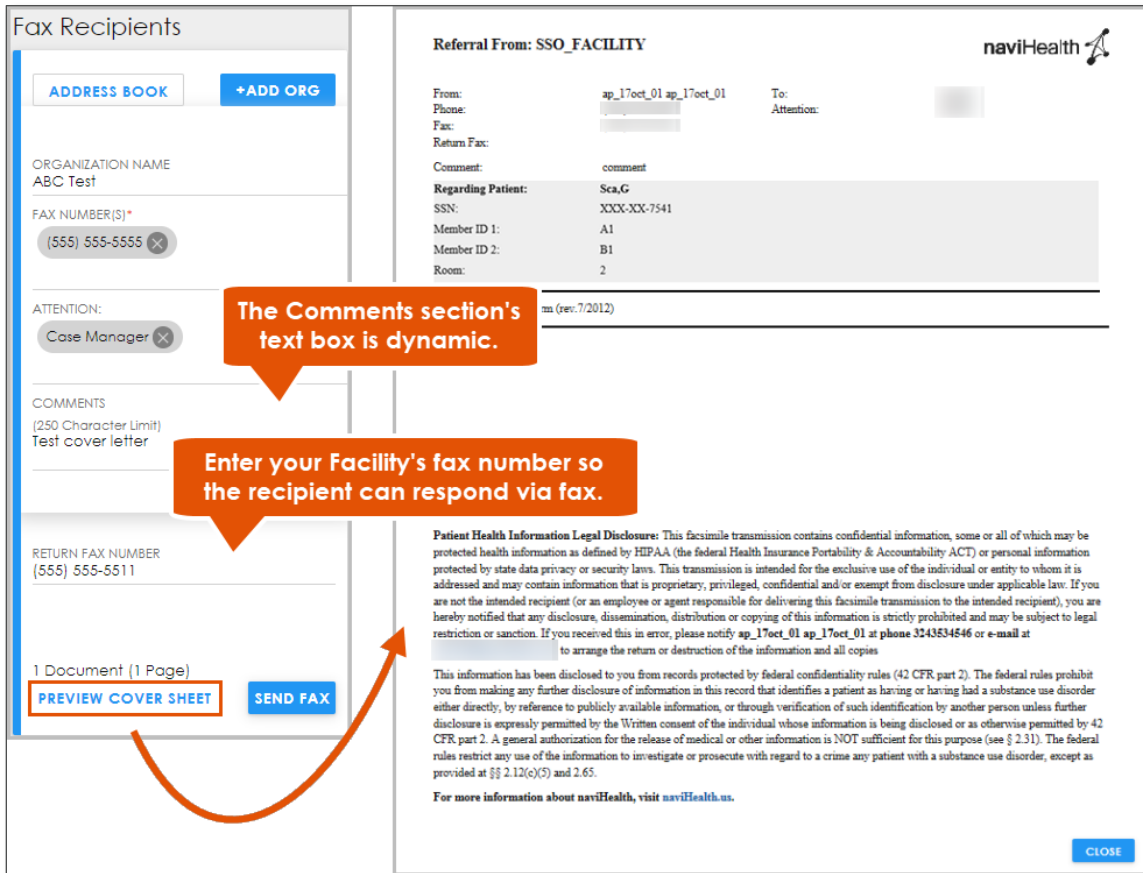
3. Choose the document(s) from the [Forms](#) **or** [Documents](#) section of the [BUILD](#) screen by selecting the checkbox(es) to the left of the document name.

NOTE: The *Outbound Fax Cover Sheet* displays the **active user** in the **From:** field no matter if it is the Primary Contact **or** a Subscriber.

The **COMMENTS** section's text box is dynamic and is limited to 250 characters.

4. In the **RETURN NUMBER FAX** field, enter your fax number so the recipient can respond via fax, if necessary.

- Click the **PREVIEW COVER SHEET** button to preview the *Outbound Fax Cover Sheet*.



Fax Recipients

ADDRESS BOOK + ADD ORG

ORGANIZATION NAME
ABC Test

FAX NUMBER(S)*
(555) 555-5555

ATTENTION:
Case Manager

COMMENTS
(250 Character Limit)
Test cover letter

RETURN FAX NUMBER
(555) 555-5511

1 Document (1 Page)
PREVIEW COVER SHEET SEND FAX

Referral From: SSO_FACILITY naviHealth

From: ap_17oct_01 ap_17oct_01 To:
Phone:
Fax:
Return Fax:
Comment: comment

Regarding Patient: Sca,G
SSN: XXX-XX-7541
Member ID 1: A1
Member ID 2: B1
Room: 2

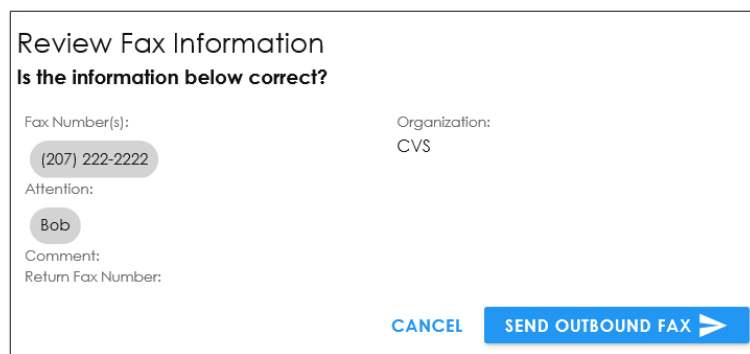
Patient Health Information Legal Disclosure: This facsimile transmission contains confidential information, some or all of which may be protected health information as defined by HIPAA (the federal Health Insurance Portability & Accountability ACT) or personal information protected by state data privacy or security laws. This transmission is intended for the exclusive use of the individual or entity to whom it is addressed and may contain information that is proprietary, privileged, confidential and/or exempt from disclosure under applicable law. If you are not the intended recipient (or an employee or agent responsible for delivering this facsimile transmission to the intended recipient), you are hereby notified that any disclosure, dissemination, distribution or copying of this information is strictly prohibited and may be subject to legal restriction or sanction. If you received this in error, please notify ap_17oct_01 ap_17oct_01 at phone 3243634646 or e-mail at to arrange the return or destruction of the information and all copies

This information has been disclosed to you from records protected by federal confidentiality rules (42 CFR part 2). The federal rules prohibit you from making any further disclosure of information in this record that identifies a patient as having or having had a substance use disorder either directly, by reference to publicly available information, or through verification of such identification by another person unless further disclosure is expressly permitted by the Written consent of the individual whose information is being disclosed or as otherwise permitted by 42 CFR part 2. A general authorization for the release of medical or other information is NOT sufficient for this purpose (see § 2.31). The federal rules restrict any use of the information to investigate or prosecute with regard to a crime any patient with a substance use disorder, except as provided at §§ 2.12(c)(5) and 2.65.

For more information about naviHealth, visit naviHealth.us.

CLOSE

- Click the **SEND FAX** button from within the **Fax Recipients** section.
The **Review Fax Information** dialog box displays.



Review Fax Information

Is the information below correct?

Fax Number(s): (207) 222-2222 Organization: CVS

Attention: Bob

Comment: Return Fax Number:

CANCEL SEND OUTBOUND FAX

- Click the **SEND OUTBOUND FAX** button.

VIEWING THE FAX HISTORY

1. Click the **FAX HISTORY** button to monitor the progress of the Outbound Fax.
The **Fax History** window displays the **status** of each outbound fax, by document, as well as by the active user of the fax in the **Sent By** column.

NOTE: If the **Status** column indicates the **fax failed** it also includes the **reason for the failure**.

- This update helps the user determine next steps to take when attempting to resend the fax.
- Failed fax notifications are sent only **to the sender**, rather than any person signed up for notifications associated to the patient.

Document	Recipient	Fax Number	Return Fax Number	Sent By	Sent Date	Comment	Status
Patient Information Form (rev.7/2012)	Name not provided	(111) 111-1111		Clapp, Amy	02/19/2021 02:52 PM	-	In Progress
Prescription - 02/18/2021	CVS Smith, Joan	(207) 555-5555		Clapp, Amy	02/18/2021 02:43 PM	-	02/18/2021 02:45 PM Failed Error: 3900 : Invalid fax number.

[PRINT](#)
[CLOSE](#)

2. To exit **Send A Fax** mode, click the **BUILD A PACKET** button beneath the navigation bar to return to the Referral Packet mode.

REFER Screen

The **REFER** screen provides you with the tools to accomplish the following objectives.

- [Identifying](#) PAC providers meeting the specific [Level of Care](#) of the patient.
- [Printing](#) a list of PAC provider options to present to the patient/caregiver.
- [Sharing](#) a list of PAC provider options with the patient or a caregiver via email or text message.
- [Viewing](#) the provider preferences returned by the patient/caregiver.
- [Notifying](#) selected providers that you have a referral for them.

Webster, Ramona U - 79 Years Old, F
MRN: 8259791 | FIN: 3753887742 | Admit Date: 10/13/2019 | Est. Discharge: 10/15/2019
Payer: AETNA, BL... | Primary Contact: Amy | Subscribers: 1

INTERNAL NOTES

BUILD REFER CONNECT DISCHARGE

ACTIVE Referral Packet

Referral Packet(s)

Service* Needs a Bed
Level of Care* Skilled Nursing Facility (SNF)
5 Documents
0 Facilities
SEND REFERRAL PACKET

Level of Care: Skilled Nursing Facility (SNF)
Search by: Location Provider Name Address and Distance
ZZ HENRY CITY or ZIP
KEY SERVICES NETWORKS
SEARCH

Showing 27 results for: Skilled Nursing Facility (SNF) in HENRY, ZZ PROVIDER LIST

Provider Name	Dist.	State	Medicare Certified	Connected	Status
<input type="checkbox"/> All Saints Nursing Center	--	ZZ	✓	✓	-
<input type="checkbox"/> Apple Grove Care Center	--	ZZ	⊗	⊗	-
<input type="checkbox"/> Bayside Healing Center	--	ZZ	✓	✓	-
<input type="checkbox"/> Blue Shores Nursing Center	--	ZZ	✓	✓	-

INACTIVE Referral Packet


Service* Home Services
Level of Care* DME Supplier
5 Documents
0 Facilities
SEND REFERRAL PACKET

EDD must be selected in order to send a Referral Packet to a PAC.

Updating the Estimated Discharge Date

It is important to keep the **Estimated Discharge Date** (EDD) as current as possible, as it is transmitted to providers in the patient's Referral Packet and may determine if a booking can be accepted.

NOTE: The **EDD** must be entered before a Referral Packet can be shared with a provider from the [REFER](#) screen.

1.  Click the **calendar** icon at the top of any screen within the [Patient Header](#).
2. Select the appropriate date from the interactive calendar that displays.
3. Click the **APPLY** button.

Searching for Post-Acute Care (PAC) Providers

naviHealth maintains a proprietary database of providers, which you can use to search for a suitable and convenient provider for the patient.

1. Select an **ACTIVE** Referral Packet within the [REFER](#) screen.
2. Define the search criteria by selecting any of the three radio buttons:
 - [Location](#)
 - [Provider Name](#)
 - [Address and Distance](#)

Level of Care: Skilled Nursing Facility (SNF)

Search by: Location Provider Name Address and Distance

ZZ HENRY CITY or ZIP

3. Click the blue **SEARCH** button.

LOCATION

The **Location** option is selected by default. When searching for a bedded or non-bedded facility, the search requirements default to any of the options described in the following table.

Location Options

If...	Then...
The patient's address is available,	naviHealth uses the patient's address.
The patient's address is not provided,	naviHealth uses defaults to the hospital address.
The hospital address and the patient address are not provided,	naviHealth leaves the field blank until we know more information.

PROVIDER NAME

1. Enter three or more characters of a known provider.
2. Click the blue **SEARCH** button.

Level of Care: Skilled Nursing Facility (SNF)

Search by: Location **Provider Name** Address and Distance

PROVIDER NAME
 Skilled Nursing ZZ

KEY SERVICES NETWORKS
 High Quality SNF Network XYZ Payer Network Healthy Lives ACO

CLEAR ALL **SEARCH**

Showing 10 Results **PROVIDER LIST**

<input type="checkbox"/>	Provider Name ↑	Dist	State	Star Rating	Medicare Certified	Connected	Status	Bed Avail
<input type="checkbox"/>	ABC Test Skilled Nursing XYZ	--	ZZ	N/A	⊗	✓	-	N/A
<input type="checkbox"/>	Dignity Health Training Skilled Nursing	--	ZZ	N/A	⊗	✓	-	N/A

ADDRESS AND DISTANCE

1. To add the capability of searching by **distance**, select the appropriate **range** from the drop-down menu (from 5 to 200 miles). The default selection is **50 miles**.
2. Click the **SEARCH** button.
3. Click the **Dist** column header to sort the providers in ascending order.
4. Once matches display, choose the provider(s) to which you want to send the referral by selecting the **checkbox(es)** to the **left** of the provider name(s).

Level of Care: Skilled Nursing Facility (SNF)

Search by: Location Provider Name **Address and Distance**

Enter Address: 1075 Main Street ZIP: Enter Zip Code (optional)

Enter City: WALTHAM MA 10 miles **1**

Selected Provider Networks
 DME Tim Test SNF UA Testing

CLEAR ALL **SEARCH** **2**

Showing 63 Results **PROVIDER LIST**

<input type="checkbox"/>	Provider Name	Dist ↑ 3	State	Star Rating	Medicare Certified	Connected	Status	Bed Avail
<input checked="" type="checkbox"/> 4	MARIST HILL NURSING HOME	1 mi	MA	★★★★☆	✓	⊗	(781) 916-1529	N/A
<input checked="" type="checkbox"/>	Wingate at Weston	2 mi	MA	N/A	✓	✓	-	N/A
<input checked="" type="checkbox"/>	West Newton HealthCare (formerly GLC West Newton)	2 mi	MA	★★★☆☆	✓	✓	-	✓
<input type="checkbox"/>	Chetwynde HealthCare (formerly GLC Chetwynde)	3 mi	MA	★★★☆☆	✓	✓	-	✓

Sorting the List of Post-Acute Care Providers

All the columns in the list are clickable and therefore, sortable.

SORT BY STATE

Sorting by state can be very useful for patients who live near neighboring states. A patient may prefer a facility in their home state, even if there is a closer facility in another state.

Showing 77 Results PROVIDER LIST ▾

<input type="checkbox"/>	Provider Name	Dist	State	Star Rating	Medicare Certified	Connected	Status	Bed Avail
<input type="checkbox"/>	The Medical Center Franklin - Swing Bed	49 mi	KY	N/A	✓	⊗	-	N/A
<input type="checkbox"/>	Ahava Healthcare of Clarksville (Formerly Grace Healthcare of Clarksville)	46 mi	TN	★★★★☆	✓	✓	-	N/A

This sorting option helps you review facility options within a particular state.

SORT BY BED AVAILABILITY

Sorting by Bed Availability makes it easy for you to locate post-acute care providers with available beds.

Showing 77 Results PROVIDER LIST ▾

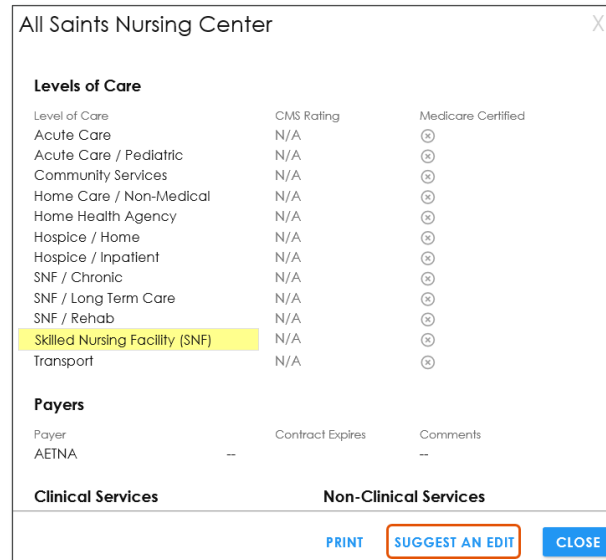
<input type="checkbox"/>	Provider Name	Dist	State	Star Rating	Medicare Certified	Connected	Status	Bed Avail
<input type="checkbox"/>	AHC Mt. Juliet (f/k/a Mount Juliet Health Care Center)	20 mi	TN	★☆☆☆☆	✓	✓	-	✓
<input type="checkbox"/>	Bethany Center for Rehabilitation and Healing	5 mi	TN	★★★★☆	✓	✓	-	✓
<input type="checkbox"/>	Creekside Center for Rehabilitation and Healing	17 mi	TN	★★★★☆	✓	✓	-	N/A

Viewing Provider Profiles and Suggesting an Edit

1. Click a provider name within the results table.

The provider's **profile window** displays, which contains information about the provider's facility as depicted below:

- Basic Information
- Levels of Care they provide
- Payers they accept
- Clinical Services they provide
- Non-Clinical Services they provide



Level of Care	CMS Rating	Medicare Certified
Acute Care	N/A	⊖
Acute Care / Pediatric	N/A	⊖
Community Services	N/A	⊖
Home Care / Non-Medical	N/A	⊖
Home Health Agency	N/A	⊖
Hospice / Home	N/A	⊖
Hospice / Inpatient	N/A	⊖
SNF / Chronic	N/A	⊖
SNF / Long Term Care	N/A	⊖
SNF / Rehab	N/A	⊖
Skilled Nursing Facility (SNF)	N/A	⊖
Transport	N/A	⊖

Payers

Payer	Contract Expires	Comments
AETNA	--	--

Clinical Services **Non-Clinical Services**

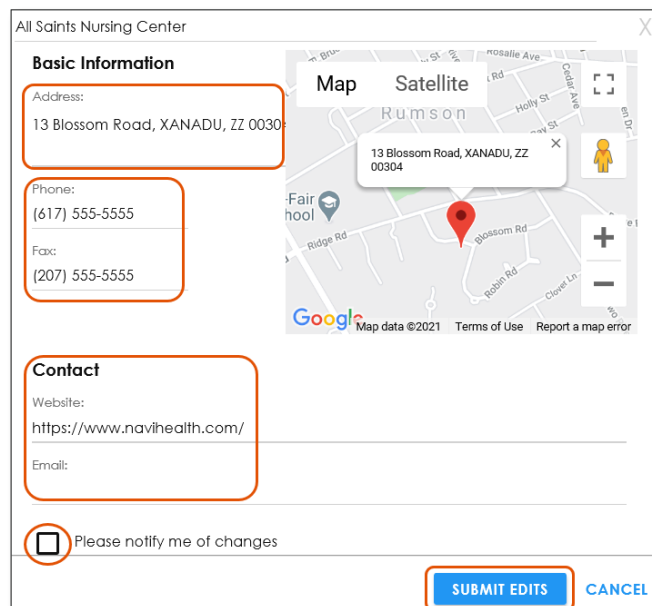
PRINT SUGGEST AN EDIT CLOSE

2. If there is an error in any of the **Basic Information** section, then click the **SUGGEST AN EDIT** button within the bottom right-hand corner of the profile window.

The only fields you can edit open, enabling you to edit.

3. In these fields, enter the changes you would like to suggest.
4. If you would like to receive notifications of changes to the provider profiles, then select the **checkbox** to the left of **Please notify me of changes.**
5. When finished, click the blue **SUBMIT EDITS** button located in the bottom right-hand corner of the profile window.

An email is sent to the email address you provided which includes a summary of your submitted suggestions.



Basic Information

Address: 13 Blossom Road, XANADU, ZZ 00304

Phone: (617) 555-5555

Fax: (207) 555-5555

Contact

Website: https://www.navihealth.com/

Email:

Please notify me of changes

SUBMIT EDITS CANCEL

Selecting Key Services and/or Provider Networks

If your facility Administrator manages **Provider Networks**, then refer to the [Appendix L: Managing Provider Networks](#) section within this guide.

1. Click the KEY SERVICES / NETWORKS button.

The **Filters** window displays.

2. Within the **Networks** section, select the checkbox(es) of the desired Networks.
3. Within the **Key Services** section, select the checkbox(es) of Key Services, if desired.

NOTE: Selecting Key Services **may exclude** qualified providers.

4. When finished, click the **UPDATE** button.
 - Tags display when you filter your search by criteria such as **Key Services**.
 - These tags enable you to quickly discern which criteria you used when searching for providers.

5. Click the **CLEAR ALL** button to clear all existing criteria entered for the search.

NOTE: The **CLEAR ALL** button does not clear networks that are highlighted on your [REFER](#) screen by default.

- Click the **(x)** within the network tag to **remove** any of the selected Provider Networks.
- Contact your internal administrator with any questions surrounding default network highlighting.

SELECTING “FAVORITE” PROVIDER NETWORKS TO FILTER SEARCH

When searching for a facility on the **REFER** screen in a geographic location outside your typical network area, you are able to view “favorite” networks from facilities in the area. To display in this network search, your Administrator needs to mark the provider network as a “favorite.”

NOTE: Refer to the [Appendix L: Managing Provider Networks](#) section within this guide.

This expansion only applies to your parent network.

Example:

- A patient from Arizona is visiting California and becomes injured while hiking.
- He or she needs a PAC setting and would prefer to be placed within their home state of Arizona.
- This feature allows the California Case Manager to view Arizona facility networks that have been “favorited.”

Creating a Patient Matching List (PML)

The *Patient Matching List* (PML) also referred to as the *Patient Choice Letter*, provides Case Managers and Social Workers with a robust tool to help patients make informed decisions about their next level of care. The PML allows a provider list to be shared with patients and their families.

Patient Matching List Purposes

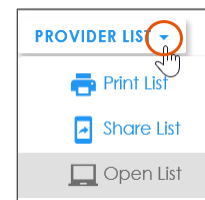
Purpose	Description
New Provider Information	Providers can add their mission statement or a description of their organization, list visiting hours for family's knowledge, and even showcase the physicians/clinicians on their staff.
Putting Choice in Patient's Hands	<ul style="list-style-type: none"> • Once a patient's care team has matched the patient with the appropriate providers, the patient can interact with the providers' digital profiles. • After the patient has viewed the available options, they can select their top five choices for providers.

1. Within the [REFER](#) screen, select an option within the **Search by:** field and enter specific search criteria.
2. Select the checkbox(es) to the left of the providers you wish to share with the patient or caregiver.
3. Within the **PROVIDER LIST** drop-down menu, select either of the following three options.
 - [Print List](#)
 - [Share List](#)
 - [Open List](#)

PRINT LIST

A **printable** PML is created for sharing with the patient. You have the ability to create *Provider Matching Lists* across levels of care consistently.

1. Select the checkboxes to the left of the Post-Acute Care providers for the Referral Packet to include in the printed list.
2. From the **PROVIDER LIST**'s drop-down menu select the **Print List** option to preview providers by level of care that will display on the PML.



Print List

Skilled Nursing Facility (SNF)

MARIST HILL NURSING HOME

Wingate at Weston

West Newton HealthCare (formerly GLC West Newton)

UAT Prod Test Hospital
 275 Grove St
 CURASPAN CITY, ZZ, 99999
 Tel: (800) 446-9614

Health-Care Provider Matches for Patient Fowler, Amy

Please review the following list that we have prepared for you as you get ready for your discharge from the hospital.

This is a list of facilities and/or agencies in your preferred geographic area which are available to provide the services recommended by your physician as described in your discharge plan. For your convenience, we have included contact information for each listed organization, if you would like to learn more about them.

Amy Clapp prepared this list on 05-05-2021 01:07 PM

Skilled Nursing Facility (SNF)

Search Criteria:
 Needs a Bed - Skilled Nursing Facility (SNF)
 Location: MA - WALTHAM - 10 Miles

<p>MARIST HILL NURSING HOME 66 NEWTON STREET WALTHAM, MA 02453 Tel: (781) 893-0240 CMS Star Rating: ★★★★★</p>	<p>Wingate at Weston 75 Norumbega Rd WESTON, MA 02493 Tel: (781) 891-6100 CMS Star Rating: N/A</p>
--	---

West Newton HealthCare (formerly GLC West Newton)
 25 ARMORY STREET
 WEST NEWTON, MA 02465
 Tel: (617) 969-2300
 www.nextstephc.com
 CMS Star Rating: ★★★★★

SHARE LIST

An **electronic** PML is created for sharing with the patient via email or text message.

In this example, the **Share List** option was selected.

1. Enter an email address **or** a cell phone number.
2. Click the blue **SHARE** button.

Share Providers

Please enter the patient or caregiver's phone number or email address to share the list of possible providers. The recipient(s) will have 72 hours from when you Share to access the list and submit their preferences.

Email or Phone Number

Enter a phone number or email

[CANCEL](#) [SHARE](#)

OPEN LIST

Once an electronic PML is sent to a patient, a **Note** dialog box displays, indicating you can open the list from the Provider List's drop-down menu.

Note

You may also open the list from the Provider List dropdown menu (may take a moment).

[CLOSE](#)

1. Click the blue **CLOSE** button.
2. Click the **down arrow** icon within **PROVIDER LIST** and select the **Open List** option from the drop-down menu that displays.

NOTE: The provider networks selected when searching the [REFER](#) screen are highlighted on a Digital PML.

The **Digital Patient Matching List** displays.

Choose your next care provider


Please review the following list that we have prepared for you as you get ready for your discharge from the hospital.

This is a list of facilities and/or agencies in your preferred geographic area which are available to provide the services recommended by your physician as described in your discharge plan. For your convenience, we have included contact information for each listed organization, if you would like to learn more about them.

Please select up to five preferred providers to send to your care coordinator by clicking the Select button.


Search based on:

Prepared by Amy
May 5, 2021, 1:15:22 PM




3 results Sort by: Default ▾

[Hide listing](#)



Wingate at Weston

 75 Norumbega Rd, WESTON, MA 02493

(781) 891-6100

Once preferences are submitted by the patient or caregiver, a list containing selected choice(s) displays within the **Documents** section on the [BUILD](#) screen.

Documents	
Share ↓	Name
<input type="checkbox"/>	Patient Preferences - Providers [11/25/2020] The electronic version of the PML returned by the patient.
<input type="checkbox"/>	Provider Matching Report to Patient [11/25/2020 03:07 PM] The electronic version of the Provider Matching List (PML) sent via text or email to the patient.

NOTE: Refer to [Appendix D: How a Patient/Caregiver Accesses the Provider Matching List](#) for additional information.

Sending Referral Packets

1. Click the **SEND REFERRAL PACKET** button within the **ACTIVE** Referral Packet .

NOTE: To send a Referral Packet, an **Estimated Discharge Date** must be entered by clicking the Calendar icon near the top-right corner.

2. Once Referral Packet s are sent, the **Status** column populates.

Provider Name ↑	Dist.	State	Star Rating	Medicare Certified	Connected	Status
All Saints Nursing Center	--	ZZ	N/A			No Response Submitted
Apple Grove Care Center	--	ZZ	N/A			Notified by QuickCase

EXCESSIVE REFERRAL FACILITIES WARNING MESSAGE

When attempting to send referrals to 300 or more facilities at once, a pop-up message displays.

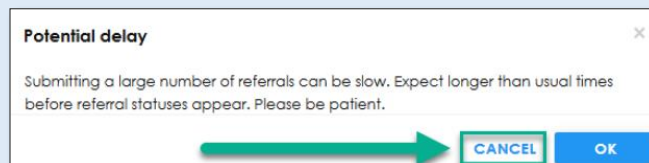
NOTE: naviHealth does **NOT** recommend sending over 250 referrals at once.

Doing so can cause performance issues and can negatively impact satisfactory patient placement.

Reconsider sending such a large quantity of referrals at once.


To cancel your request and select a smaller group of facilities, click the **CANCEL** button.

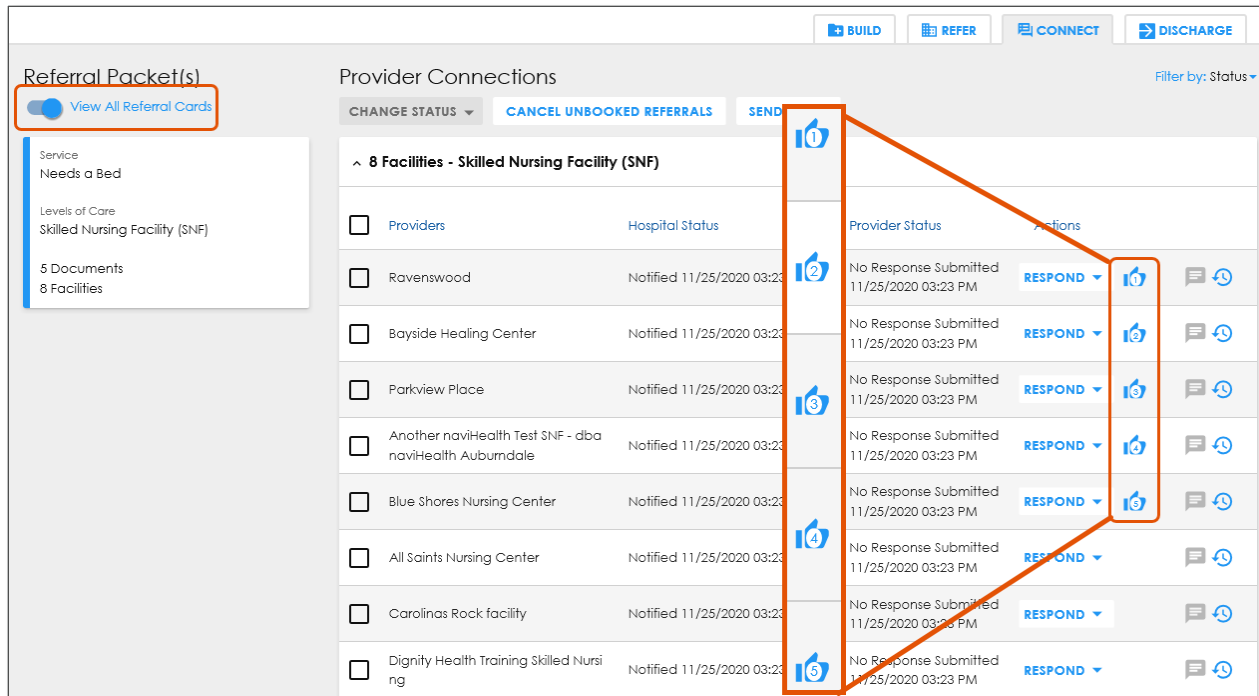
To continue sending the referral to the large number of facilities, click **OK** and anticipate longer than normal processing times.



CONNECT Screen

Use the **CONNECT** screen for communicating with a **nH Intake** providers via electronic messaging, check statuses, messages and failed **QuickCase™** faxes.


The **CONNECT** screen displays a “thumbs up” icon  indicating the patient's first, second, third, fourth, and fifth preferences.



The screenshot shows the 'CONNECT' screen with the following elements:

- Referral Packet(s)**: A sidebar on the left with a toggle for 'View All Referral Cards' (highlighted in red).
- Provider Connections**: A main table with columns for 'Providers', 'Hospital Status', 'Provider Status', and 'Actions'.
- Table Data**:

Providers	Hospital Status	Provider Status	Actions
^ 8 Facilities - Skilled Nursing Facility (SNF)			
<input type="checkbox"/>	Providers		
<input type="checkbox"/>	Ravenswood	Notified 11/25/2020 03:23 PM	No Response Submitted 11/25/2020 03:23 PM RESPOND
<input type="checkbox"/>	Bayside Healing Center	Notified 11/25/2020 03:23 PM	No Response Submitted 11/25/2020 03:23 PM RESPOND
<input type="checkbox"/>	Parkview Place	Notified 11/25/2020 03:23 PM	No Response Submitted 11/25/2020 03:23 PM RESPOND
<input type="checkbox"/>	Another naviHealth Test SNF - dba naviHealth Aubumdale	Notified 11/25/2020 03:23 PM	No Response Submitted 11/25/2020 03:23 PM RESPOND
<input type="checkbox"/>	Blue Shores Nursing Center	Notified 11/25/2020 03:23 PM	No Response Submitted 11/25/2020 03:23 PM RESPOND
<input type="checkbox"/>	All Saints Nursing Center	Notified 11/25/2020 03:23 PM	No Response Submitted 11/25/2020 03:23 PM RESPOND
<input type="checkbox"/>	Carolinas Rock facility	Notified 11/25/2020 03:23 PM	No Response Submitted 11/25/2020 03:23 PM RESPOND
<input type="checkbox"/>	Dignity Health Training Skilled Nursing	Notified 11/25/2020 03:23 PM	No Response Submitted 11/25/2020 03:23 PM RESPOND

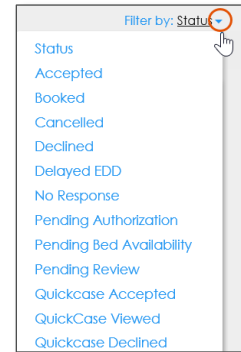
 Click the toggle icon beneath the Referral Packet(s) title to switch your view between viewing all referral cards **or** selecting which cards on which you would like to focus.

Use the **CONNECT** screen when:

- [Filtering](#) Providers by their Status
- [Performing](#) a Bulk Action change
- [Viewing](#) the Referral History for a provider
- [Sending](#) messages to **nH Intake** providers
- [Communicating](#) with Providers
- [Updating](#) a provider's status
- [Resending](#) a Referral to a QuickCase™ provider
- [Booking](#) a referral
- [Cancelling](#) a Booked Referral
- [Reopening](#) a Cancelled Referral

Filtering Providers by Status

1. Click the blue **down arrow** icon to the right of the **Filter by: Status** field.
2. Select the desired option from the drop-down menu that displays.

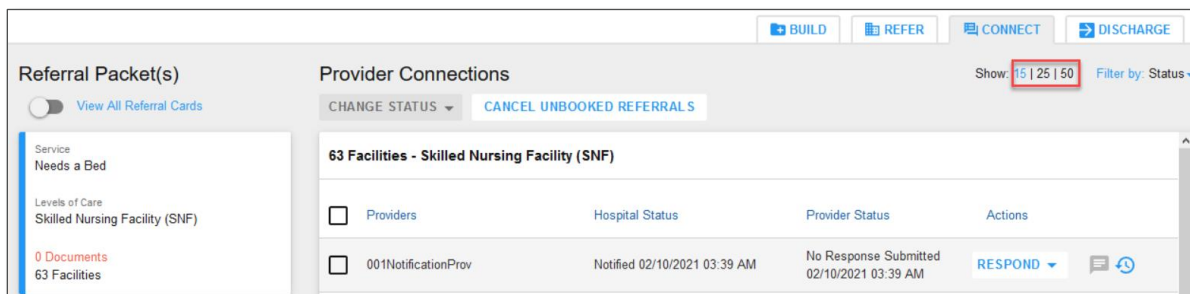


CHOOSING THE NUMBER OF REFERRALS DISPLAYED

Choose the **number of referrals displayed** per page when viewing a single referral's level of care.

There are three options for the number of referrals displayed: **15** (default), **25**, or **50**.

NOTE: With this enhancement, you will be able to see many more referrals without clicking from page to page.



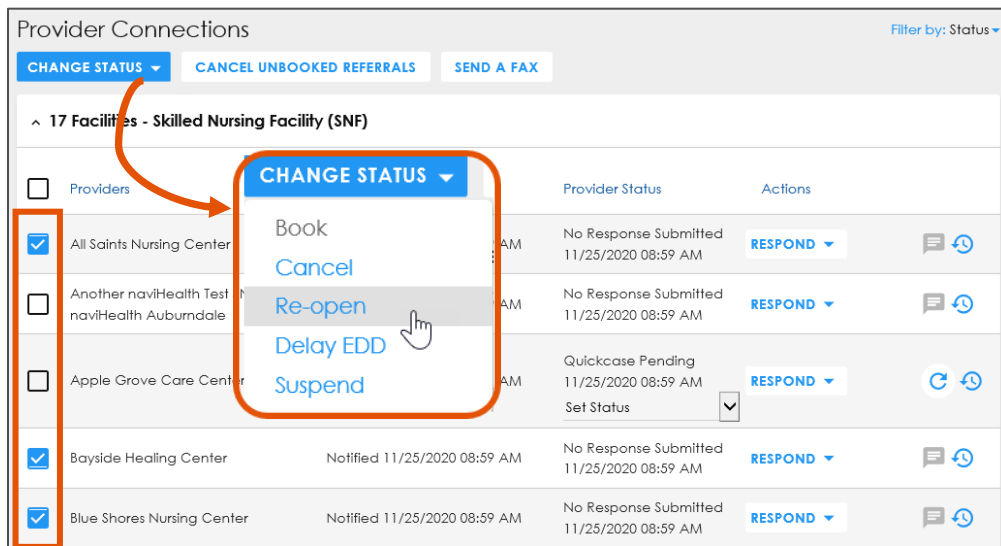
The screenshot shows the naviHealth interface with the following elements:

- Referral Packet(s):** Includes a toggle for 'View All Referral Cards', 'Service: Needs a Bed', 'Levels of Care: Skilled Nursing Facility (SNF)', '0 Documents', and '63 Facilities'.
- Provider Connections:** Includes a 'CHANGE STATUS' dropdown, a 'CANCEL UNBOOKED REFERRALS' button, and a table of 63 facilities.
- Table Headers:** Providers, Hospital Status, Provider Status, Actions.
- Table Row:** 001NotificationProv, Notified 02/10/2021 03:39 AM, No Response Submitted 02/10/2021 03:39 AM, RESPOND dropdown, chat icon, refresh icon.
- Filters:** 'Show: 15 | 25 | 50' and 'Filter by: Status' dropdown.
- Top Navigation:** BUILD, REFER, CONNECT, DISCHARGE buttons.

Performing a Bulk Action Change

The process of reopening cancelled referrals is not a one-by-one process. The **CHANGE STATUS** drop-down field reduces clicks and drives user efficiency within this part of the workflow.

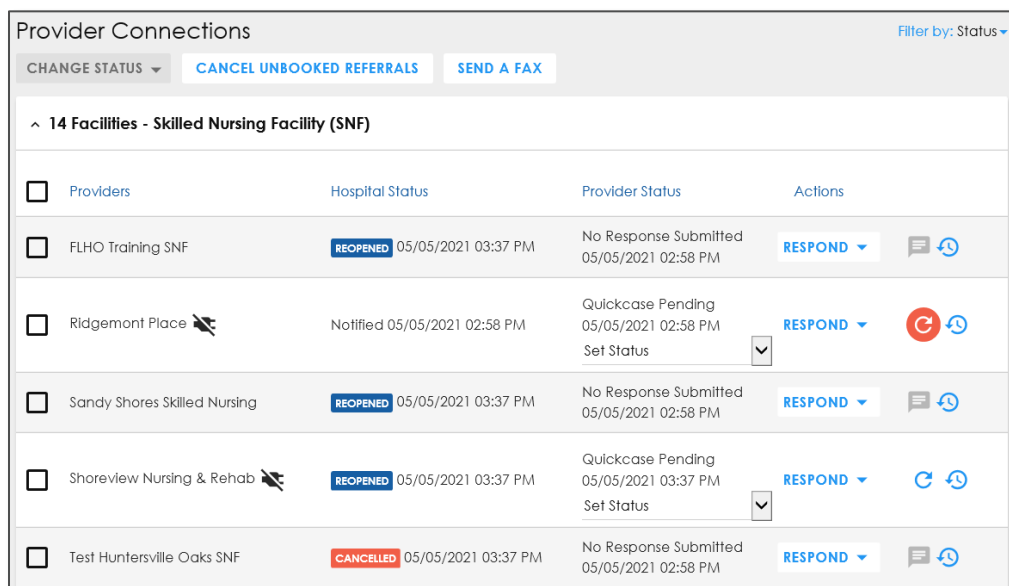
1. Within the **Provider Connections** table, select the checkboxes to the left of the facilities for which you would like to change their status.



The screenshot shows the 'Provider Connections' interface. At the top, there are buttons for 'CHANGE STATUS', 'CANCEL UNBOOKED REFERRALS', and 'SEND A FAX'. Below this, a section for '17 Facilities - Skilled Nursing Facility (SNF)' is shown. A table lists several facilities with checkboxes in the 'Providers' column. The 'CHANGE STATUS' dropdown menu is open, showing options: 'Book', 'Cancel', 'Re-open', 'Delay EDD', and 'Suspend'. A hand cursor is hovering over the 'Re-open' option.

Providers	Hospital Status	Provider Status	Actions
<input checked="" type="checkbox"/>	All Saints Nursing Center	No Response Submitted 11/25/2020 08:59 AM	RESPOND
<input type="checkbox"/>	Another naviHealth Test naviHealth Auburndale	No Response Submitted 11/25/2020 08:59 AM	RESPOND
<input type="checkbox"/>	Apple Grove Care Center	Quickcase Pending 11/25/2020 08:59 AM Set Status	RESPOND
<input checked="" type="checkbox"/>	Bayside Healing Center	Notified 11/25/2020 08:59 AM No Response Submitted 11/25/2020 08:59 AM	RESPOND
<input checked="" type="checkbox"/>	Blue Shores Nursing Center	Notified 11/25/2020 08:59 AM No Response Submitted 11/25/2020 08:59 AM	RESPOND

2. Click the **CHANGE STATUS** drop-down button and select from the available options shown above. The following screen displays the result of the bulk action selection.

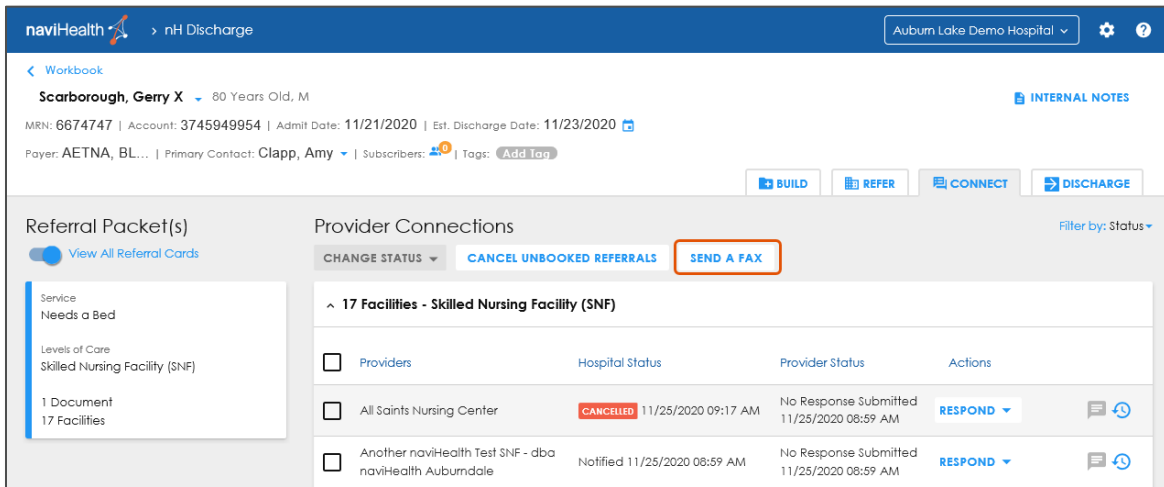


The screenshot shows the 'Provider Connections' interface after a bulk action. The 'CHANGE STATUS' dropdown is now closed. The table shows 14 facilities. The 'Hospital Status' column now includes 'REOPENED' (in blue) and 'CANCELLED' (in red) labels with timestamps. The 'Provider Status' column shows 'No Response Submitted' or 'Quickcase Pending'. The 'Actions' column includes 'RESPOND' buttons and refresh icons.

Providers	Hospital Status	Provider Status	Actions
<input type="checkbox"/>	FLHO Training SNF	REOPENED 05/05/2021 03:37 PM No Response Submitted 05/05/2021 02:58 PM	RESPOND
<input type="checkbox"/>	Ridgemont Place	Notified 05/05/2021 02:58 PM Quickcase Pending 05/05/2021 02:58 PM Set Status	RESPOND
<input type="checkbox"/>	Sandy Shores Skilled Nursing	REOPENED 05/05/2021 03:37 PM No Response Submitted 05/05/2021 02:58 PM	RESPOND
<input type="checkbox"/>	Shoreview Nursing & Rehab	REOPENED 05/05/2021 03:37 PM Quickcase Pending 05/05/2021 03:37 PM Set Status	RESPOND
<input type="checkbox"/>	Test Huntersville Oaks SNF	CANCELLED 05/05/2021 03:37 PM No Response Submitted 05/05/2021 02:58 PM	RESPOND

Sending an Outbound Fax

The **Send a Fax** feature is also available on the **CONNECT** screen as this is where users like UR Staff traditionally operate.

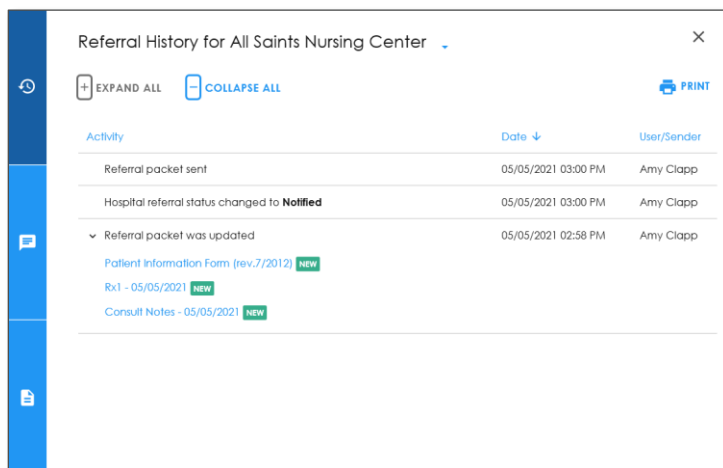


The screenshot shows the 'nH Discharge' interface for patient Scarborough, Gerry X. It includes a 'Referral Packet(s)' section with 'Needs a Bed' and 'Skilled Nursing Facility (SNF)' services. The 'Provider Connections' section is active, showing a table of SNF providers. The 'SEND A FAX' button is highlighted in a red box.

Providers	Hospital Status	Provider Status	Actions
<input type="checkbox"/>			
<input type="checkbox"/> All Saints Nursing Center	CANCELLED	11/25/2020 09:17 AM	No Response Submitted 11/25/2020 08:59 AM RESPOND
<input type="checkbox"/> Another naviHealth Test SNF - dba naviHealth Auburndale	Notified	11/25/2020 08:59 AM	No Response Submitted 11/25/2020 08:59 AM RESPOND

NOTE: Refer to the instructions for [sending an outbound fax](#) within the **BUILD** screen.

Viewing Referral History



The screenshot shows a 'Referral History for All Saints Nursing Center' window. It includes a table of activities:


Activity	Date	User/Sender
Referral packet sent	05/05/2021 03:00 PM	Amy Clapp
Hospital referral status changed to Notified	05/05/2021 03:00 PM	Amy Clapp
Referral packet was updated	05/05/2021 02:58 PM	Amy Clapp

Below the table, there are links for 'Patient Information Form (rev.7/2012)', 'Rxl - 05/05/2021', and 'Consult Notes - 05/05/2021', each with a 'NEW' indicator.

View the status of the individual forms and documents included in a Referral Packet by clicking that has been sent to both [QuickCase™](#) providers and **nH Intake** providers.

The referral history feature provides the ability to track forms, documents, and other communications, including details on when a [QuickCase™](#)

recipient has downloaded the Referral Packet.

Click the **Referral History** icon  to view the referral history for any provider (**nH Intake** or QuickCase™) in the **Global Messaging Center**.




Communicating with Providers

Communicating with **nH Intake** providers versus QuickCase™ providers involves different methods, but **nH Discharge** is designed to assist you in monitoring and auditing all patient-related communications throughout the discharge process.

Communication with QuickCase™ providers must be handled **outside** of **nH Discharge**, though the application enables you to update a QuickCase™ providers' status and add internal notes for other users at your facility.

Communicating with **nH Intake** Providers

nH Discharge has a **Global Messaging Center** that allows you to quickly access Referral Status updates, Messages, and Internal Notes all in one spot.

-  User has a **number** of unread messages.  User has **no** unread messages.
-  Referral updates are available.

1. Click the **unread messages** icon within the provider line you would like to view within the **Global Messaging Center**.

2. Click the **messages** icon to view a list of messages, sorted in descending order from the oldest to the newest.

A messaging window displays a **nH Intake** provider's message transcript.

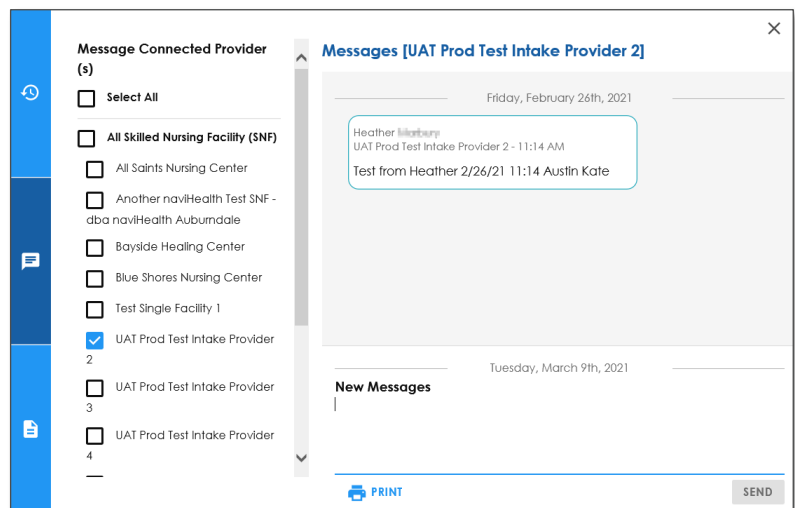
3. Select the provider(s) you wish to message from the checkboxes on the left.

You can also message across all levels of care.

4. Click above the blue line at the bottom to enter a response.

5. Click the **SEND** button.

6. Click the **PRINT** button to print the communication history.



Updating a Provider's Status

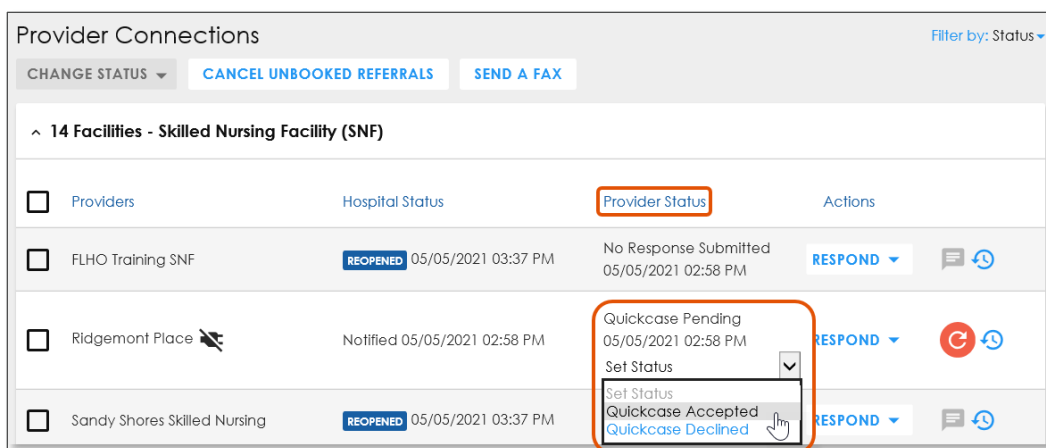
On the [CONNECT](#) screen, you can update each provider's status using the **RESPOND** field's drop-down menu options under the **Actions** column.

Book	Sends a message and confirms the booking.
Suspend	Places the discharge on hold .
Delay EDD	Indicates you expect to discharge the patient later than the EDD you previously gave the provider(s).
Cancel	Cancels the Booking request.
Re-open Referral	Re-opens a previously Cancelled or Suspended booking request.

1. View the **Provider Status** column to determine if the provider has accepted or declined your referral.
2. Accept or decline for a QuickCase™ provider by choosing an option from the **Set Status**' drop-down menu.

While you can update QuickCase™ providers' **Status** columns by selecting an option from the **RESPOND** field's drop-down menu, you must communicate that status change to them.

3. In the event a QuickCase™ provider does not respond via [QuickCase™](#), use the **Set Status** option to manually update their **Provider Status** column by selecting either **QuickCase Accepted** or **QuickCase Declined**.




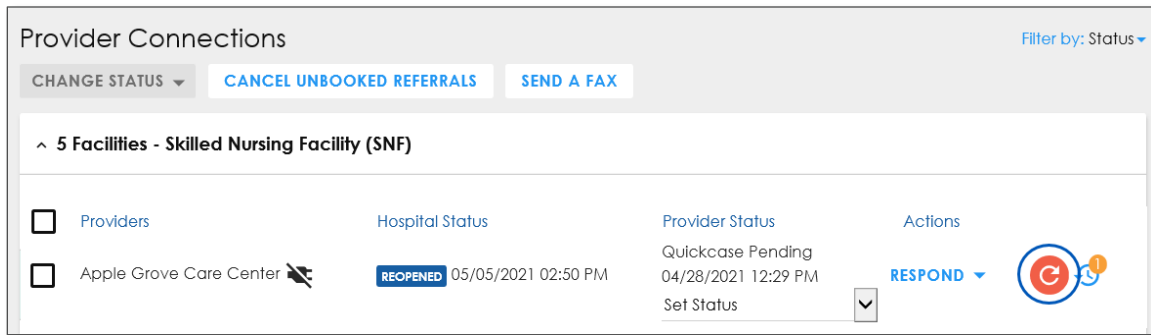
The screenshot shows a table titled "Provider Connections" with a "Filter by: Status" dropdown. Below the table are buttons for "CHANGE STATUS", "CANCEL UNBOOKED REFERRALS", and "SEND A FAX". The table has four columns: "Providers", "Hospital Status", "Provider Status", and "Actions".



Providers	Hospital Status	Provider Status	Actions
<input type="checkbox"/> FLHO Training SNF	REOPENED 05/05/2021 03:37 PM	No Response Submitted 05/05/2021 02:58 PM	RESPOND [message icon] [refresh icon]
<input type="checkbox"/> Ridgemont Place	Notified 05/05/2021 02:58 PM	Quickcase Pending 05/05/2021 02:58 PM	RESPOND [refresh icon]
<input type="checkbox"/> Sandy Shores Skilled Nursing	REOPENED 05/05/2021 03:37 PM	Set Status Quickcase Accepted Quickcase Declined	RESPOND [message icon] [refresh icon]

NOTE: A best practice is to ask for an email from the QuickCase™ provider so there is a paper trail of the acceptance or decline.

Resending a Referral to a QuickCase™ Provider

If a faxed referral to a QuickCase™ provider fails, click the **failed fax** visual indicator  to resend the referral. The QuickCase™ provider receives another one-page fax.

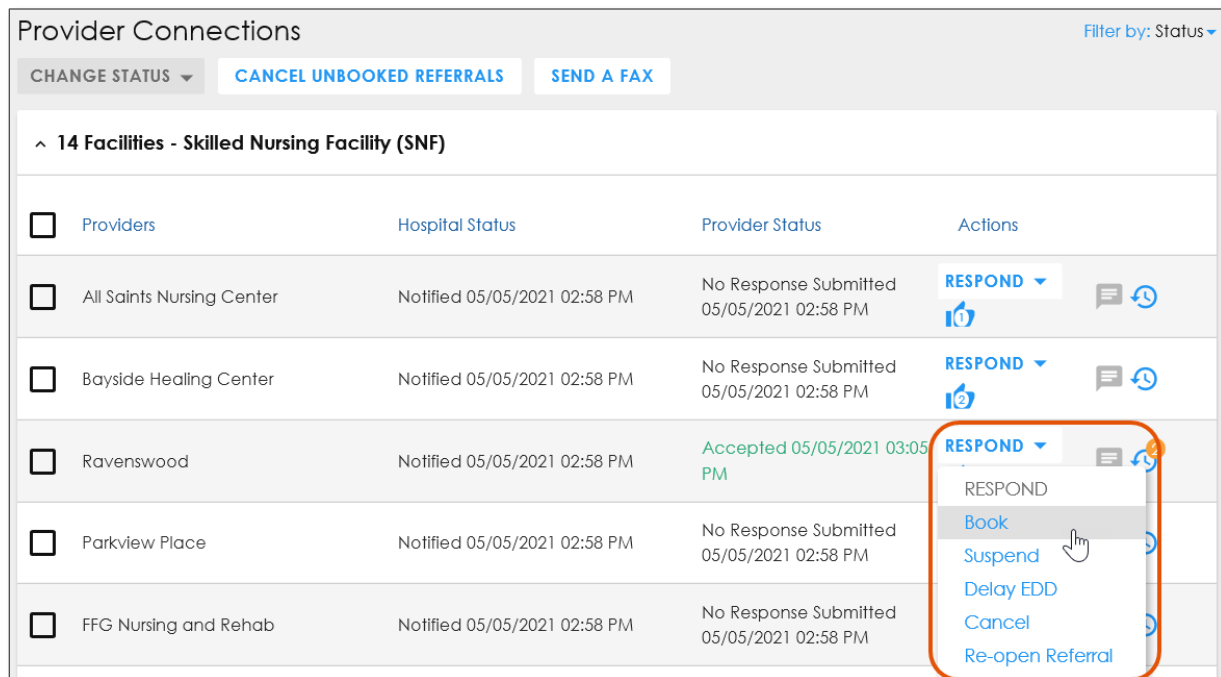







Providers	Hospital Status	Provider Status	Actions
<input type="checkbox"/> Apple Grove Care Center 	REOPENED 05/05/2021 02:50 PM	Quickcase Pending 04/28/2021 12:29 PM Set Status <input type="text"/>	RESPOND 

Booking Referrals

When one or more providers accepts a booking request, you can book a referral from the [CONNECT](#) screen. Unlike a booking request, booking is a commitment to the provider that they will receive the patient for Post-Acute Care.

To book the referral with a provider, use the **RESPOND** drop-down menu to the right of the provider's name and select the **Book** option. This "closes the loop" on the referral.



Providers	Hospital Status	Provider Status	Actions
<input type="checkbox"/> All Saints Nursing Center	Notified 05/05/2021 02:58 PM	No Response Submitted 05/05/2021 02:58 PM	RESPOND 
<input type="checkbox"/> Bayside Healing Center	Notified 05/05/2021 02:58 PM	No Response Submitted 05/05/2021 02:58 PM	RESPOND 
<input type="checkbox"/> Ravenswood	Notified 05/05/2021 02:58 PM	Accepted 05/05/2021 03:05 PM	RESPOND 
<input type="checkbox"/> Parkview Place	Notified 05/05/2021 02:58 PM	No Response Submitted 05/05/2021 02:58 PM	RESPOND 
<input type="checkbox"/> FFG Nursing and Rehab	Notified 05/05/2021 02:58 PM	No Response Submitted 05/05/2021 02:58 PM	RESPOND 

BOOKED Once a provider has been booked, the green **BOOKED** indicator displays within the **Hospital Status** column to the right of the provider's name.

Providers	Hospital Status	Provider Status	Actions
All Saints Nursing Center	BOOKED 02/11/2020 12:33 PM	Accepted 02/11/2020 12:33 PM	RESPOND [dropdown]
Apple Grove Care Center	CANCELLED 02/11/2020 12:33 PM	Quickcase Pending 02/11/2020 12:33 PM Set Status [dropdown]	RESPOND [dropdown]

The Referral Packet's **side bar** turns from blue to **green**, indicating there is at least one booked provider for that Referral Packet . Additionally, the provider row is highlighted in green, as displayed above.

NOTE: This makes it easier for you to identify booked facilities and to draw your attention to the booked provider on the screen.

Other **RESPOND** drop-down options are available, including **Cancel**, which disables the provider's ability to view the patient's PHI.

Updating Bookings/Cancelling Referrals

Complete the following steps to cancel a booked provider, reopen a cancelled referral, and book the reopened referral.

CANCELLING A BOOKED REFERRAL

On the **CONNECT** screen, within the **Actions** column, select the **Cancel** option from the **RESPOND** field's drop-down menu.

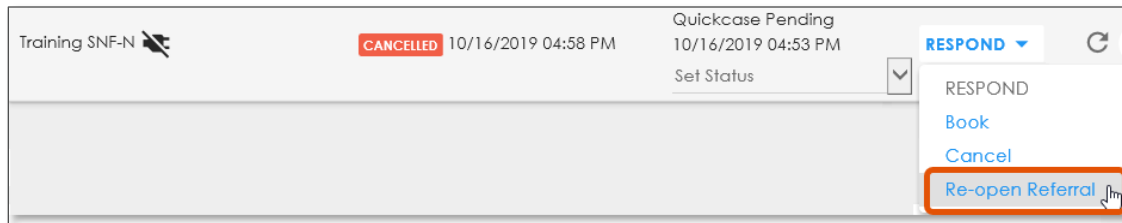
Providers	Hospital Status	Provider Status	Actions
Training SNF-E	BOOKED 10/16/2019 04:58 PM	No Response Submitted 10/16/2019 04:53 PM	RESPOND [dropdown]
Training SNF-N	CANCELLED 10/16/2019 04:58 PM	Quickcase Pending 10/16/2019 04:53 PM Set Status [dropdown]	<ul style="list-style-type: none"> RESPOND Book Suspend Delay EDD Cancel [highlighted] Re-open Referral

The previously booked provider now displays a red **CANCELLED** indicator.

Training SNF-E	CANCELLED 10/16/2019 05:10 PM
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REOPENING A CANCELLED REFERRAL

On the [CONNECT](#) screen, within the **Actions** column, select the **Cancel** option from the **RESPOND** field's drop-down menu.



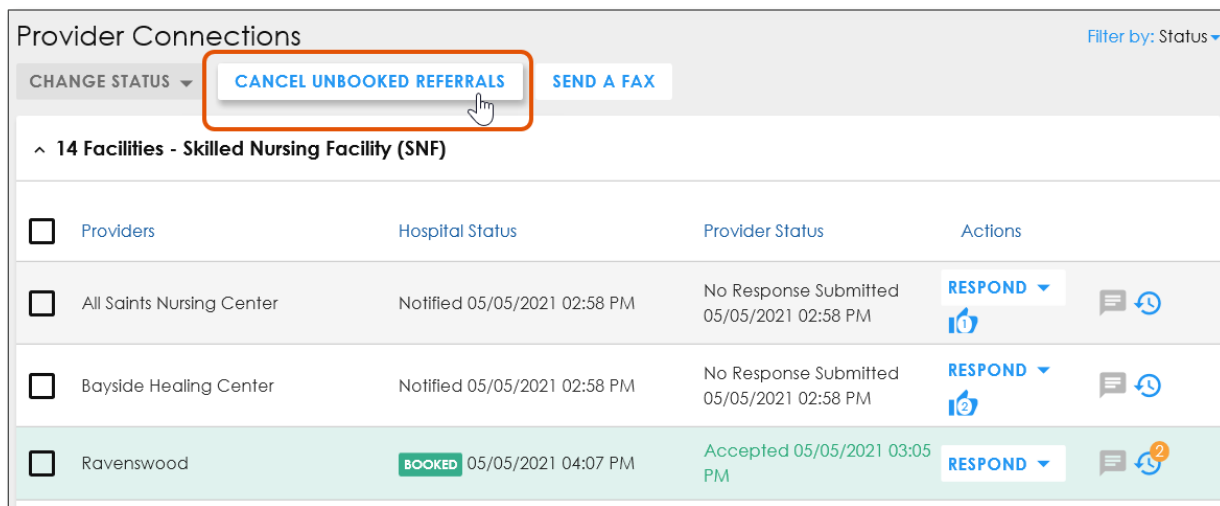
The previously cancelled provider now displays a blue **REOPENED** indicator.



CANCEL ALL UNBOOKED REFERRALS

When you book with a facility, it is important to cancel any unbooked referrals, by clicking the **CANCEL UNBOOKED REFERRALS** button.

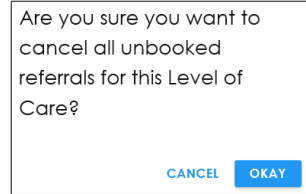
- It lets the unbooked providers know that when the patient discharges from your Acute facility, the provider will not receive the patient.
- It turns off the provider's ability to see the patient's PHI.
- It is good for reporting purposes.



A confirmation dialog box displays, asking if you are sure you want to cancel all unbooked referrals.

Click the blue **OKAY** button.

All unbooked referrals are now cancelled.



Provider Connections Filter by: Status ▾

CHANGE STATUS ▾ CANCEL UNBOOKED REFERRALS SEND A FAX

^ 14 Facilities - Skilled Nursing Facility (SNF)

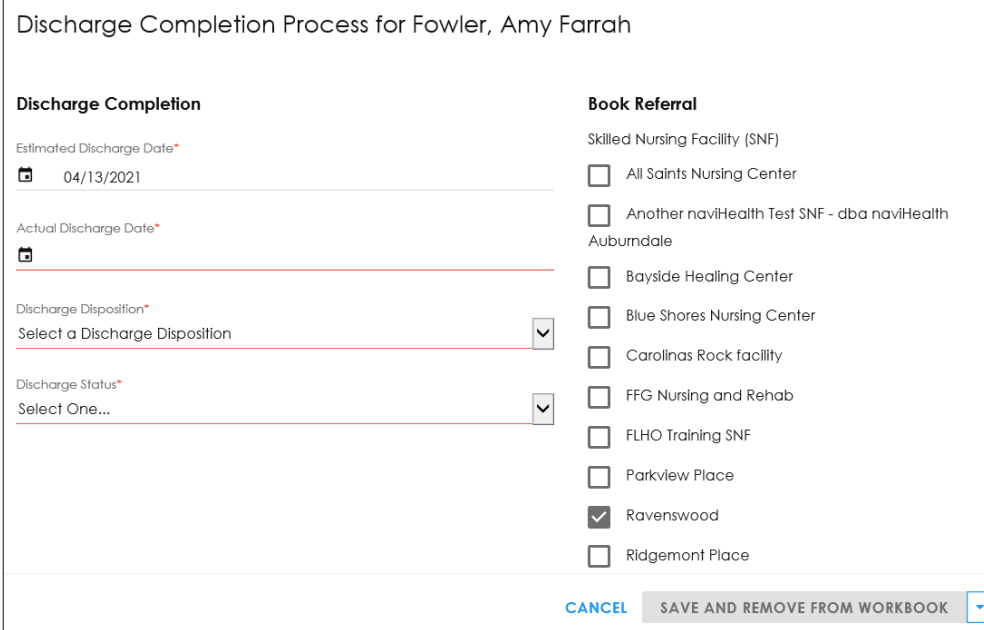
<input type="checkbox"/> Providers	Hospital Status	Provider Status	Actions
<input type="checkbox"/> Ravenswood	BOOKED 05/05/2021 04:07 PM	Accepted 05/05/2021 03:05 PM	RESPOND ▾
<input type="checkbox"/> Ridgemont Place	CANCELLED 05/05/2021 04:15 PM	Quickcase Pending 05/05/2021 02:58 PM Set Status ▾	RESPOND ▾
<input type="checkbox"/> Sandy Shores Skilled Nursing	CANCELLED 05/05/2021 04:15 PM	No Response Submitted 05/05/2021 02:58 PM	RESPOND ▾
<input type="checkbox"/> Shoreview Nursing & Rehab	CANCELLED 05/05/2021 04:15 PM	Quickcase Pending 05/05/2021 03:37 PM Set Status ▾	RESPOND ▾

DISCHARGE Screen: Discharging a Patient

The goal of the **Discharge Completion** phase is to enter final details and close out the patient's record after the patient has been discharged from the hospital.

1. Click the **DISCHARGE** tab.

The **Discharge Completion Process for [patient name]** window displays.



Discharge Completion Process for Fowler, Amy Farrah

Discharge Completion

Estimated Discharge Date*
📅 04/13/2021

Actual Discharge Date*
📅

Discharge Disposition*
Select a Discharge Disposition

Discharge Status*
Select One...

Book Referral

Skilled Nursing Facility (SNF)

All Saints Nursing Center

Another naviHealth Test SNF - dba naviHealth Auburndale

Bayside Healing Center

Blue Shores Nursing Center

Carolinas Rock facility

FFG Nursing and Rehab

FLHO Training SNF

Parkview Place

Ravenswood

Ridgemont Place

CANCEL SAVE AND REMOVE FROM WORKBOOK

2. Complete any required fields (marked with a red asterisk *****) in the **Discharge Completion** column.
3. Verify the **Estimated Discharge Date** is correct.
4. If the **Estimated Discharge Date** and the **Actual Discharge Date** differ, then a **Delay Reason** must be selected from the drop-down menu.

For example, if the date difference is due to a change in the patient's condition, select that option.

If there was no delay, then you have the ability to update the **Estimated Discharge Date** on this screen.

5. Select the **Actual Discharge Date** for the patient.

NOTE: In some cases, the **Actual Discharge Date** pre-populates from the hospital's EMR software and cannot be changed here.

- Choose the appropriate **Discharge Status** (two-digit CMS code) code from the drop-down menu.

NOTE: Because this status impacts naviHealth reports for your facility, select the status carefully.

Discharge Completion Process for Fowler, Amy Farrah

<p>Discharge Completion</p> <p>Estimated Discharge Date*</p> <p><input type="text" value="05/03/2021"/></p> <hr/> <p>Actual Discharge Date*</p> <p><input type="text" value="05/05/2021"/></p> <hr/> <p>Delay Reason</p> <p>Change in Condition <input type="button" value="v"/></p> <hr/> <p>Discharge Disposition*</p> <p>SNF <input type="button" value="v"/></p> <hr/> <p>Discharge Status*</p> <p>3: SNF with Medicare <input type="button" value="v"/></p>	<p>Book Referral</p> <p>Skilled Nursing Facility (SNF)</p> <p><input type="checkbox"/> All Saints Nursing Center</p> <p><input type="checkbox"/> Another naviHealth Test SNF - dba naviHealth</p> <p><input checked="" type="checkbox"/> Ravenswood</p> <p><input type="checkbox"/> Ridgemont Place</p> <p><input type="checkbox"/> Sandy Shores Skilled Nursing</p> <p><input type="checkbox"/> Shoreview Nursing & Rehab</p> <p><input type="checkbox"/> Test Huntersville Oaks SNF</p> <p><input type="checkbox"/> Test Stanly Manor</p> <p><input type="checkbox"/> Cancel all other referrals</p> <p><input type="checkbox"/> No Services</p>
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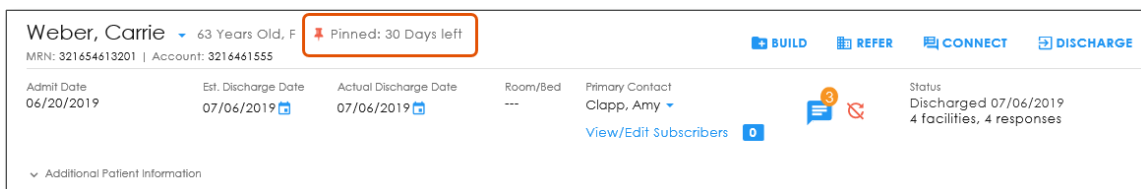
At the time of completing the discharge, you can cancel all unbooked referrals at once by selecting the checkbox to the left of **Cancel all other referrals**.

- To save your changes, choose one of the options from the drop-down menu in the bottom-right corner.
 - Save and Remove from Workbook:** Saves your changes and removes the patient from your Workbook.
 - Save and Pin to Workbook:** Saves your changes and leaves the patient on your Workbook for a total of 30 days.


Pin the Patient Record

You have the option to pin a patient record to your Workbook. Pinned patient records remain on the Workbooks of the [Primary Contact](#) and all [Subscribers](#) for **30 days after** the Discharge Date.

1. If you selected **Save and Pin to Workbook** option, then you can monitor the amount of time the patient remains on your Workbook before being **automatically removed** by viewing the **countdown message** to the right of the patient's name on the Patient Tile.



NOTE: This allows for easy clean-up of any last-minute items that may have been missed prior to discharge.

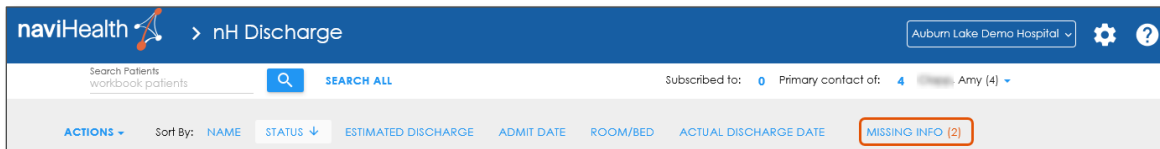
2.  To **remove** the pinned patient from your Workbook **prior** to the end of the 30-day period, then click the **red pushpin** icon.
The **Unpin Patient** dialog box displays.
3. Click the **OKAY** button to **remove** the patient from your [Workbook](#).

NOTE: Unpinning a patient from your [Workbook](#) also removes the patient from any colleagues' Workbooks who are either the [Primary Contact](#) of the case, or who have chosen to be a [Subscriber](#).

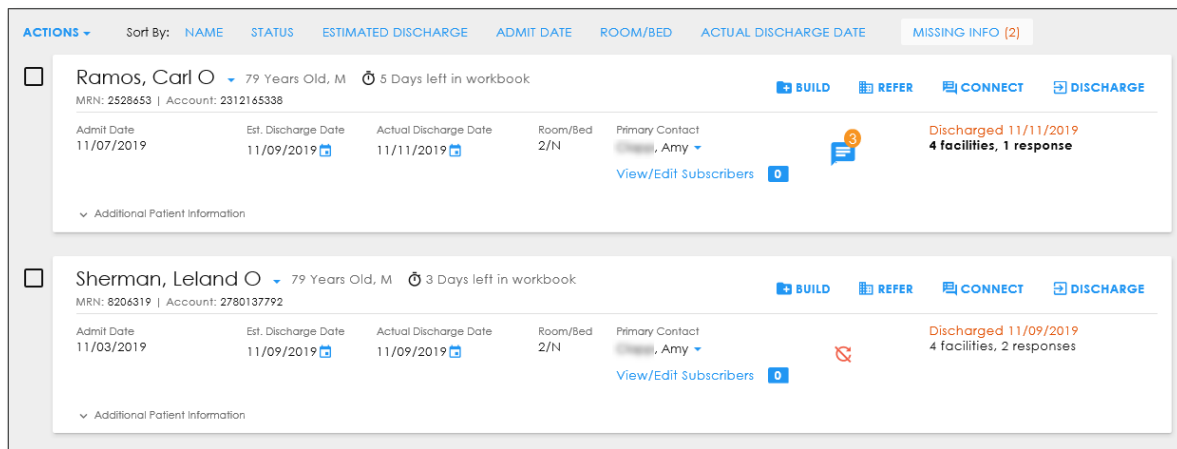
- To avoid this scenario, you may want to remove yourself from the case by changing the Primary Contact to another colleague or removing yourself as a Subscriber.
- This leaves the pinned patient on your colleagues' Workbooks.

Missing Info Tab

The **MISSING INFO** tab on the [Workbook](#) displays a count of all discharged patients whose records are **missing necessary information**.



Clicking this tab displays a list of those patients with missing information as denoted by the **orange text** within the right side of the patient card.



If you update an **Actual Discharge Date** for a patient who was discharged in the past and is missing information, the **MISSING INFO** tab automatically updates after modifying the information (i.e., Actual Discharge Date) from the Workbook.

Viewing the Patient's Case History

The **Case History** is a list of actions taken by **nH Discharge** users to the patient case, such as moving a patient to the Workbook and assigning or sharing forms or documents to providers.

NOTE: If a case is shared, actions taken by all users display.

1. Click the blue **down arrow** icon to the right of the patient's name.
2. Select the **Case History** option from the drop-down menu that displays.

The **Case History for [patient name]** window displays

Case History for Hamilton, Joann G

⊕ EXPAND ALL ⊖ COLLAPSE ALL

Activity	Date ↑	User
▼ Document attached to Skilled Nursing Facility (SNF) packet	04/08/2021 09:17 AM	Clapp, Amy
▼ Document attached to Skilled Nursing Facility (SNF) packet	04/08/2021 09:17 AM	Clapp, Amy
▼ Form attached to Skilled Nursing Facility (SNF) packet	04/08/2021 09:17 AM	Clapp, Amy
▼ Form attached to Skilled Nursing Facility (SNF) packet	04/08/2021 09:17 AM	Clapp, Amy
▼ Form attached to Skilled Nursing Facility (SNF) packet	04/08/2021 09:17 AM	Clapp, Amy
▼ Form attached to Skilled Nursing Facility (SNF) packet	04/08/2021 09:17 AM	Clapp, Amy
▼ Document Creation via Form Snapshot	04/08/2021 09:17 AM	Clapp, Amy
▼ Document Creation via Form Snapshot	04/08/2021 09:17 AM	Clapp, Amy
▼ Document Creation via Form Snapshot	04/08/2021 09:17 AM	Clapp, Amy
▼ Document Creation via Form Snapshot	04/08/2021 09:17 AM	Clapp, Amy
▼ Provider search performed with matching criteria	04/08/2021 09:19 AM	Clapp, Amy
... Provider search performed with matching criteria	04/08/2021 09:20 AM	Clapp, Amy

CLOSE

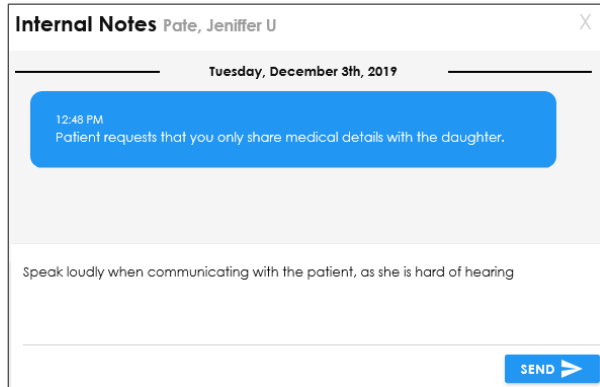
- Click the **Expand** icon within the **Activity** column and to the left of an individual activity to view additional information for a specific activity.

Possible Activities

Activity	Description
Provider search performed with matching criteria	Displays the following selections, all of which can be used for the provider search: Service, Level of Care, and ZIP Code
Message sent to [Provider]	Displays the message and message recipient(s).
Form attached to [LOC] Packet	Displays the name of the form attached and a link to view the document.

- Click the blue **Collapse** icon to return to the default view.
- Alternatively, you may click the **Expand All** or **Collapse All** buttons in the top-right corner of the **Case History** window.

Internal Notes



The **Internal Notes** feature allows you to leave notes for yourself or other team members in the hospital who may work on a particular patient case.

Internal Notes are **internal** to your hospital and can be used by any **nH Discharge** user with access to the case; these notes cannot be seen by providers or patients.

However, these notes are **discoverable**,

so keep it professional.

1. Click the **INTERNAL NOTES** button within the patient header on the [BUILD](#), [REFER](#) or [CONNECT](#) screens or in the [Global Messaging Center](#).

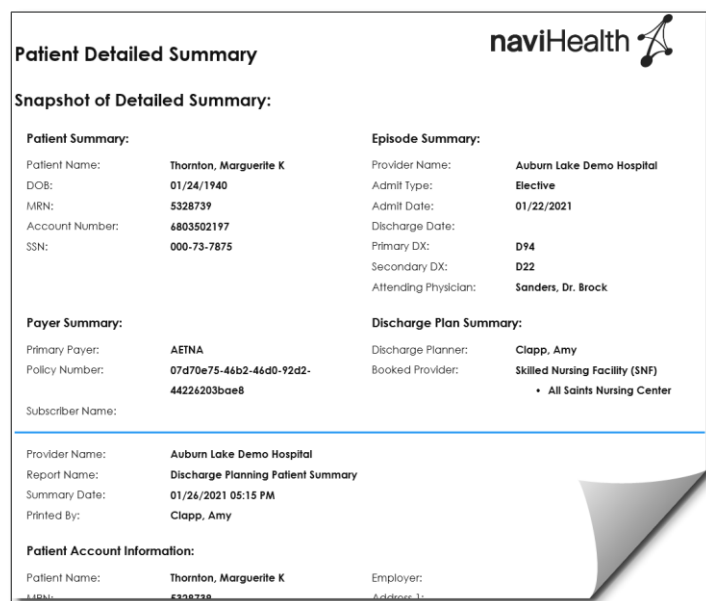
The **Internal Notes [Patient Name]** window displays.


2. Enter your note into the text box and click the **SEND** button.

The most recent note sent by you is highlighted blue.

Patient Summary

Click the blue down arrow icon to the right of the patient's name and select the **Patient Summary** option from the drop-down menu that displays.



Patient Detailed Summary		naviHealth 	
Snapshot of Detailed Summary:			
Patient Summary:		Episode Summary:	
Patient Name:	Thornton, Marguerite K	Provider Name:	Auburn Lake Demo Hospital
DOB:	01/24/1940	Admit Type:	Elective
MRN:	5328739	Admit Date:	01/22/2021
Account Number:	6803502197	Discharge Date:	
SSN:	000-73-7875	Primary DX:	D94
		Secondary DX:	D22
		Attending Physician:	Sanders, Dr. Brock
Payer Summary:		Discharge Plan Summary:	
Primary Payer:	AETNA	Discharge Planner:	Clapp, Amy
Policy Number:	07a70e75-46b2-46d0-92d2-44226203bae8	Booked Provider:	Skilled Nursing Facility (SNF) • All Saints Nursing Center
Subscriber Name:			
<hr/>			
Provider Name:	Auburn Lake Demo Hospital		
Report Name:	Discharge Planning Patient Summary		
Summary Date:	01/26/2021 05:15 PM		
Printed By:	Clapp, Amy		
<hr/>			
Patient Account Information:			
Patient Name:	Thornton, Marguerite K	Employer:	
MRN:	5328739	Address 1:	

Modifying Account Settings

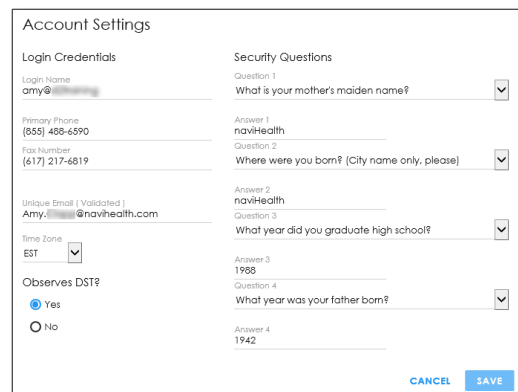
Clicking the **COG** icon in the top-right corner of the blue navigation bar allows you to perform any of the following tasks.

Admin

Only users who have **Administrative** permissions have this option. If you are an Admin at your facility, refer to the **nH Discharge Administrator Guide**.

Account Settings

Select this option to set or update your personal account settings. If your **Login Credentials** are missing information or are not correct, then enter or update, as necessary. Select the questions and provide responses to each **Security Question**.



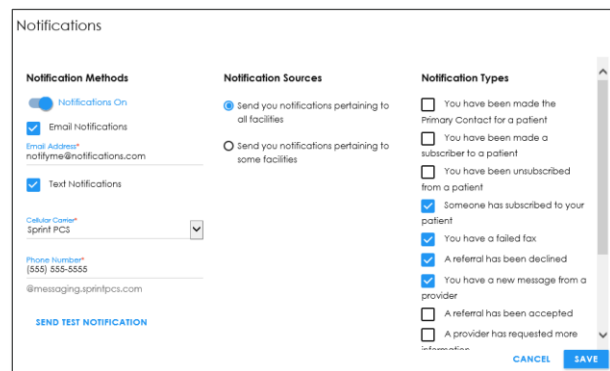
NOTE: All fields with a red asterisk (*) are required in order to click the **SAVE** button.

Notification Settings

Select the methods, sources, and types of notifications you would like to receive.

NOTIFICATION METHODS

1. Turn on notifications by clicking the toggle next to **Notifications Off**.
2. Choose to receive notifications via a facility approved e-mail, text, or both, and enter information into the required fields with the red asterisks (*).



NOTE: Enter a facility-approved email address and a facility-approved cell phone for texts.

3. Click **SEND TEST NOTIFICATION** to receive a confirmation e-mail or text.

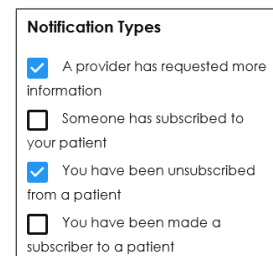
NOTIFICATION SOURCES

By default, the first radio button is selected to receive notifications from all sources to all hospitals you manage.

1. Select the second radio button to receive notifications pertaining to certain facilities.
2. Begin entering the name(s) of these facilities and select them to add.

NOTIFICATION TYPES

1. Select the checkbox to the left of specific notification types you would like to receive.
You may change them at any time.
2. Click the **SAVE** button to save your changes and exit.

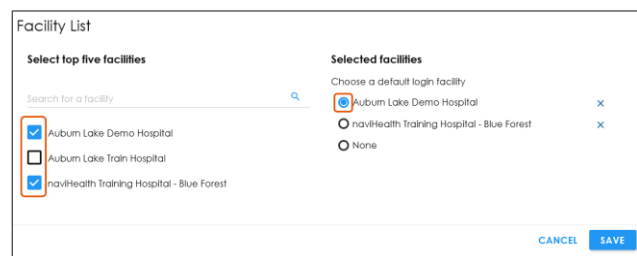


Notification Types

- A provider has requested more information
- Someone has subscribed to your patient
- You have been unsubscribed from a patient
- You have been made a subscriber to a patient

Facility Settings

1. Select this option to select the facility(ies) where you work (if part of a health system).
2. Designate which facility you want to display by default upon login.
3. Click the **SAVE** button when finished.



Facility List

Select top five facilities

Search for a facility

- Auburn Lake Demo Hospital
- Auburn Lake Train Hospital
- naviHealth Training Hospital - Blue Forest

Selected facilities

Choose a default login facility

- Auburn Lake Demo Hospital
- naviHealth Training Hospital - Blue Forest
- None

CANCEL SAVE

To remove favorite facilities, select the **None** radio button within the **Selected facilities** list.

Address Book

Only users who have **Administrative** permissions have this option. If you are an Admin at your facility, refer to the [nH Discharge Administrator Guide](#).

Document Manager

Refer to the [Document Manager](#) section within this document.

Change Password

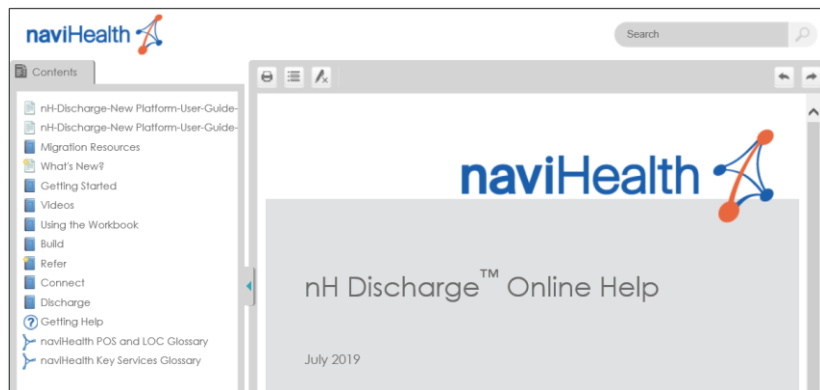
Select this option as necessary to change your login password.

Log Out

Select this option to log out of **nH Discharge**.

Online Help

If you need **help** using the **nH Discharge** application, then click the **question mark** icon on any screen. The **nH Discharge Online Help** screen displays.



NOTE: naviHealth's help is **context sensitive**.

Technical Support

1. Click the **COG** icon.
2. Select the **Contact Customer Support** option to create a support ticket.

This sends an email to support@navihealth.com.

Customer Support ✕

Completing this form will send a ticket to our support team.

Email address:
Amy. [redacted]@navihealth.com

Phone number:
(855) 488-6590

Details

The Customer Support team is available by phone from 8 a.m. until 7 p.m. (EST).

You may also call customer support at
(855) 488-6590.

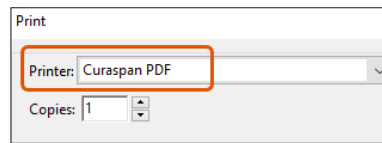
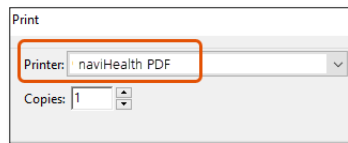
Appendices

Your facility **may not have all these features** loaded into your **nH Discharge** application.

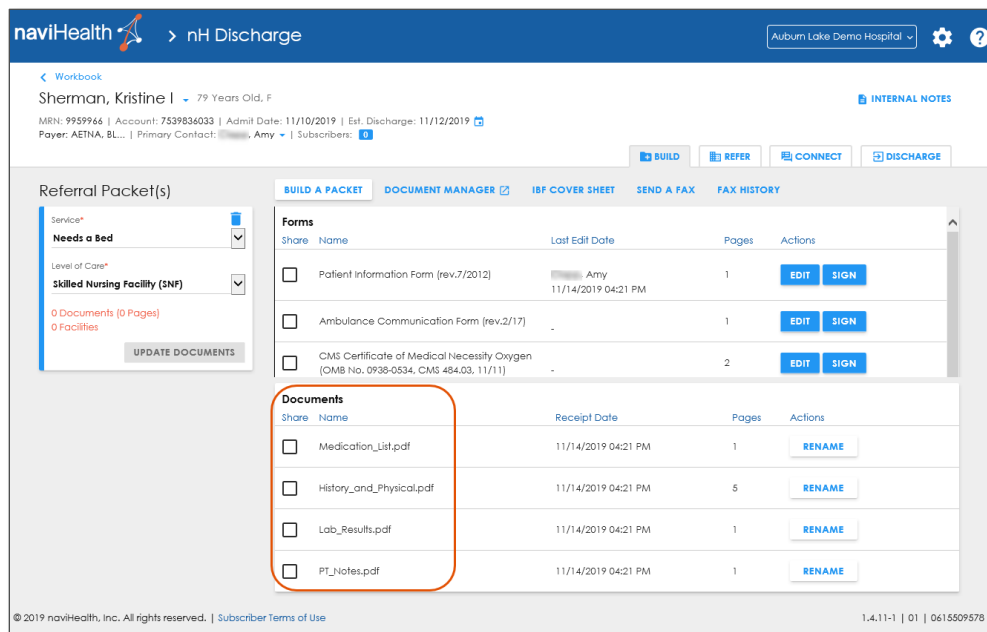
Appendix B: Virtual Printer – LPR

LPR printing is a way to move any **digital** file, including those in the HIS, into the application. LPR printing tricks the computer being used into thinking that the application is a printer. Anything can be printed using the LPR virtual printer; however, instead of printing on paper, the document displays inside the **nH Discharge** application.

1. Locate the document in the HIS.
2. Click the **Print** button as you would to print the document on paper. A **Print** dialog box displays with a drop-down list of available printers.
3. Select the **naviHealth PDF** or **Curaspan PDF** printer option.



4. Click the **Print** button. The document now displays within the **Documents** section on the **BUILD** screen.



The screenshot shows the nH Discharge application interface for patient Sherman, Kristine I. The 'BUILD' tab is active, and the 'Documents' section is highlighted with an orange box. The 'Documents' table lists the following files:

Share	Name	Receipt Date	Pages	Actions
<input type="checkbox"/>	Medication_List.pdf	11/14/2019 04:21 PM	1	RENAME
<input type="checkbox"/>	History_and_Physical.pdf	11/14/2019 04:21 PM	5	RENAME
<input type="checkbox"/>	Lab_Results.pdf	11/14/2019 04:21 PM	1	RENAME
<input type="checkbox"/>	PT_Notes.pdf	11/14/2019 04:21 PM	1	RENAME

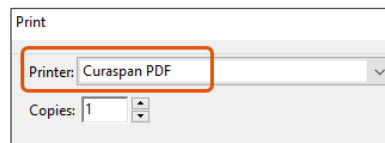
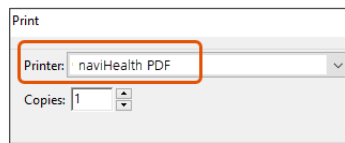
Appendix B: Virtual Printer – PrinterQ v4

PrinterQ is a way to move any digital file (e.g., patient information within the EMR) to the **nH Discharge** application. **PrinterQ** tricks the computer into thinking there is a printer called naviHealth PDF. Anything can be printed using this printer; however, instead of printing out on paper, it simply displays within the application.

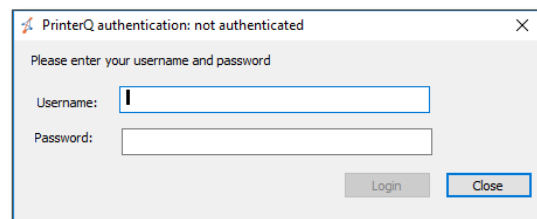
NOTE: SSO users signing into PrinterQ for the first time must set up a profile prior to signing into PrinterQ.

Once your profile is established, you do not have to log into PrinterQ again unless you do not use it for more than seven days.

1. Locate the electronic document.
2. Click the **Print** button as you would to print the document on paper.
A **Print** dialog box displays with a drop-down list of available printers.
3. Select the **naviHealth PDF** or **Curaspan PDF** printer option.

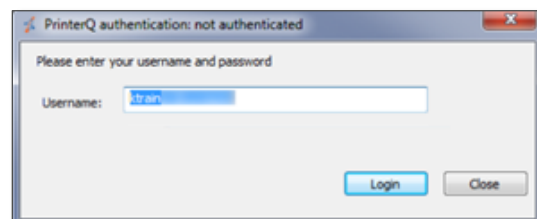


4. Click the **Print** button.
The **PrinterQ** server login window displays for direct login users.
5. Enter the same username and password used to log into the application.
6. For the **shared-key version**, enter the username (username@clientdomain).



This usually does **not** include **.com** or **.net**, etc. The second pop-up box to the right displays when establishing the **shared key** version.

If the user does not know his or her username, then check with your local hospital resource for **nH Discharge**.

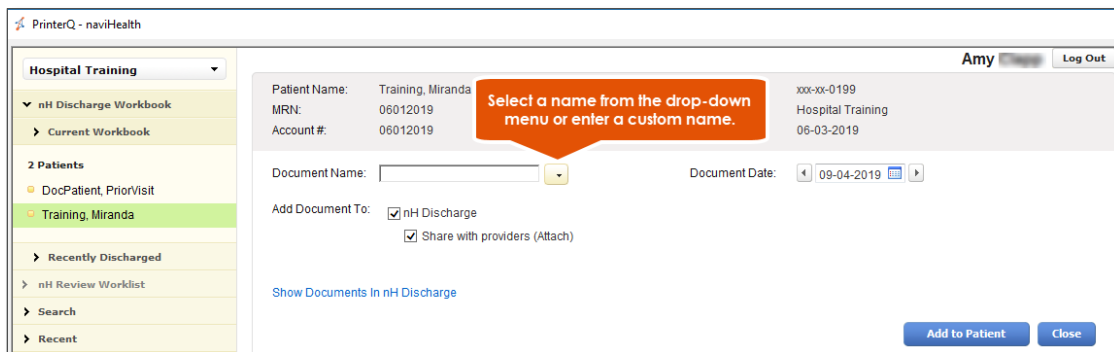


7. Click the **Login** button.

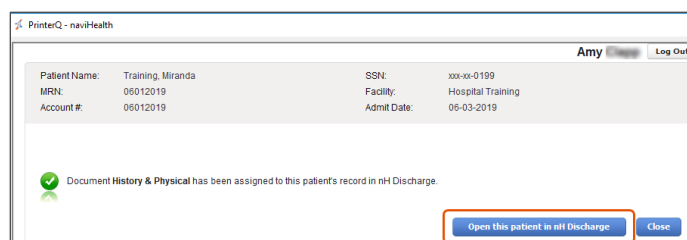
The **PrinterQ – naviHealth** window displays two windows.



8. Select the patient record within the **Current Workbook** option.
9. If the patient is not listed under the **Current Workbook** section, then use the **Search** option to find the patient record for attaching the document by entering the patient's name. **PrinterQ** returns suggestions as you type.
10. Select the patient from the list. The patient's details display within the top section of the **Add to Patient** window.



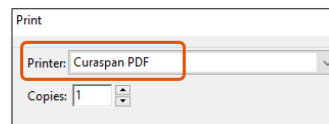
11. Click the **Add to Patient** button. The **Open this patient in nH Discharge** button displays, which launches **nH Discharge** when clicked.



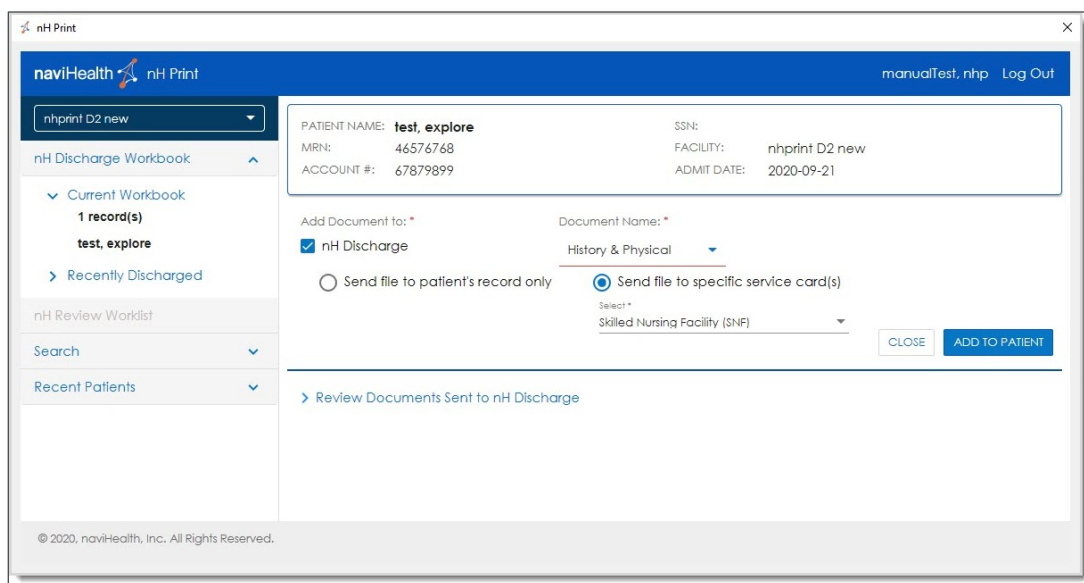
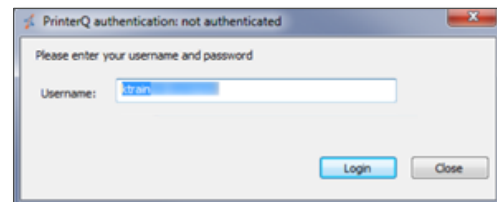
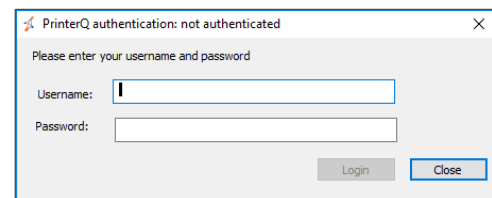
12. **nH Discharge** opens at the **BUILD** screen with the document displaying within the **Documents** section at the bottom.

Appendix B: Virtual Printer – nH Print


1. Locate the electronic document.
2. Click the **Print** button as you would to print the document on paper.
A **Print** dialog box displays with a drop-down list of available printers.
3. Select the **naviHealth PDF** or **Curaspan PDF** printer option.



4. Click the **Print** button. The **nH Print** server login window displays for direct login users.
5. Enter the same username and password used to log into the application.
6. For the **shared-key version**, enter the username (username@clientdomain). This usually does **not** include **.com** or **.net**, etc.
The pop-up box to the right displays when establishing the **shared key** version.
7. If the user does not know his or her username, then check with your local hospital resource for **nH Discharge**.
8. Click the **Login** button. The **nH Print** window displays.



9. Select the patient record within the **Current Workbook** option.
10. If the patient is not listed under the **Current Workbook** section, then use the **Search** option to find the patient record for attaching the document by entering the patient's name.
nH Print returns suggestions as you type.
11. Select the patient from the list.
The patient's details display within the top section of the **Add to Patient** window.
12. Click the **Add to Patient** button.
The **Open this patient in nH Discharge** button displays, which launches **nH Discharge** when clicked.
13. **nH Discharge** opens at the **BUILD** screen with the document displaying within the **Documents** section at the bottom.

Documents				
Share	Action	Document Name	Number of Pages	Receipt Date
<input checked="" type="checkbox"/>	Rename	 History & Physical - 09/04/2019	1	09-04-19 02:51 PM

Appendix C: QuickCase™

Use **nH Discharge** to send referrals to QuickCase™ providers.

NOTE: The QuickCase™ provider completes the following steps to access, review, and respond to your referral.

These providers receive referrals through a one-page fax called a **QuickCase™**. It contains information to retrieve the referral electronically through naviHealth's QuickCase™ platform.


These providers receive referrals through a one-page fax called a QuickCase™.

It contains information to retrieve the referral electronically through naviHealth's QuickCase™ platform.

The provider accesses the URL and enters the **Referral Code** and **PIN** where indicated and selects the checkbox to indicate they agree to the **Terms and Conditions**.

A screen displays requesting verification from the provider.

New Patient Referral From:
Auburn Lake Demo Hospital



To see this referral and respond:

- Go to www.navihealth.com/quickcase
- Enter:

Referral Code: **101673240237**

PIN: **79094**

This naviHealth QuickCase referral is a free service provided by naviHealth.

Patient Summary:

Name: **Gag, D**

Gender: **Unknown**

Age: **81**

Room: **2**

Payer: **AETNA**


Services:

Level of Care: **Skilled Nursing Facility (SNF)**

For security purposes, this referral will expire on 01/27/2021.

Want to ditch the Fax? Upgrade to nH Intake today to improve efficiency and measure performance.

Support or Sales questions?
navihealth.com/contact/navihealth.com/upgradetoday/


Quickcase

Pick up your new patient referral

Enter the following information from the fax you received:

Referral Code:

PIN Code:

I have agreed to the [Terms & Conditions](#).

[Get Referral](#)

COVID-19 Response

In order to better serve our community, we are asking all of our Quickcase users to mark if they are a facility accepting COVID-19 patients. This will better direct our users to quickly providing the proper care their patients need. Thank you for your assistance.

Please include your COVID-19 response

Learn More about naviHealth

Get Connected © Receive multiple referral requests electronically, communicate instantly with the discharge staff, and access reporting tools.

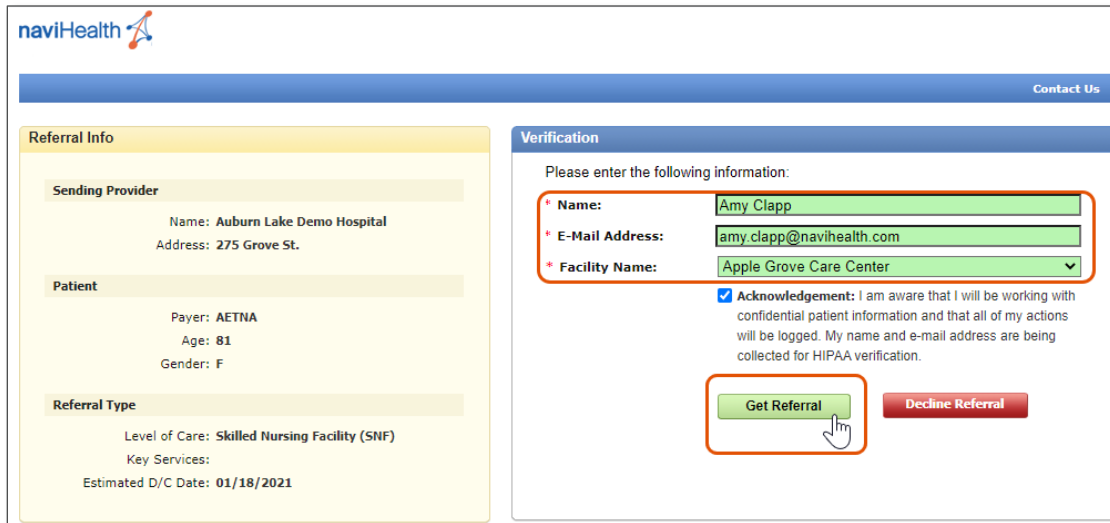
Sales: Connect@navihealth.us

Support: Support@navihealth.com

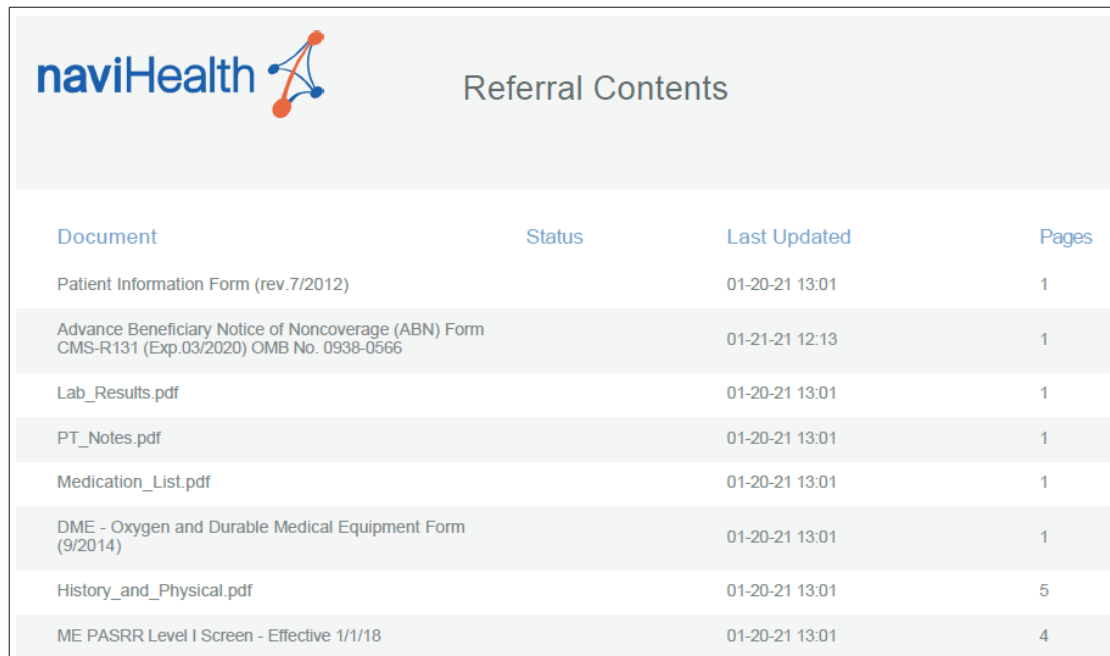
Please note: There is no charge for this information. You will not be asked for any billing information. We will, however, ask that you provide your name and e-mail address so the referring facility can log this transaction as per HIPAA regulations.

Browser Compatibility Check | © 2000-2021 Curaspan Health Group, Inc. All rights reserved.
3|prd

Once the **Verification** section is complete, the provider clicks the **Get Referral** button. A screen displays, where the provider can click the **View This Referral** button.



The **Referral Contents** PDF opens and displays the referral documents.



Document	Status	Last Updated	Pages
Patient Information Form (rev.7/2012)		01-20-21 13:01	1
Advance Beneficiary Notice of Noncoverage (ABN) Form CMS-R131 (Exp.03/2020) OMB No. 0938-0566		01-21-21 12:13	1
Lab_Results.pdf		01-20-21 13:01	1
PT_Notes.pdf		01-20-21 13:01	1
Medication_List.pdf		01-20-21 13:01	1
DME - Oxygen and Durable Medical Equipment Form (9/2014)		01-20-21 13:01	1
History_and_Physical.pdf		01-20-21 13:01	5
ME PASRR Level I Screen - Effective 1/1/18		01-20-21 13:01	4

The following table contains definitions of each QuickCase™ status you may find in **nH Discharge**.

QuickCase™ Statuses

Status	Description
Notified by QuickCase™	A referral has been sent to a QuickCase™ provider.
QuickCase™ Pending	The fax has been sent and you are waiting for the provider to act on the referral.
QuickCase™ Delivered	The provider successfully accessed and entered the Referral Code and PIN to access the referral via QuickCase™.
QuickCase™ Viewed	The provider has successfully downloaded the Referral Packet via QuickCase™.
QuickCase™ Accepted	<ul style="list-style-type: none"> • The, if the provider communicates this acceptance to you via phone or email, you should manually update the status on the CONNECT screen.
QuickCase™ Declined	<ul style="list-style-type: none"> • The provider has declined the referral via QuickCase™. • Alternatively, if the provider communicates this declination to you via phone or email, you should manually update the status on the CONNECT screen.

NOTE: **Referral History** alerts you as to you whether the fax was successfully sent.

If a fax fails to send, then **nH Discharge** tries an additional three times to re-send it, after which the **Failed Fax** icon displays.

- The status does not change.
- Click the resend **icon** to re-send the fax.

STATUSES BY SCREEN

The following table provides a breakdown of QuickCase™ statuses by screen in **nH Discharge**.

REFER Screen Status	CONNECT Screen: Hospital Status	CONNECT Screen: Provider Status	Triggered by nH Discharge Action	Triggered by QuickCase™ Action
QuickCase™ Pending *	Notified ** [Date Time]	QuickCase™ Pending [Date Time]	QuickCase™ Referral Sent From nH Discharge	n/a
QuickCase™ Delivered	Notified [Date Time]	QuickCase™ Delivered [Date Time]	n/a	Log in to QuickCase™
QuickCase™ Viewed	Notified [Date Time]	QuickCase™ Viewed [Date Time]	n/a	Download Referral Packet
QuickCase™ Accepted	Notified [Date Time]	QuickCase™ Accepted [Date Time]	n/a	Accept Referral
QuickCase™ Declined	Notified [Date Time]	QuickCase™ Declined [Date Time]	n/a	Decline Referral

NOTE: Immediately after sending a referral, this briefly reads as **Notified by QuickCase** before changing to QuickCase™ Pending.

The **Hospital Status** on the [CONNECT](#) screen changes to reflect any further action you take on the referral from **Notified** to:

- Booked
- Cancelled
- Re-opened

Appendix F: eSignature

There are several forms managed within **nH Discharge** that require a signature by a case manager.

The **eSignature** feature allows case managers to electronically sign forms on the **BUILD** screen in **nH Discharge**. The feature is compliant with most relevant state and all federal eSignature regulations.

1. From the **BUILD** screen, open a form by clicking the form name.

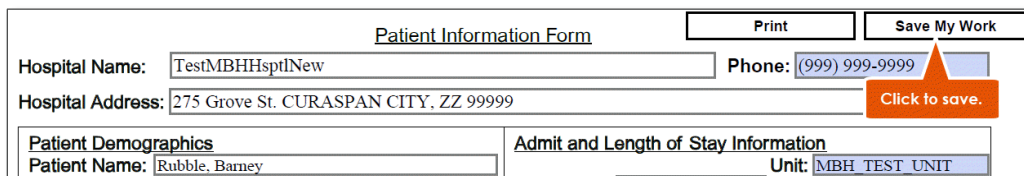


Share	Name	Last Edit Date	Pages	Actions
<input type="checkbox"/>	Patient Information Form (rev.7/2012)		1	EDIT SIGN

NOTE: The form has the blue **SIGN** button to the right of the **EDIT** button within the Actions column.

The form opens as a fillable PDF in a new browser window.

2. Enter/edit any data within the blue/gray fields.
3. When finished click the **Save My Work** button to save.



Patient Information Form [Print] [Save My Work]

Hospital Name: TestMBHHSptlNew Phone: (999) 999-9999

Hospital Address: 275 Grove St. CURASPAN CITY, ZZ 99999 [Click to save.]

Patient Demographics Admit and Length of Stay Information

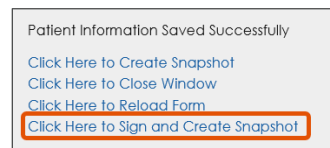
Patient Name: Rubble, Barney Unit: MBH_TEST_UNIT

A screen displays indicating the patient's information successfully saved and provides 4 options for closing the form.

4. Click the **Click Here to Sign and Create Snapshot** option.

The following dialog box displays.

5. Enter your password in the **SIGNATURE PASSWORD** field.



Patient Information Saved Successfully

Click Here to Create Snapshot

Click Here to Close Window

Click Here to Reload Form

Click Here to Sign and Create Snapshot

NOTE: Your signature password is the same password used to access **nH Discharge**. After entering your E-Signature password, you are not asked again until your next login.

6. Click the **SIGN** button.

The **BUILD** screen displays with **Signed by** information within the **Last Edit Date** column in the **Forms** section.

Additionally, a signed version of the form displays within the **Documents** section at the bottom of the screen, which can be shared as part of the Referral Packet with Providers.

Forms			Documents		
Share	Name	Last Edit Date	Share	Name	Receipt Date
<input checked="" type="checkbox"/>	Patient Information Form (rev.7/2012)	Signed by: [redacted] Amy on 07/15/2019 06:05 PM [redacted], Amy 07/15/2019 06:05 PM	<input type="checkbox"/>	Patient Information Form (rev.7/2012) [07/15/2019 06:05 PM_Signed]	07/15/2019 06:05 PM

NOTE: To sign a form without first editing it, click the **SIGN** button within the **Actions** column.

- Once again you are prompted to enter your password in the dialog box that displays and click the **SIGN** button. The form displays as **Signed**.

SIGN MULTIPLE FORMS

You can sign multiple forms without re-entering your password.

If you click the **SIGN** button for the next form in the sequence without opening it, you do not have to enter a password again.

The form displays as **Signed** and a copy is saved in the **Documents** section for sharing as part of the Referral Packet with Post-Acute Providers.

Forms				
Share	Name	Last Edit Date	Pages	Actions
<input checked="" type="checkbox"/>	Patient Information Form (rev.7/2012)	Signed by: [redacted] Amy on 10/02/2019 04:36 PM [redacted] Amy 10/02/2019 12:23 PM	1	EDIT
<input checked="" type="checkbox"/>	Ambulance Communication Form (rev.2/17)	Signed by: [redacted] Amy on 10/02/2019 04:36 PM	1	EDIT
Documents				
Share	Name	Receipt Date	Pages	Actions
<input type="checkbox"/>	Patient Information Form (rev.7/2012) [10/02/2019 04:36 PM_Signed]	10/02/2019 04:36 PM	2	-
<input type="checkbox"/>	Ambulance Communication Form (rev.2/17) [10/02/2019 04:36 PM_Signed]	10/02/2019 04:36 PM	2	-

NOTE: The number of pages changes, as the **Digital Signature Information** page is added to the form.

EDIT A SIGNED FORM

Complete the following steps to edit a signed form and re-sign it.

- From the **BUILD** screen, click the **EDIT** button within the **Actions** column.
- Edit any data within the blue/gray fields.
- When finished click the **Save My Work** button to save.

Patient Information Form		Print	Save My Work
Hospital Name:	TestMBHHsptlNew	Phone:	(999) 999-9999
Hospital Address:		275 Grove St. CURASPAN CITY, ZZ 99999	
Patient Demographics		Admit and Length of Stay Information	
Patient Name:	Rubble, Barney	Unit:	MBH TEST UNIT

Click to save.

A screen displays indicating the patient's information successfully saved and provides 4 options for closing the form.

4. Click the **Click Here to Sign and Create Snapshot** option.

Patient Information Saved Successfully

[Click Here to Create Snapshot](#)

[Click Here to Close Window](#)

[Click Here to Reload Form](#)

[Click Here to Sign and Create Snapshot](#)

The [BUILD](#) screen displays with **Signed by** information within the **Last Edit Date** column in the **Forms** section.

5. Additionally, a signed version of the form displays within the **Documents** section at the bottom of the screen, which can be shared as part of the Referral Packet with providers.

Appendix K: Provider Networks

The **Provider Networks** feature on the [REFER](#) screen helps you identify specific providers to which you want to transition patients by allowing you to create and maintain up to **10** networks of up to **250** providers each within **nH Discharge**.

1. Enter your desired search criteria on the [REFER](#) screen.
2. Click the **KEY SERVICES/NETWORKS** button.

The **Filters** window displays.

3. Select the checkbox(es) to the left of the desired Network(s).
4. Click the **UPDATE** button in the bottom right-hand corner of the window.

<input type="checkbox"/>	Provider Name ↑	Dist.	State	Star Rating	Medicare Certified	Connected	Status
<input type="checkbox"/>	All Saints Nursing Center ACO	--	ZZ	N/A	✓	✓	-
<input type="checkbox"/>	Boyside Healing Center ACO	--	ZZ	★☆☆☆☆	✓	✓	-
<input type="checkbox"/>	FFG Nursing and Rehab CJR HO	--	ZZ	★★★★☆	✓	✓	-

- The providers within the selected networks display within the top of the table and are **highlighted yellow**.
- The network identifier displays within a green oval.
- Provider Network affiliations are also included on the [Provider Matching Reports](#).

Skilled Nursing Facility (SNF)

Search Criteria:
Needs a Bed - Skilled Nursing Facility (SNF)
Location: ZZ - HENRY

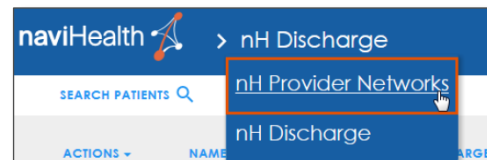
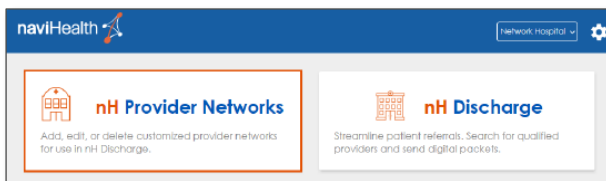
FFG Nursing and Rehab
275 Grove St
XANADU, ZZ 00304
Tel: (617) 395-0125
CMS Star Rating: ★★★★★
Networks: Joint Replacement (CJR), Hospital Owned

Appendix L: Managing Provider Networks

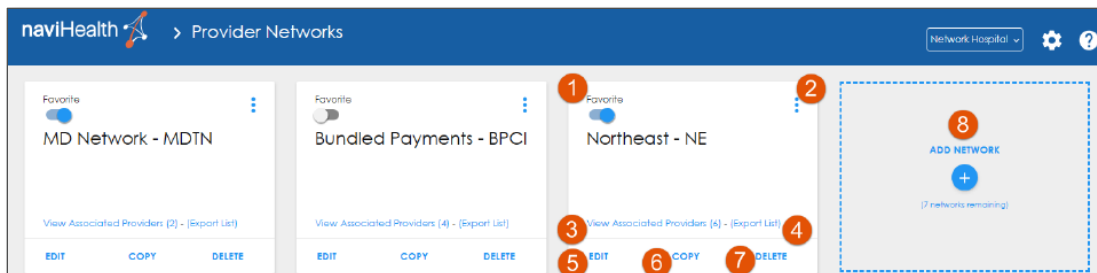
Provider Networks enable you to quickly view providers within a specific network compared against other providers matching your overall search criteria on the [REFER](#) screen.

This tool enables Administrators to efficiently add, edit, delete, or highlight Provider Networks without leaving the application.

1. After logging in, select **nH Provider Networks** from the landing page.
2. Alternatively, if you are already within the application, click **nH Discharge** across the top of your screen and then select **nH Provider Networks**.



The **Provider Networks** screen displays.



3. Add networks, edit, or delete networks, copy an existing network to a different acute facility (if you have access to more than one), favorite a network for use on the [REFER](#) screen, view providers in a specific network and export lists of your networks.

Parts of the Provider Networks screen

Part	Description
1	Favorite Automatically highlights networks on the REFER screen.
2	Menu Access Network History to view an audit log of edits made to a network, including the activity, the date the activity occurred, and the user who acted.
3	View Associated Providers View which providers are in a particular network.
4	Export List Export a .CSV file containing the providers within a particular network.
5	Edit Add or remove providers from an existing network and edit a network's name or acronym.
6	Copy Select the acute facility to which you want to copy an existing network. Users at this facility are able to utilize that network.
7	Delete Select the acute facility to which you want to copy an existing network. Users at this facility are able to utilize that network.
8	Add Network You must first enter a unique Network Name and Network Acronym , after which you may search for (and add) providers based on level of care, name, state, county, and city.

- Click the **ADD NETWORK** button. The **Edit Provider Network Name** window displays.
- Create your **Network Name** and **Acronym** and click the **CONTINUE** button.

NOTE: The following are things to keep in mind when creating a network:

The network name should be simple, clear, and descriptive, making it easy for the case manager to identify the type or purpose of the network.

- Network names have a character limit of 255.
- Remember, when used as a filter during your search, the name of the network is visible to patients/families when sharing Provider Matching Lists.
- Avoid using terms such as "In-Network" or "Preferred Network".
- Consider using terms such as "[Payer] Participating Providers."

- Enter search criteria for the providers you want to include in the network ([Level of Care](#) and **State** are **required** fields, while Provider Name, County, and City are *optional*).

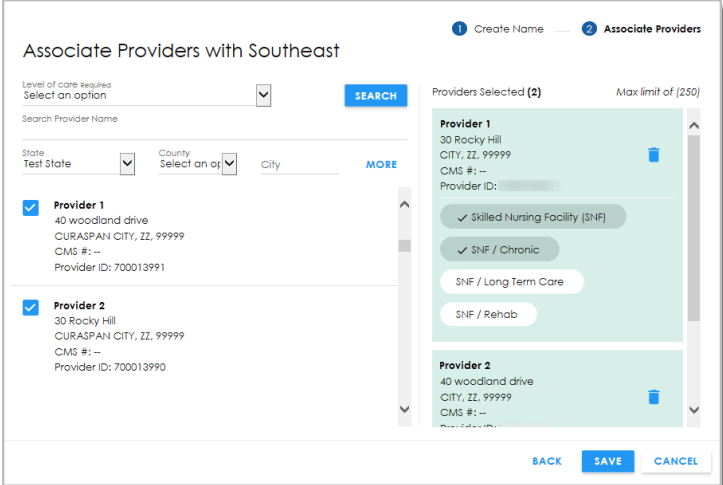
NOTE: Some healthcare organizations provide more than one level of care at a single location.

- On the right (green) side of the window, after selecting a provider, indicate which levels of care are accessible from the network.
- Levels of care included in a specific network are shaded green and include a checkmark (✓).

7. Once you add the appropriate providers to your new network, click **Save** to ensure your changes are reflected in **nH Discharge**.

8. Select your **Favorite** networks by clicking the toggle.

You can highlight **Favorite** networks when visiting the [REFER](#) screen, bringing a maximum of four Favorite network providers to the top of your screen.



NOTE: A **toggle** icon means the network is a Favorite. Click the toggle icon again to remove the network as a Favorite; the toggle turns gray.

9. Click **View Associated Providers** to see the providers within a given network or click **Export List** to download a .CSV file containing that network's providers, their address, and CMS number(s).

10. If you are curious about edits made to a network, click the **Menu** button to access **Network History**.

11. To return to **nH Discharge**, access the application drop-down menu like you did in [step 1](#).

NOTE: Updates may take up to five minutes to display in **nH Discharge**.