

h

# Referral/Intake

myUnity Hospice User Guide



**Netsmart**

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Springfield, MO 65803

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# Objectives

After reviewing this user guide, you will be able to do the following:

- determine whether a patient has been on service prior to entering a new referral.
- enter a new patient in to the myUnity system.
- understand the layout of the Home Page for myUnity.

# Entering a New Hospice Patient

Before entering a new patient, always search to determine if the patient has been on service prior to today's request.

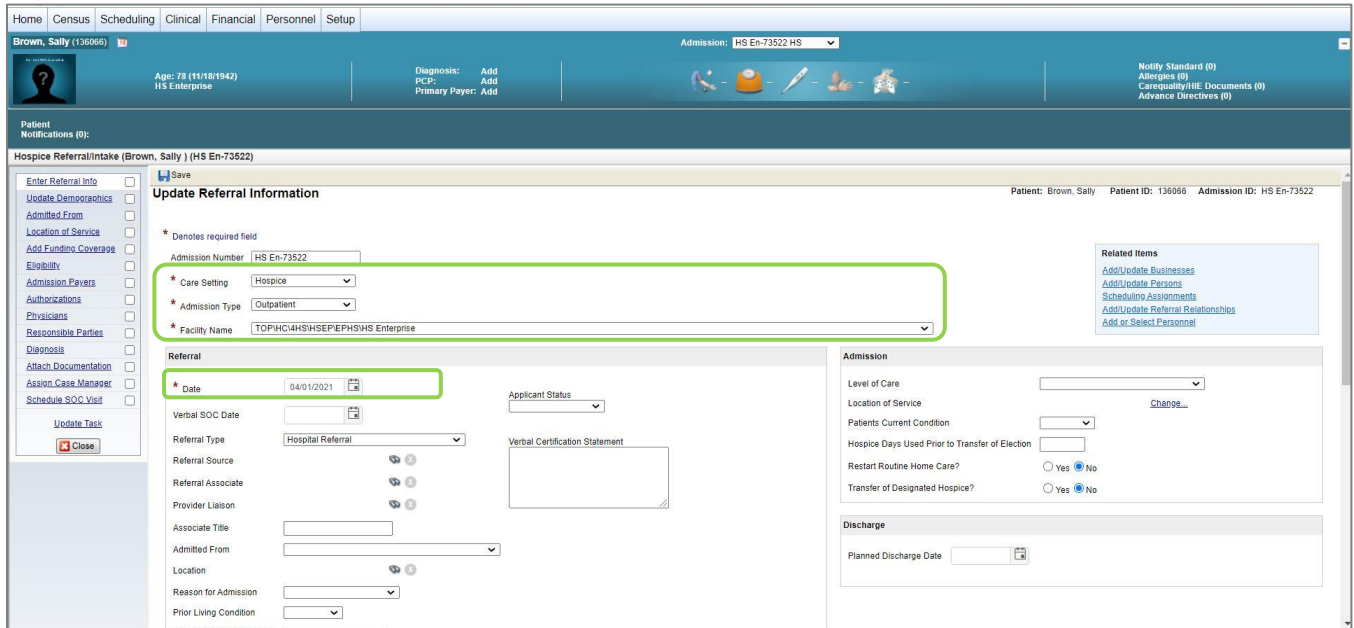
On the **Home** tab, navigate to **Processes > myUnity HS: Referral/Intake**.

1. On the **Quick Search** window, use the **Advanced Search** link to access the **Add or Select Patient** window.
2. Type in the patient's Last Name, First Name and Gender in the **Add or Select Patient** window and click **Search**.
  - a. If the patient is on service or has been on service, a message will be displayed '**1 Patient(s) Found**'.
  - b. Click the patient's name to view dates of service. A list of service dates will display; if the new admission date does not display, click the **Create New Admission** link.
  - c. If the service date is active, highlight the date and click **OK** to continue with the open admission.
3. If the patient is not found in the system, a message will be displayed '**0 Patient(s) Found**'. Click **Add** to continue with a new admission.
4. The Enter Referral Information (all fields required) window will open.
  - a. **Care Setting**: select Hospice
  - b. **Admission Type**: select Outpatient
  - c. **Facility**: choose the facility this patient will be admitted into
  - d. **Referral Date**: today's date will default; if applicable this may be changed.
5. Click **OK**.
6. The **Organizational Selection** will now open.
  - a. Select the Hospice org template
  - b. Select the Hospice facility
  - c. Select the patient org location
  - d. Click **Submit**
7. The **myUnity HS: Referral/Intake** window will be displayed

## Enter Referral Info

1. On the **Update Referral Information** window, populate the required fields and any

others based on your organization's procedures.



Home | Census | Scheduling | Clinical | Financial | Personnel | Setup

Brown, Sally (136066) | Admission: HS En-73522 HS

Age: 73 (11/16/1942) | HS Enterprise | Diagnosis: Add | PCP: Add | Primary Payer: Add

Notify Standard (0) | Allergies (0) | Caregiver/HIE Documents (0) | Advance Directives (0)

Save

Hospice Referral/Intake (Brown, Sally) (HS En-73522)

Update Referral Information

\* Denotes required field

Admission Number: HS En-73522

\* Care Setting: Hospice

\* Admission Type: Outpatient

\* Facility Name: TOPHC4HSISEPEPHSIS Enterprise

Referral

\* Date: 04/01/2021

Verbal SOC Date: [ ]

Referral Type: Hospital Referral

Referral Source: [ ]

Referral Associate: [ ]

Provider Liaison: [ ]

Associate Title: [ ]

Admitted From: [ ]

Location: [ ]

Reason for Admission: [ ]

Prior Living Condition: [ ]

Admission

Level of Care: [ ]

Location of Service: [ ]

Patients Current Condition: [ ]

Hospice Days Used Prior to Transfer of Election: [ ]

Restart Routine Home Care?  Yes  No

Transfer of Designated Hospice?  Yes  No

Discharge

Planned Discharge Date: [ ]

Related Items

- [Add/Update Businesses](#)
- [Add/Update Persons](#)
- [Scheduling Assignments](#)
- [Add/Update Referral Relationships](#)
- [Add or Select Personnel](#)

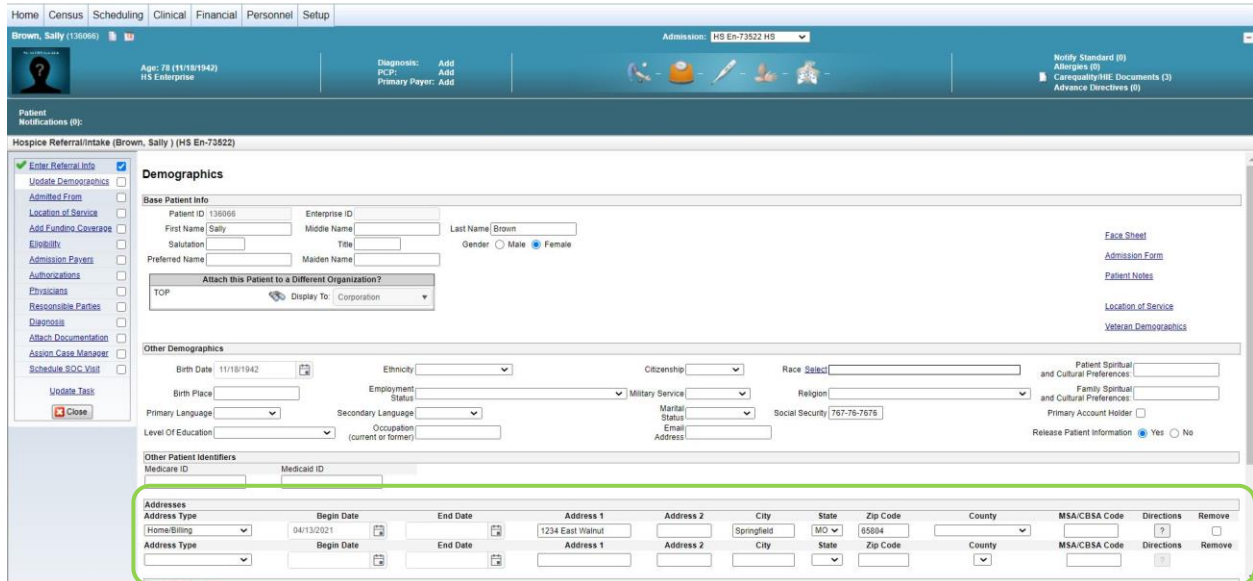
Update Task

Close

2. Click **Save**.
3. Check the box for **Enter Referral Info** to move to the next step.

## Update Demographics

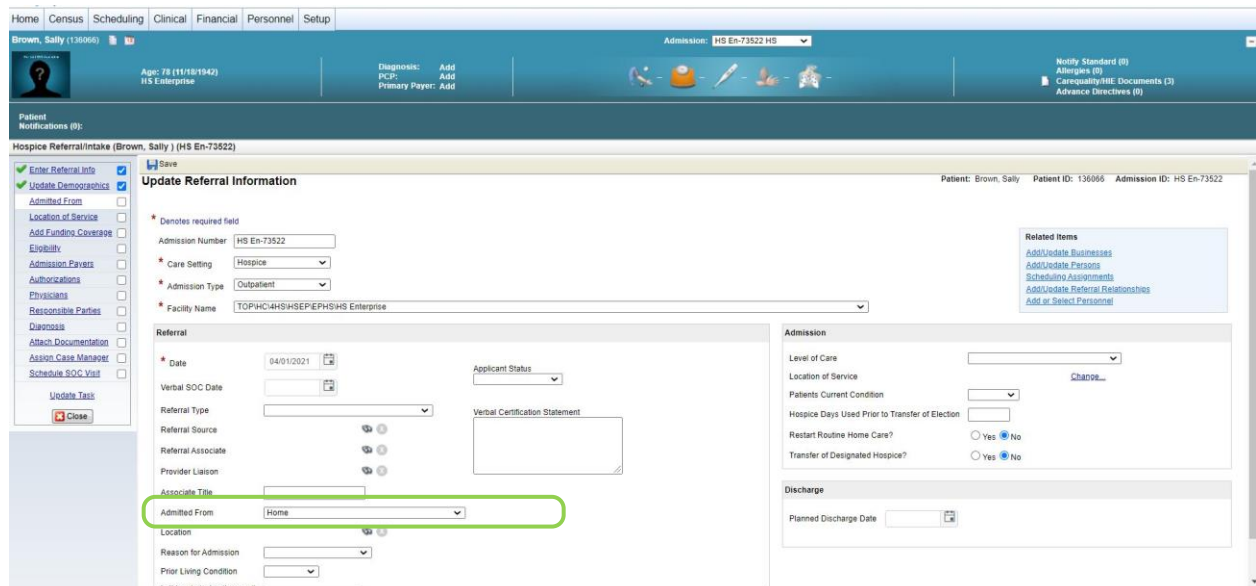
1. On the **Update Demographics** window, populate the address fields and any others based on your organization's procedures.



2. Click **Submit**. At the bottom of the window.
3. Check the box for Update Demographics to move to the next step.

## Admitted From

1. On the **Update Referral Information** screen, select the **Admitted From** location for the patient.

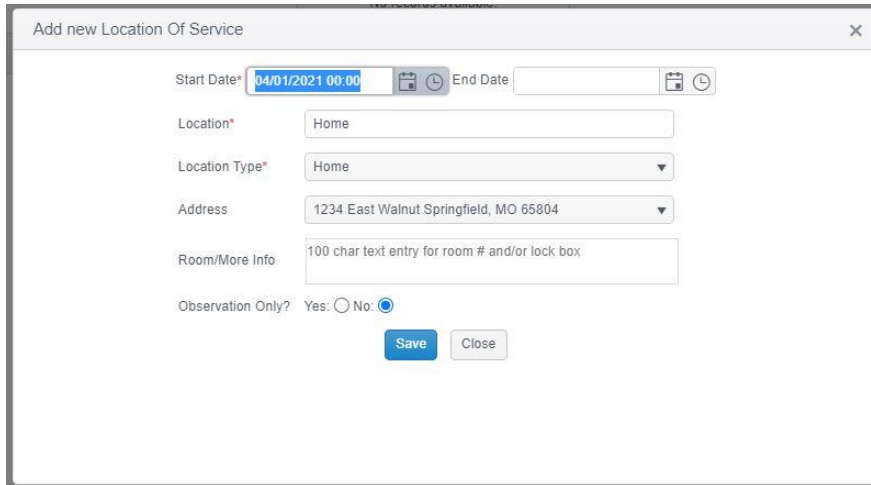


2. Click **Save** at the top of the window.

3. Check the box for **Admitted From** to move to the next step.

## Location of Service

1. On the **Location of Service** window, click the **Add** button.
2. The **Add new Location of Service** window will display.



3. Enter the Location of Service information.
  - a. If the patient had been in the hospital previous to being at home, enter the end time of the hospital stay with 23:59 as the time and the start date for home with 00:00. This will ensure no gap in the location of service.
4. **Save.**
5. Check the **Location of Service** box to move to the next step.

## Add Funding Coverages

1. On the **Funding Coverages** window, click **Add**.

Hospice Referral/Intake (Brown, Sally ) (HS En-73522)

Enter Referral Info  
 Update Demographics  
 Admitted From  
 Location of Service  
 Add Funding Coverage  
 Eligibility  
 Admission Payers  
 Authorizations  
 Physicians  
 Responsible Parties  
 Diagnostics  
 Attach Documentation  
 Assign Case Manager  
 Schedule SOC Visit

**Funding Coverages**

Admission Payers  
 Admission Range Payers  
 Admission Schedule Reimbursement Parameters  
 Payer/Plan Active Inactive Bill Holds Edit Remove  
 Medicare A  
 Medicare HS (Medicare Hospice) 4/1/2021 Add Edit

**Add Funding Coverage**

HCBS Lorraine  
 HCBS Self Pay  
 HCBS Workers Compensation  
 LSS  
 Managed Medicaid  
 MCR Managed Care  
 Medicaid  
 Medicaid pending  
 Medicare A  
 Medicare Advantage  
 Medicare B

Payer Type

(any test) Med A test  
 (MedA-PDGM) MedA PDGM  
 (Med A) Medicare A  
 (MCA) Medicare A

Payer

Medicare HS Medicare Hospice

Plan

Policy Number: 787878787  
 Policy Owner: Brown, Sally  
 Relationship to Patient: Self  
 Date Active: 4/1/2021  
 Date Inactive:  
 Eligibility Status:  
 Eligibility Date:  
 Return Normal

Patient: Brown, Sally  
Patient ID: 130085

2. Populate:
  - a. select a Payer type, Payer, and Plan
  - b. enter the Policy Number
  - c. select the Policy Owner
3. Select **Submit** at the bottom of the window.
4. Repeat steps for additional funding coverages
5. Check the **Add Funding Coverage** box to move to the next step.

## Eligibility

1. On the **Funding Coverages** window, choose **Edit** for the payer to be verified.
2. Choose the **Eligibility Status** and enter the **Eligibility Date**.



Hospice Referral/Intake (Brown, Sally) (HS En-73522)

Patient: Brown, Sally  
Patient ID: 136066

- Enter Referral Info
- Update Demographics
- Admitted From
- Location of Service
- Add Funding Coverage
- Eligibility
- Admission Payers
- Authorizations
- Physicians
- Responsible Parties
- Diagnosis
- Attach Documentation
- Assign Case Manager
- Schedule SOC Visit

Update Task

Close

### Funding Coverages

Admission Payers  
Admission Denied Payers  
Admission Co-Payment Reimbursement Parameters

Payer/Plan	Active	Inactive	Bill Holds	Edit	Remove
Medicare A					
Medicare HS(Medicare Hospice)	4/1/2021			Add	Edit

Add

Update Funding Coverage - Medicare HS (Medicare Hospice)

Policy Number: 767767676

Policy Owner: Brown, Sally

Relationship to Patient: Self

Date Active: 04/01/2021

Date Inactive: [calendar icon]

Eligibility Status: **Approved**

Eligibility Date: Approved

Clearinghouse Eligibility: Disapproved

Eligibility Status: Pending

Eligibility Status: Not Sent

Last Eligibility Check Date: [calendar icon]

Group Name: [text box]

Group Number: [text box]

Rx BIN Number: [text box]

Employee Group Health Plan?: Yes  No

Ok to Release Information?: Yes  No

Benefits Assigned?: Yes  No

LOA Anniversary Date: [calendar icon]

- Repeat these steps for other coverages to be verified.
- Click **Submit** at the bottom of the window.
- Check the **Eligibility** box to move to the next step.

## Admission Payers

- Enter the **Start Date** for the admission as the start date for the admission payers.
- Select the **Primary Payer** and **Primary Reason**.

Brown, Sally (136066) | Admission: HS En-73522 HS 4/1/2021

Age: 78 (11/18/1942) | Diagnosis: Cerebral infrc ... | Primary Payer: Medicare A

Hospice Referral/Intake (Brown, Sally) (HS En-73522)

Patient: Brown, Sally  
Patient ID: 136066  
Admission ID: HS En-73522

- Enter Referral Info
- Update Demographics
- Admitted From
- Location of Service
- Add Funding Coverage
- Eligibility
- Admission Payers
- Authorizations
- Physicians
- Responsible Parties
- Diagnosis
- Attach Documentation
- Assign Case Manager
- Schedule SOC Visit

Update Task

Close

### Payers

Patient Funding Coverages  
Update Level of Care  
Admission Denied Payers

Start Date	#Days	End Date	Primary Payer	Primary Reason	Secondary Payer	Third Payer	Fourth Payer	Fifth Payer	Sixth Payer	Seventh Payer	Remove
04/01/2021			Medicare HS-Medicare Hospice (04/01/2021-)	Medicare is Primary							
			Primary Payer	Primary Reason	Secondary Payer	Third Payer	Fourth Payer	Fifth Payer	Sixth Payer	Seventh Payer	

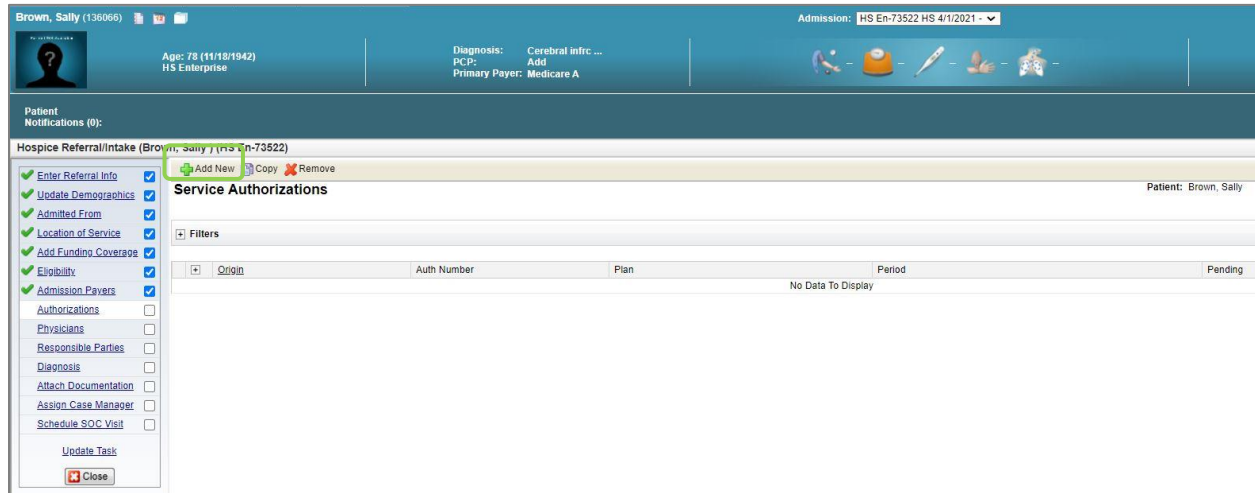
Submit

- Add any other payers to the admission payer order.
- Click **Submit**.
- Check the **Admission Payers** box to move to the next step.

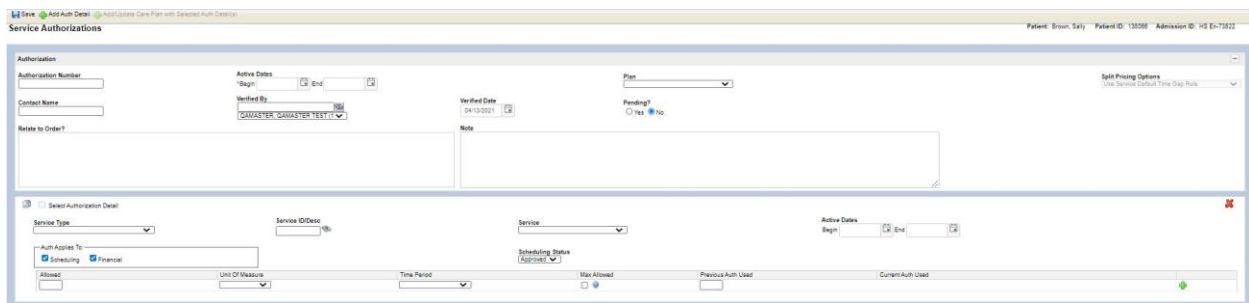
## Add Authorization

If an authorization is not needed, this step can be marked as complete. However, if the authorization is not available, do not mark as complete so that the step remains on the To Do list.

1. On the **Services Authorization** window, choose **Add New** for the authorization to be added.



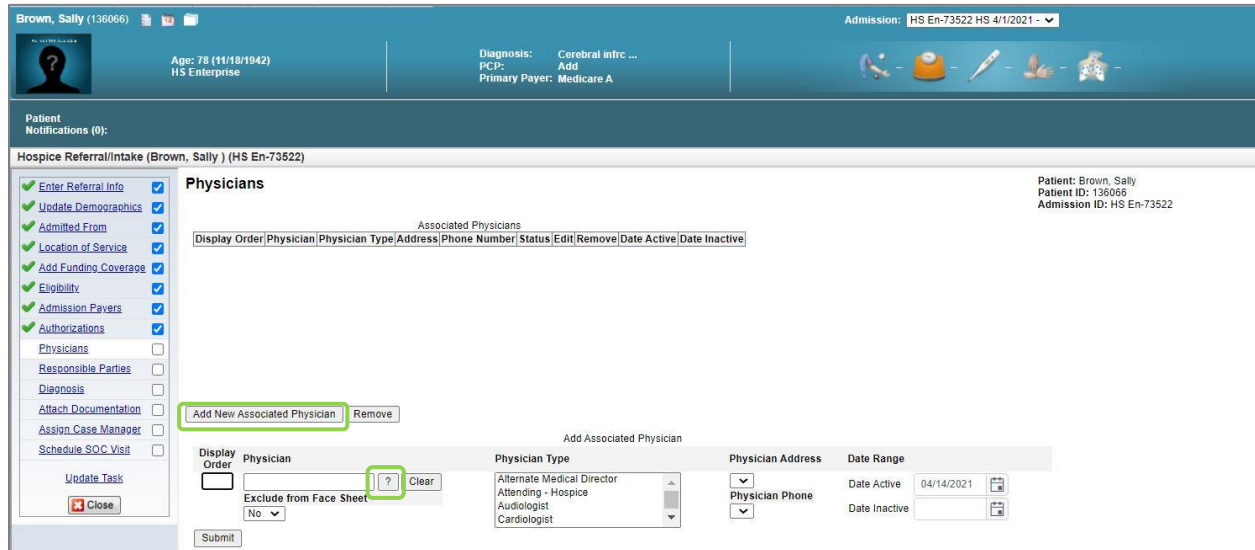
2. Add the authorization details if known
  - a. Number
  - b. Date Range
  - c. Insurance Plan
  - d. Service Details if authorization is limited to a service type or specific service
3. If the authorization is still pending, choose **Yes**.



4. Check the **Authorizations** box to move to the next step.

## Physicians

1. On the **Physicians** window, select **Add New Associated Physician**.
2. Click the ? to search for a physician(s).



Patient: Brown, Sally  
 Patient ID: 136066  
 Admission ID: HS En-73522

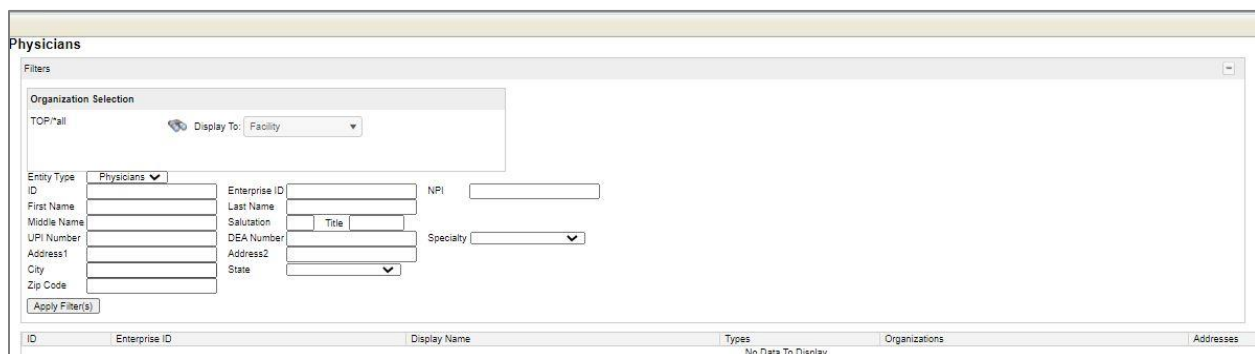
**Physicians**  
 Associated Physicians  
 Display Order | Physician | Physician Type | Address | Phone Number | Status | Edit | Remove | Date Active | Date Inactive

Add New Associated Physician Remove

Add Associated Physician  
 Display Order:  Physician:  ? Clear  
 Exclude from Face Sheet:  No

Physician Type: Alternate Medical Director, Attending - Hospice, Audiologist, Cardiologist  
 Physician Address:   
 Date Range: Date Active: 04/14/2021, Date Inactive:

3. The **Physician** search window will open. Type in the physician's last name or Apply Filter(s) to display a list of physicians.



**Physicians**  
 Filters  
 Organization Selection: TOP/all, Display To: Facility  
 Entity Type: Physicians  
 ID:  Enterprise ID:  NPI:   
 First Name:  Last Name:   
 Middle Name:  Salutation:  Title:   
 UPI Number:  DEA Number:  Specialty:   
 Address1:  Address2:   
 City:  State:   
 Zip Code:   
 Apply Filter(s)

ID | Enterprise ID | Display Name | Types | Organizations | Addresses  
 No Data To Display

4. Select the physician and **Physician Type**: Attending – Hospice, and enter the Display Order.

Hospice Referral/Intake (Brown, Sally ) (HS En-73522)

Patient: Brown, Sally  
Patient ID: 136066  
Admission ID: HS En-73522

**Physicians**

Associated Physicians

Display Order	Physician	Physician Type	Address	Phone Number	Status	Edit	Remove	Date Active	Date Inactive
	Smith, John B	Hospice Medical Director/Physician						04/01/2021	

Display Order: 1  
 Physician: Smith, John B  
 Exclude from Face Sheet: No  
 Physician Type: Hospice Medical Director/Physician  
 Physician Address: [Dropdown]  
 Physician Phone: [Dropdown]  
 Date Active: 04/01/2021  
 Date Inactive: [Dropdown]

5. **Submit**, and repeat these steps to add additional physicians.
6. Repeat steps 2 through 5 to add the Hospice Certifying Physician.
  - a. This physician type must be added even if the Certifying and Attending Hospice Physicians are the same. If the same physician is Certifying and Attending, you can hold down the Ctrl key and select multiple physician types.
7. Check the **Physicians** box to move to the next step.

## Responsible Parties

1. On the **Related Parties** window, click **Add** to add a responsible party for the patient.

Hospice Referral/Intake (Brown, Sally ) (HS En-73522)

Patient: Brown, Sally Patient ID: 136066

**Related Parties**

Responsible/Related Parties Private Pay Distribution/ACH Setup

**Responsible Parties**

Display Order	Name (ID)	Responsible Party Type	Address	Phone Number	Email	Edit	Remove
No Responsible Parties Found							

**Related Parties**

Display Order	Name (ID)	Related Party Type	Comments	Address	Phone Number	Email	Edit	Remove
No Related Parties Found								

- a. **Add/Edit Responsible Party** window will display.

**Add/Edit Responsible Party**

**Add New Responsible Party**

Person
  Business

\* Organization Level  
TOP

First Name Charles	Middle Name 	<b>Search Results</b> The person may already exist. Select the desired person to associate with Sally Brown. Brown, Charles   1234 South Carolina Street, Springfield, MO (HM) Brown, Charles   12345 Oak Lawn Street, Nixa, MO (HM)   (417) 565-9876 (CP)
Last Name Brown	Date of Birth <input type="text"/>	
SSN <input type="text"/>	Email <input type="text"/>	

Bereavement Priority Level  Primary Language

Comment

Phones

+ Add new record

Phone Type	Phone Number	Active	Inactive	Remove

Addresses

+ Add new record

Address Type	Address 1	Address 2	City	State	Zip Code	Active	Inactive	Remove

<p>* Relationship Type</p> <ul style="list-style-type: none"> <li>All Responsibilities</li> <li>Attorney</li> <li>Bereaved</li> <li>Best Friend</li> <li>Brother</li> <li>Brother in law</li> <li>CAHPS Survey</li> <li>Care Plan Consult</li> <li>Care Responsibility</li> <li>Child</li> <li>Conservator</li> <li>Cousin</li> <li>Daughter</li> <li>Daughter-in-Law</li> </ul>	<p>Person Type</p> <ul style="list-style-type: none"> <li>Accountant</li> <li>Activity Director</li> <li>Attorney</li> <li>Church Member</li> <li>Driver</li> <li>Father</li> <li>Geriatric Manager</li> <li>GN Caregiver</li> <li>Guardian</li> <li>Medical Social Worker</li> <li>Mother</li> <li>Personnel</li> <li>Physician</li> <li>Physician Staff</li> </ul>
--	--

2. Type in the first and last name of the responsible party.
  - a. If the responsible party appears in the search results, select them from the list and the information will pull into the appropriate fields.
  - b. If the responsible party does not appear in the search results, enter all information including the address and phone number.

**Note:** The financial responsible party, if not the patient, should be entered in this process.

- a. **Relationship Type:** select **Bereaved**. This is very important to associate the bereaved at this time, along with Priority Level, to initiate bereavement admission and activity to begin upon death of the patient.
- b. **Priority Level:** select the appropriate priority level for the bereaved.
- c. If the responsible party is designated as a Primary Caregiver, the party should be added to pull to the CAHPS report. Once Primary Caregiver is selected the field to receive the CAHPS report will display and default as yes.
- d. All other information will default.
- e. Select **Save and Close** if this is the only responsible party. Select Save and

Add New if other related parties need to be entered.

**Add/Edit Responsible Party**

Save Save & Close Save & Add New

**Add New Responsible Party**

A person has been selected. [Edit Brown, Charles](#) [Clear Form](#)

\* First Name: Charles Middle Name:   
 \* Last Name: Brown Date of Birth: 11/24/1997   
 SSN: 654-21-9876 Email: CBrown@aol.com

Bereavement Priority Level: Medium Primary Language: English Hospice CAHPS: Send Survey?  Yes  No

Comment:   
 Phones:   

Phone Type	Phone Number	Active	Inactive	
Cell or Mobile	(417) 565-9876	05/01/2023		<a href="#">Edit</a>

 Addresses:   

Address Type	Address 1	Address 2	City	State	Zip Code	Active	Inactive	
HomeBilling	12345 Oak Lawn Street		Nixa	MISSOURI	65714	04/01/2022		<a href="#">Edit</a>

 \* Relationship Type:   
 All Responsibilities: Attorney, Bereaved, Best Friend, Brother, Brother in law, CAHPS Survey, Care Plan Consult, Care Responsibility, Child, Conservator, Cousin, Daughter, Daughter-in-Law   
 Person Type: Driver, Father, Geriatric Manager, GN Caregiver, Guardian, Medical Social Worker, Mother, Personnel, Physician, Physician Staff, Provider Liason, Referral Associate, Registered Nurse, Resident

**Related Parties** Patient: Brown, Sally May Patient ID: 142795

Responsible/Related Parties Private Pay Distribution/ACH Setup

**Responsible Parties**

Display Order	Name (ID)	Responsible Party Type	Address	Phone Number	Email	Actions	Edit	Remove
1	Brown, Charles (140995)	Bereaved CAHPS Survey Primary Caregiver	HM 12345 Oak Lawn Street Nixa, MO 65714	CP (417) 565-9876	CBrown@aol.com		<a href="#">Edit</a>	<a href="#">Remove</a>

**Note: To Edit a Responsible Party**, in the Edit column, select the Edit button and make the appropriate changes.

**To Remove a Responsible Party**, Select the remove button. The Responsible Party will only be removed from the patient record, not removed from myUnity.


3. Check the **Responsible Parties** box to move to the next step.

## Diagnosis


This step is only based on agency process. It is possible the diagnosis codes will be captured as part of the admission process in clinical rather than as part of the referral process.

**Note:** Entry of the primary diagnosis in back office will only display as a referral diagnosis on the patient profile in the clinical chart.

1. On the **Diagnosis/Surgical Procedures** window, click **Add**.




Hospice Referral/Intake (Brown, Sally ) (HS En-73522)

Inactivate  Delete

### Diagnoses/Surgical Procedures


Show Inactive/Resolved: Yes  No

#### Diagnoses


 **Add**

Show:  Admission  Patient Show Deleted: Yes  No

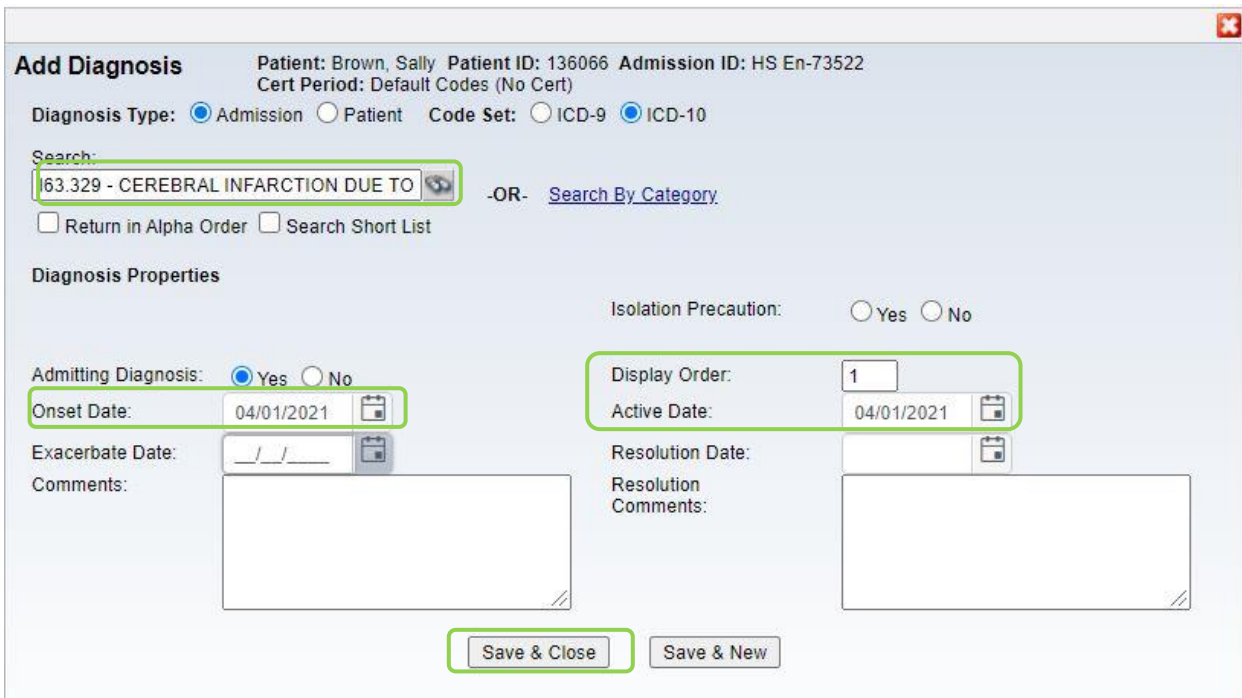
#### Patient Surgical Procedures

 **Add**

Update Task


 Close

2. The **Add Diagnosis** window will open.
3. In the **Search** field, enter at least three characters to search by OR **Search By Category**.



**Add Diagnosis** Patient: Brown, Sally Patient ID: 136066 Admission ID: HS En-73522  
Cert Period: Default Codes (No Cert)


Diagnosis Type:  Admission  Patient Code Set:  ICD-9  ICD-10


Search:   -OR- [Search By Category](#)

Return in Alpha Order  Search Short List

Diagnosis Properties

Admitting Diagnosis:  Yes  No


Onset Date:  


Exacerbate Date:  

Comments:

Isolation Precaution:  Yes  No

Display Order:

Active Date:  

Resolution Date:  

Resolution Comments:

4. If multiple diagnosis codes need to be entered, click **Save & New**. If entry of the

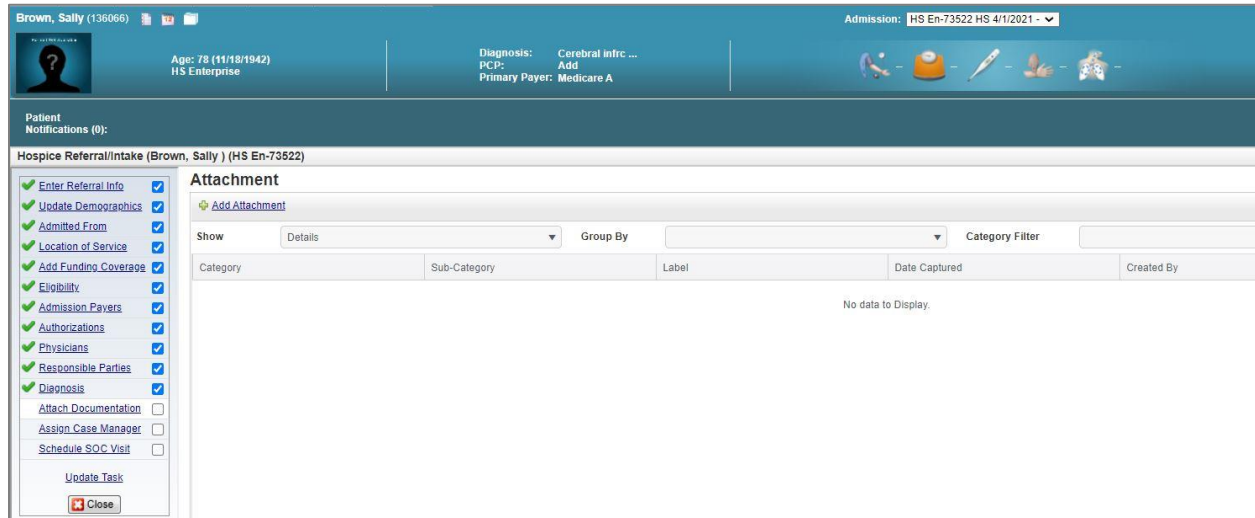


diagnosis codes is complete, click **Save & Close**.

5. Check the **Diagnosis** box to move to the next step.

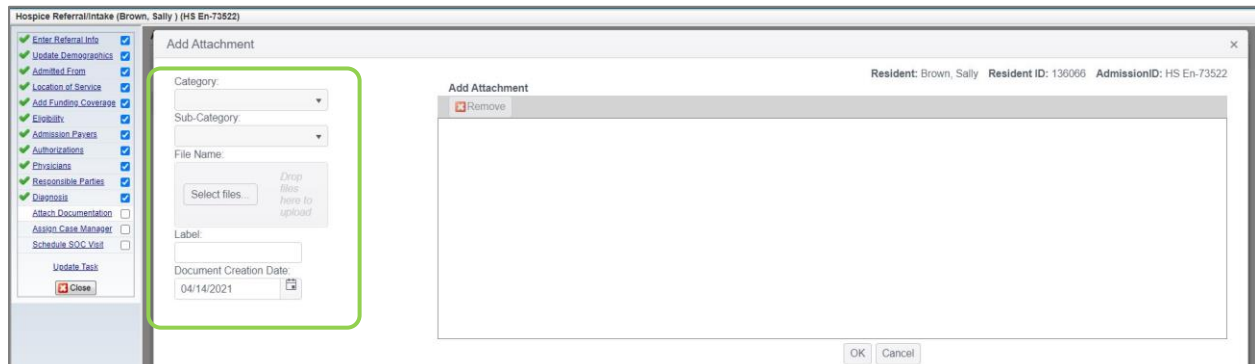
## Attach Documentation

1. On the **Attachments** window, click **Add Attachment**.



The screenshot shows the patient record for Sally Brown (136066) with admission HS En-73522 HS 4/1/2021. The interface includes a navigation menu on the left with various task options, some of which are checked. The main area displays the 'Attachment' section, which is currently empty with the message 'No data to Display.'

2. The **Add Attachment** window will open. Fill in appropriate fields and navigate to add the attachment.



The screenshot shows the 'Add Attachment' dialog box open over the patient record. The dialog has fields for 'Category', 'Sub-Category', 'File Name', 'Label', and 'Document Creation Date'. A 'Select files...' button is highlighted with a green box. The 'Document Creation Date' is set to 04/14/2021. The dialog also includes 'OK' and 'Cancel' buttons at the bottom.

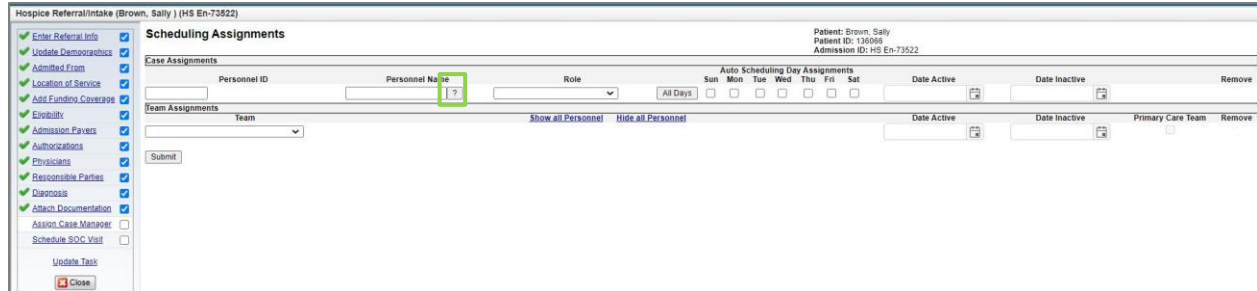
3. Click **OK**.
4. Check the **Attach Documentation** box to move to the next step.

## Assign Case Manager

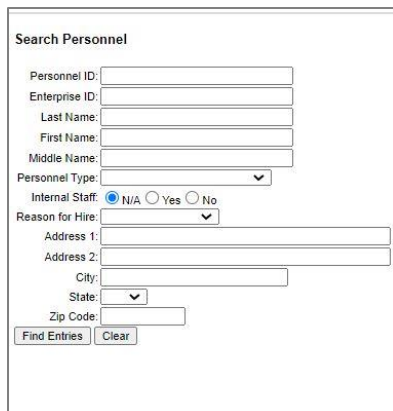
1. Click the ? to search for personnel.

**Note:** When adding a case manager in back office it will be displayed on the patient profile in the clinical chart.

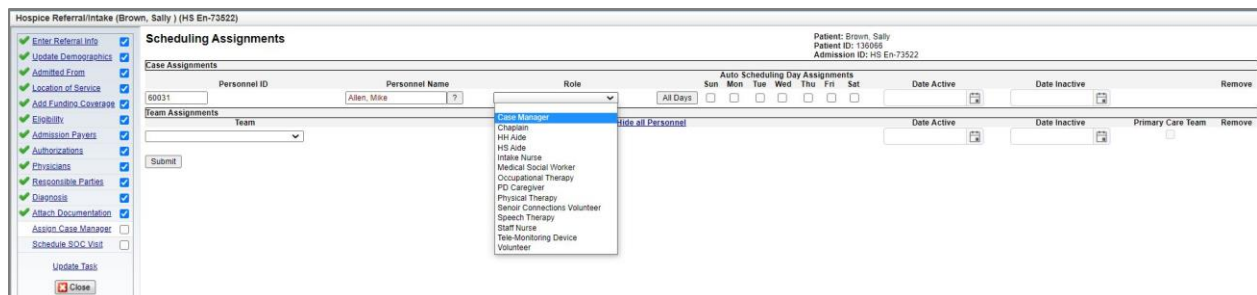




2. The **Personnel** search window will open. Type in the personnel **Last Name** or **Find Entries** to display a list of personnel.



3. Select the personnel from the list.
4. Choose the **Role** for the Personnel from the dropdown list and assign **Date Active**.



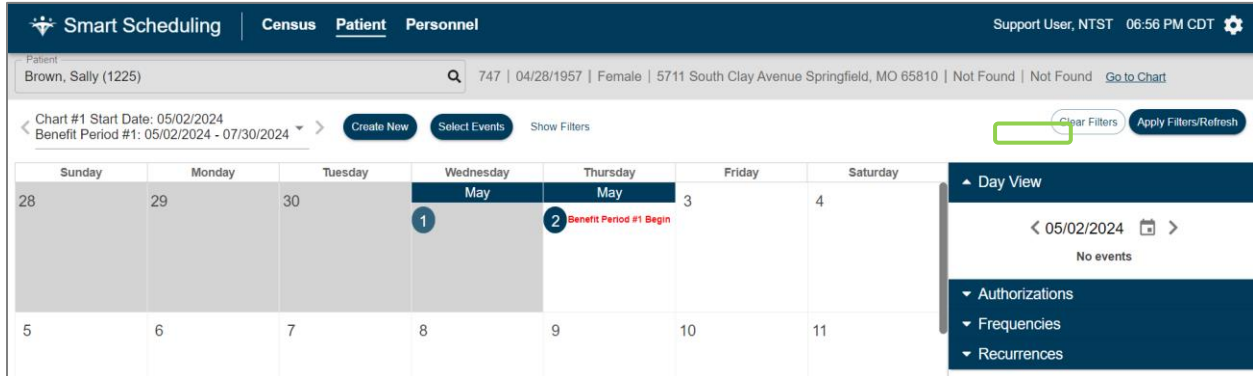
5. Click on the **Team** drop down and select the team appropriate for the patient and assign the **Date Active**.

Note: When selecting a team in the back office, select the check box “primary care team” so it will display on the clinical chart.

6. Click **Submit**.
7. Check the **Assign Case Manager** box to move to the next step.

## Schedule SOC Visit

1. On the **Schedule SOC Visit** window, select **Open Census Calendar**.
2. Select the **Patient Calendar**, search for and select the patient.



Smart Scheduling | Census Patient Personnel | Support User, NTST 06:56 PM CDT

Patient: Brown, Sally (1225) | 747 | 04/28/1957 | Female | 5711 South Clay Avenue Springfield, MO 65810 | Not Found | Not Found | Go to Chart

Chart #1 Start Date: 05/02/2024  
Benefit Period #1: 05/02/2024 - 07/30/2024

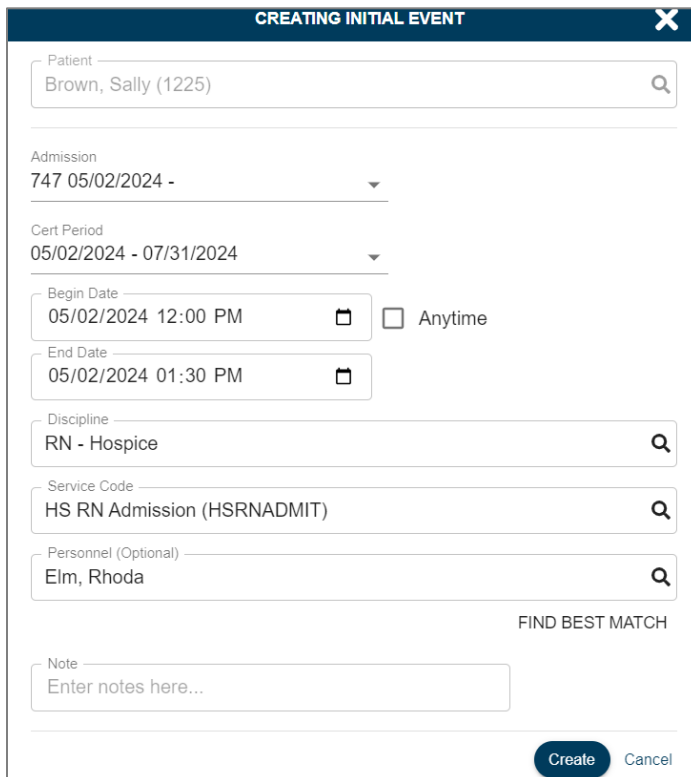
Buttons: Create New, Select Events, Show Filters, Clear Filters, Apply Filters/Refresh

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
28	29	30	1 May	2 May	3	4
5	6	7	8	9	10	11

Day View: 05/02/2024 | No events

- Authorizations
- Frequencies
- Recurrences

3. Select **Create New**.



**CREATING INITIAL EVENT**

Patient: Brown, Sally (1225)

Admission: 747 05/02/2024 -

Cert Period: 05/02/2024 - 07/31/2024

Begin Date: 05/02/2024 12:00 PM  Anytime

End Date: 05/02/2024 01:30 PM

Discipline: RN - Hospice

Service Code: HS RN Admission (HSRNADMIT)

Personnel (Optional): Elm, Rhoda

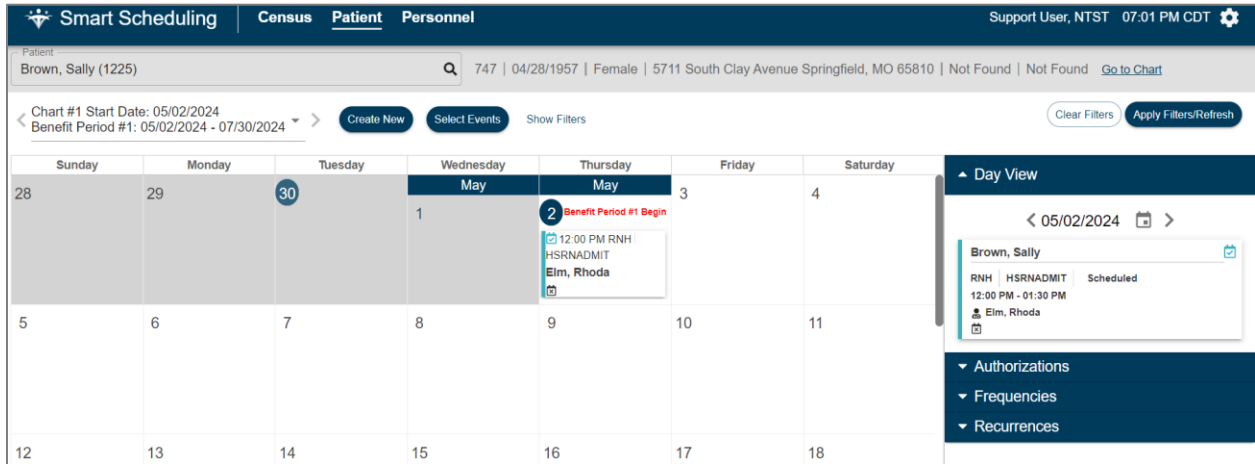
FIND BEST MATCH

Note: Enter notes here...

Buttons: Create, Cancel

4. Select the patient admission from the drop down
5. Select the **Begin Date** and time for the visit. If the visit can be made anytime, the anytime box can be checked and time will not be required.
6. Select the **Discipline** making the visit.
7. Select the **Service Code** for the visit
8. Select the **personnel** for the visit.

## 9. Select Create.



Smart Scheduling | Census | **Patient** | Personnel | Support User, NTST | 07:01 PM CDT

Patient: Brown, Sally (1225) | 747 | 04/28/1957 | Female | 5711 South Clay Avenue Springfield, MO 65810 | Not Found | Not Found | [Go to Chart](#)

Chart #1 Start Date: 05/02/2024 | Benefit Period #1: 05/02/2024 - 07/30/2024 | [Create Now](#) | [Select Events](#) | [Show Filters](#) | [Clear Filters](#) | [Apply Filters/Refresh](#)

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
28	29	30	1 May	2 May Benefit Period #1 Begin 12:00 PM RNH HSRNADMIT Elm, Rhoda	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18

Day View | < 05/02/2024 >

Brown, Sally

RNH | HSRNADMIT | Scheduled  
12:00 PM - 01:30 PM  
Elm, Rhoda

- Authorizations
- Frequencies
- Recurrences

10. Close the Smart Scheduling window.

 11. Check the **Schedule SOC Visit** box.

**Select Close at the bottom of the process list.**