

myUnity: What's New!

Release 2021.04



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Auto Activate Hospice Outpatient Orders from OrderConnect

MUE-1374

Auto Populate Covered/Related Status for OrderConnect Orders

Senior Living Enterprise Senior Living for Home Health and/or Hospice Enterprise for Hospice IPU

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
MUE-169


  New Veteran Demographics Data Capture and Report

MUE-1809

  Enhancements to Authorizations outside range of plan dates

MUE-1908

  Ability to search Patient ID or Admission ID added to Patient Quick Search

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- CCD-A: Vital signs included in the CCD

MUE-1400

- CCD-A: Incorporate ICD-10 diagnoses into the GenerateCCDListProblem action

MUE-1401

- CCD-A: Multiple Races will be included in the CCD

MUE-1768

- CCD-A: Care Team included in the CCD

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  Restrict Overlapping Dates on Visit Forms

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  Modify/Delete buttons added to CPT Code Widget

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 RTA Patient Statement printing option to include a Resident Copy

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 1099-INT and 1096 Tax Form RTA Report

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 Custom Pay Rate enhancement to functionality

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 Hospice Claims with multiple Respite Care

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 PDGM Notices and Final Claims – 0023 Date Requirement

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 Display Organization Logo on Private Pay PDF

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MUE-878 Auto Activate Hospice Outpatient Orders from OrderConnect

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*With this release, agencies can choose to **auto activate orders** in myUnity which originated in **Order Connect**.*

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MUE-878 Auto Activate Hospice Outpatient Orders from OrderConnect

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Navigate to **Setup > General > General > Organization Parameters > Clinical**

- **'Auto Activate Orders for OrderConnect Hospice Outpatient'**
 - Default is **No**.
- Setting the parameter to **Yes** will enable orders to be auto-activated in myUnity when created in OrderConnect.
 - Patient must currently be in a **Hospice Outpatient facility**.
 - All required myUnity fields must be complete.
 - If any fields are specified as required in myUnity, but aren't received from OrderConnect, the order will be created in **draft status**.

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MUE-1374 Auto Populate Covered/Related Status for OrderConnect Orders

With this release, myUnity will auto-populate 'Covered' and 'Related' status for hospice orders which are changed or reordered in OrderConnect.

Users will no longer have to manually set those statuses on a new order.

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MUE-1374 Auto Populate Covered/Related Status for OrderConnect Orders

When an order is changed or reordered in Order Connect, the process will discontinue the current order in myUnity and create a new order.

- The new order created will inherit the **'Covered'** and **'Related'** status of the previous order.

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*With this release, a new **Veteran Demographics** entry page has been added to allow the capture of veteran specific items associated with a patient. An associated report has also been added.*

*This functionality is to assist with the requirement for **State Veterans Homes** to capture and report on several data points related to a veteran's status and background. Additionally, non-state facilities that serve veterans may find this functionality applicable.*

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Security

Navigate to **Setup > Security > Roles > Menu Access Privileges**

- **Select Role(s)**
- **Service Module:** Census
- **Service Area:** Resident/Patient
- **Resident/Patient Info > Veteran Demographics**
 - **View:** gives a user access to the **Veteran Demographics** page but not the rights to modify any fields
 - **Update:** gives a user access to the page and to update fields

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Security

Navigate to **Setup > Security > Roles > Menu Access Privileges**

- **Select Role(s)**
- **Service Module:** Census
- **Service Area:** Reports
- **General > Veteran Statistics**
- **View:** gives a user access to run the report and view results

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Reference Codes

Four new reference code categories were added under **Demographics/Patient Information** for the purpose of capturing and reporting on veteran specific patient data. None of these reference code categories will be installed with any entries; an organization must create their corresponding codes.

1. **Military Branches**
2. **Military Conflicts (served in)**
3. **Military Rank**
4. **Reason for Military Discharge**

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Military Service Field

The **Military Service field** existed prior to the **Veteran Demographics** page. The selections will continue to be populated from values set up for the **Military Service reference code**.

- Prior to the addition of the **Veteran Statistics Report**, there were not military service reserved codes, and organizations could define any values for their purposes.
- The **Military Service** field is currently also used to indicate **Veteran** or **Non-Veteran** on the **Demographics Worksheet report** and **Hospice CAHPS reports**.

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Military Service Field

- With this release, two reserved military service reference codes have been added.
 - **VT** = Veteran (Is Veteran = yes)
 - **NO** = Non-Veteran (Is Veteran = no)
 - Existing codes distinctly used to represent veteran or non-veteran were converted to the new reserved codes.
 - Example: If the code **NV** (non-veteran) was present this code will be automatically converted to **NO** (non-veteran). If the code **NV** (navy veteran) was present this code would not be converted because it is not specific to veteran or non-veteran.

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Military Service Field

- Functionality associated with the existing **Demographics Worksheet** and the **Hospice CAHPS report** has not changed; these still rely on the **Is Veteran Yes/No** selection on the reference code setup.
 - The new **Veteran Statistics Report** will also use the **Veteran Yes/No** selection on the reference code setup.
 - If a patient's military service is associated with a military service which has been set up as **Yes** (Is Veteran), the patient will be returned on the report. If the military service has been set up as **No** (Is Not Veteran), the patient will not be returned on the report.

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Veteran Demographics Capture

When a patient is selected, access to the **Veteran Demographics** page is available by:

- **Census > Referral Info > Related Links**
- **Census > Patient Info > Related Links**
- **Census > Patient Info > Demographics > Related Links**
- None of the fields are required.

Note: Veteran Demographics is a patient specific entry page so all data captured is associated to the patient and not a specific admission.

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Veteran Demographics Capture

- Military Service
- Military Service ID
- Military Rank
- Military Branches
- Conflicts Served in
- Enlisted Date
- State Enlisted In
- Discharge Date
- State Discharged In
- Discharge Reason

Veteran Demographics

Military Service: <input type="text"/>	Military Service ID: <input type="text"/>	Military Rank: <input type="text"/>
Military Branches: <input type="text"/>	Conflicts Served In: <input type="text"/>	
Enlistment Date: <input type="text"/>	State Enlisted In: <input type="text"/>	
Discharge Date: <input type="text"/>	State Discharged In: <input type="text"/>	Discharge Reason: <input type="text"/>

Served In Combat? Yes No

Prisoner of War (POW)? Yes No

Purple Heart Recipient? Yes No

VA Per Diem Eligible? Yes No

Is Service-Connected Disability percentage 70% or higher? Yes No

Is Service-Connected Disability reason for admission? Yes No

Reason(s) for Service-Connected Disability:

Note: For more detail about each field, please refer to the 2021.04 What's New Release guide.

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Veteran Demographics Capture

- Served in Combat
- Prisoner of War (POW)
- Purple Heart Recipient
- VA Per Diem Eligible
- Is Service-Connected Disability Percentage 70% or higher?
- Is Service-Connected Disability reason for admission
- Reason(s) for Service-Connected Disability

Veteran Demographics

Military Service: <input type="text"/>	Military Service ID: <input type="text"/>	Military Rank: <input type="text"/>
Military Branches: <input type="text"/>	Conflicts Served In: <input type="text"/>	
Enlistment Date: <input type="text"/>	State Enlisted In: <input type="text"/>	
Discharge Date: <input type="text"/>	State Discharged In: <input type="text"/>	Discharge Reason: <input type="text"/>

Served in Combat? Yes No
 Prisoner of War (POW)? Yes No
 Purple Heart Recipient? Yes No
 VA Per Diem Eligible? Yes No

Is Service-Connected Disability percentage 70% or higher? Yes No
 Is Service-Connected Disability reason for admission? Yes No

Reason(s) for Service-Connected Disability:

Note: For more detail about each field, please refer to the 2021.04 What's New Release guide.

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Veteran Statistics Report

Navigate to **Census > Reports > General > Veteran Statistics Report**

The **Veteran Statistics Report** is a report based on the veteran patient data captured on the **Veteran Demographics** page. The report will return results in a patient detail view and will also allow grouping and sorting to capture statistical totals related to the captured patient veteran data.

Veteran Statistics Report

Org: Active Dates: To [Apply Filters](#)

Veterans by Conflict
 Veterans by Branch
 Detail View

[Collapse/Open All](#) [Export to Excel](#) [Export to PDF](#)

	Resident Name	Resident ID	Admission ID	Military ID	SCD Reason	70% or Greater ...	SCD Admission	Purple Heart Re...	POW (prisoner o...	Served in Combat
No items to display.										

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Veteran Statistics Report

- The report will only return veteran patients. The veteran status is determined by having selected a **Military Service** value that has '**Is Veteran – Yes**' selected.
 - Org** – filters the report by the admission organization level for any veteran patient's admission included in the Active Date range
 - Active Dates** – returns all veteran patients who have an active admission for one or more days within the active date range entered.

Veteran Statistics Report

Org: HB,And AL,Seavw IL Active Dates: 01/01/2021 To 01/31/2021

Veterans by Conflict Veterans by Branch Detail View

Collapse/Open All

Resident Name	Resident ID	Admission ID	Military ID	SCD

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Report Results

The results can be viewed in three different ways by selecting one of the three tabs at the top of the report.

1. Veterans by Conflict

- All veteran patients are grouped by the conflict(s) they have served in.
- By expanding any of the conflict groupings, a statistical total in addition to a patient detail list of all patients within the report criteria that have served in that expanded conflict.
- A patient may have service in multiple conflicts so may be included in more than one of the sub total groupings. However, the patient is only counted one time in the report grand totals at the bottom of the report.

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Report Results

The results can be viewed in three different ways by selecting one of the three tabs at the top of the report.

2. Veterans by Branch

- All veteran patients are grouped by the branch(s) they have served in.
- By expanding any of the branch groupings, a statistical total in addition to a patient detail list of all patients within the report criteria that have served in that expanded branch.
- A patient may have service in multiple branches so may be included in more than one of the sub total groupings. However, the patient is only counted one time in the report grand totals at the bottom of the report.

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Report Results

The results can be viewed in three different ways by selecting one of the three tabs at the top of the report.

3. Detail View

- There are no default groupings
- Each veteran patient returned on the report is displayed here
- The results can be filtered and sorted as needed from this view

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Report Grouping and Sorting

All report columns can be sorted by clicking on the column headers. Sorting the report will not affect the results of the report, just the display of the results.

The **Report** results can be grouped by any of the columns showing the funnel icon in the header. Grouping will group and subtotal the veteran patients based on the selected grouping.

Organization	Org Level	Patient Name	Patient ID	Admission ID	Admission Date	Military ID	VA Per Diem Eligible
TOPFCARDHSSLSLHSHS Senior Living	Facility	Holcomb, hospice Med A	133916	71441	2020-04-01T00:00:00	7116	No
TOPFCIDHHSLSLHSHH Senior Living	Facility	Holcomb, PDGM PaymentRegression	133917	HH Sa-71443	2020-05-01T00:00:00	999	No
TOPFCIDHHSLSLHSHH Senior Living	Facility	Holcomb, Homecare Med A	133921	HH Sa-71444	2020-04-01T00:00:00	9636	No
TOPFCIDHHSLSLHSHH Senior Living	Facility	Holcomb, Homecare NOT Med A	133922	HH Sa-71445	2020-04-01T00:00:00	9537	No
TOPFCIDHHSLSLHSHH Senior Living	Facility	Gage, Jeremiah Duaneus	886	72057	2020-10-22T00:00:00		No
TOPFCIDHHSLSLHSHH Senior Living	Facility	Holcomb, UnDischarged	94426A	41049A	2020-03-01T00:00:00	9437	No
TOPFCIDHHSLSLHSHH Senior Living	Facility	Gage, Jeremiah Duaneus	886	Pinch-71543	2020-10-01T00:00:00		No
TOPFCIDHHSLSLHSHH Senior Living	Facility	Gage, Jeremiah Duaneus	886	Aid A-72840	2020-10-01T00:00:00		No
Unduplicated Total: 6							Total: 0
* VA Per Diem Eligible: 1							
TOPFCARDHSSLSLHSHS Senior Living	Facility	Holcomb, hospice NOT Med A	133919	71442	2020-04-01T00:00:00	8864	Yes
TOPFCIDHHSLSLHSHH Senior Living	Facility	Holcomb, hospice Med A PLUS NOT Med A	133920	71443	2020-04-01T00:00:00	9657	Yes
TOPFCIDHHSLSLHSHH Senior Living	Facility	HOLCOMB, PPS 2020	133970	HH Sa-71391	2020-03-01T00:00:00	5887	Yes
TOPFCIDHHSLSLHSHH Senior Living	Facility	Holcomb, Homecare Med A PLUS NOT Med A	133923	HH Sa-71446	2020-04-01T00:00:00	885	Yes
TOPFCIDHHSLSLHSHH Senior Living	Facility	Holcomb, CMPPS18865	134084	HH Sa-71546	2019-09-01T00:00:00	1092	Yes

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Organization	Org Level	Patient Name	Patient Organization	Admission ID	Admission Date	Military ID	VA Per Diem Eligible
TOPHCAHS/HSSLSLHSHS Senior Living	Facility	Holcomb, Hospice Med A	133918	71441	2020-04-01T00:00:00	7116	No
TOPHC3HHHHHSLHSHH Senior Living	Facility	Holcomb, PDGM Payment/Regression	133917	HH Se-71440	2020-03-01T00:00:00	999	No
TOPHC3HHHHHSLHSHH Senior Living	Facility						No
TOPHC3HHHHHSLHSHH Senior Living	Facility						No
TOPHC3HHHHEP/EPHNTST EVV Enterprise	Facility						No
TOPHC3HHHHEP/EPHWH Enterprise	Facility						No
TOPEV1CMOCCRC/BB/Plnd RC	Facility						No
TOPEV1CMOCCRC/BB/And AL	Facility						No
							Total: 0
TOPHCAHS/HSSLSLHSHS Senior Living	Facility						Yes
TOPHCAHS/HSSLSLHSHS Senior Living	Facility						Yes
TOPHC3HHHHHSLHSHH Senior Living	Facility	HOLCOMB, PPS 2020	133870	HH Se-71391	2020-03-01T00:00:00	5087	Yes
TOPHC3HHHHHSLHSHH Senior Living	Facility	Holcomb, Homecare Med A PLUS NOT Med A	133823	HH Se-71446	2020-04-01T00:00:00	865	Yes
TOPHC3HHHHHSLHSHH Senior Living	Facility	Holcomb, OldPPS18605	134084	HH Se-71548	2019-09-01T00:00:00	1092	Yes

For example, to see all veteran patients eligible for VA Per Diem Reimbursements and all that are not, drag the VA Per Diem Eligible column to the grouping bar at the top. Automatically the report will refresh and group by the VA per Diem eligibility.

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Report Grouping and Sorting

The report can also be grouped by multiple columns at once.

For example, a user could additionally group by **Military Branch** to see a break down of which of the **VA Per Diem Eligible** veterans served under which branch(s).

The screenshot shows the 'Veterans by Conflict' report interface. At the top, there are tabs for 'Veterans by Conflict', 'Veterans by Branch', and 'Detail View'. Below the tabs is a 'Collapse/Open All' button. Two filter buttons are highlighted with an orange box: 'VA Per Diem Eligible' and 'Military Branch'. Below the filters is a table with columns: Organization, Org Level, Patient Name, Patient ID, and Admission ID. The table is grouped by 'VA Per Diem Eligible: 0' and 'VA Per Diem Eligible: 1'. The 'VA Per Diem Eligible: 0' group is further grouped by 'Military Branch: Army' and 'Military Branch: Marines'. The 'VA Per Diem Eligible: 1' group is grouped by 'Military Branch: Army', 'Military Branch: Army, Navy', 'Military Branch: Marines, Coast Guard', and 'Military Branch: Navy'. The table shows several rows of data with columns for Organization, Facility, Payment/Regression, Patient Name, Patient ID, and Admission ID. At the bottom, there is a pagination control showing '1' of 25 items per page.

Organization	Org Level	Patient Name	Patient ID	Admission ID
VA Per Diem Eligible: 0				
Military Branch:				
Military Branch: Army				
TOPH/C3/H/HH/SL/SL/H/HH	Facility	Holcomb, PDGM	133917	HH Se-71440
Senior Living		Payment/Regression		
TOPH/C3/H/HH/SL/SL/H/HH	Facility	Holcomb, Homecare Med A	133921	HH Se-71444
Senior Living				
TOPH/C3/H/HH/EP/EP/HH/...	Facility	Gage, Jeremiah Duancus	bbb	72857
EVV Enterprise				
TOPE/1/H/MOCCRC/HB/Plnd	Facility	Gage, Jeremiah Duancus	bbb	Plnd-71543
RC				
TOPE/1/H/MOCCRC/HB/And	Facility	Gage, Jeremiah Duancus	bbb	And A-72840
AL				
Unduplicated Total: 3				
Military Branch: Marines				
Unduplicated Total: 6				
VA Per Diem Eligible: 1				
Military Branch:				
Military Branch: Army				
Military Branch: Army, Navy				
Military Branch: Marines, Coast Guard				
Military Branch: Navy				
Unduplicated Total: 6				

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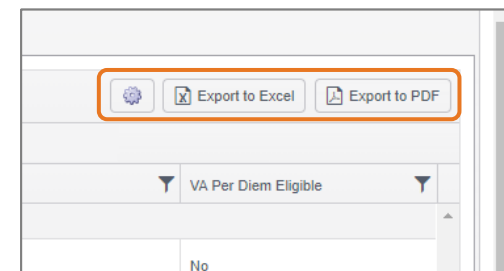
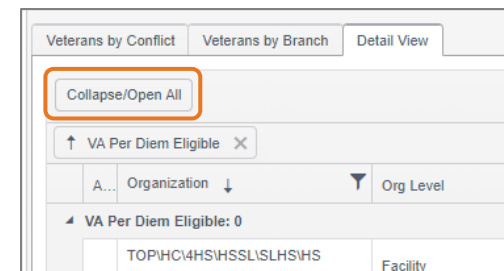
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Additional Report Options

- **Collapse/Open All button:** when grouping the report, this button displays all patient detail or collapses all patient detail to view totals only.
- **Add/Remove Report Columns from View:** clicking on the gear icon allows the user to select and/or deselect columns that display on the report.
- **Export to Excel/PDF:** select to create either an Excel or PDF file with the report results.



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Enhancements to Authorizations outside range of plan dates

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With this release, enhancements have been made to the functionality surrounding Authorizations associated to active Plans.

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MUE-1809 Enhancements to Authorizations outside range of plan dates

End of MUE

- In this scenario, the auth was originally in sync with plan dates, but then plan dates were changed. A message would also have appeared when the plan dates were edited.
- When a user is changing a Service Authorization Date Range to one that spans outside the date range for the associated plan, they will get a message that informs them '*Plan Name* is not active for the entire Authorization date range.'
- When a plan is removed from the **Funding Coverage** which has an associated **Service Authorization**, that plan will remain displayed on the **Authorization** but will not appear in a selection list if the Authorization is edited.

The screenshot shows the 'Service Authorizations' form in a web application. At the top, there are buttons for 'Save', 'Add Auth Detail', and 'Create Summary Row'. Below these, a message box displays: 'Authorization saved successfully. TS MED A (Cahaba) is not active for the entire Authorization date range.' The form fields include: 'Authorization Number' (text input), 'Active Dates' (with 'Begin' set to 10/01/2020 and 'End' as a date picker), 'Contact Name' (text input), 'Verified By' (dropdown menu showing 'Scott, Trenton (TSCOTT1)'), 'Verified Date' (set to 01/29/2021), and 'Relate to Order?' (checkbox). A 'Note' field is also present at the bottom right.

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MUE-169

Setup
Functionality

MUE-1809

Functionality

MUE-1908

Functionality

Overview

MUE-1908 Ability to search Patient ID or Admission ID added to Patient Quick Search

*With this release, the **Patient Quick Search** has been updated to allow searching by **Patient ID** and **Admission ID** in addition to the already existing patient name search.*

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MUE-169

Setup
Functionality

MUE-1809

Functionality

MUE-1908

Functionality

Functionality

MUE-1908 Ability to search Patient ID or Admission ID added to Patient Quick Search

End of Section

The search box will now search by one of the following patient parameters, as entered by the user:

- **Patient Name (Last, First)**
- **Patient ID**
- **Admission ID**

Quick Search

Search by Patient Name (Last, First), Patient ID, or Admission ID

Active All

Patient

[Advanced Search](#)
[Add Patient](#)

OK Cancel

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End of Section. Please Select a Tab at the top.



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MUE-199

Overview

MUE-199 Immunizations Manual Entry

Setup
Functionality

*With this release, a new **Immunizations** tab will give users the ability to capture immunization information for vaccinations administered outside of the facility. This functionality has special importance for off-site COVID-19 immunization clinics.*

Further functionality for this tab will continue in future releases.

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MUE-199

Setup

MUE-199 Immunizations Manual Entry

Setup

Functionality

Navigate to **Setup > Security > Roles > Menu Access Privileges**

- Select **Role**
- **Service Module:** Clinical
- **Service Area:** Chart View
- **Provide access to Immunizations**

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Functionality

MUE-199 Immunizations Manual Entry

Setup
Functionality

Once setup is complete, a new **Immunizations** tab will be available under the **Clinical** tab.

- This tab is specifically for capturing any immunizations not captured via an order.
- In this tab, an **Immunizations (not Administered in Facility)** hyperlink is available.

Alerts	Resident Info	Care Mgmt	Admission	Vitals	Care Plan	Assessments	MDS	Therapy	Orders	Tests	Wounds	Notes	Risk Mgmt	Providers	Discharge Meds	Immunizations
Immunizations (Not Administered in Facility) Add Immunization																
Immunization Type	Immunization	Amount	Route	Lot Number	Date Admi...	Location	Administ...	Date Obse...	Observed ...	Notes	History					
Toxoid Vaccines - Toxin-Producing Bacilli	TB Vaccine	99.99 cc	Intramuscular	TB-001 234 123	9/3/2020	CVS #10	Nurse Nancy	9/20/2020	Positive	Imm added on Adm 71389 (3/1/...	History					
Vaccine Viral - COVID-19 (SARS-CoV-2)	Moderna	full syringe	Intramuscular	197619581951	1/1/2021	CVS #16	Nurse Nelda			documented on Adm 73099 (2n...	History					
Vaccine Viral - Mumps and Related	MPS-Vax	115 mil	Intramuscular			CVS #16				adding a note after this row had...	History					
Vaccine Viral- Tick-borne Encephalitis	Tick B Gone	25 grams	Oral	OU812	1/2/2021	CVS #18	Dr Dave			more security testing	History					
		abc def ghi ikl		abc def ghi ikl		75 def ghi ikl	dr75def ghi ikl mno									

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MUE-199

Functionality

MUE-199 Immunizations Manual Entry

Setup

Functionality

- Selecting the **Immunizations (Not Administered in Facility)** link or the **Add Immunization** button will open the screen with immunization details and the ability to add a new immunization

Alerts	Resident Info	Care Mgmt	Admission	Vitals	Care Plan	Ass
Immunizations (Not Administered In Facility) Add Immunization						
Immunization Type	Immunization	Amount	Route			

Immunizations (Not Administered In Facility)				
+ Add Immunization Cancel changes				
Immunization Type	Immunization	Amount	Route	Lot Number
<input type="text"/>				
Toxoid Vaccines - Toxin-Producing Bacilli	TB Vaccine	99.99 cc	Intramuscular	TB-001 234 123

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Functionality

MUE-199 Immunizations Manual Entry

Setup

Functionality

- **Immunization Type (required field):** FDB immunization categories, one must be selected to fill out the rest of the fields.
 - In addition to the Immunization categories, the **Diagnostic Bio logistic category** is an option – to populate the **Date Observed** – for the two step PPD (TB Test).

Note: Only the **Immunization Type** and **Date Administered** fields are required, but users should enter as much information as is available.

Immunizations (Not Administered)

+ Add Immunization ⓧ Cancel changes

Immunization Type

Toxoid Vaccines - Toxin-Producing Bacilli

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Functionality

MUE-199 Immunizations Manual Entry

Setup
Functionality

- **Immunization:** free text
- **Amount:** free text
- **Route:** multi-select options; same options as in orders for route administration

Entered In Facility)

ges

Immunization	Amount	Route
TB Vaccine	99.99 cc	Intramuscular

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Functionality

MUE-199 Immunizations Manual Entry

Setup
Functionality

- **Lot number:** free text
- **Date Administered** (required field)
- **Location:** free text

Note: Only the **Immunization Type** and **Date Administered** fields are required, but users should enter as much information as is available.

Lot Number	Date Admini...	Location
TB-001 234 123	9/3/2020	CVS #10

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Functionality

MUE-199 Immunizations Manual Entry

Setup
Functionality

- **Administered:** free text
- **Date Observed:** Only populates if Diagnostic Bio logistics was selected for 2 Step PPD (TB Test)
- **Observed:** Positive or Negative – captures result of 2 Step PPD (TB Test); only populates if Diagnostic Bio logistics is selected

			Resi
Administe...	Date Obser...	Observed R...	
Nurse Nancy	9/20/2020	Positive	

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Functionality

MUE-199 Immunizations Manual Entry

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Setup
Functionality

- **Notes:** Free text to capture any necessary information

Resident: Branstetter, Clementine Resident	
Notes	
Imm added on Adm 71389 (3/1/20) R...	

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Functionality

Overview

Multiple MUE

CCD (Continuity of Care Document)

*With this release, several updates have been made to the **Continuity of Care** document.*

MUE-498: CCD-A: Vital signs included in the CCD

MUE-1400: CCD-A: Incorporate ICD-10 diagnoses into the **GenerateCCDListProblem** action

MUE-1401: CCD-A: Multiple Races will be included in the CCD

MUE-1768: CCD-A: Care Team included in the CCD

CCD Updates

MUE-498

MUE-1400

MUE-1401

MUE-1768

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MUE-199

Functionality

Multiple MUE CCD (Continuity of Care Document)

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Setup
Functionality

CCD Updates

MUE-498

MUE-1400

MUE-1401

MUE-1768

- The most recent vital sign capture for the requested time frame will be included in the CCD.
 - Includes **blood pressure, height, weight, BMI, heart rate, respiratory rate, temperature, and pulse oximetry.**
- The problem section of the CCD will be populated with the **ICD code(s)**, description, and effective date for diagnoses active during the creation date range.
 - The Organization Global Setting “**Use CareFabric CCD**” must be set to **Yes**.
- As myUnity now supports multi race selections, the CCD will also display multi race selections.
- The **Care Team** will now be included in the CCD.
 - The Care Team for the CCD is defined as **physicians** associated to the patient and the **case manager** associated through the admission scheduling assignments.

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MUE 21.3

Overview

MUE 21.3 Restrict Overlapping Dates on Visit Forms

MUE 21.3

This feature sets up logic to detect overlapping date/time values that could inadvertently be entered into visit forms by clinicians without notification. Typically, these overlaps are caught by billing software, and the forms show up in the Integration Log.

With this functionality, users are notified earlier of overlap errors when a clinician attempts to send the form to the office. If an overlap is detected, myUnity will generate a pop-up window prompting the user to adjust the date/time fields.

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MUE 21.3 Restrict Overlapping Dates on Visit Forms

MUE 21.3

Check and Warn: If the configuration is set to warn, the clinician can bypass the prompt and send the form to the Office, but the form will be marked as **"Visit Overlap Warning"**.

Visit Overlap Warning 

The following errors were found: The date and time for this visit overlaps with an existing visit. Would you still like to Send to Office?

Patient	MR #	Date In	Date Out	Time In	Time Out	User	Form
hospice, test d.	94131A	01/04/2021		08:30 AM	11:00 AM	rn, rn (RN) (H)	Hospice Nursing Initial Comprehensive Admission Assessment (HIS) 3.

Send to Office

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Functionality

MUE 21.3 Restrict Overlapping Dates on Visit Forms

End of MUE

MUE 21.3

Check and Require: If the configuration is set to require, the clinician will be prevented from sending the form to office if Date In/Date Out and Time In/Time Out overlaps with another visit owned by the same user.

Visit Overlap Error ✕

The following errors were found: The date and time for this visit overlaps with an existing visit. Please adjust your visit date(s) and/or times.

Patient	MR #	Date In	Date Out	Time In	Time Out	User	Form
hospice, test d.	94131A	01/04/2021		08:30 AM	11:00 AM	rn, rn (RN) (H)	Hospice Nursing Initial Comprehensive Admission Assessment (HIS) 3.

Note: This feature is **not enabled** by default with this release; please create a Support ticket at <https://netsmartcares.force.com> to request it be turned on. In your ticket, please note if your agency would like to turn on either **“Check and Warn”** or **“Check and Require.”**

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MUE 21.3

Functionality

MUE 21.3 Modify/Delete buttons added to CPT Code Widget

End of Section

MUE 21.3

With this update, CPT codes that have been added to the CPT Code Widget can now be modified or deleted, provided the form is still editable. The **Modify** and **Delete** buttons will not be available if the user form is no longer editable (for example if the form is in Completed status).

Codes					
Add Code					
Code	Start Time	End Time	E/M or GW	Notes	Modify Delete
10061 I&D Complicated or Multiple	9:30 PM	10:30 PM	-	-	Modify Delete
11200 Skin Tag removal up to 15	5:15 PM	6:00 PM	-	-	Modify Delete
Caregiver Signature: This form has not been electronically signed by you.					

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MUE-20

Functionality

Overview

MUE-20 RTA Patient Statement printing option to include a Resident Copy

MUE-21

Setup

Functionality

MUE-1863

Functionality

With this release, a new option has been added to the RTA Patient Statement which allows a duplicate copy to be printed for the patient, which is useful for situations in which the patient has a financially responsible party to whom the initial copy will be addressed to.

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Functionality

MUE-20 RTA Patient Statement printing option to include a Resident Copy

Functionality

MUE-21

Setup

Functionality

MUE-1863

Functionality

Submit Reset

Resident Statements

Organization Selection
 TOP*/all
 HH Senior Living*/all
 HH Enterprise*/all
 NTST EVV Enterprise*/all
 Display To: Facility

Date Filter(s)
 Starting: 01/01/2021 Ending: 01/31/2021

Selection(s)

Resident Selection

 Include Message
 (Characters Left: 250)

Account Type(s)
 Resident Trust
 Entrance Fee
 Security Deposit
 Adjustment

Format/Processing Options

Format	Process
<input type="radio"/> Excel	<input checked="" type="radio"/> Online
<input checked="" type="radio"/> PDF	<input type="radio"/> Background
Stored Templates	

Include Signature Line
 Yes No

Include Zero Balance
 Yes No

Include No Activity Accounts
 Yes No

Include Closed Accounts
 Yes No

Include Payee & Hide Batch & Trans #
 Yes No

Create for Credit Balances Only
 Yes No

Create Separate Statement for Each Account
 Yes No

Print Duplicate Copy for the Resident
 Yes No

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Functionality

MUE-20 RTA Patient Statement printing option to include a Resident Copy

End of MUE

Functionality

MUE-21

Setup

Functionality

MUE-1863

Functionality

From the myUnity home screen, navigate to **Financial > Reports > RTA > Patient Statements**

- A new radio button option for **“Print Duplicate Copy for the Patient”**
 - Selecting **Yes** will print a second copy of the statement to hand to the patient.
 - Selecting **No** will work as it did prior to this update. A single statement for each patient will be printed, addressed to either the financially responsible party or if none listed, to the patient.

The screenshot shows a form with several radio button options for printing statements. The options are:

- Include Signature Line**: Yes No
- Include Zero Balance**: Yes No
- Include No Activity Accounts**: Yes No
- Include Closed Accounts**: Yes No
- Include Payee & Hide Batch & Trans #**: Yes No
- Create for Credit Balances Only**: Yes No
- Create Separate Statement for Each Account**: Yes No
- Print Duplicate Copy for the Resident**: Yes No

The 'Print Duplicate Copy for the Resident' option is highlighted with an orange box.

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MUE-21

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Functionality

MUE-1863

Functionality

Overview

MUE-21 1099-INT and 1096 Tax Form RTA Report

With this release, a new report gives a list of accounts which were paid interest, and how much that interest was. This report will assist agencies in meeting the IRS requirement of filing a 1099 for any account which was paid more than \$10 in interest during the fiscal year.

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Setup

MUE-21 1099-INT and 1096 Tax Form RTA Report

MUE-21

Setup

Functionality

MUE-1863

Functionality

Navigate to **Setup > Security > Roles > Menu Access Privileges**

- **Select Role(s)**
- **Service Module:** Financial
- **Service Area:** Reports
- **RTA > RTA Interest Report:** select View and Update

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Functionality

MUE-21 1099-INT and 1096 Tax Form RTA Report

MUE-21

Setup

Functionality

MUE-1863

Functionality

Navigate to **Financial > Reports > RTA > RTA Interest Report**

RTA Interest Report

Orig: TOP Transaction Dates: 01/01/2020 to 12/31/2020 Minimum Interest Amount: \$10.00 Group by Facility? [Show More Filters](#) [Reset Filters](#) [Apply Filters](#)

[Collapse/Open All](#) [Export to Excel](#)

Facility	Puppy Name (ID)	Social Security Number	Home Address	Account ID	Interest Amount
All:					Total Interest: \$112.72
TOPE11GSLCCRC@PLake SNF	Cawley, Eleanor M (13785)	XXX-XX-8152	999 Northberry Lane Town River Drive St Charles, MO 63304	285-Lake SNF-Resident Trust	\$10.69
TOPE11GSLCCRC@PLake SNF	Dog, Shmoopy (93734)	XXX-XX-	.	290-Lake SNF-Resident Trust	\$11.24
TOPE11GSLCCRC@PLake SNF	Munson, Barbara (57580)	XXX-XX-8622	999 Northberry Lane Town River Drive Weldon Spring, MO 63304	156-Lake SNF-Resident Trust	\$25.77
TOPE11GMOCCRC@LIVStnGI SNF	RTA Statements, MUE-20 (135634)	XXX-XX-0482	3203 N Glenstone Springfield, MO 65807	327-StnGI SNF-Resident Trust	\$34.14
TOPE12CILCCRC@LHVtunOks SNF	VIS-8965, RTA_Date (93789)	XXX-XX-	789 Republic Rd Springfield, MO 65804	282-TunOks SNF-Resident Trust	\$15.99
TOPE11GMOCCRC@LIVStnGI SNF	Zouglas, Leona R (39930)	XXX-XX-5923	4323 Infinity Road Columbia, MO 65202	283-StnGI SNF-Resident Trust	\$14.89

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Functionality

MUE-21 1099-INT and 1096 Tax Form RTA Report

End of MUE

MUE-21

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Functionality

MUE-1863

Functionality

RTA Interest Report

Org: Transaction Dates: to Minimum Interest Amount: Group by Facility?

[Show More Filters](#)

- Select **Org**
- **Transaction Dates** will default to the previous year.
- **Minimum Interest Amount** defaults to \$10.00.
 - The report may return specific patients with an amount lower than the minimum because all of the accounts for that patient added together equal the minimum amount or over.
- **Group by Facility** will group the accounts by facility and collapse the details.
- **Show More Filters** allows for filtering by specific patients.

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MUE-1863

Functionality

Overview

MUE-1863 Custom Pay Rate enhancement to functionality

*With this release, the **custom pay rate** that can be added in the back office patient calendar is integrated with **Visit Notes**.*

*Previously the **custom pay rates** were only applicable for **scheduled requests**.*

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MUE-20

Functionality

MUE-1863 Custom Pay Rate enhancement to functionality

End of Section

Functionality

MUE-21

Setup

Functionality

MUE-1863

Functionality

- Any scheduled request in back office can be edited to add a custom pay rate override or add-on (screenshot shows current activity).
 - These rates will now also be used when the scheduled request is completed as a visit note.

The request is completed and cannot be modified or removed

Edit Request

Selected Request(s) 1/18/2021

Begin Date: 9/18/2021 Status: Completed Related Activity: Completed

Client: Sergio Trinidad (2095) Admission: 1006PD-1019 7/8/2019 Status: Confirmed Scheduling Attributes

Service: LPN_Visit/PDLPN(VISIT)

Recurrence: Beginning 12/5/2020 every 1 week(s) on Sunday, Saturday until 1/31/2021

Time/Duration: Time: 6:09 AM Duration: 1 Hours Quantity: 1

Resource: Type Needed: Case/Team/Previously Assigned Name: Thomas, LPN Kim A (KThomas002) Payable: Confirmed Custom Rate Type: Fixed Override Custom Rate: \$100,000 Add Non-Required

Note: Address Cost Enter notes for this request here (Characters Left: 2500)

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MUE-579

Overview

MUE-579 Hospice claims with multiple Respite Care spans

Setup

MUE-2005

Functionality

MUE-1345

Setup
Functionality

Occurrence Span M2 is required if there are multiple Respite Care spans on the hospice claim. With this release, the occurrence span option has been added.

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MUE-579

Setup

MUE-579 Ability to Adjust Hospice Per Diem charges in Adjustments – Remove/Regenerate Action and in Auto Adjustments

Setup

MUE-2005

Functionality

MUE-1345

Setup

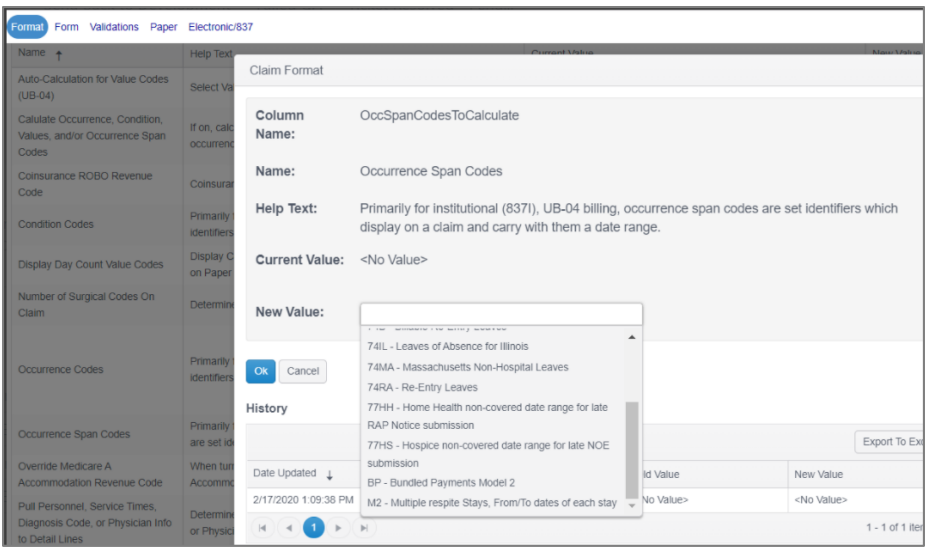
Functionality

- The new option will automatically be enabled on these claim formats:

- HP_UB04MCRA5010_CBA2
- HP_UB04MCRA5010_ESL
- HP_UB04MCRA5010_PM2

- For other claim format types, navigate to the **Claim Utility**

- Enable the occurrence span code '**M2- Multiple respite stays, From/To dates of each stay**'





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MUE-2005

PDGM Notices and Final Claims – 0023 Date Requirement

MUE-2005

Functionality

MUE-1345

Setup

Functionality

*With this release, the **0023 Date** on the final claim matches the **0023 Date** on the **RAP Notice for PDGM**.*

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Functionality

MUE-2005 PDGM Notices and Final Claims – 0023 Date Requirement

End of MUE

MUE-2005

Functionality

MUE-1345

Setup

Functionality

- CMS no longer validates the final claim with the first billable service date for the period, instead requiring the 0023 Date on the final claim to match the 0023 Date on the RAP Notice.
- With this release, myUnity is compliant with this requirement for any PDGM Notice plans.

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MUE-1345

Display Organization Logo on Private Pay PDF

MUE-2005

Functionality

MUE-1345

Setup

Functionality

*With this release, an organization's logo can appear on the **Private Pay PDF** form.*

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MUE-1345 Display Organization Logo on Private Pay PDF

MUE-2005

Functionality

MUE-1345

Setup

Functionality

To add a logo to the system, navigate to **Setup > General > Org Struct > Add/Update Upper Level Entities**.

- Search for **Facility** being used and once selected, **Edit**.
- Select the **Edit Organization Logos** link, then select **Add Organization Logo**.
- **Sub-Category:** Logo for Claims.
- Select **File** and **Ok**.

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MUE-579

Functionality

MUE-1345 Display Organization Logo on Private Pay PDF

End of Section

Setup

MUE-2005


Functionality

MUE-1345

Setup

Functionality

- The logo will appear in the upper left corner of all pages of a **Private Pay PDF form**.



Ava Residential Community
4303 Infinity Road
St Louis, MO 63144
(801) 815-8967

LTC: KJPvPay
123 Ady
Springfield, MO 65804

STATEMENT Page 1 of 2

Invoice #	Account #	Date
1047305	130691	02/04/2021

Due Date	Amount Due	Amount Paid
02/15/2021	\$7,750.00	

Resident Name
KJPvPay, LTC

PLEASE DETACH AND RETURN UPPER PORTION WITH YOUR

Date		Description	Units	Unit Cost	Net		Balance	
From	Through				Charges	Accruals		
RESIDENT RESPONSIBILITY								
01/01/2021	01/01/2021	Level I	1.00	250.00	250.00		\$0.00	
01/02/2021	01/02/2021	Level I	1.00	250.00	250.00		\$0.00	
01/03/2021	01/03/2021	Level I	1.00	250.00	250.00		\$0.00	
01/04/2021	01/04/2021	Level I	1.00	250.00	250.00		\$0.00	
01/05/2021	01/05/2021	Level I	1.00	250.00	250.00		\$0.00	
01/06/2021	01/06/2021	Level I	1.00	250.00	250.00		\$0.00	
01/07/2021	01/07/2021	Level I	1.00	250.00	250.00		\$0.00	
01/08/2021	01/08/2021	Level I	1.00	250.00	250.00		\$0.00	
01/09/2021	01/09/2021	Level I	1.00	250.00	250.00		\$0.00	
01/10/2021	01/10/2021	Level I	1.00	250.00	250.00		\$0.00	
01/11/2021	01/11/2021	Level I	1.00	250.00	250.00		\$0.00	
01/12/2021	01/12/2021	Level I	1.00	250.00	250.00		\$0.00	
01/13/2021	01/13/2021	Level I	1.00	250.00	250.00		\$0.00	
01/14/2021	01/14/2021	Level I	1.00	250.00	250.00		\$0.00	
01/15/2021	01/15/2021	Level I	1.00	250.00	250.00		\$0.00	
01/16/2021	01/16/2021	Level I	1.00	250.00	250.00		\$0.00	
RESIDENT RESPONSIBILITY								
			Current	Over 31	Over 62	Over 92	Over 123	Total
			7,750.00					\$7,750.00