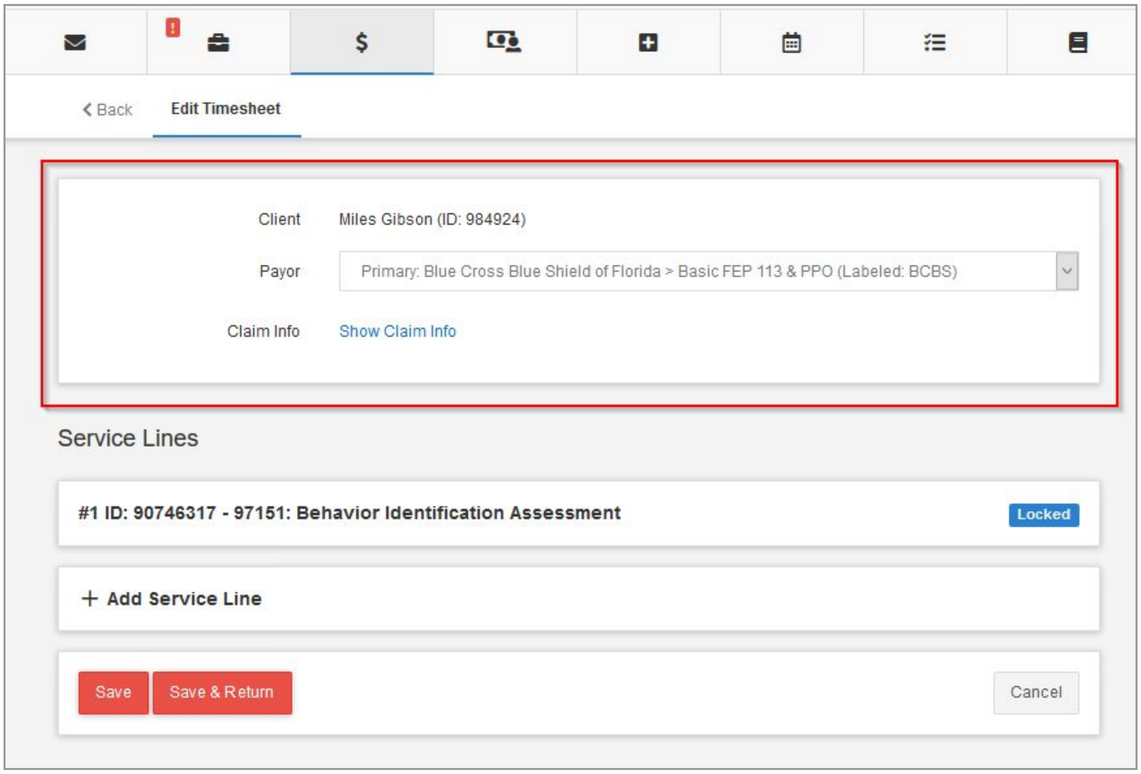
CentralReach
New Timesheet

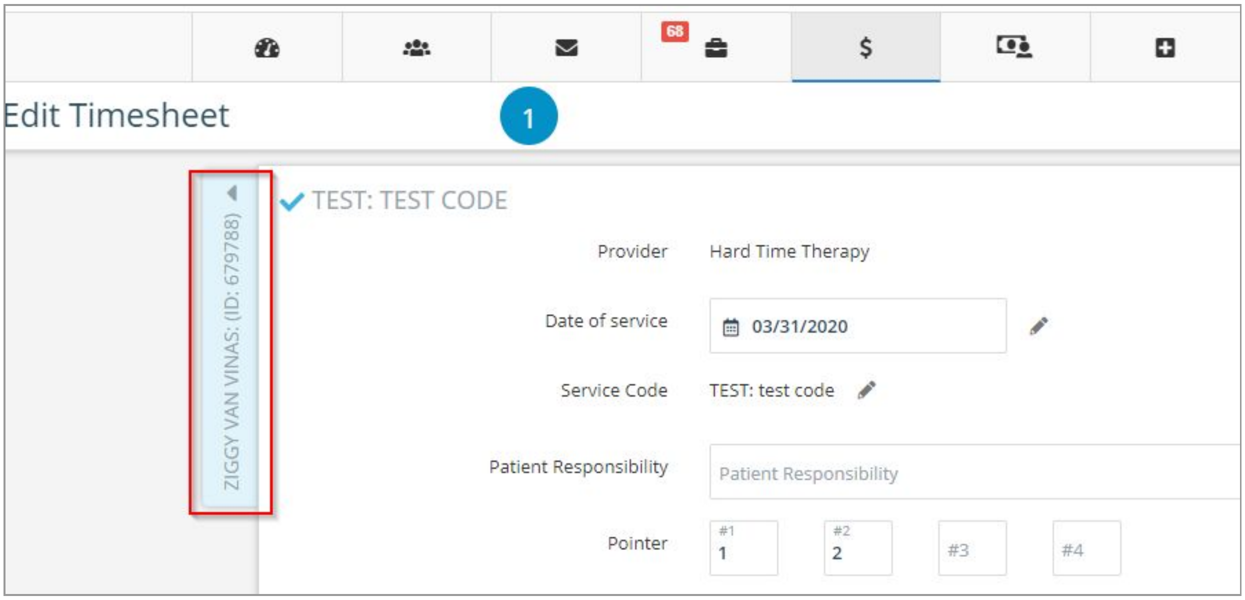
A detailed overview of the new CentralReach timesheet, highlighting before and after updates to help you quickly familiarize yourself with the new changes.

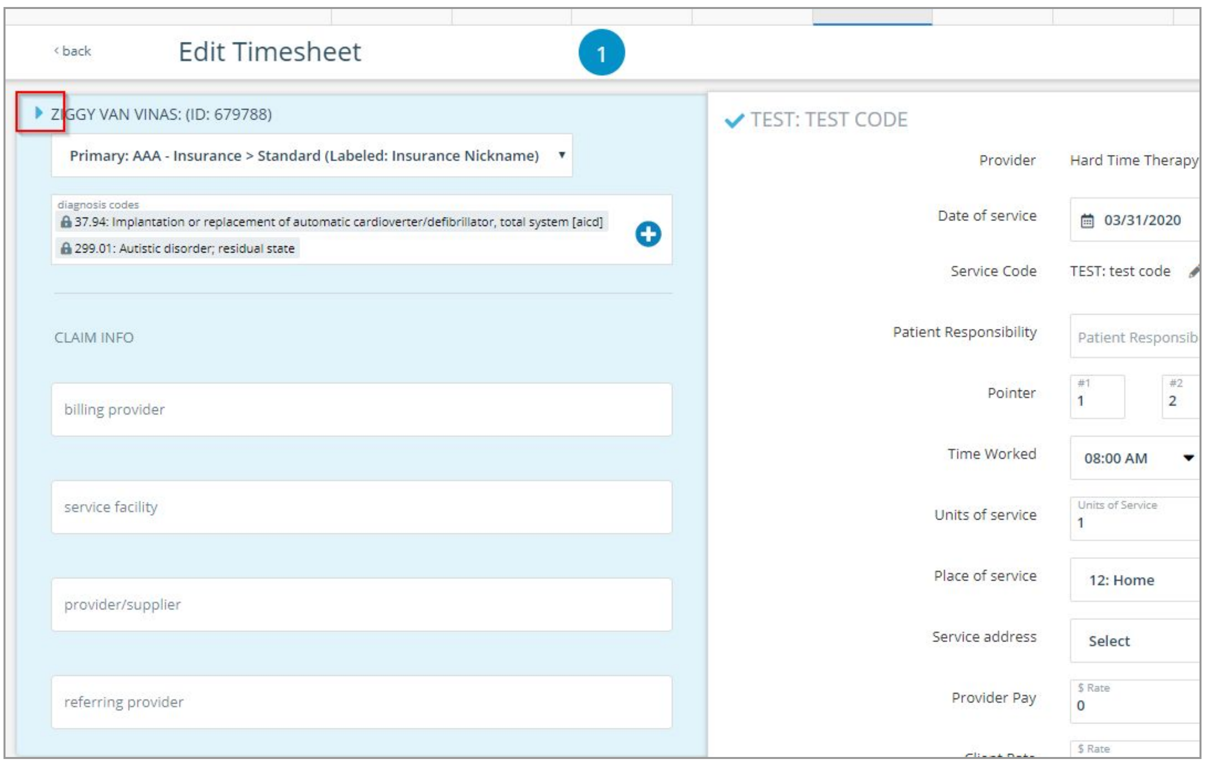
1. Location of Client Information

OLD VIEW: When creating a timesheet from an appointment, all client information (*Client Name, Payor, and Claim Information*), was displayed on top of the timesheet page.



NEW VIEW: The client's name and the client ID will live on the expandable tab on the left of the timesheet screen. Click the arrow to the left of the *Service Code* name to open and view details including the client's payor and claim Information. Click the arrow again to hide information.

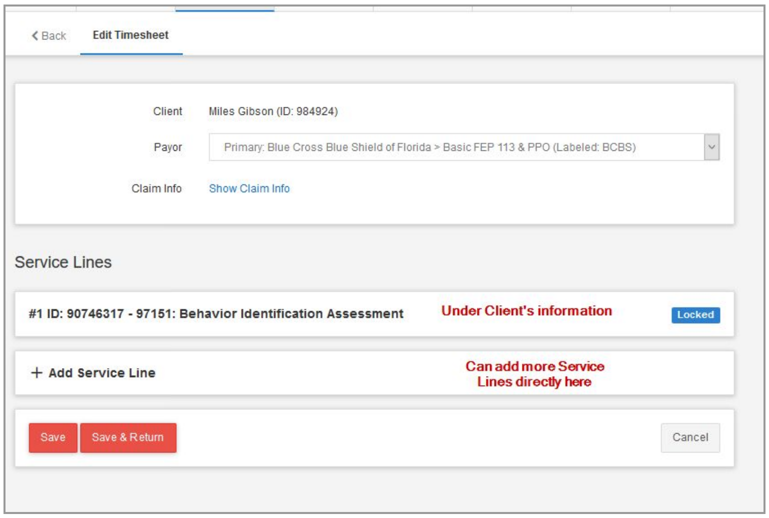

Edit Timesheet
1
ZIGGY VAN VINAS: (ID: 679788)
TEST: TEST CODE
Provider
Hard Time Therapy
Date of service
03/31/2020
Service Code
TEST: test code
Patient Responsibility
Patient Responsibility
Pointer
#1
1
#2
2
#3
#4


back
Edit Timesheet
1
ZIGGY VAN VINAS: (ID: 679788)
Primary: AAA - Insurance > Standard (Labeled: Insurance Nickname)
diagnosis codes
37.94: Implantation or replacement of automatic cardioverter/defibrillator, total system [aicd]
299.01: Autistic disorder, residual state
CLAIM INFO
billing provider
service facility
provider/supplier
referring provider
TEST: TEST CODE
Provider
Hard Time Therapy
Date of service
03/31/2020
Service Code
TEST: test code
Patient Responsibility
Pointer
#1
1
#2
2
Time Worked
08:00 AM
Units of service
Units of Service
1
Place of service
12: Home
Service address
Select
Provider Pay
$ Rate
0
$ Rate

2. View and Add Service Lines

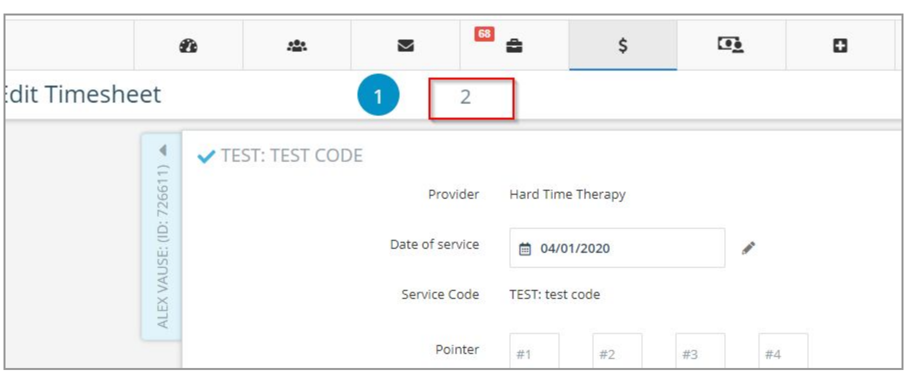
OLD VIEW:

- When converting from an appointment, users were able to add more *Service Lines* to the timesheet without the *Service Code* being on the actual appointment (depending on *Service Code* properties).
- In addition, the *Service Line(s)* in the old view were displayed under the client's information.



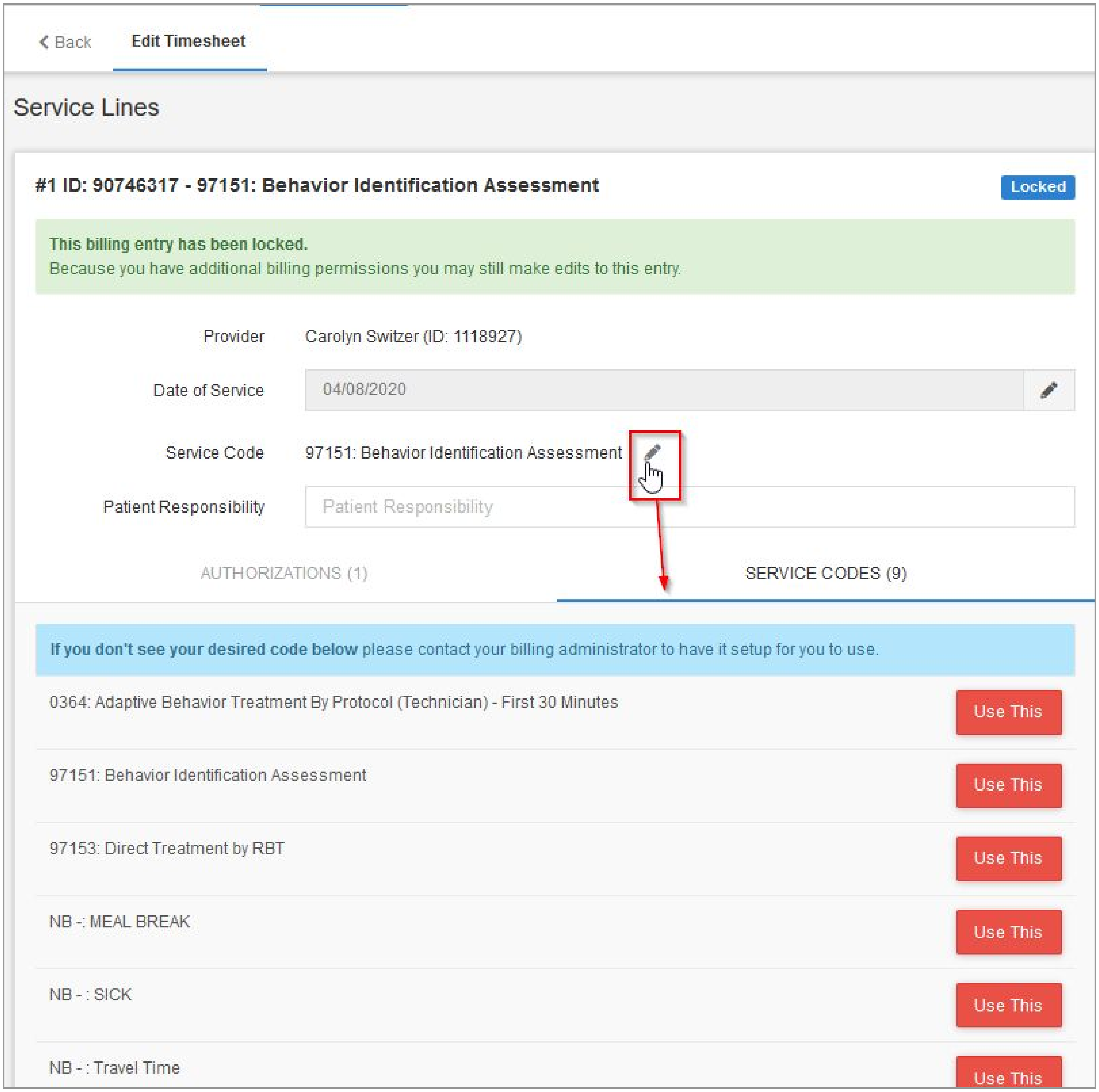
NEW VIEW:

- The *Service Line* information is now accessible via the top of the screen. If there is more than one *Service Code*, the user will now click the blue numbers at the top of the page to navigate to the other service line.
- If the user is creating a timesheet from an appointment, the new timesheet will not allow additional *Service Codes* to be added. Instead, these *Service Code* updates must be made on the appointment prior to conversion, which is our recommended best practice workflow for accuracy and consistency between appointments and billing entries. Users must have the Scheduling permission: *Settings < Manage Own Schedule* enabled within the to be able to do these changes in their appointment.



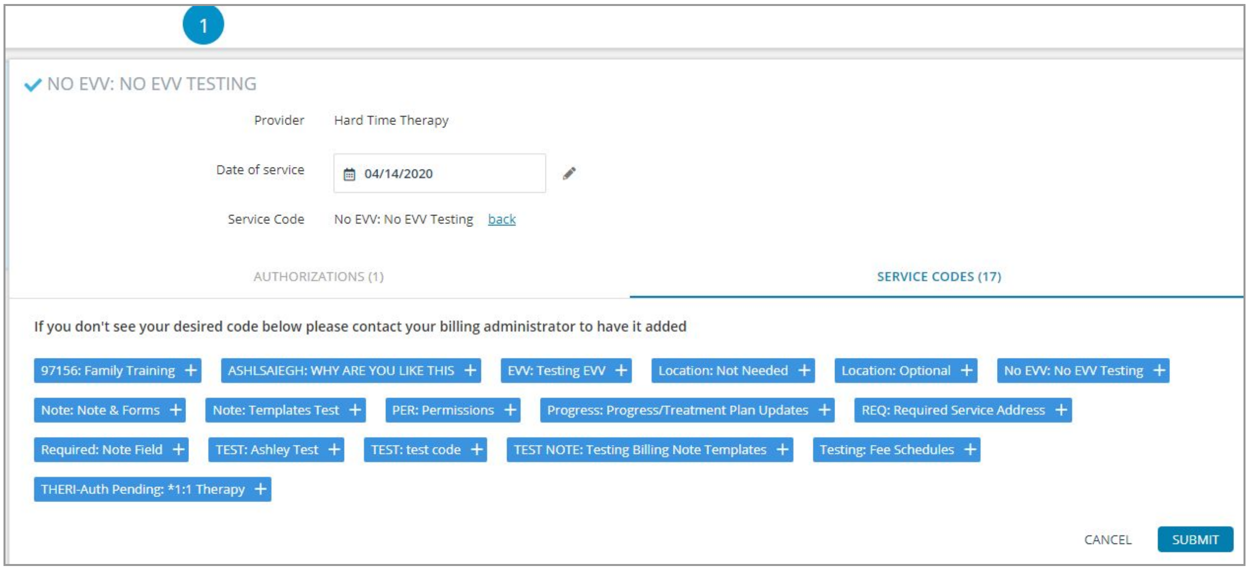
3. Changing Codes on a Timesheet

OLD VIEW: When converting from an appointment, users could delete codes and add new codes. All other available codes were displayed in a list view.

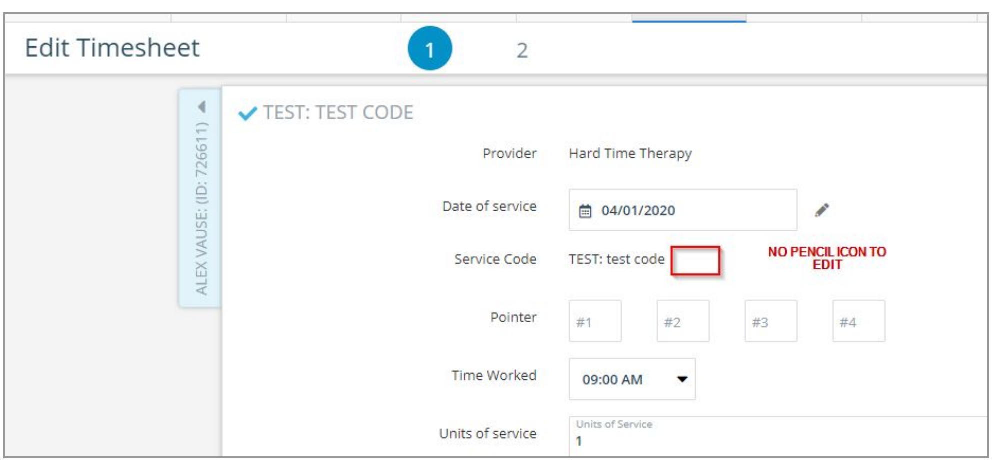


NEW VIEW: *Service Code* modifications will depend on the type of code, and the user's enabled permissions, as further detailed below:

- **Non-EVV Service Codes:** users will only be able to delete and change the *Service Code* in a timesheet if they have the Billing permission *Timesheets > Allow Conversion Modifications* enabled. When doing such changes, the available *Service Codes* will be shown side-by-side instead of a list view, to easily select the new code.

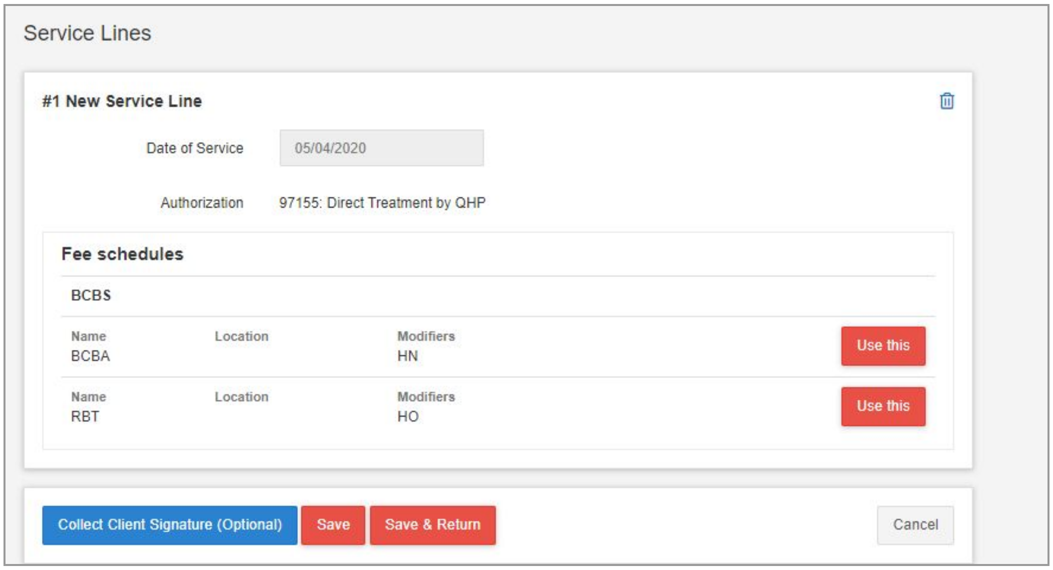


- **EVV Service Codes:** If the appointment includes an *EVV Service Code*, the service code will not be able to be modified on the timesheet. Since time is being captured, locations are tracked, and signatures are collected on this EVV code for compliance purposes, CR prevents the code from being changed. If appointment changes occur, these need to be done on the appointment prior to conversion.

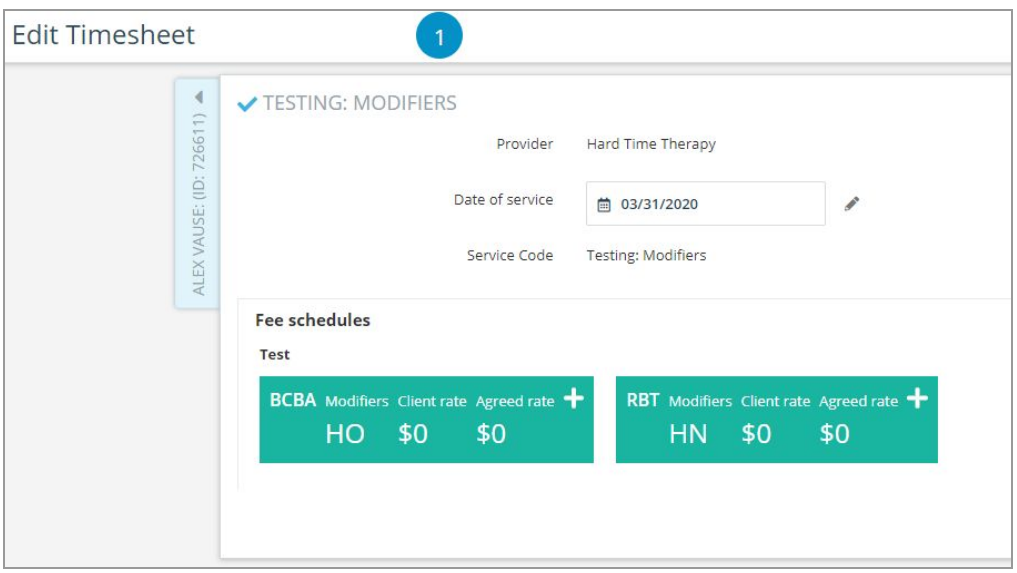


4. Selecting Modifiers on Timesheet

OLD VIEW: When *Service Code* had more than one *Modifier Group* linked to the *Fee Schedule*, users had the option to select the one to be converted based on the services provided. Modifiers were shown in a list-view with a red *Use This* button to the right.



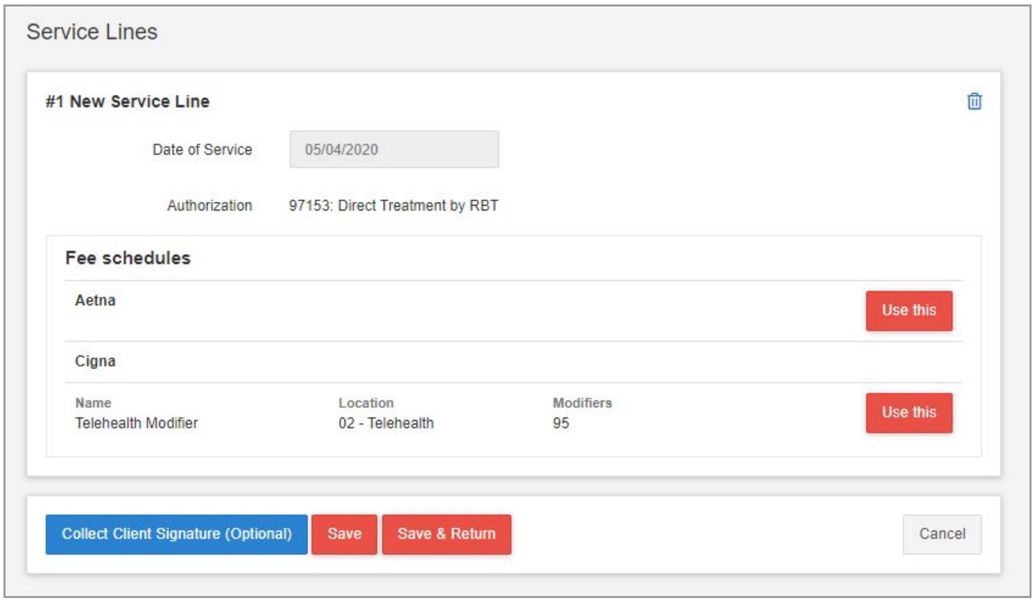
NEW VIEW: The new timesheet provides an enhanced look and feel for the modifiers that will stand out to help users more intuitively select the service modifiers.



5. Selecting Fee Schedules (w/o Modifiers) on Timesheet

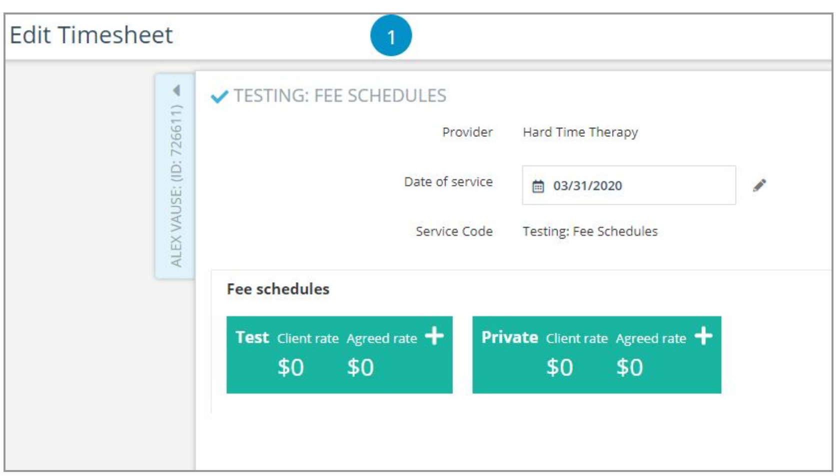
OLD VIEW:

- If the *Service Code* was not set up correctly with the client's payor on file/authorization, then, employees were prompted to choose a *Fee Schedule* before they move on.
- Best practice was for the employee not to continue and reach out to an administrator to correct the *Fee Schedule* so the right rates apply.
- The list of *Fee Schedules* to choose from appeared in a list view.



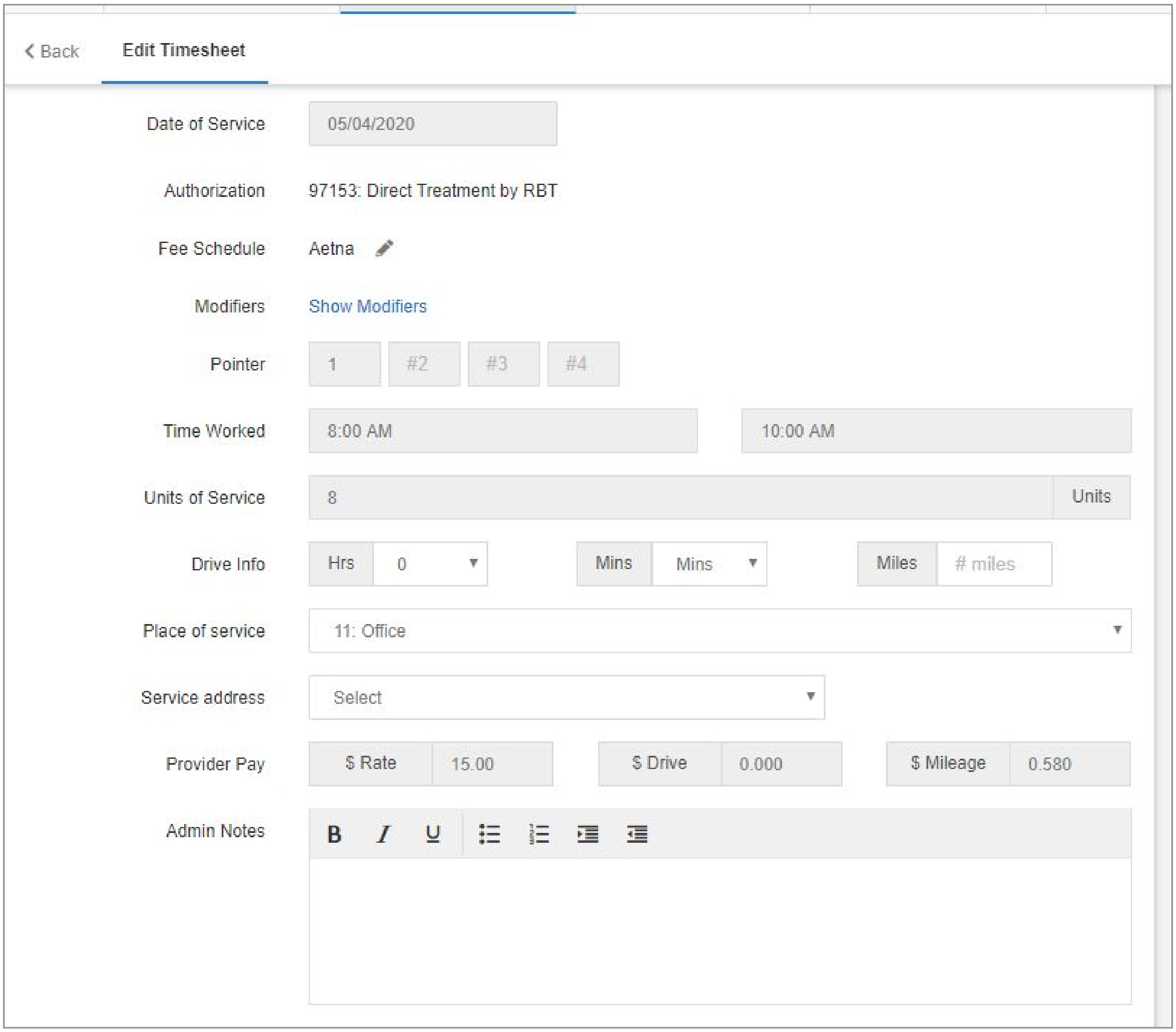
NEW VIEW:

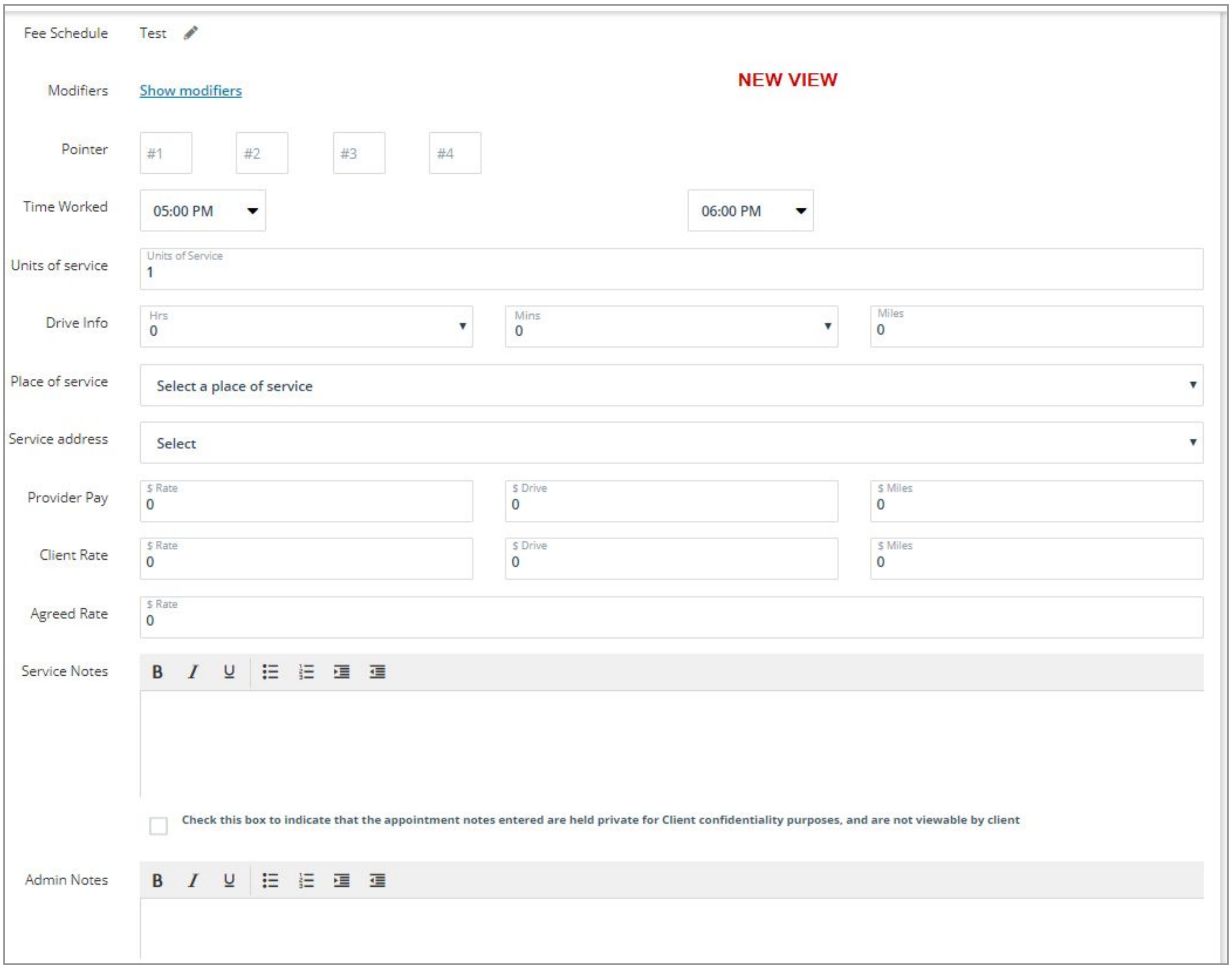
- The new view shows the *Fee Schedules* side-by side instead of a list view which makes viewing easier when there are a lot of *Fee Schedules* linked to that one code.
- They are also shown in a new bright color to prompt the user to choose before they move on.



6. Body of Timesheet

The body of the new timesheet is similar to the previous view. What appears here is dependent on what is required/optional in the *Service Code* properties and what permissions the employee has to see rates.





NOTE about EVV Service Codes:

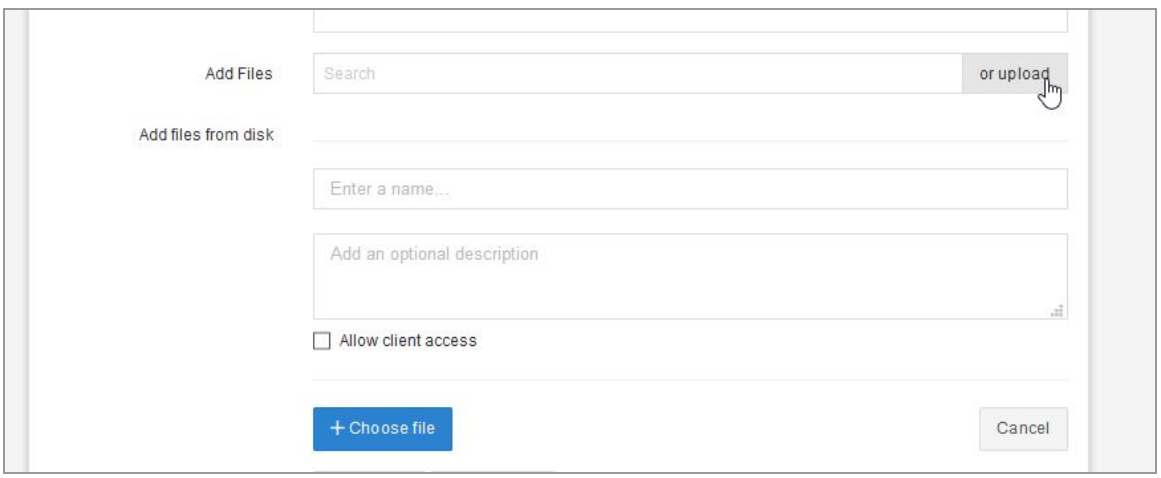
For compliance purposes, any timesheets that have EVV tracked services will not be able to edit some pieces of information with the new timesheet view. The fields that cannot be edited are:

- Client
- Provider
- Date of Service
- Time Worked
- Service Code
- Service Address
- Client and/or Provider Signature

7. Adding Files to Timesheet

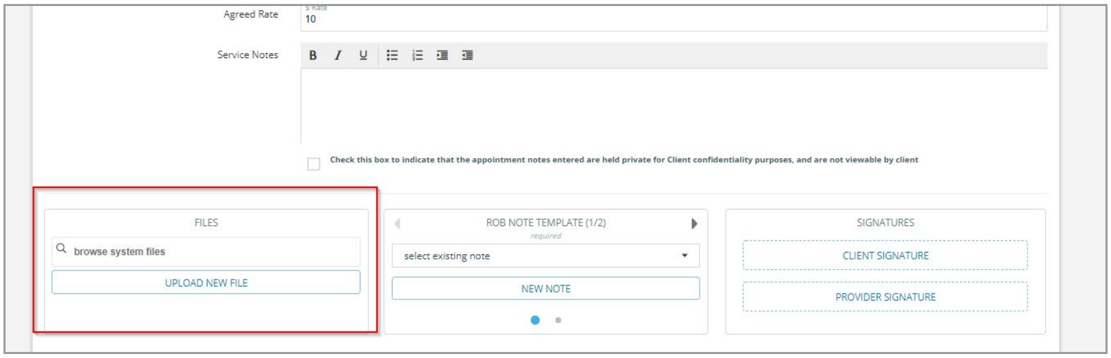
OLD VIEW:

- The old view had the ability to add a file right underneath the *Admin Notes* box if they were set to optional or required.
- You were able to search for a file using the search box by typing out the file name or inserting the file ID. Alternatively, users could upload a file straight from their computer from here as well. More than one file could be uploaded to a timesheet.

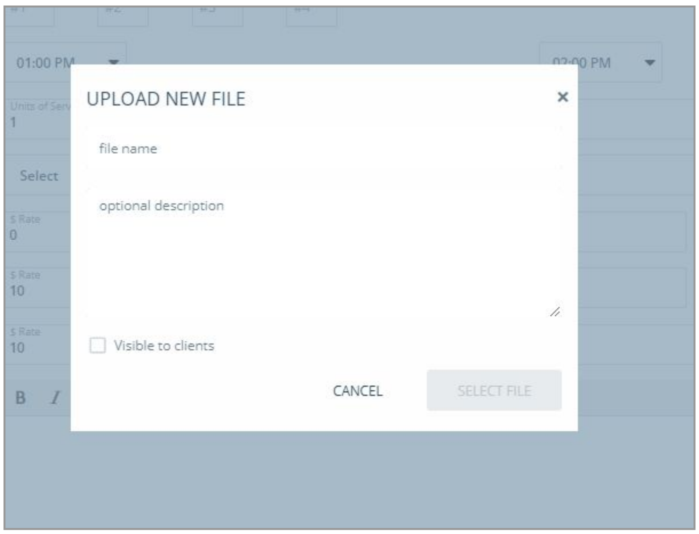


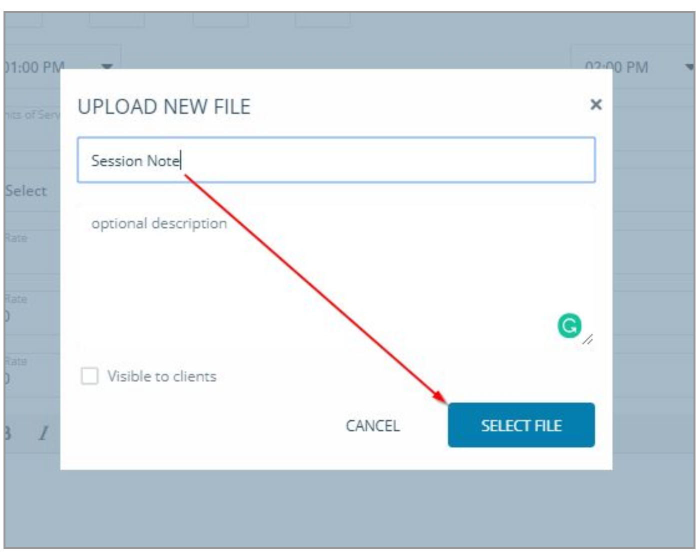
NEW VIEW:

- The new view is meant to be easier and quicker for the user. The spot for uploading files is now placed at the bottom of the timesheet to the left of the screen and in it's own box.
- The user can still either search by using the search box for files that already exist in CR. They will still need to be shared to the file they are trying to upload and it has to be owned by the client on the timesheet.



- Alternatively, the user can choose to upload a file directly from their computer and a pop up will appear.
- The difference between the old view and new view is that users are required to have a file name before you get the option to select a file.

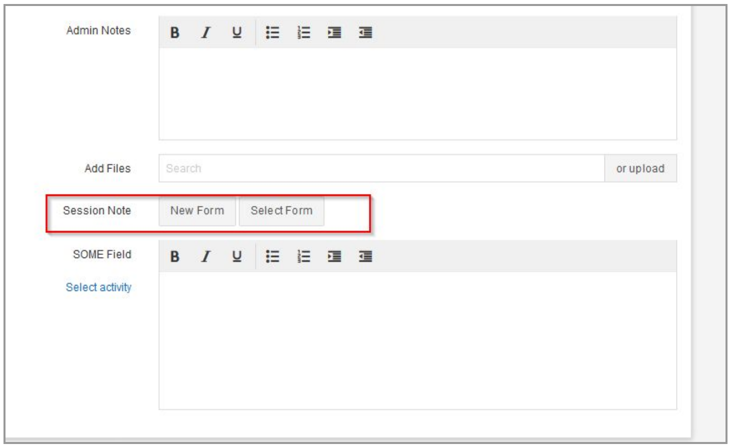




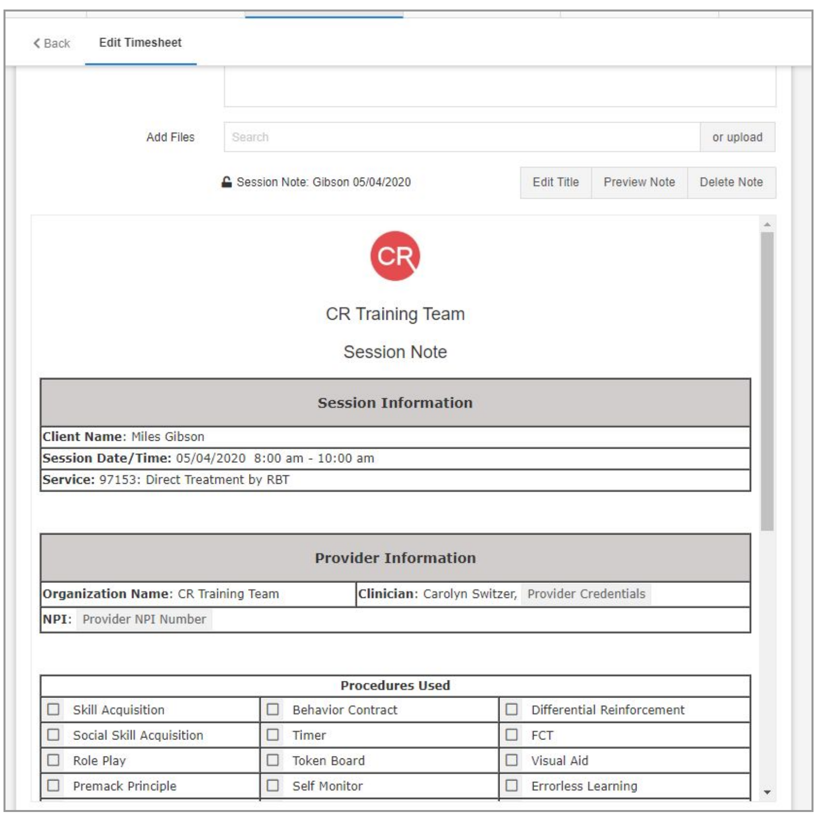
8. Adding Notes & Forms to Timesheet

OLD VIEW

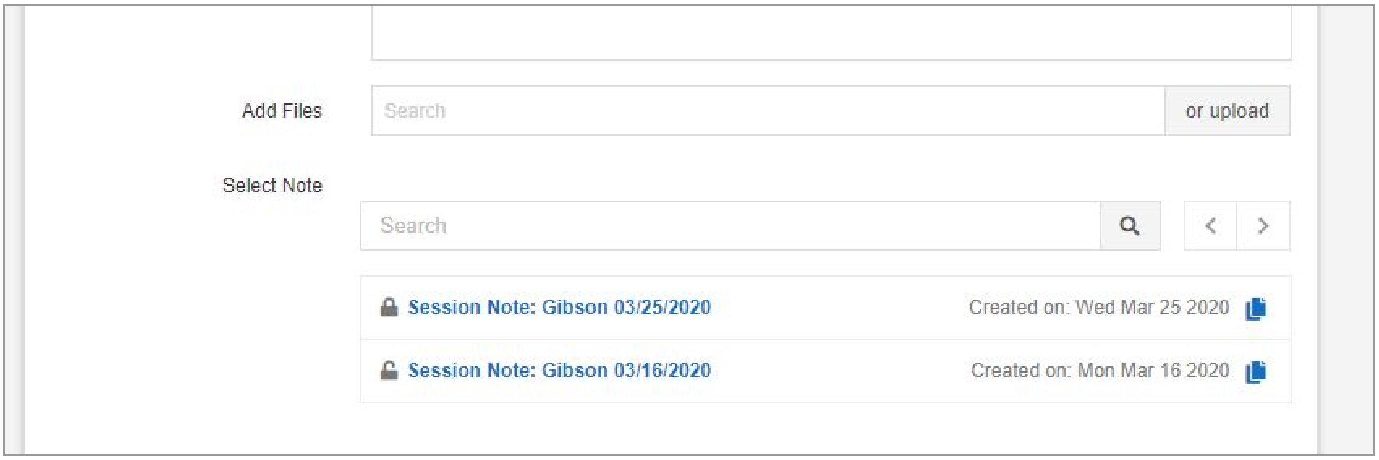
- Session Notes were located underneath the files section. Users had two buttons for *New Form* or *Select Form*.



- **When clicking to add a *New Form*,** the note template linked to the *Service Code* was displayed to be completed. Three buttons appear on the top: *Edit Title*, *Preview Note*, and *Delete Note.* The option to save the note was at the bottom of the *Note & Form Template*.

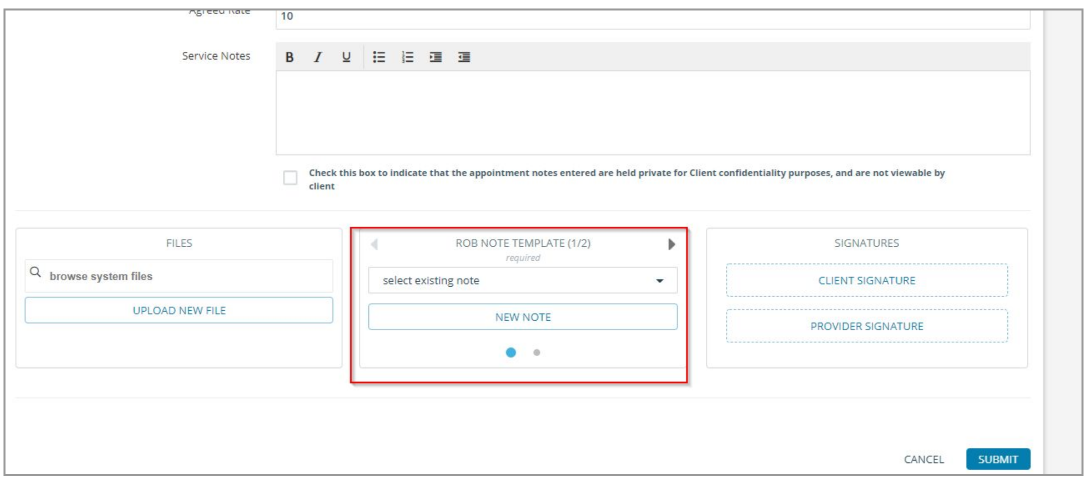


- **When clicking *Select Form*,** users could choose an existing note to be attached. The list of the client's completed forms would be displayed for the user to select which one to link to the timesheet.

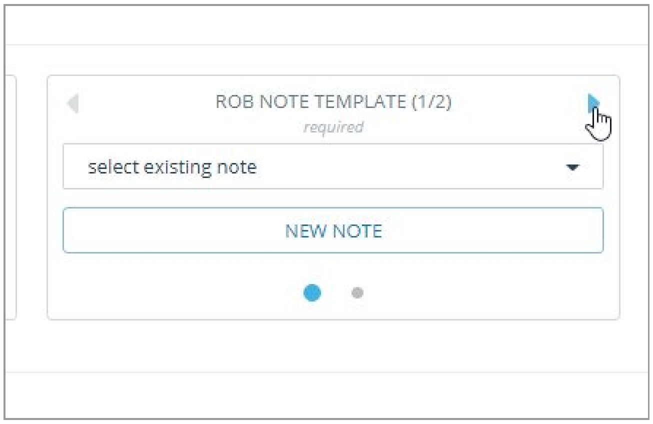


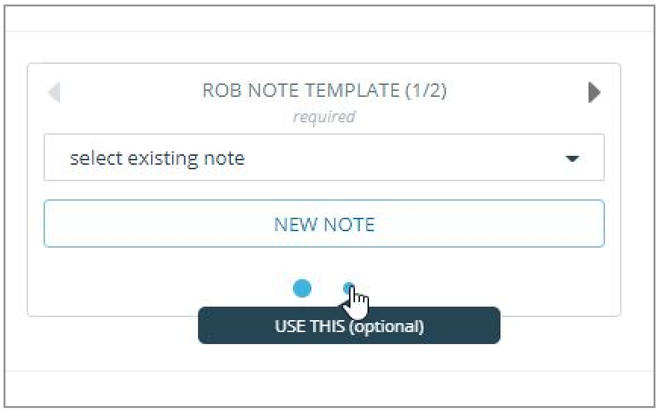
NEW VIEW

- *Note & Forms* section is now located on the bottom of the timesheet, in the middle box, improving visibility and making it easier for providers to identify and complete their *Note & Form.*

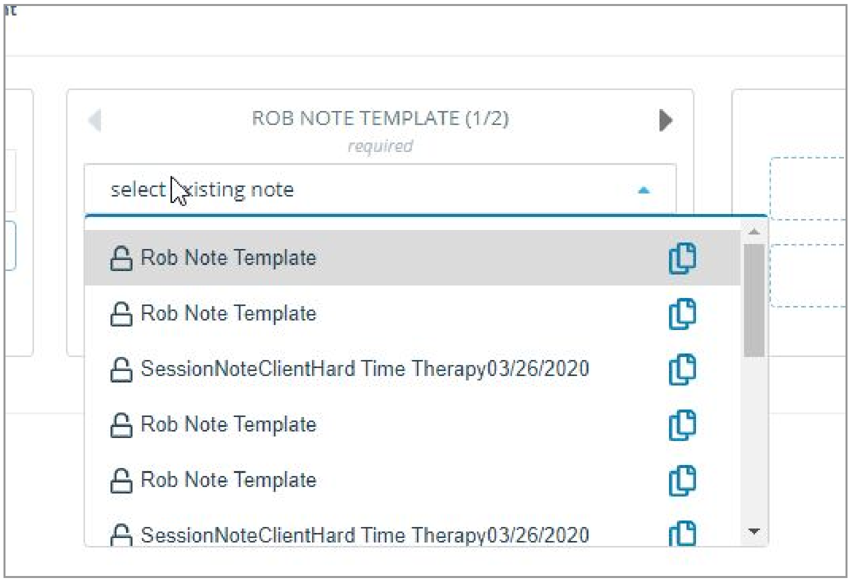


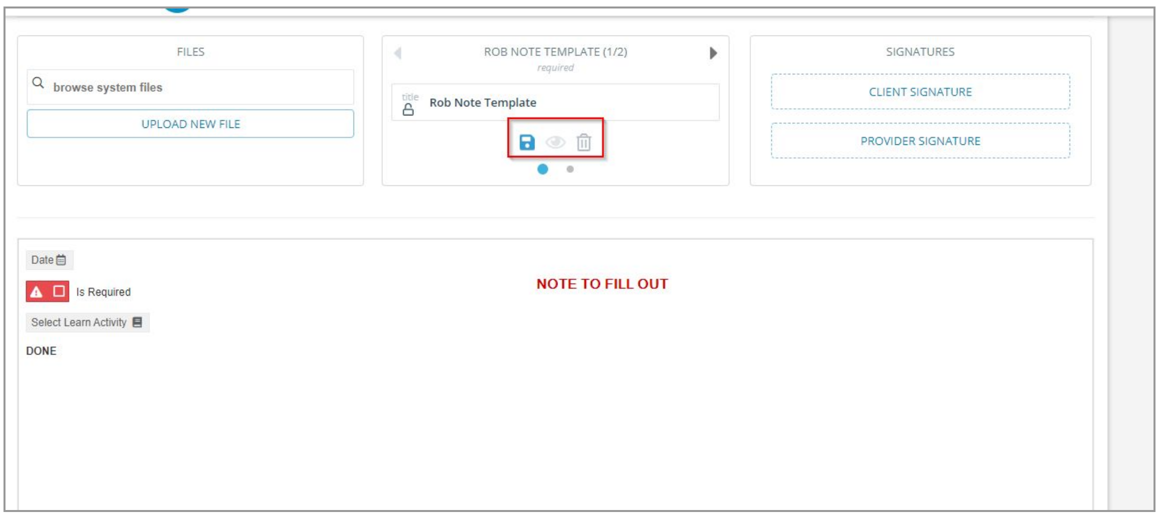
- *Note & Forms* templates linked to the *Service Code* are now identified at the bottom of the timesheet page. If there is more than one *Note & Form* template linked to the *Service Code*, the user will be able to click the arrow to view them all and select the one they wish to complete. Alternatively, users can use the bubbles at the bottom of the box to navigate, view and identify the names of the linked forms and see whether they are required or optional.

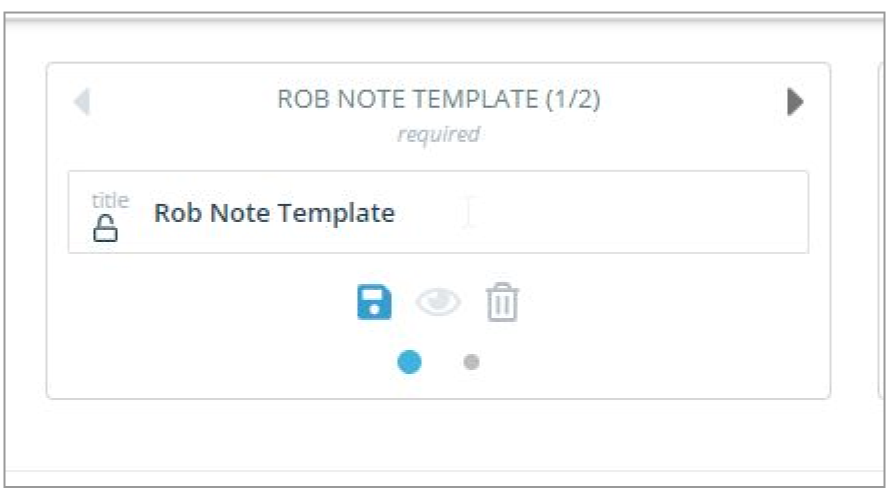




- When adding a brand new note to the timesheet, users can now click *New Note*. When you select to add a *New Note*, the note opens on the bottom of the page for the user to fill out.
- The options to save the note, preview the note, or delete the note appear in the *Note Templates* box and as icons versus words. Click the *disk icon to save the note*; *the eye icon to view it*; and the *trashcan icon to delete it.*
- There is no longer a button to edit the title of the note; users can just click on the name in the box and edit the name from there.
- To select a previously completed note, users can click *Select an existing note* drop-down menu, to see a list of completed notes and click the ones they wish to attach to the timesheet.
- Also, with the previous view, you could not stop the process of selecting a note once you clicked it. You would have to refresh your page or start converting again. This view gives you the option to not select a form if you mistakenly pressed that button.
- If users want to create a new note but copy all of the information from a previous note that was already created, you can choose to copy the note by clicking the paper icon.


ROB NOTE TEMPLATE (1/2)
required
select existing note
Rob Note Template
Rob Note Template
SessionNoteClientHard Time Therapy03/26/2020
Rob Note Template
Rob Note Template
SessionNoteClientHard Time Therapy03/26/2020

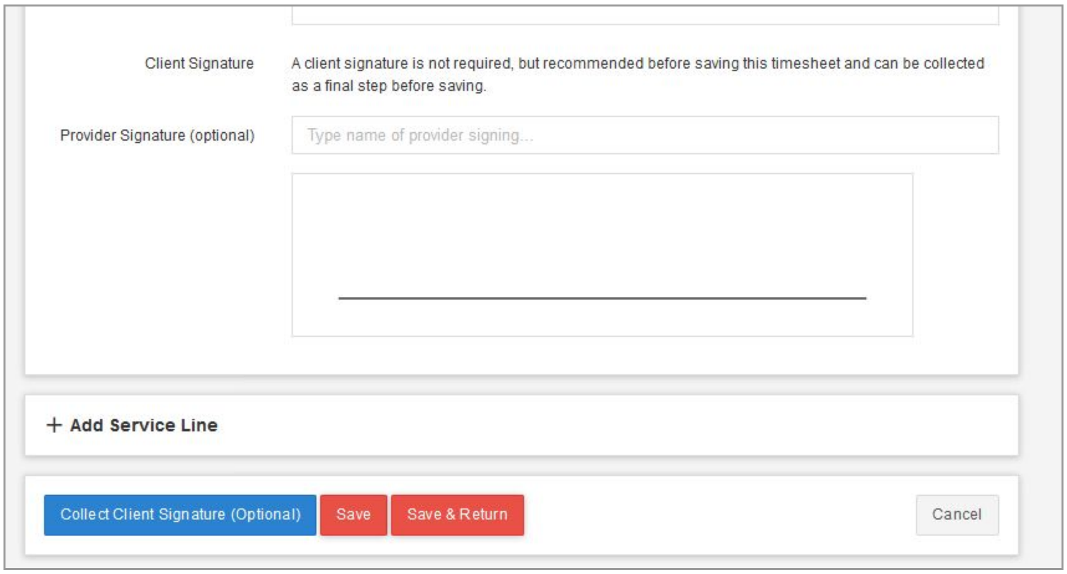

FILES
browse system files
UPLOAD NEW FILE
ROB NOTE TEMPLATE (1/2)
required
title
Rob Note Template
SIGNATURES
CLIENT SIGNATURE
PROVIDER SIGNATURE
Date
Is Required
Select Learn Activity
DONE
NOTE TO FILL OUT

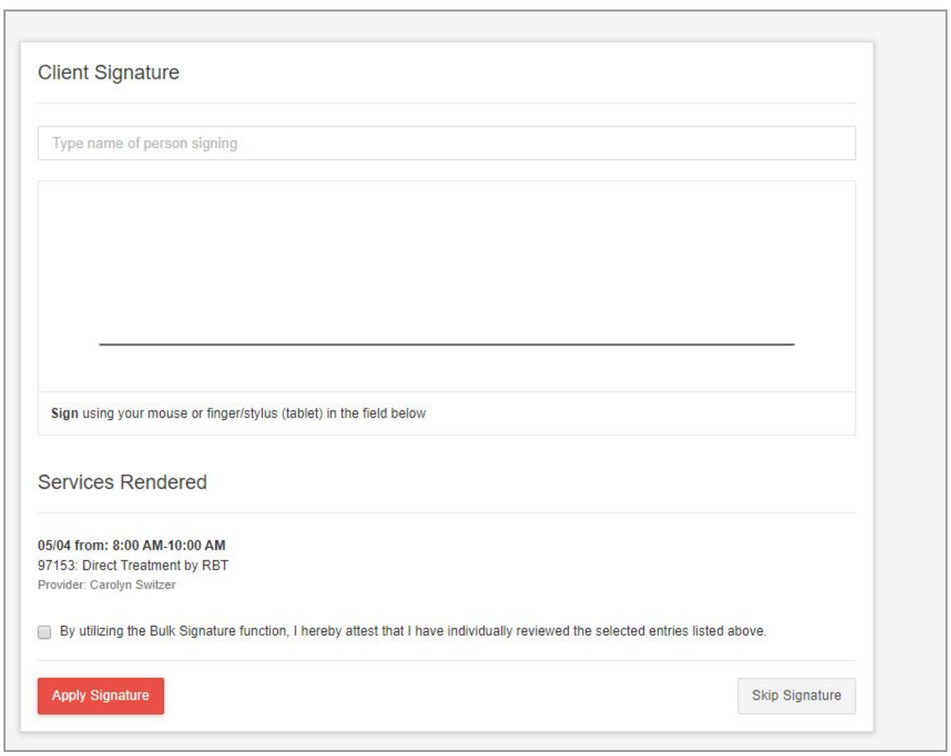

ROB NOTE TEMPLATE (1/2)
required
title
Rob Note Template

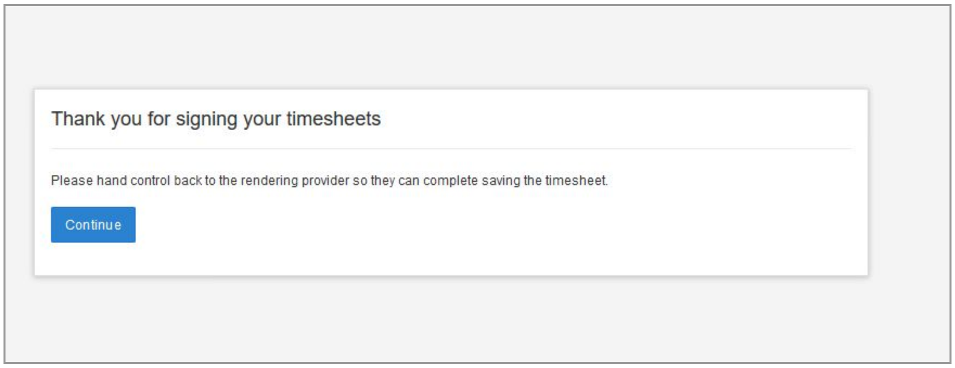
9. Adding Signatures to Timesheet

OLD VIEW

- For a provider signature, users could enter the signature directly on the timesheet body.
- To enter client signatures, providers had to click the bottom on the bottom of the timesheet. When doing so, a new page would open up to collect the client signature. Once the client signatures were collected, to complete the process users would have to click *Apply Signatures*. A message would then be displayed for clients to hand the device over to the provider.

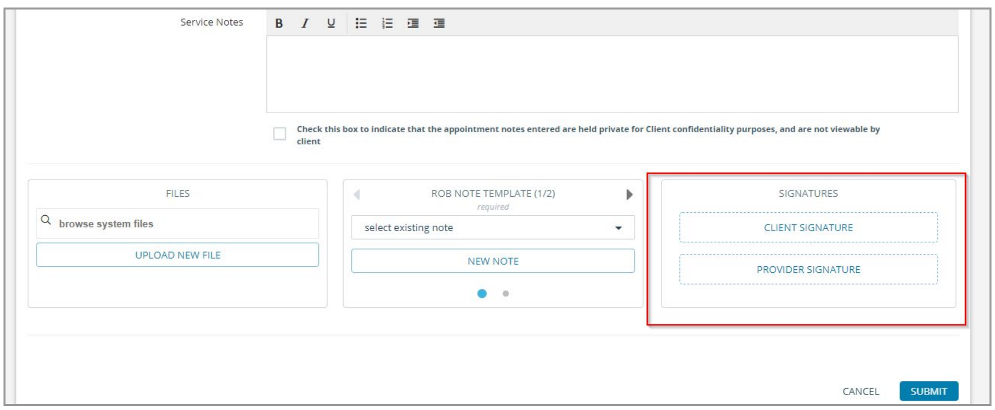




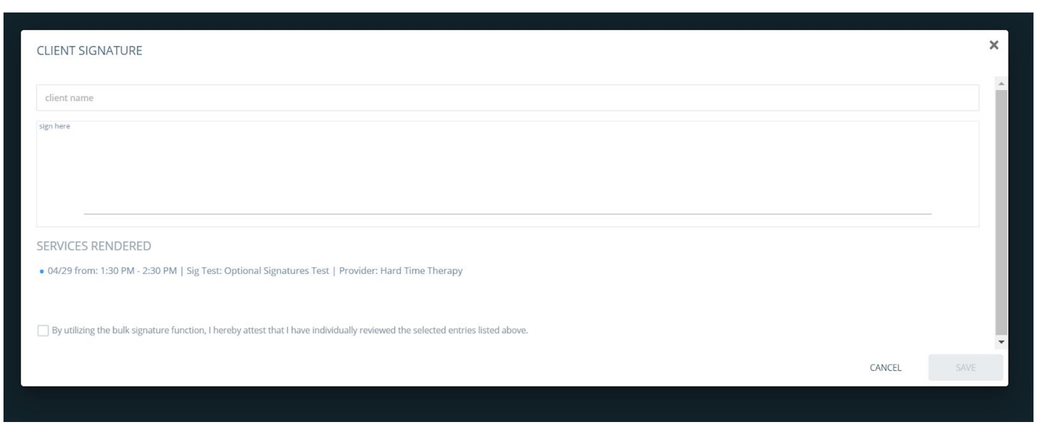


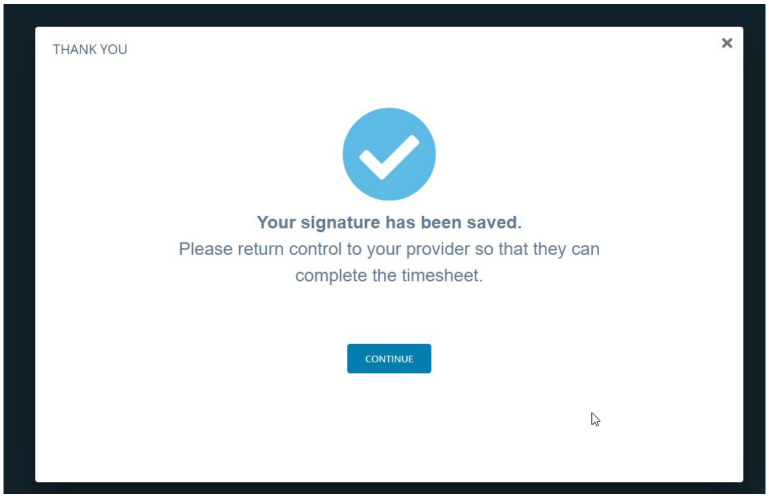
NEW VIEW

- The new timesheet view allows collecting of signatures in a more streamlined way, with both provider and client signatures now on the bottom right corner of the timesheet. A clear button identifies what to select to collect the provider signature, and to collect the client signature. Signatures now only need to be entered once, and will be automatically propagated to all the Service Lines in the timesheet.

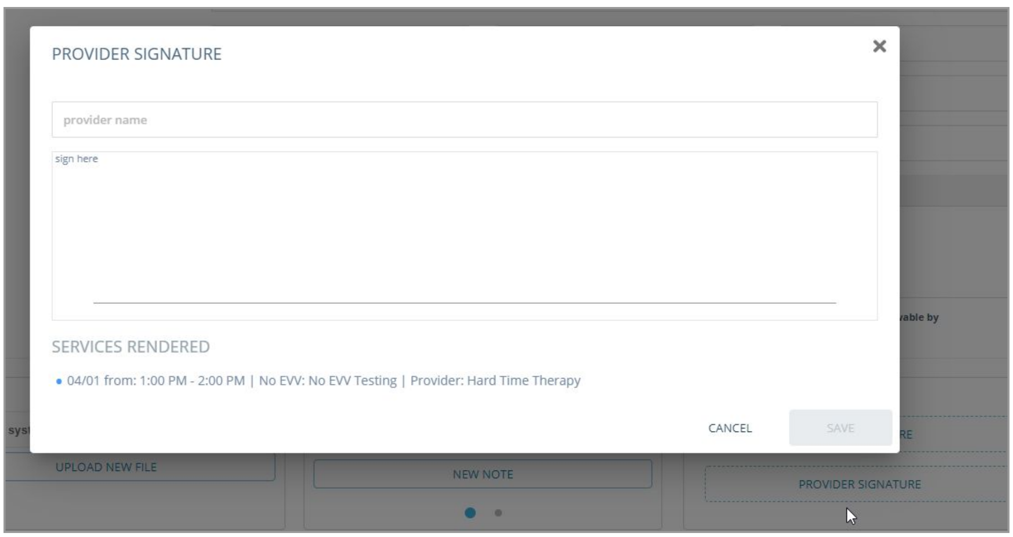


- When clicking to collect the client's signature, a box will pop up and the background will be black out so the client cannot see any of the timesheet information. Once the client signs and hits *Save*, they will receive a message stating to hand the device back to the provider.





- Provider signatures will now also display a pop up to sign. Once they sign the box will disappear. There is no additional confirmation displayed.



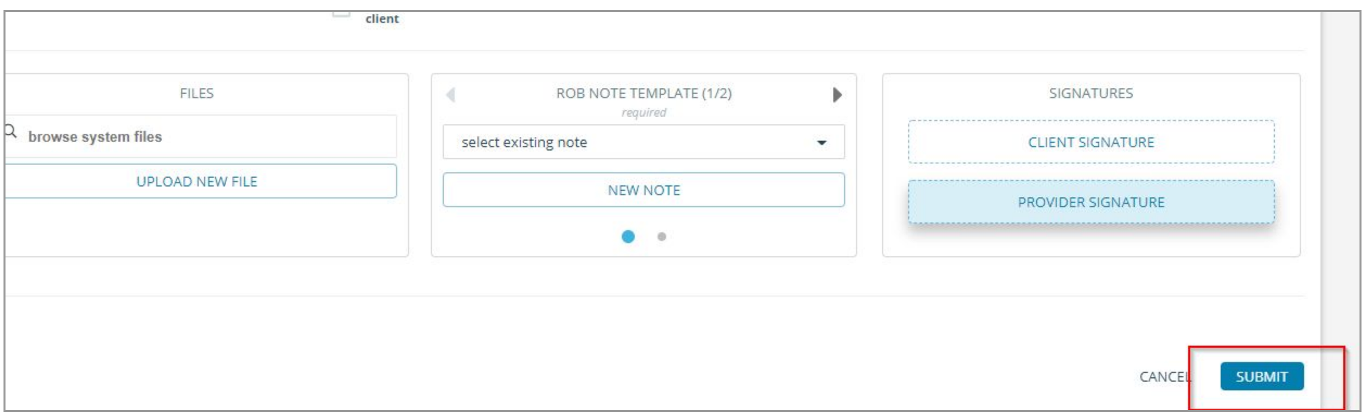
10. Saving a Timesheet

OLD VIEW

- To save a timesheet users had to click the button at the bottom of the page to save which is in red.

NEW VIEW

- With the new timesheet view, users will have a button to *Submit* versus save. There will no longer be an option to save & return like the previous timesheet view. Once the timesheet is submitted, users will be taken to the Billing module timesheet page.

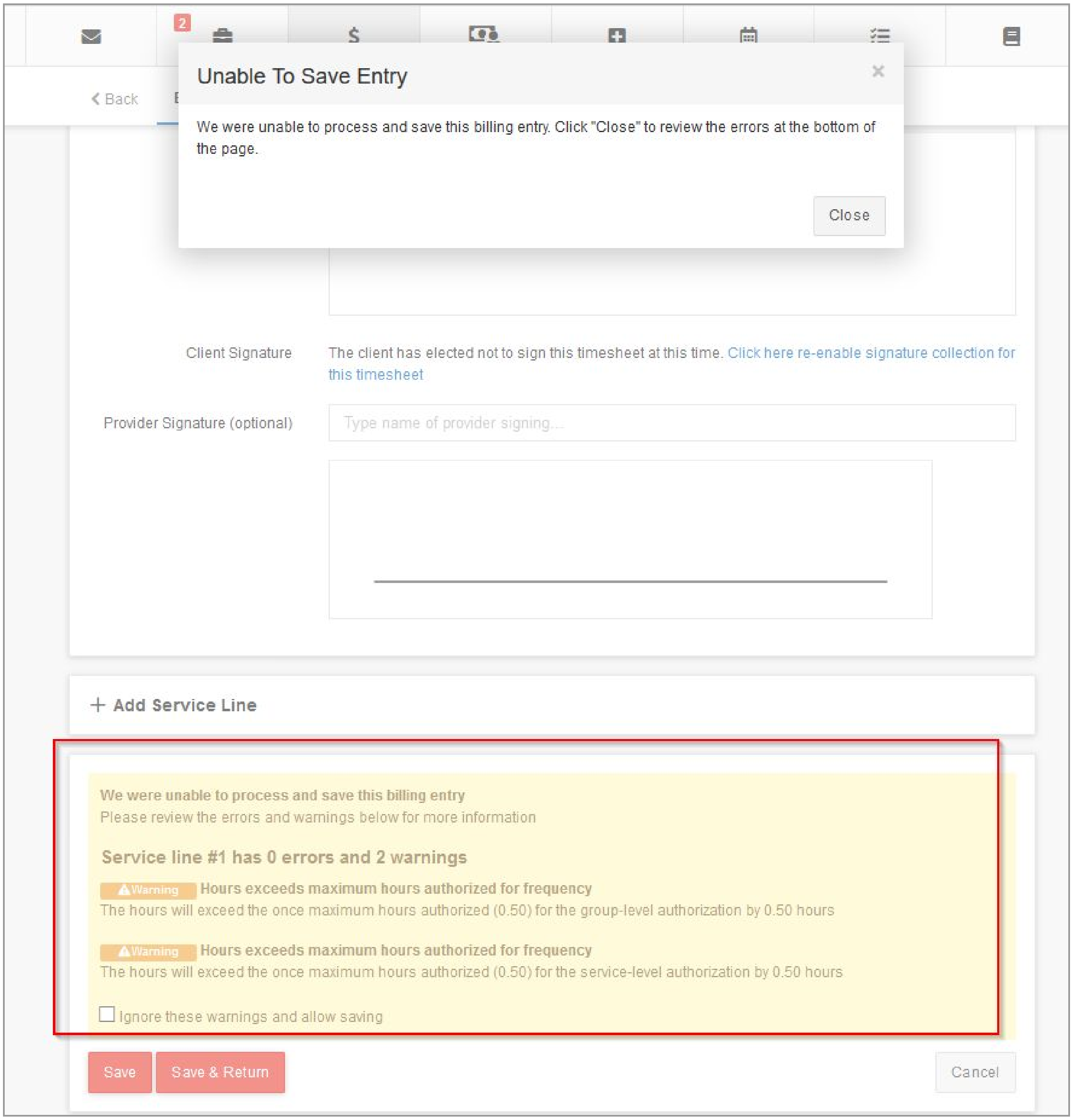


CentralReach

11. Timesheet Exceptions

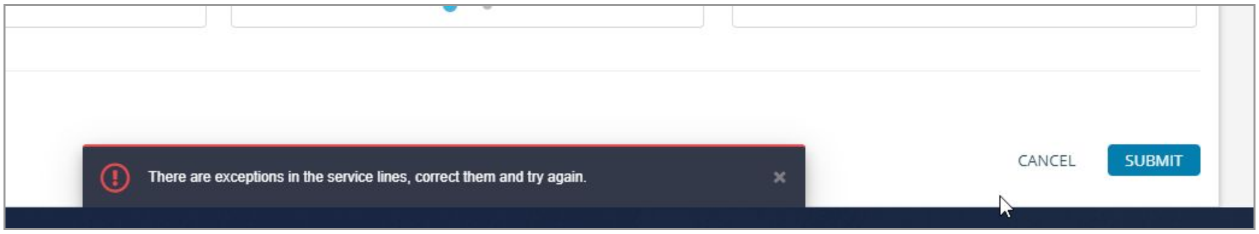
OLD VIEW

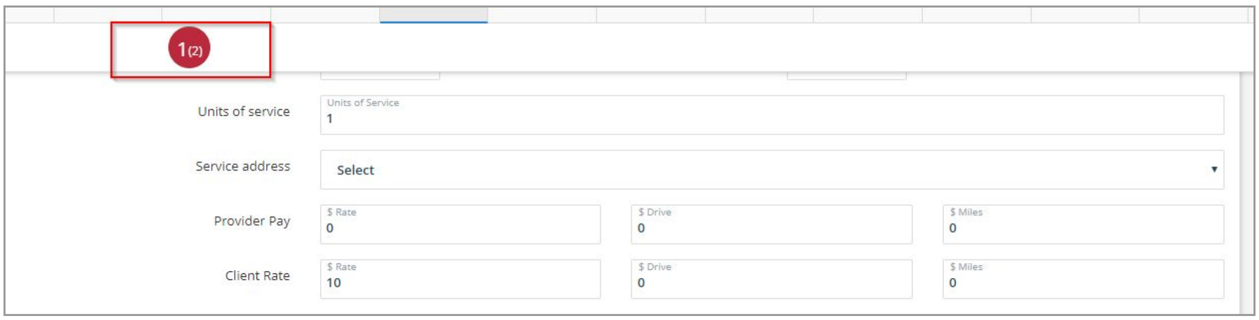
- If there were any errors or missing information, users would receive a pop up box stating that the entry couldn't save. Errors were displayed on the bottom of the timesheet.

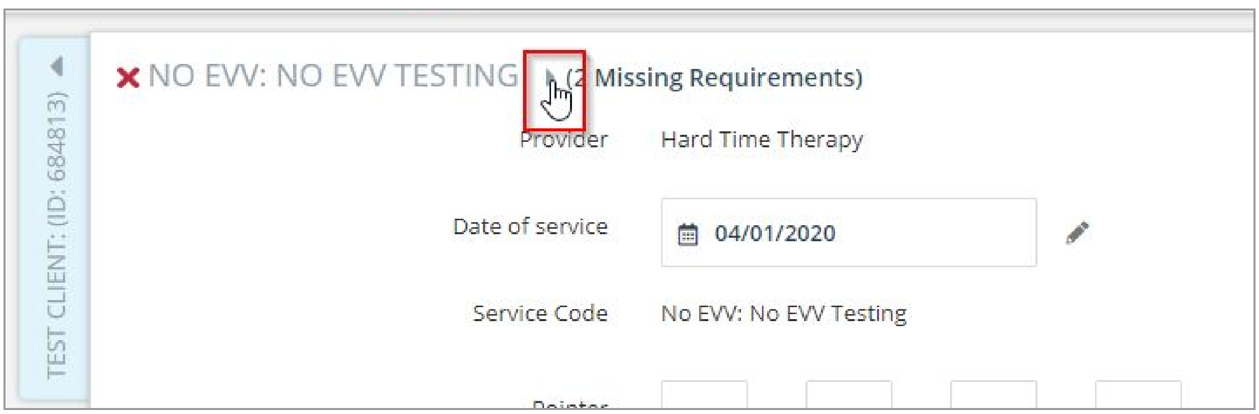


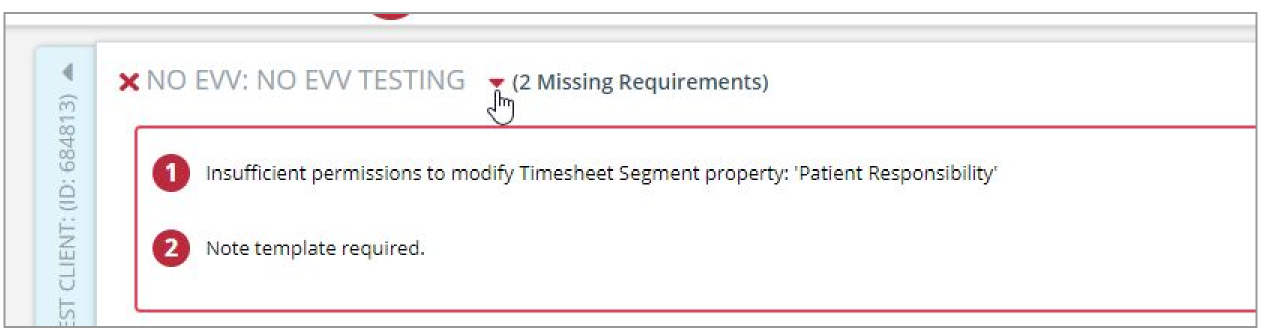
NEW VIEW

- Users will now see an exception message pop up on the bottom of the screen when errors occur. The *Service Codes* on top will turn red and will display in parentheses the number of errors to be corrected. Click the *Missing Requirements* arrow to expand and view details on what needs to be modified/fixed in order to submit the timesheet successfully.





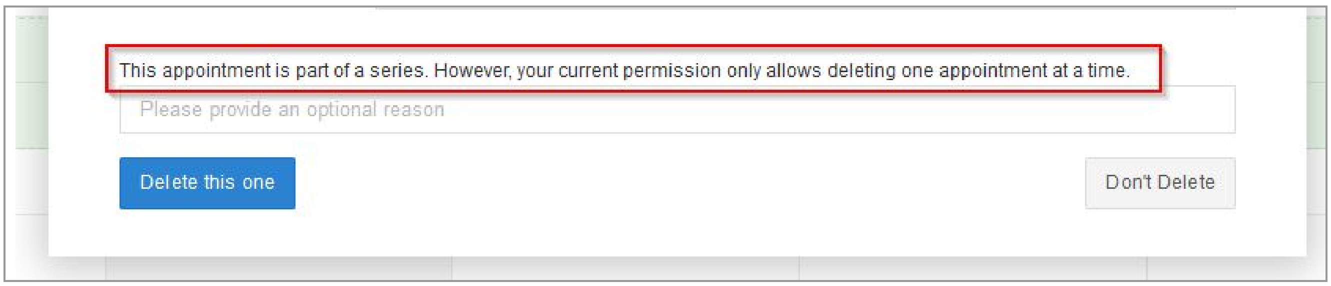


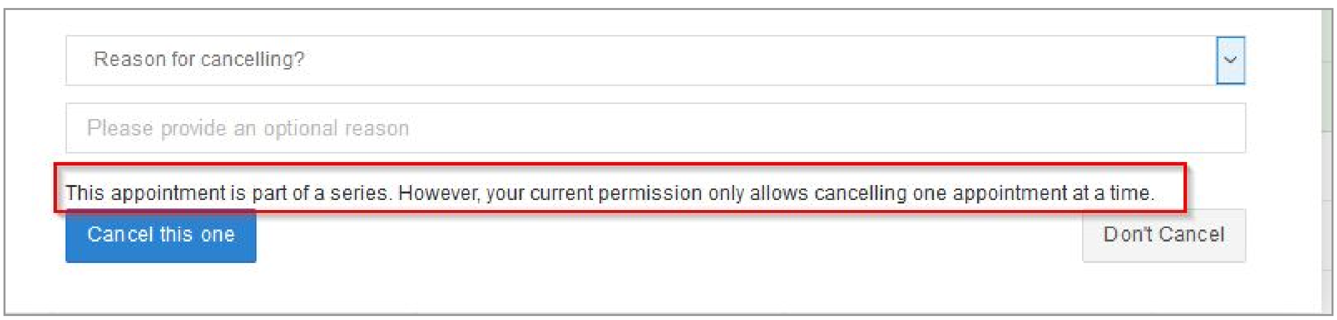


12. Deleting or Canceling a Converted Appointment Permissions: Workflow Updates

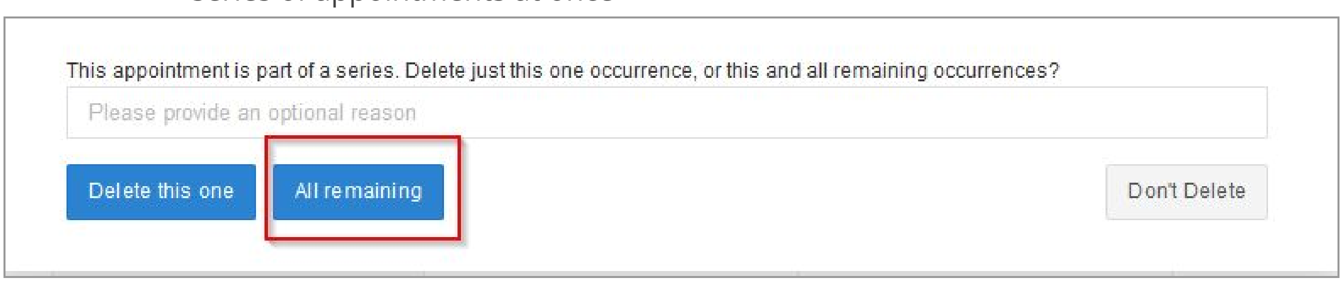
OLD VIEW

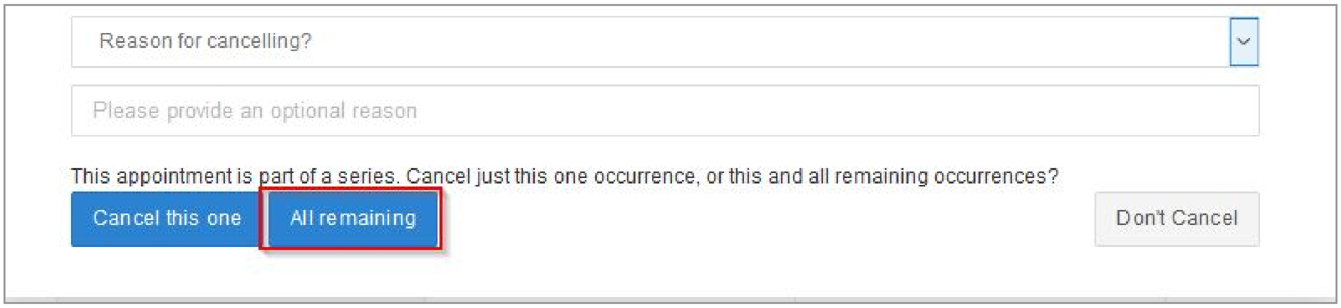
- Users with the following Scheduling permissions were able to complete certain tasks, as further detailed below:
    - *Appointments > Allow Canceling One-off Appointments* → enabled users to delete and cancel appointments that were already converted into a billing entry, without canceling any other appointment in a recurring series. This permission did not enable users to cancel all recurring appointments in a series.
    - *Appointments > Allow Deleting One-Off* → provided users the ability to delete appointments that are not a part of a recurring series or only one appointment from the series. Users with this permission were not able to delete the whole recurring series at a time.





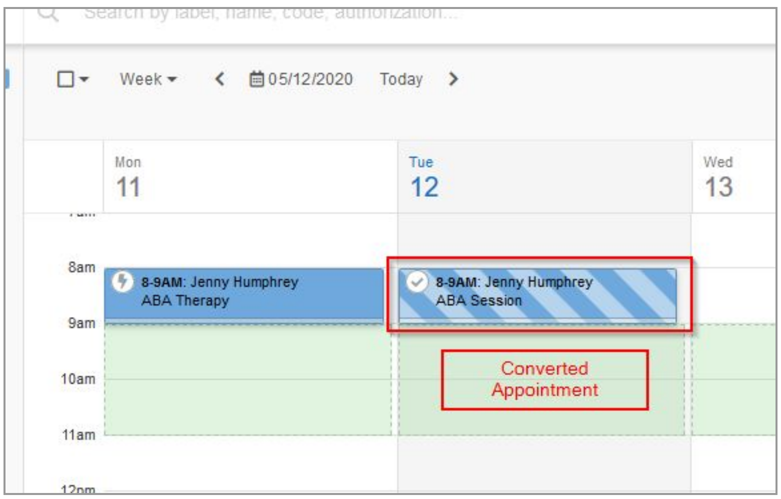
- *Appointments > Allow Cancelling Recurring* → enabled the ability to cancel a recurring series of appointments at once
- *Appointments > Allow Deleting Recurring* → provided the ability to delete a recurring series of appointments at once

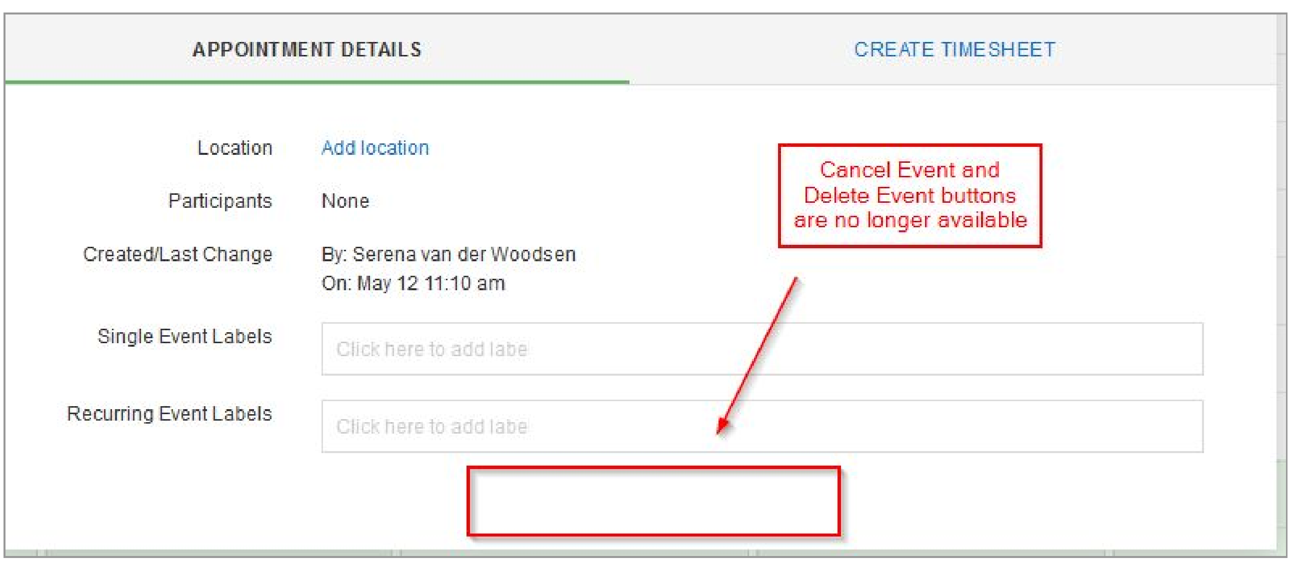




NEW VIEW

- Now, once an appointment has been either fully or partially converted, employees with the permissions above will not be able to cancel or delete that appointment. Administrators with the Billing module permissions *Billing* > *Manage Timesheets* and *Timesheets* > *Delete Timesheets* will need to either delete or void the billing entry associated with that appointment first by navigating to the Billing screen in the Billing module. Then, users with the permissions mentioned above will be able to cancel or delete the appointment or series.





13. Deleting a Locked Timesheet

OLD VIEW

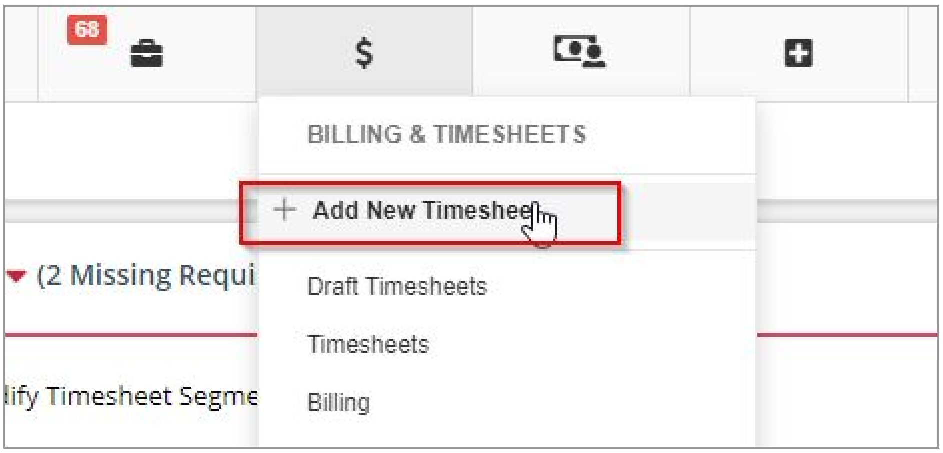
- Users with Billing module permission: *Billing* > *Manage Timesheet* were able to delete a locked timesheets. Locked timesheets could be deleted by navigating to the Billing module > Billing screen > click the gear icon > Delete Timesheet.

NEW VIEW

- Now, to delete a locked timesheet users will still need the Billing module permission *Billing* > *Manage Timesheet*, plus the permission *Timesheet* > *Delete Timesheet*. The process will be the same which is to navigate to the Billing module > Billing screen > click the gear icon > Delete Timesheet.

14. Creating a Timesheet Manually via the Billing module *(Not From an Appointment)*

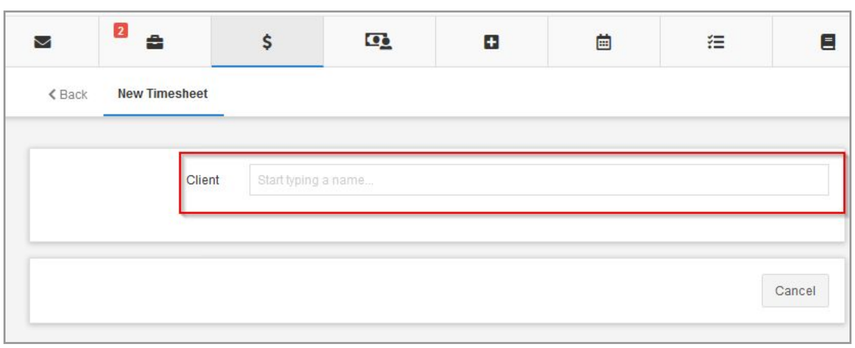
Timesheets can be created manually, without having an appointment, from the *Billing* module by selecting + *Add New Timesheet*. The process remains the same with these new timesheet updates, but there are new look and feel updates users will see in the timesheet itself, as further detailed below.

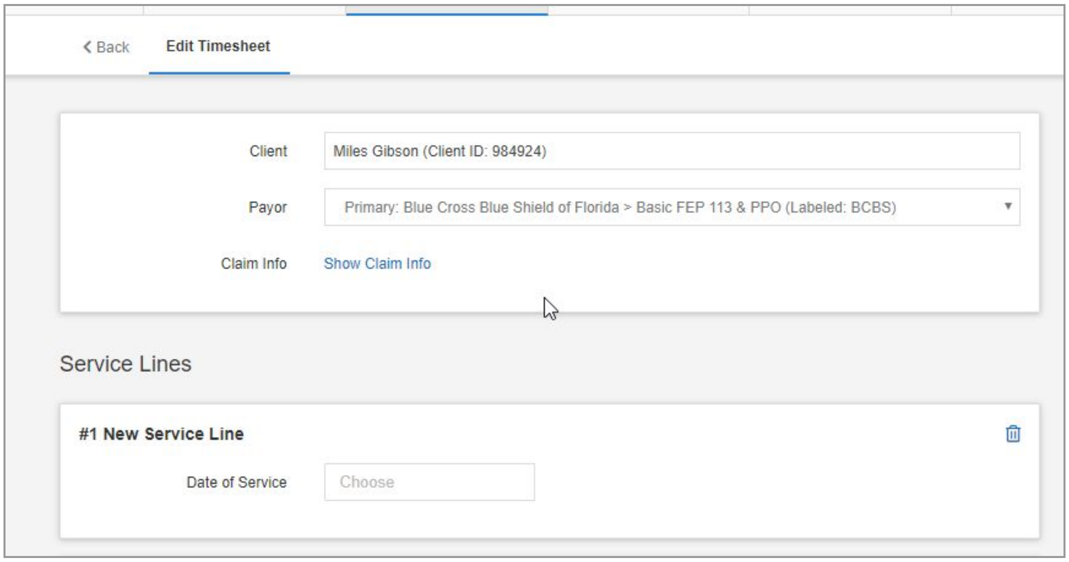


I. Adding a Client on a Timesheet

OLD VIEW

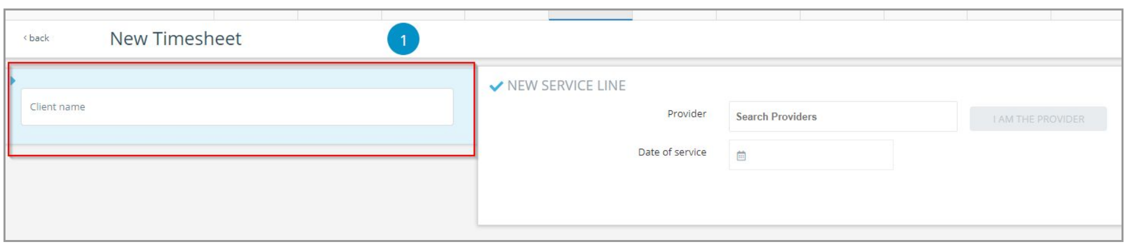
- To add the client name, the field was displayed on the top of the page.

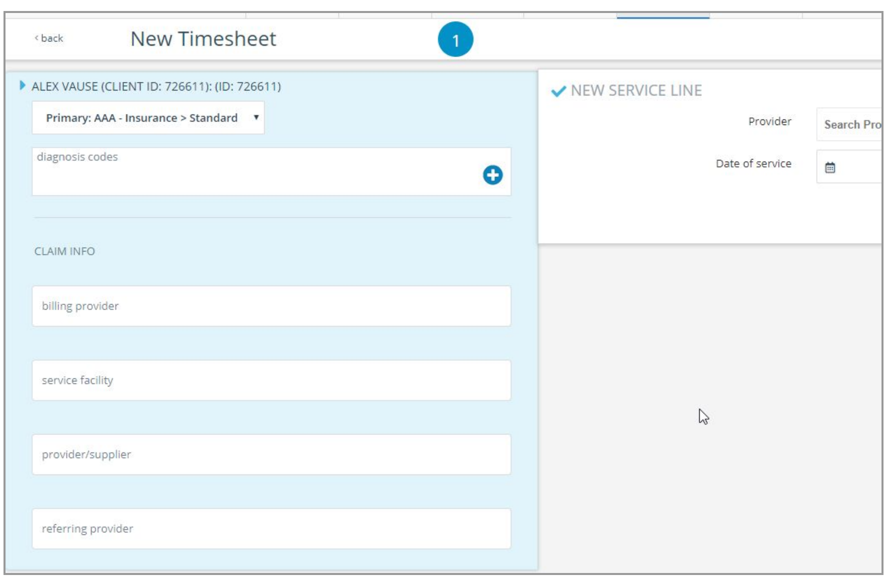




NEW VIEW

- Client info will be on the left hand side of the timesheet. The section will be open for the user to enter the client name.
- As the client name is entered, their claim information will automatically be displayed (versus the old view where the user would need to click "show claim info" to see that information.)

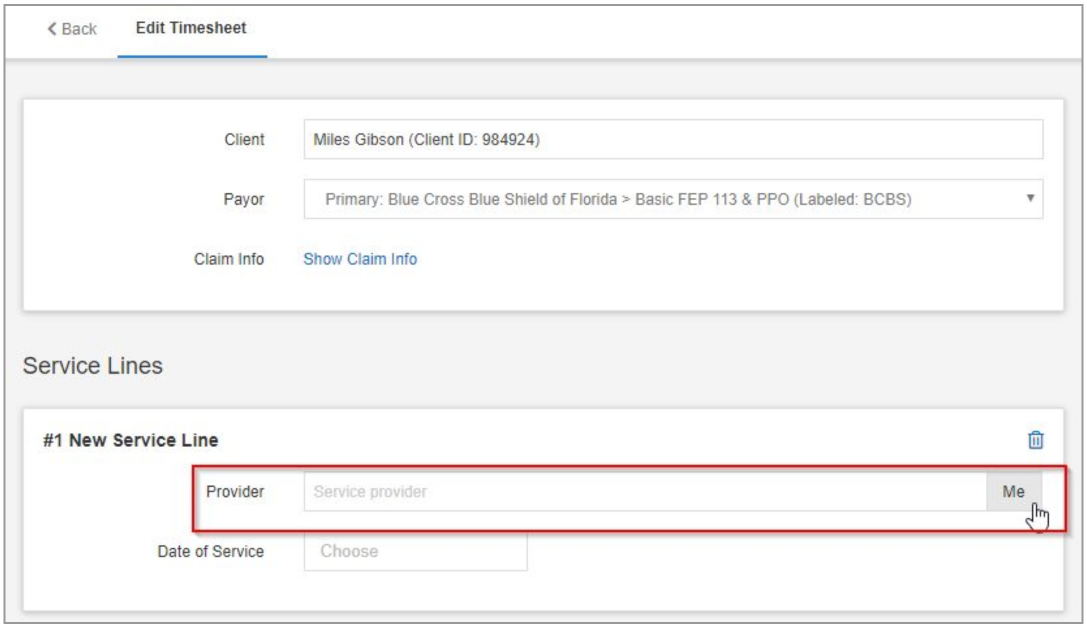




II. Adding a Provider to a Timesheet

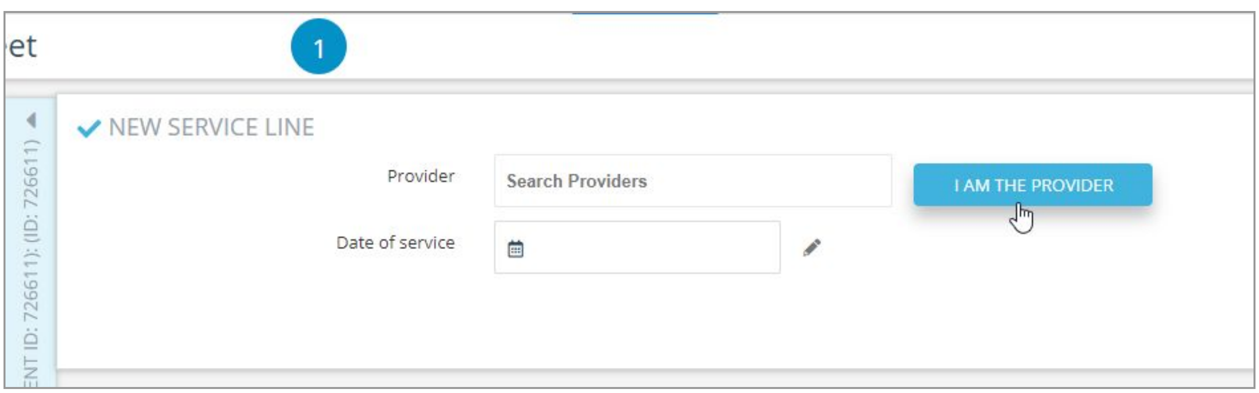
OLD VIEW

- After the client name was entered, the box for the provider info was shown and the user had the option to either search for a provider or select themselves with the *Me* button.



NEW VIEW

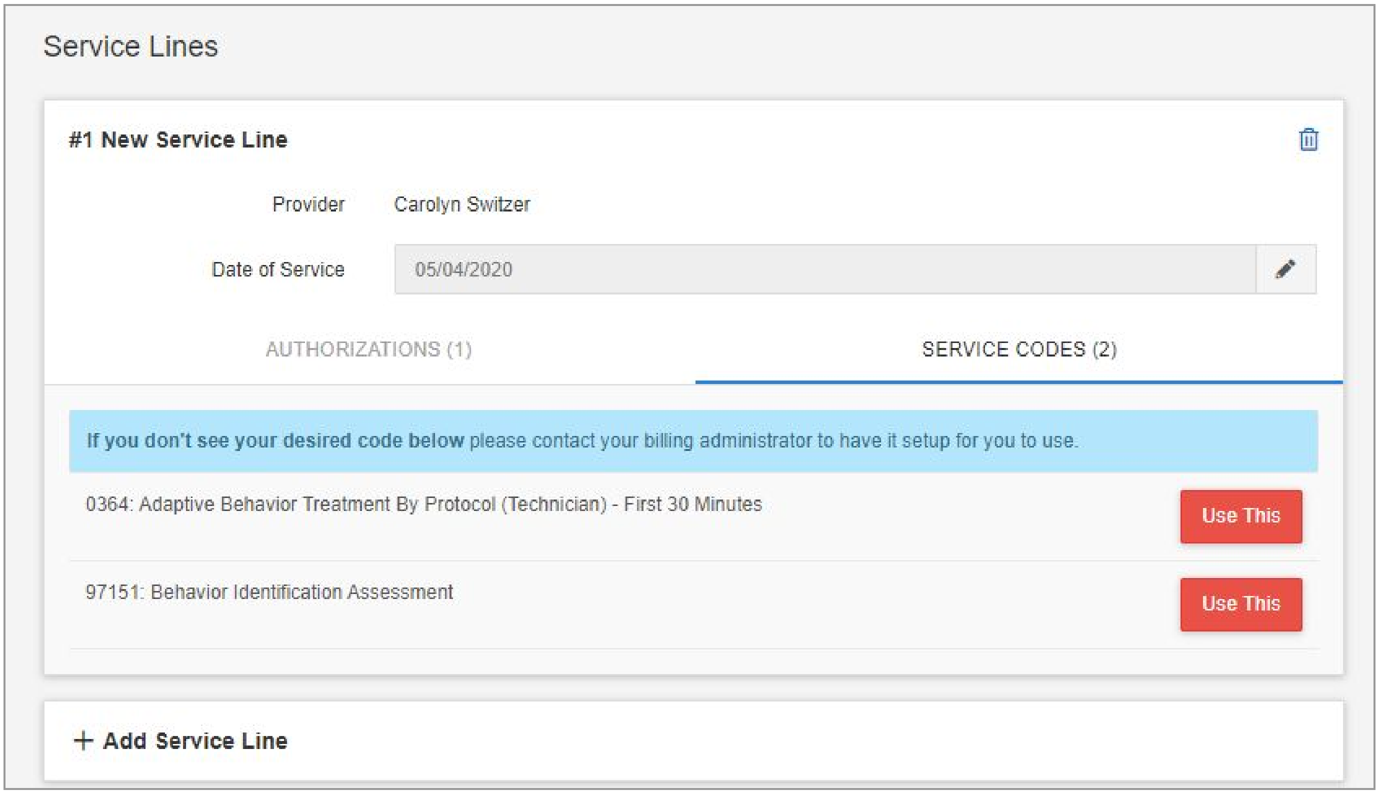
- The provider section is at the top of the timesheet page, to the right of the client info.
- Both the client and the provider sections will now appear on the timesheet, but users will still need to enter the client name before entering the provider name.
- For the user to select themselves as the provider, they would now click *I AM THE PROVIDER* versus *Me*.



III. Adding a Service Code to a Timesheet

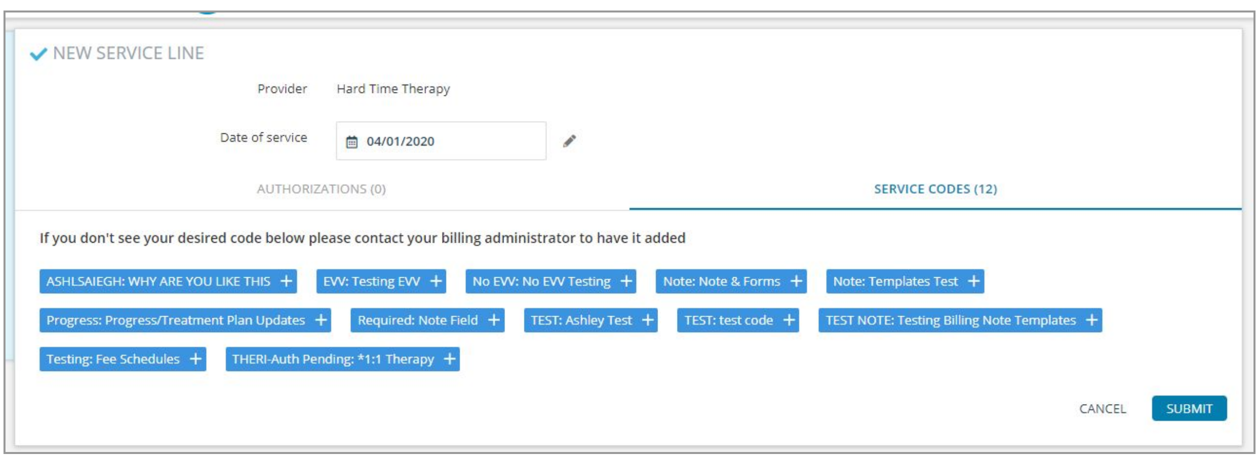
OLD VIEW

- The *Service Codes* were listed in one long list



NEW VIEW

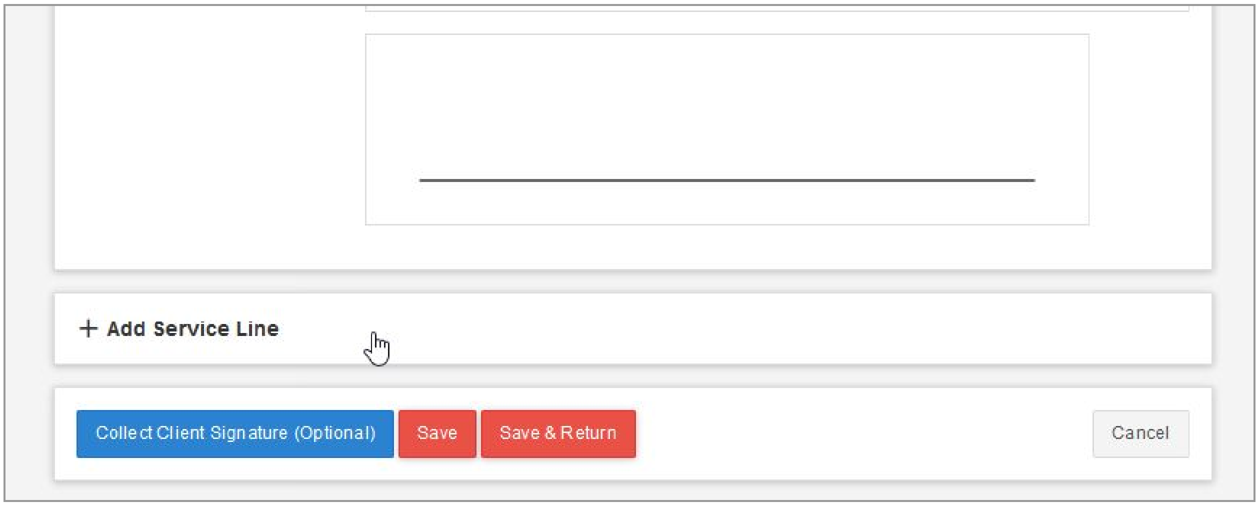
- The new timesheet view provides the options of the available *Service Codes* side-by-side in a blue color



IV. Adding A Service Line

OLD VIEW

- A *Service Line* could be added by clicking + *Add Service Line* on the bottom of the page. When adding more than one service line, they would be displayed underneath one another.



NEW VIEW

- The option to add a service line is now on the top right corner: *ADD SERVICE LINE.* All service lines added will be shown via the blue numerical bubbles on the top of the timesheet.