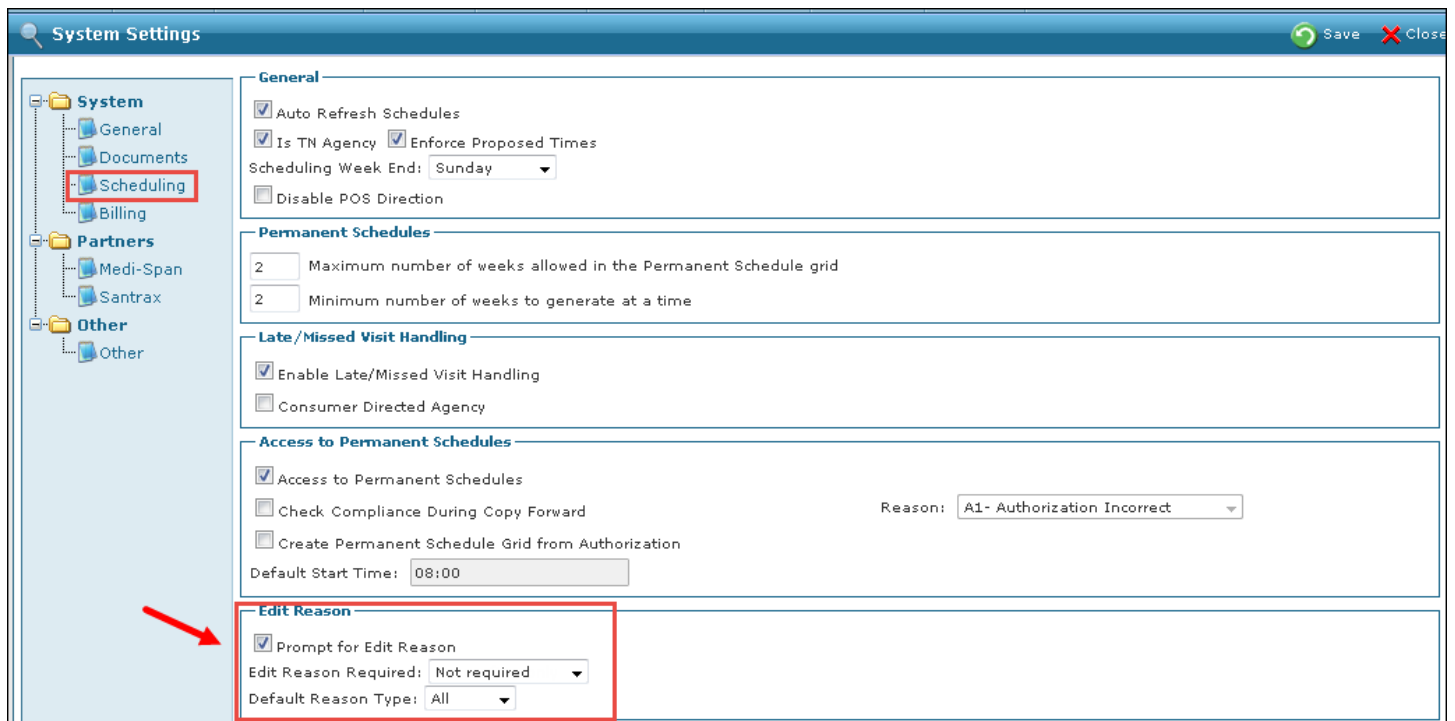


System Settings (Admin Users only)

Review your system settings by navigating to **Admin > System Settings > Scheduling**.

- If **Prompt for Edit Reason** is checked, do not modify these settings.
- If **Prompt for Edit Reason** is un-checked:
 1. Select the **Prompt for Edit Reason** check-box.
 2. Select **Not Required** from the **Edit Reason Required** drop-down menu.
 3. Click **Save**.

Note: This will cause the Reason Code screen to display after a user manually confirms a visit. If the edit reason is set to "Not Required" and it is not enable on the payor then user can click out of this screen without entering a reason code.



The screenshot shows the 'System Settings' application window. The left sidebar contains a tree view with categories: System (General, Documents, Scheduling, Billing), Partners (Medi-Span, Santrax), and Other (Other). The 'Scheduling' item is highlighted with a red box. The main content area is divided into several sections: 'General' (Auto Refresh Schedules, Is TN Agency, Enforce Proposed Times, Scheduling Week End: Sunday, Disable POS Direction), 'Permanent Schedules' (Maximum number of weeks allowed in the Permanent Schedule grid: 2, Minimum number of weeks to generate at a time: 2), 'Late/Missed Visit Handling' (Enable Late/Missed Visit Handling, Consumer Directed Agency), 'Access to Permanent Schedules' (Access to Permanent Schedules, Check Compliance During Copy Forward, Create Permanent Schedule Grid from Authorization, Reason: A1- Authorization Incorrect, Default Start Time: 08:00), and 'Edit Reason' (Prompt for Edit Reason, Edit Reason Required: Not required, Default Reason Type: All). The 'Edit Reason' section is highlighted with a red box, and a red arrow points to the 'Prompt for Edit Reason' checkbox.



Standardized Reason & Resolution Codes Santrax Agency Management

Setting up the OMIG Reason Code Crosswalk (Admin Users only)

- Determine the OMIG Reason Code Crosswalk:
 - If your agency was provided with a CHHA crosswalk, assign the OMIG codes to the reason codes as instructed.
 - If your agency uses agency-defined reason codes when manually verifying visits, determine the appropriate OMIG reason code that will represent your agency-defined code.
- Then a security administrator can access the **Value Items: Edit Reason** screen by navigating to **Admin > System Setup > Value Items**, and then scroll down and select **Edit Reason** under **Scheduling**
- For each agency code used during manual verification, click the drop down menu next the reason code and select the appropriate OMIG code.
- Select the **Notes Required** check-box as necessary. Please review the OMIG Reason Codes spread sheet and any CHHA specific requirements.
- Click **Save**.

Value	Name	Client	Staff	Agency	Payor	Export Code	Notes Required	Task Note	Edit Reason	Active
DF	DEATH IN FAMILY	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>
DISC	PHONE DISCONNECTED	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>		Client's phone line not working (technical issue or natural disast	<input checked="" type="checkbox"/>
EERR	EMPLOYEE ERROR	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>
ETD	TRANSPORTATION DEL	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>
ETMP	TEMPORARY REPLACEN	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>		Attendant failed to report to client's home	<input checked="" type="checkbox"/>
EUNK	UNKNOWN PHONE NUM	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>		Phone number did not link to the client.	<input checked="" type="checkbox"/>
F02T	F02T/S-DATA ENTRY EF	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>		Phone number did not link to the client.	<input checked="" type="checkbox"/>
F10	F10-MD/PT.IN APPT/HF	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>		Client won't let attendant use phone. Client doesn't have a phone in home.	<input checked="" type="checkbox"/>
F10T	F10T/S-MD/PT.IN APPT	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>		Phone in use by client or individual in client's home.	<input checked="" type="checkbox"/>
F11	F11-TEMPORARY CHAN	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>		Client received services outside of the home. Client's phone line not working (technical issue or natural disas	<input checked="" type="checkbox"/>

Reviewing Current Reason Code and Reason Code Crosswalk

To review the **OMIG Reason Code Crosswalk Report**, navigate to **Reports > Santrax > OMIG Reason Code Crosswalk**

- Part 1 of the **OMIG Reason Code Crosswalk Report** includes agency reason codes that your agency has already set to an OMIG code.
- Part two of the **OMIG Reason Code Crosswalk Report** includes agency reason codes that do not have an OMIG code selected.

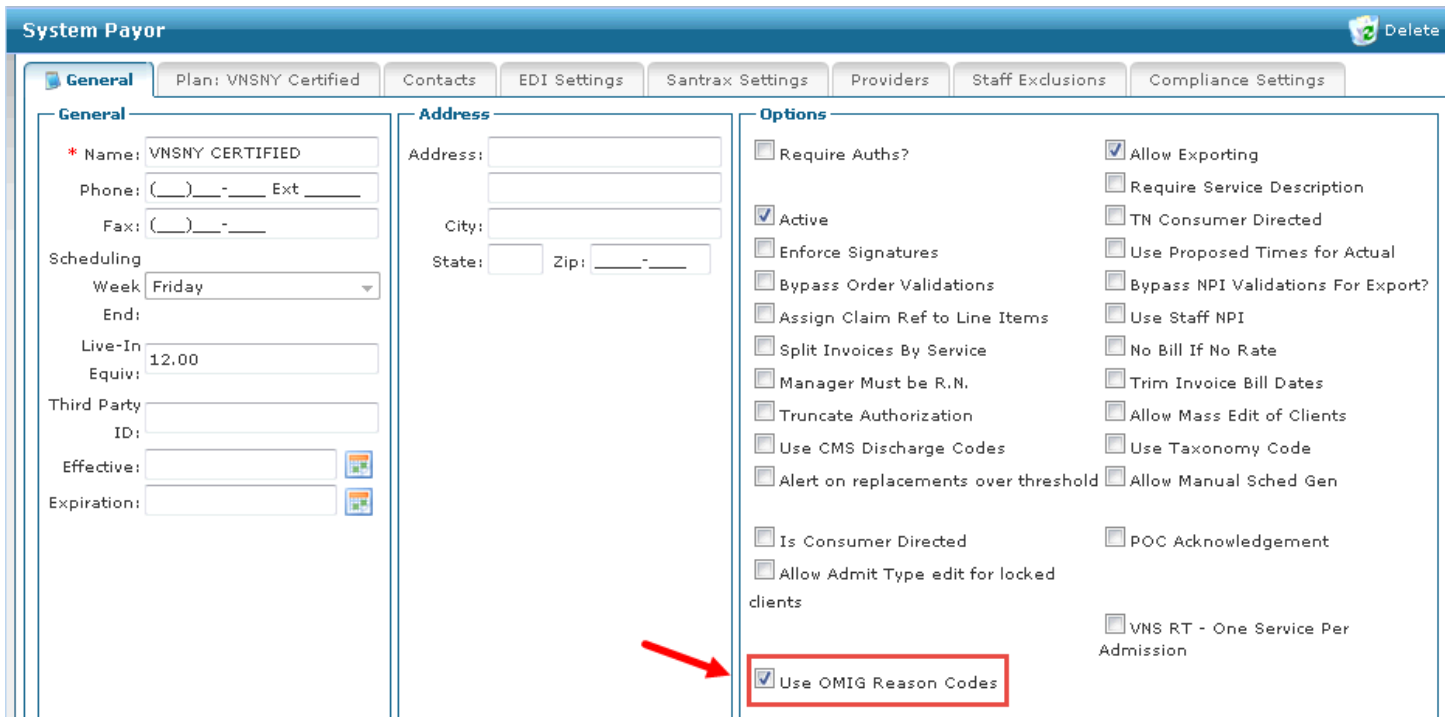
OMIG Reason Code Crosswalk				
Edit Reason With OMIG Code				
Value	Name	Default	Active	OMIG Code Assigned
F1T	F01T/S- AIDE CALLED FROM ALTERNATE PHONE	No	Yes	OM11
F21	F21-PATIENT HAS NO PHONE	No	Yes	OM10
FLAT	EMPLOYEE LATE	No	Yes	OM16
Edit Reason Without OMIG Code				
Value	Name	Default	Active	
DISC	PHONE DISCONNECTED	No	Yes	
ETD	TRANSPORTATION DELAY	No	Yes	
EUNK	UNKNOWN PHONE NUMBER	No	Yes	

****Now you are ready to train your staff on using Reason and Resolution Codes!**

- Refer to the OMIG Reason Code Spread Sheet and page 4 of this document.

Setting OMIG Reason and Resolution Codes as Required at the Payor

1. A user with security administrator credential should then access the **System Payor** screen by navigating to: **Billing > Payors.**
2. Select a contract(s) that is requires a VO, and then select **OMIG Reason Code Required.**



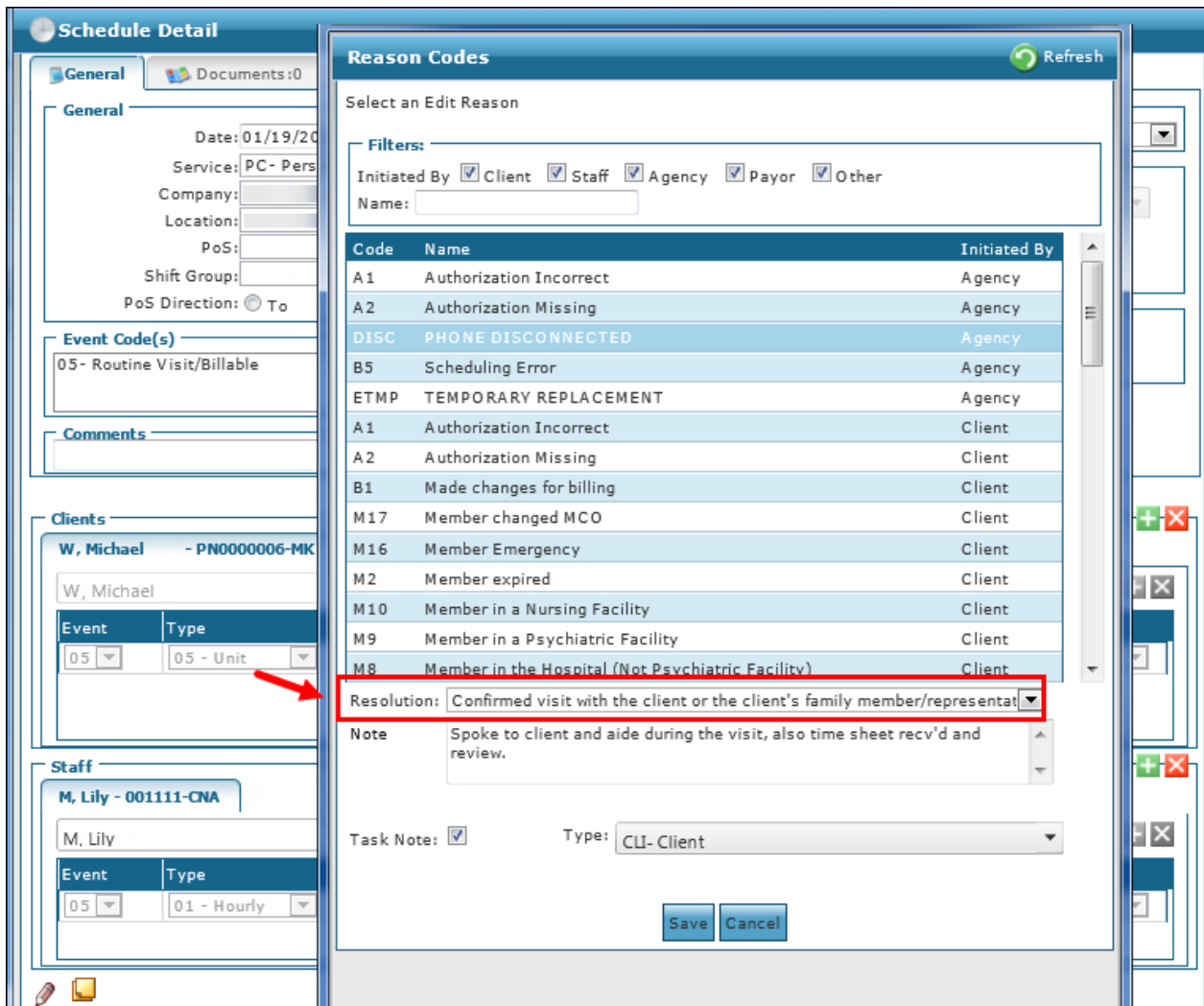
The screenshot shows the 'System Payor' configuration interface. The 'Options' tab is active, displaying various checkboxes for system settings. The checkbox for 'Use OMIG Reason Codes' is checked and highlighted with a red box, with a red arrow pointing to it from the bottom left.

General	Address	Options
<p>* Name: VNSNY CERTIFIED</p> <p>Phone: () - - Ext - -</p> <p>Fax: () - -</p> <p>Scheduling</p> <p>Week: Friday</p> <p>End:</p> <p>Live-In: 12.00</p> <p>Equip:</p> <p>Third Party ID:</p> <p>Effective: [calendar icon]</p> <p>Expiration: [calendar icon]</p>	<p>Address:</p> <p>City:</p> <p>State: Zip: - -</p>	<p><input type="checkbox"/> Require Auths?</p> <p><input checked="" type="checkbox"/> Active</p> <p><input type="checkbox"/> Enforce Signatures</p> <p><input type="checkbox"/> Bypass Order Validations</p> <p><input type="checkbox"/> Assign Claim Ref to Line Items</p> <p><input type="checkbox"/> Split Invoices By Service</p> <p><input type="checkbox"/> Manager Must be R.N.</p> <p><input type="checkbox"/> Truncate Authorization</p> <p><input type="checkbox"/> Use CMS Discharge Codes</p> <p><input type="checkbox"/> Alert on replacements over threshold</p> <p><input type="checkbox"/> Is Consumer Directed</p> <p><input type="checkbox"/> Allow Admit Type edit for locked clients</p> <p><input checked="" type="checkbox"/> Use OMIG Reason Codes</p>
		<p><input checked="" type="checkbox"/> Allow Exporting</p> <p><input type="checkbox"/> Require Service Description</p> <p><input type="checkbox"/> TN Consumer Directed</p> <p><input type="checkbox"/> Use Proposed Times for Actual</p> <p><input type="checkbox"/> Bypass NPI Validations For Export?</p> <p><input type="checkbox"/> Use Staff NPI</p> <p><input type="checkbox"/> No Bill If No Rate</p> <p><input type="checkbox"/> Trim Invoice Bill Dates</p> <p><input type="checkbox"/> Allow Mass Edit of Clients</p> <p><input type="checkbox"/> Use Taxonomy Code</p> <p><input type="checkbox"/> Allow Manual Sched Gen</p> <p><input type="checkbox"/> POC Acknowledgement</p> <p><input type="checkbox"/> VNS RT - One Service Per Admission</p>

Verification Staff

Complete the following steps when manually verifying a visit:

1. After editing the visit select the exit icon, the Change Notes screen will display.
Select the note type: **Client**, **Employee Agency** or **Service**. The reason codes for that note type will then display in the **Reason** drop-down menu.
2. Select the **Reason** code that applies from the drop-down menu.
New functionality: If the reason code is mapped to an OMIG code, the resolution code field will pre-populate with the allowable resolutions for the code selected.
Note: The resolution code field will only display if the client is under a contract that uses OMIG codes.
3. Select the **Resolution** code that applies from the drop-down menu.
Note: If an OMIG reason code is selected, you must select a resolution code before exiting and saving the verification.
4. Best Practice: It is also a best practice to enter verification note.
Note: Certain Reason Codes require notes. In addition certain Payers may also require reason codes always be entered upon verification.



Schedule Detail

General Documents:0

General

Date: 01/19/20

Service: PC - Pers

Company:

Location:

PoS:

Shift Group:

PoS Direction: To

Event Code(s)

05 - Routine Visit/Billable

Comments

Clients

W, Michael - PN000006-MK

W, Michael

Event	Type
05	05 - Unit

Staff

M, Lily - 001111-CNA

M, Lily

Event	Type
05	01 - Hourly

Reason Codes Refresh

Select an Edit Reason

Filters:

Initiated By Client Staff Agency Payor Other

Name:

Code	Name	Initiated By
A1	Authorization Incorrect	Agency
A2	Authorization Missing	Agency
DISC	PHONE DISCONNECTED	Agency
B5	Scheduling Error	Agency
ETMP	TEMPORARY REPLACEMENT	Agency
A1	Authorization Incorrect	Client
A2	Authorization Missing	Client
B1	Made changes for billing	Client
M17	Member changed MCO	Client
M16	Member Emergency	Client
M2	Member expired	Client
M10	Member in a Nursing Facility	Client
M9	Member in a Psychiatric Facility	Client
M8	Member in the Hospital (Not Psychiatric Facility)	Client

Resolution: Confirmed visit with the client or the client's family member/representative

Note: Spoke to client and aide during the visit, also time sheet recv'd and review.

Task Note: **Type:** CLI - Client

Save Cancel

OMIG Reason Code Reporting

Use the following reports to review reason codes.

- **OMIG Reason Code Crosswalk Report**
Discussed in page 2 of this handout.
- **OMIG Visit Reason Code Report**

The **OMIG Visit Reason Code** report displays the Client schedule and actual hours and the reason code entered for that visit. The OMIG reason code may be mapped to an agency defined reason code. To review agency defined code review the **Visit Reason Code** report.

To review the **OMIG Visit Reason Code**, navigate to **Reports > Scheduling > OMIG Visit Reason Codes**. Select the Date Range and the **Group By** option.



OMIG Visit Reason Codes By Reason Code, Client

Time Zone

E Eastern **C** Central **M** Mountain **P** Pacific

Date From 01/19/2016 Date To 01/19/2016, Summary Report = 'False'

<u>Client Name</u>	<u>Chart ID</u>	<u>Service</u>
--------------------	-----------------	----------------

Reason: OM06 - Client's phone line not working (technical issue or natural disaster).

W, Michael **PN0000116-MK** **PC** Coordinator: S, Jennifer (372)

Date	Schd Times Strx Times	Hrs LI	Staff Payor	Reason Event Status
1/19/16	12:00P- 2:00P 12:00P- 2:00P	2.00	101112 M, Lily NY Medicaid	OM06 OM06 - Client's phone line not working (technical issue or nat Timesheet received and signed by supervisor. 02 - Confirmed
1/19/16	10:00A-11:00A 10:00A-11:00A	1.00	101112 M, Lily NY Medicaid	OM06 OM06 - Client's phone line not working (technical issue or nat Timesheet received and signed by supervisor. Spoke to client and aide during the visit, also time sheet recv'd and review. 02 - Confirmed
Totals for Client:		3.00		

Reason: OM06 - Client's phone line not working (technical issue or natural disaster) Total Hours : 3.00 Client count: 1

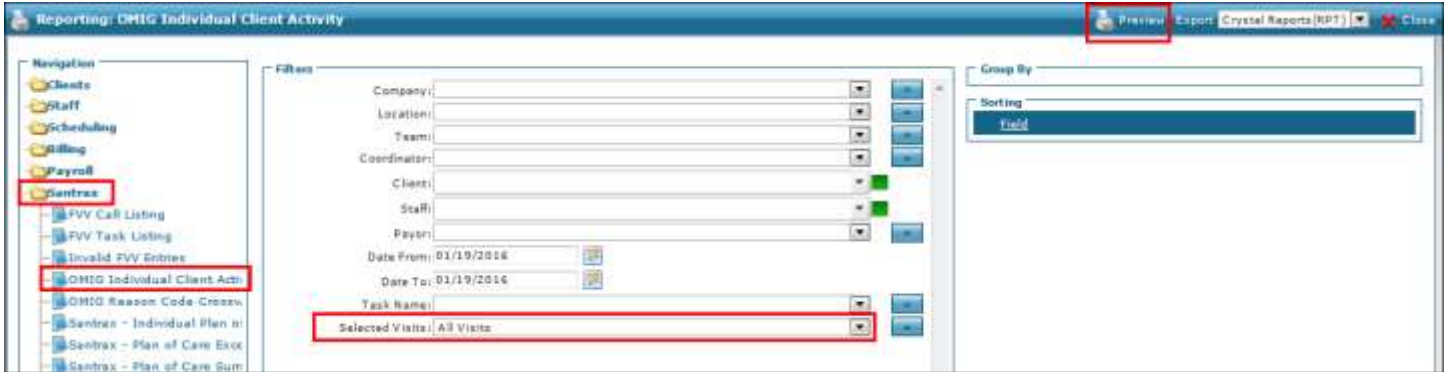


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- OMIG Individual Client Activity Report

The **OMIG Individual Client Activity** report displays the Client schedule and actual hours, tasks and the OMIG Reason and Resolution code entered for that visit. The OMIG reason code may be mapped to an agency defined reason code. To review agency defined code review the **Individual Client Activity** report.

To review the **OMIG Reason Code Crosswalk Report**, navigate to **Reports > Scheduling > OMIG Visit Reason Codes**. Select the Date Range and the **Group By** option.



OMIG Individual Client Activity

From 01/19/2016 To 01/19/2016, Selected Visits = 'All Visits'

Company ID

Client NY0000098-GLN Medicaid ID
Client-Name C, James

EMPLOYEE	EMPLOYEE-NAME	STX ID	DISCIPLINE	DATE	PROPOSED			ACTUAL			TASK	READING
					START	END	HRS	START	END	HRS		
0123456	B, Sarah		HHA	01/19/16	12:00	14:00	2.00			2.00		

Reason Code: Attendant failed to report to client's home.

Resolution Code: Confirmed with the client or the client's family member/representative and documented.

0021 Dressing
0023 Bathing

000005	W, Harold		HHA	01/19/16	10:00	12:00	2.00			2.00		
--------	-----------	--	-----	----------	-------	-------	------	--	--	------	--	--

Reason Code: Attendant failed to call in and out.

Resolution Code: Timesheet received and signed by supervisor.

Total of Tasks: 2
Total of Visits: 2
Total of Proposed Hrs: 4.00
Total of Actual Hrs: 4.00

* - MULTIPLE CLIENTS WITH SAME PHONE
INDIVIDUAL CLIENT ACTIVITY REPORT

01/19/2016 16:52

Pag2