

## Bed Board 2.0 Product Manual

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## Client Bed Board Page Anatomy

1. **Residential Inpatient Stay Label:** This label contains the *Residential Inpatient Stay ID*, as well as the *Admission Date/Time* stamp. It is important to note that the Admission Date/Time stamp of the Residential Inpatient Stay will *always* equal the Admission Date/Time stamp of the first *Client Bed Board Interval* in that Residential Inpatient Stay. If a Client Bed Board Interval is updated so that its Admission Date/Time is less than that of the Residential Inpatient Stay, the Residential Inpatient Stay's Admission Date/Time stamp will automatically update to match the Admission Date/Time stamp of the Client Bed Board Interval.
2. **History Button:** By clicking this button, the user will be able to view previously completed and archived Residential Inpatient Stays.
3. **Action Link Bar:** This is where staff will initiate 99% of the workflows that they use on this page. *Action Links* will be enabled or disabled based on the client's current *Bed Board Status*. (A table outlining expected functionality around enabled and disabled Action Links is available [here](#).) Conversely, an end user can always hover over a disabled Action Link to view a tooltip explaining why the Action Link is disabled.
4. **Compress All/Expand All Link:** This link allows end users to compress or expand the Facility tables. If one or none of the Facility tables is currently expanded, the *Expand All* link will be displayed. If all of the Facility tables are expanded, the *Compress All* link will be displayed. Any other combination of Compressed/Expanded Facility tables will result in both the *Compress All* and *Expand All* links being displayed.
5. **Facility Table Header:** This label identifies the Facility that the Client Bed Board Interval is associated with. To the left of this label is the Facility level expand/compress link. This link allows the end user to expand or collapse the display at the facility level, rather than the Residential Inpatient Stay level. Note that Facilities will be displayed in the following order:
  - a. Facility that contains the Active Client Bed Board Interval record;
  - b. any other Facilities that the client has Client Bed Board Interval records associated with, listed in alphabetical order.

6. **Active Interval Icon:** This icon identifies the Client Bed Board Interval as being the *Active Client Bed Board Interval*.
7. **Edit Button:** This button allows the end user to engage in the *Edit Interval workflow*.
8. **Delete Button:** This button allows the end user to engage in the *Delete Interval workflow*.
9. **On Hold Icon:** This icon identifies Client Bed Board Intervals that are *On Hold*. On Hold Intervals allow for beds to be reserved for clients.
10. **Release Button:** This button allows the end user to engage in the *Release Bed workflow*.

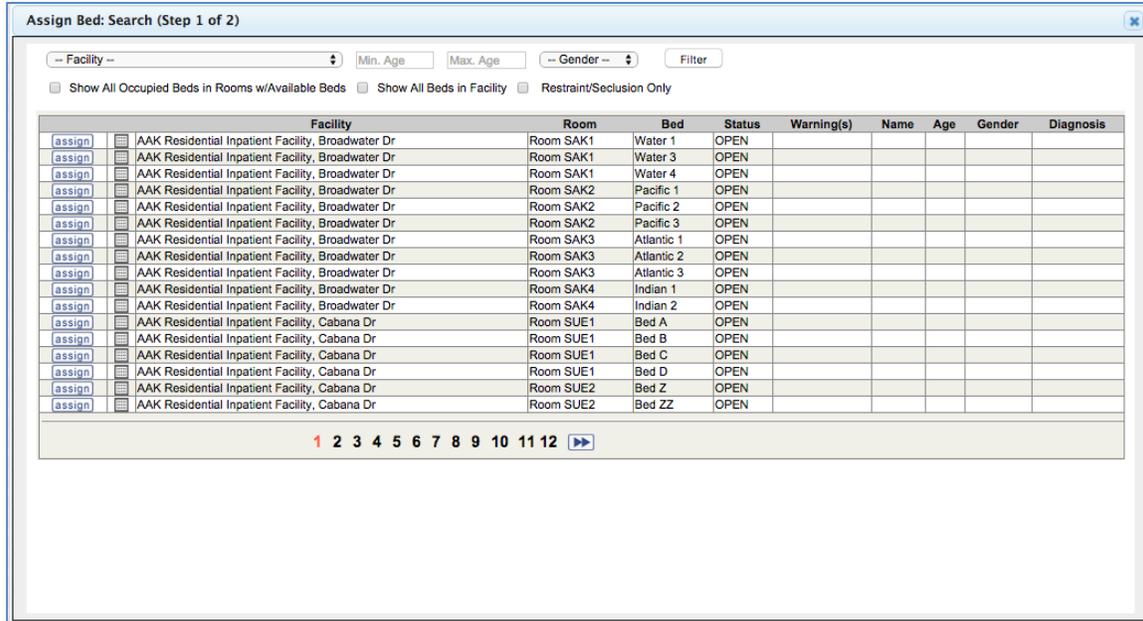
## Bed Assign Workflows

### Assign Bed

Assign Bed	
Use	Assign a client to a bed when they do not already have an active bed assignment.
Required Security Matrix Rights	<i>ClientBedBoardAssign</i>
Partner Configs	<i>Use Bed Board</i>

### Steps to Complete Workflow

1. Click the *Assign Bed* link. This will cause the *Assign Bed: Search (Step 1 of 2)* popup to be displayed.



2. Click the *Assign* button on the desired bed. (If you do not see the bed you are looking for, or otherwise want to filter your results, you can do so via the filter options at the top of the popup. A description of filter usage can be viewed [here](#).)

- Once the *Assign* button is clicked, the *Assign Bed: Enter Details (Step 2 of 2)* popup will be displayed. Complete the **required fields**, and then click the *Add Interval* button.

- The end user will return to the landing page, and the newly added interval will be displayed.

[-] Haverhill Boys Group Home									
Room	Bed	In Date	Est Release Date	Out Date	Out Reason	Type	Team	On Hold	Released Rate Unit
✓ Room 1	ABCDEFGHIJKLMNQRST	05/11/2015 12:00 AM						No	NA NA NA <input type="button" value="edit"/> <input type="button" value="delete"/>

## Check In

Check In	
Use	Check a client back into their bed when they have returned from a pass, OR check a client into an On Hold bed, when they do not currently have an Active Bed Assignment.
Required Security Matrix Rights	<i>ClientBedBoardAssign</i>
Partner Configs	<i>Use Bed Board</i>

## Steps to Complete Workflow (Returned from Pass)

1. Click the *Check In* link. This will cause the *Client Check In* popup to be displayed.

**Check Client In**
✕

Are you sure that you want to check Client **Johnny Bravo** back into **Haverhill Boys Group Home Room 1 ABCDEFGHIJKLMNOPQRST?**

In Date:

Do Not Check In
Check In

2. The Date Time stamp defaults to the current Date/Time stamp. The end user can update this value if they so choose.
3. To complete the workflow, the End user can click the *Check In* button. The end user will be returned to the landing page, and the newly added interval will be displayed.

**[ - ] Haverhill Boys Group Home**

Room	Bed	In Date	Est Release Date	Out Date	Out Reason	Type	Team	On Hold	Released	Rate	Unit	
Room 1	ABCDEFGHIJKLMNQRST	05/11/2015 09:13 AM						No	NA	NA	NA	<a href="#">edit</a> <a href="#">delete</a>
Room 1	ABCDEFGHIJKLMNQRST	05/03/2015 12:00 AM		05/04/2015 04:00 AM	DAY PASS			No	No	NA	NA	<a href="#">edit</a> <a href="#">delete</a>

## Steps to Complete Workflow (On Hold Bed, with no active Bed assignment)

1. Click the *Check In* action link. A popup similar to that shown below will be displayed.

**Check In Bed: Select Bed on Hold**
✕

Beds On Hold for Client

Facility	Room	Bed	Status	Warning(s)	Name	Age	Gender	Diagnosis
<input type="text" value="select"/> AAK Residential Inpatient Facility, Broadwater Dr	Room SAK3	Atlantic 1	ON HOLD		J Bravo	15	F	
<input type="text" value="select"/> jk HoldFacility	The Room	Bed D	ON HOLD		J Bravo	15	F	

- Click the *Select* button, for the desired bed. You will then see a popup similar to the below:

**Client Check In: Assign Bed (Step 1 of 2)**
✕

**Placement:** jk HoldFacility **Room:** The Room **Bed:** Wadsworth #1

\*Admission Date:

Visit Type:

Team:

Est. Rel. Date:

Rate:  Units:

Roommate Warnings:  
This is a high is\_roommate = true warning (...)

- All fields inherit values from the 'On Hold' Interval, but can be updated by the end user.
- After all required fields are populated, the *Client Check In* button will be enabled. When this button is clicked, the client is checked into the bed, and the end user will see a page similar to the below:

**Client Bed Board: Johnny2 Bravo (2435)**
History

Residential / Inpatient Stay (366) Admission Date: 6/3/2015 9:01 AM

Assign Bed | Check In | Check Out | Hold Bed | Move Client | End Residential / Inpatient Stay

Expand All

[ - ] jk HoldFacility

Room	Bed	In Date	Est Release Date	Out Date	Out Reason	Type	Team	On Hold	Released	Rate	Unit
✓ The Room	Wadsworth #1	06/09/2015 08:02 AM						No	NA	NA	NA <input type="button" value="edit"/> <input type="button" value="delete"/>
The Room	Bed A	06/03/2015 09:05 AM		06/03/2015 09:16 AM	RIS Ended	Residential		No	Yes	NA	NA <input type="button" value="edit"/> <input type="button" value="delete"/>

[+] Haverhill Boys Group Home

## Check Out

Check Out	
Use	Check a Client Out of a Bed to either place them on a pass, or to fully check them out of a bed.
Required Security Matrix Rights	<i>ClientBedBoardAssign</i>
Patner Configs	<i>Use Bed Board</i>

## Steps to Complete Workflow

1. Click the *Check Out* link. This will cause the *Client Check Out* popup to be displayed.

2. Enter the appropriate data into the required fields (*Out Date*, *Release Bed*, *Out Reason*) and enter an *Interval Note* if desired.
3. Click the *Check Client Out* button.
4. The end user will be returned to the landing page, and the existing interval will be appropriately updated.

## Hold Bed

Hold Bed	
Use	Place a bed on hold for a Client. When a bed is on hold, the only Client who can be moved into the bed, it the Client who the bed is on hold for.
Required Security Matrix Rights	<i>ClientBedBoardAssign</i>
Partner Configs	<i>Use Bed Board</i>

## Steps to Complete Workflow

1. Click the *Hold* action link. This will cause the Place Bed On Hold: Search (Step 1 of 2) to display.



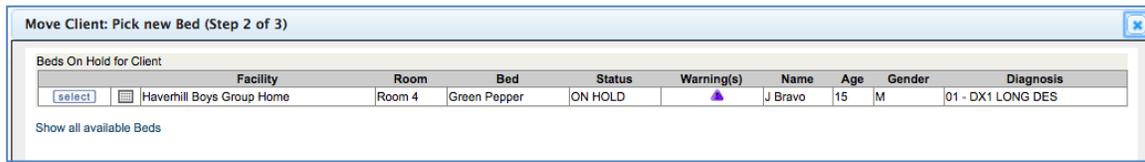
## Move Client

Move Client	
Use	Move a Client from the Bed that they are currently assigned to, to either a bed that is on hold for that Client, or an otherwise new bed assignment.
Required Security Matrix Rights	<i>ClientBedBoardAssign</i>
Partner Configs	<i>Use Bed Board</i>

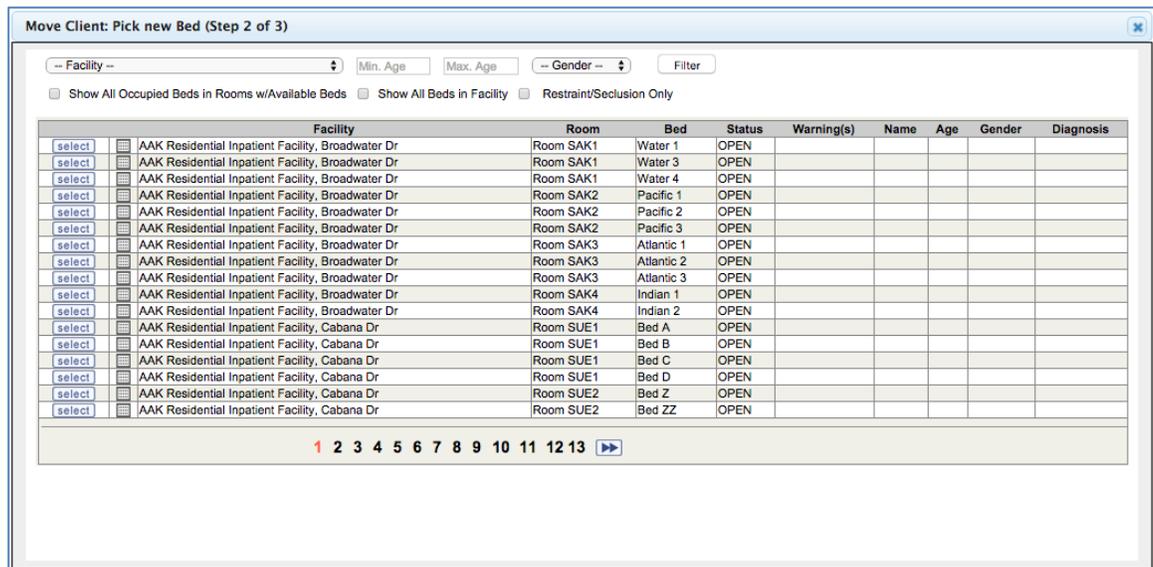
### Steps to Complete Workflow

1. Click the *Move Client* action link
2. The Move Client: *Check Out of Existing Bed (Step 1 of 3)* popup will be displayed.

3. Populate the required fields (Out Date/Time and Out Reason (Best Practice is to select an out reason of 'MOVE CLIENT' or something similar. (Out Reasons can be configured in Admin Tab > Bed/Facility Interval Reasons.))
4. Populate the *Interval Notes* field if desired.
5. Click the *Continue Moving Client* button.
6. The *Move Client: Pick New Bed (Step 2 of 3)* popup will be displayed.



7. At this point the end user can select 1 of 2 routes:
  - a. Select on of the Beds that the Client currently has *On Hold* as pictured above;
  - b. OR click the *Show all available Beds* link to Select from the global pool of available beds.



8. Regardless of the choice above, once the *Select* button is clicked, the *Move Client: Assign New Bed (Step 3 of 3)* popup will be displayed. Fill in the required fields, and click the *Move Bed* button.

**Move Client: Assign new Bed (Step 3 of 3)**

**Placement:** Haverhill Boys Group Home **Room:** Room 4 **Bed:** Green Pepper

Admission Date: 05/11/2015 12:01 AM  Visit Type: --- SELECT ---  
 Est. Rel. Date:  Team: --- SELECT ---  
 Rate:  Units:

Roommate Warnings:

- The end user will be returned to the landing page, and the newly added and updated intervals will be displayed.

Room	Bed	In Date	Est Release Date	Out Date	Out Reason	Type	Team	On Hold	Released	Rate	Unit
✓ Room 4	Green Pepper	05/11/2015 12:01 AM						No	NA	NA	NA <input type="button" value="edit"/> <input type="button" value="delete"/>
Room 1	Alpha	05/10/2015 12:00 AM		05/11/2015 12:00 AM	MOVE Bed			No	Yes	NA	NA <input type="button" value="edit"/> <input type="button" value="delete"/>

## End Residential Inpatient Stay

End Residential Inpatient Stay	
Use	Archive/Close a Residential Inpatient Stay
Required Security Matrix Rights	ClientBedBoardAssign, RISArchive
Partner Configs	Use Bed Board

### Steps to Complete Workflow

- Click the *End Residential Inpatient Stay* link.
- A version of the *End Residential/Inpatient Stay: Enter Details* popup will be displayed.
  - The below version will be displayed if there is no active Bed assignment.

**End Residential / Inpatient Stay: Enter Details**
✕

Are you sure that you would like to End Residential / Inpatient Stay (213) for Client **Johnny Bravo (2433)**?

Bed interval: **5/11/2015 12:00:00 AM** To

Interval Notes: (optional)

Cancel
End Residential / Inpatient Stay

b. The below version will be displayed *if there is* an active Bed assignment.

**End Residential / Inpatient Stay: Enter Details**
✕

Are you sure that you would like to End Residential / Inpatient Stay (213) for Client **Johnny Bravo (2433)**? If you end this Residential / Inpatient Stay, **Johnny Bravo (2433)** will be checked out of Facility **Haverhill Boys Group Home, Room Room 2, Bed Cappa** with an Out Reason of **Residential / Inpatient Stay Ended**, and an out date of the Residential / Inpatient Stay end.

Bed interval: **5/11/2015 12:00:00 AM** To

Interval Notes: (optional)

Cancel
End Residential / Inpatient Stay

3. Enter the Out date and RIS notes (optional), and then click the *End Residential/Inpatient Stay* button.
4. The Residential/Inpatient Stay will now be archived and available in the History page. The end user will be returned to the landing page, and the NULL state page will be displayed.

**Client Bed Board:** Johnny Bravo (2433)
History

Assign Bed | Check In | Check Out | Hold Bed | Move Client | End Residential / Inpatient Stay

There is No Active Residential / Inpatient Stay. Please Click Assign Bed, or Hold Bed to create a new Residential Inpatient Stay

## Bed Board Interval Manipulation Workflows

### Edit Bed Board Interval

Edit Bed Board Interval	
Use	Edit an Existing Bed Board Interval
Required Security Matrix Rights	<i>ClientBedBoardAssign,</i> <i>ClientBedBoardIntervalEdit</i>
Partner Configs	<i>Use Bed Board</i>

#### Steps to Complete Workflow

1. Click the Edit button on the desired Client Bed Board Interval. [Certain fields](#) will become editable, as displayed below:

Room	Bed	In Date	Est Release Date	Out Date	Out Reason	Type	Team	On Hold	Released	Rate	Unit
Room 2	Delta	04/28/2015 12:00 AM			--SELECT--	SELECT	SELECT	No	NA		

2. Edit the fields as desired, and click the *Update* button.
3. Your updates will be saved, and you will be returned to the view type of the page:

Room	Bed	In Date	Est Release Date	Out Date	Out Reason	Type	Team	On Hold	Released	Rate	Unit
Room 2	Delta	04/26/2015 12:00 AM						No	NA	NA	NA

### Delete Bed Board Interval

Delete Bed Board Interval	
Use	Delete a Bed Board Interval that was created in error
Required Security Matrix Rights	<i>ClientBedBoardAssign,</i> <i>ClientBedBoardIntervalDelete</i>
Partner Configs	<i>Use Bed Board</i>

#### Steps to Complete Workflow

1. Click the *Delete* button on the desired Client Bed Board Interval. You will receive a confirmation:

**Are you sure you want to delete Bed Board Interval?** ✕

Are you sure that you want to delete the Bed Board Interval for **Haverhill Boys Group Home Room Room 2 Bed Delta** for Client **Johnny Bravo**? Please note that this action can not be undone.

No, Do Not Delete Bed Board Interval
Yes, Delete Bed Board Interval

- Click the *Yes, Delete Bed Board Interval* button, to confirm the deletion of the Client Bed Board Interval. Note: If there is one or more Visit records associated with the Interval, the *Delete* button will be disabled. On mouse hover, a tooltip will be displayed explaining why the button is disabled.

## Release Bed Board Interval (On Hold Bed)

Release Bed Board Interval (On Hold Bed)	
Use	Release a Bed that is currently on hold. This will place the bed back into the pool of beds available for assignment
Required Security Matrix Rights	<i>ClientBedBoardAssign</i>
Partner Configs	<i>Use Bed Board</i>

### Steps to Complete Workflow

- Click the Release button on the desired Client Bed Board Interval. You will receive a confirmation:

**Are you sure you want to release Bed Board Interval?** ✕

Are you sure that you want to release the hold from **AAK Residential Inpatient Facility, Broadwater Dr : Room Room SAK1 Bed Water 4**

No, Do Not Release Hold
Yes, Release Hold

- Click the *Yes, Release Hold* button to release the bed back into the pool of available beds, and the end user will be returned to the *Bed Assign* landing page.

## Archived/Closed Residential Inpatient Stays

### Page Anatomy

**Client Bed Board: Johnny B. Brews (2435)** 1 Active Residential/Inpatient Stay

2 3 Here are some RIS notes. 4 Reactivate

Residential / Inpatient Stay ID	Facility	Room	Bed	In Date	Out Date	Released	Out Reason	Type	Team On Hold	Rate	Unit
263 (04/26/2015 12:00 AM- 05/15/2015 11:39 AM)	Haverhill Boys Group Home	Room 4	Green Pepper	04/26/2015 12:00 AM	04/28/2015 12:00 AM	False	DAY PASS	jkBedDay	False		
	Haverhill Boys Group Home	Room 4	Green Pepper	05/04/2015 11:03 AM	05/04/2015 11:05 AM	False	DAY PASS	jkBedDay	False		
	Haverhill Boys Group Home	Room 4	Green Pepper	05/04/2015 11:06 AM	05/15/2015 11:26 AM	True	MOVE Bed	jkBedDay	False		
	jk HoldFacility	The Room	Bed B	05/15/2015 11:27 AM	05/15/2015 11:38 AM	True	DISCHARGE	Residential	False		

5

Residential / Inpatient Stay 312 (01/01/2015 12:00 AM- 03/01/2015 07:30 AM)

- Active Residential/Inpatient Stay Button:** If end user clicks this button, they are re-directed to the Bed Assign landing page (Client Nav Bar > Bed Assign).
- Residential/Inpatient Stay Accordion Control:** In its compressed state, the accordion control displays a list of *all* archived/closed Residential Inpatient Stays that the client has. The accordion control headers display the residential/Inpatient Stay ID, as well as the start date/time and end date/time of the Residential/Inpatient Stay.
- Residential/Inpatient Stay Notes:** When the end user hovers over the Info (i), a tool tip is displayed. The tooltip is populated with the note that was entered in the *End Residential/Inpatient Stay: Enter Details* popup.
- Reactivate Link:** This link is only available on the most recently archived Residential/Inpatient Stay. There are two additional conditions that must be true for the *Reactivate* link to be present:
  - the end user's Profile Code has the Security Matrix Right: *RISReactivate* = True;
  - the Specific Client **does not** currently have an active Residential/Inpatient Stay.
- Bed Board Intervals:** When the user clicks on one of the accordion control's headers, the header expands to display all *Client Bed Board Intervals* that are associated with that Residential/Inpatient Stay. If the header is clicked a second time, the accordion control is collapsed/compressed.

### History/Archive Page Workflows

#### Reactivate Residential/Inpatient Stay

Reactivate Residential/Inpatient Stay	
Use	Reactivate the most recently archived/closed Residential/Inpatient Stay. Note that if the Client has an Active Residential/Inpatient Stay, this action will not be available
Required Security Matrix Rights	<i>ClientBedBoardAssign, RISReactivate</i>
Partner Configs	<i>Use Bed Board</i>

## Steps to Complete Workflow

1. Click the *Reactivate* link. A popup confirmation will be displayed:



2. Click the *Yes Re-Open this Res/Inp Stay* button to reactivate/reopen the Residential/Inpatient Stay.
3. On button click, the *Residential/Inpatient Stay* will be reactivated, and the end user will be redirected to the *Bed Assign* landing page.

## Bed Board Billing

### Bed Board Gap Days Definition

Bed Board Gap Days is defined as the maximum number of days between intervals, where those intervals are still allowed to Merge. If the *Bed Board Gap Days* field is NULL, then Intervals will be eligible to merge if there is 1-minute duration between them.

Bed Board Gap Days are only relevant for the *Merge By Client* functionality on the *Bed Board Billing* filtering page (Billing Tab > Bed Board Billing). If the Bed Board Gap Days functionality **is not** turned on in a Partner's Domain, Intervals will only be able to merge together if there is a 1-minute difference between the end date of Interval 'A' and the start date of Interval 'B'. The table below helps to illustrate this:

Bed Board Gap Days	Interval 'A' End Date	Interval 'B' Start Date	Can Merge?
1	5/1/2015 10:00 AM	5/3/2015 4:00 PM	No
2	5/3/2015 7:00 AM	5/5/2015 10:00 PM	Yes
10	5/1/2015 12:30PM	5/4/2015 9:00 AM	Yes
NULL	5/3/2015 9:00 AM	5/3/2015 9:01 AM	Yes
NULL	5/3/2015 9:00 AM	5/3/2015 9:02 AM	No

### Bed Board Gap Days Configuration/Setup

The setup/configuration for Bed Board Gap Days is a two-part process.

#### Part 1 (Set Partner Config: Use Bed Board Gap Days in Client Ins = True)

1. Navigate to **Admin Tab > Partner Config**.
2. CTRL + F for *Use Bed Board Gap Days in Client Ins*.
3. Set *Use Bed Board Gap Days in Client Ins = True* by marking the checkbox.
4. Save *Partner Config*.

#### Part 2 (Set the appropriate BedBoard Gap Days value for the Client)

1. Navigate to the appropriate Client.
2. Click **Client Nav Bar > Insurance**.

3. Set *Bed Board Gap Days* to the appropriate value, and then Click the *Save* button.

**INSURANCE COVERAGE: Johnny2 Bravo (2435)**

Ord	Ins	Ins ID	Group	Start	End	Copay	Active	Self	Updated	
1	jkBillingPayer	<a href="#">1/1/2015</a>	GrpNUM	1/1/2000		\$0	True	True	5/27/15	<input type="button" value="edit"/> <input type="button" value="subscr"/> <input type="button" value="delete"/> <input type="button" value="scan"/>

ACTIVE

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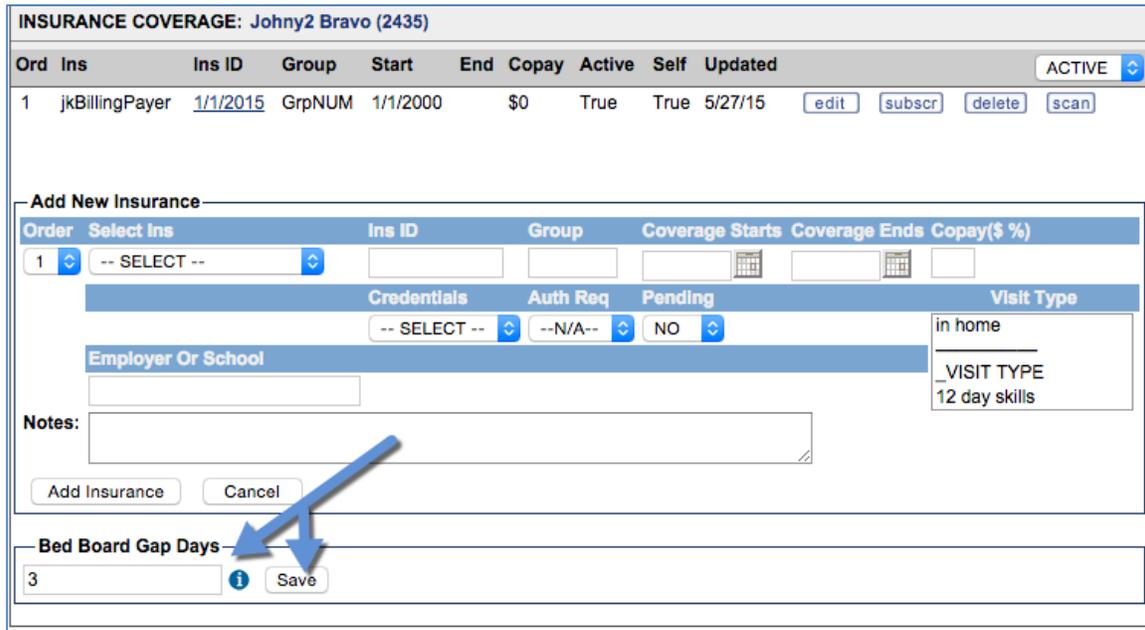
**Add New Insurance**

Order	Select Ins	Ins ID	Group	Coverage Starts	Coverage Ends	Copay(\$ %)	
1 <input type="button" value="v"/>	-- SELECT -- <input type="button" value="v"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> <input type="button" value="calendar"/>	<input type="text"/> <input type="button" value="calendar"/>	<input type="text"/>	
		Credentials	Auth Req	Pending	Visit Type		
		-- SELECT -- <input type="button" value="v"/>	--N/A-- <input type="button" value="v"/>	NO <input type="button" value="v"/>	<input type="text" value="in home"/>		
		Employer Or School				<input type="text" value=""/>	
		Notes:				<input type="text" value=""/>	
		<input type="button" value="Add Insurance"/> <input type="button" value="Cancel"/>					

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**Bed Board Gap Days**

3	<input type="button" value="i"/>	<input type="button" value="Save"/>
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## Bed Board Billing Filtering Page Anatomy

**Bed Board Billing:**

Merge Interval  By Client    Include Check out Date  Released Beds Only

<input checked="" type="checkbox"/>	Start Date	End Date	Name	Bed	Type Assignment	Adm Date	Rel'd	Residential Stay ID
<input checked="" type="checkbox"/>	5/1/2015	5/1/2015	DOEFINER, MARYJANE	KB Facility Two / room 1 / CC / F2_RCC_bed1		1/7/2015	No	136
<input checked="" type="checkbox"/>	5/1/2015	5/1/2015	Brown, Rex	Newbury 26 / NBR&S / RS1		4/22/2015	No	136
<input checked="" type="checkbox"/>	5/1/2015	5/1/2015	Coyote, Wiley E	Michelle My Belle Center / MLF 3 / 3C		5/1/2015	No	262
<input checked="" type="checkbox"/>	5/1/2015	5/1/2015	annie, orphan J	Haverhill Boys Group Home / All Occupied / Bed B		4/9/2015	No	78
<input checked="" type="checkbox"/>	5/1/2015	5/1/2015	104, Test	Michelle My Belle Center / MLF 1 / 1A		4/16/2015	No	116
<input checked="" type="checkbox"/>	5/1/2015	5/1/2015	104, Test	Michelle My Belle Center / MLF 1 / 1A		4/16/2015	No	116
<input checked="" type="checkbox"/>	5/1/2015	5/1/2015	104, Test	Michelle My Belle Center / MLF 1 / 1A		4/16/2015	No	116
<input checked="" type="checkbox"/>	5/1/2015	5/1/2015	105, test	Michelle My Belle Center / MLF 4 / 4D		4/18/2015	No	309
<input checked="" type="checkbox"/>	5/1/2015	5/1/2015	KBTest, KB	KB Facility One / room 1 / F1_R1_Bed3		2/1/2015	No	97
<input checked="" type="checkbox"/>	5/1/2015	5/1/2015	Boxer, Lindsay	Michelle My Belle Center / MLF 3 / 3G		5/1/2015	No	320
<input checked="" type="checkbox"/>	5/1/2015	5/1/2015	109, 11062013	Michelle My Belle Center / MLF 3 / 3D		5/1/2015	No	317
<input checked="" type="checkbox"/>	5/1/2015	5/1/2015	XXTestpatient, Heather	123 Main Street / 1-A / South		3/24/2015	No	68
<input checked="" type="checkbox"/>	5/1/2015	5/1/2015	KBInpatient-One, KB1	KB Facility One / room 1 / F1_R1_Bed1		2/1/2015	No	93
<input checked="" type="checkbox"/>	5/1/2015	5/1/2015	RSPKirk, James	SP The Big House / 1 North / Pinot Noir		4/13/2015	No	150
<input checked="" type="checkbox"/>	5/1/2015	5/1/2015	Troopa, Koopa	Hyrule / Gerudo / B		4/21/2015	No	131
<input checked="" type="checkbox"/>	5/1/2015	5/1/2015	Troopa, Koopa	Hyrule / Kakariko / Skulltulla		4/21/2015	No	133
<input checked="" type="checkbox"/>	5/1/2015	5/1/2015	Troopa, Koopa	Hyrule / Dodongo / 3		4/21/2015	No	134
<input checked="" type="checkbox"/>	5/1/2015	5/1/2015	Troopa, Koopa	Hyrule / Gerudo / A		4/23/2015	No	147
<input checked="" type="checkbox"/>	5/1/2015	5/1/2015	DEVClient-1, John	Random Inpatient Facility / Room 1 / Bed 1		4/13/2015	No	84
<input checked="" type="checkbox"/>	5/1/2015	5/1/2015	Test, jkInpBed2	Newburyport Girls Group Home / Room A / Bed 5		4/6/2015	No	125
<input checked="" type="checkbox"/>	5/1/2015	5/1/2015	Merge3, Lucy	KB Facility One / room 1 / F1_R1_Bed2		3/14/2015	No	115
<input checked="" type="checkbox"/>	5/1/2015	5/1/2015	RSPSpock, Mr	SP The Big House / 1 North / Cabernet		4/26/2015	Yes	180
<input checked="" type="checkbox"/>	5/1/2015	5/1/2015	Bravo, Johnny	Haverhill Boys Group Home / Room 1 / Alpha		5/1/2015	No	192
<input checked="" type="checkbox"/>	5/1/2015	5/1/2015	BedBoard, Fantastic	Michelle My Belle Center / MLF 2 / 2D		5/1/2015	No	261
<input checked="" type="checkbox"/>	5/1/2015	5/1/2015	Heroes, Hogans	Michelle My Belle Center / MLF 4 / 4B		5/1/2015	No	347
<input checked="" type="checkbox"/>	5/1/2015	5/1/2015	CMB_Patient5, Christina	CMB-Facility2 / FC2-RM2 / FC2-RM2-BD1		5/1/2015	No	331
<input checked="" type="checkbox"/>	5/1/2015	5/1/2015	CMB_Patient6, Christina	CMB-Facility2 / FC2-RM1 / FC2-RM1-BD2		5/1/2015	No	350
<input checked="" type="checkbox"/>	5/1/2015	5/1/2015	CMB_Patient7, Christina	CMB-Facility1 / FC1-RM1 / FC1-RM1-BD1		5/1/2015	No	352

Continue to Billing Options

1. **Facility Filter:** This filter allows the end user to select a single facility, or *All* facilities. This selection will modify the results that are returned when the end user Clicks the Filter button. If this filter is set to a specific facility, only records for that facility that adheres to the other filtered on criteria will be returned. If this filter = *All* then records from any facility, that adhere to the other filtered on criteria, will be returned.
2. **Visit Type Assignment Filter:** This filter has two distinct options: *Unassigned Only* (which is the default selection) and *Assigned Only*. If *Unassigned Only* is selected, only those records that are associated with a *ClientBedBoardInterval* that **does not** have a Visit Type associated with it, **and** adheres to the other criteria filtered on, will be returned. If *Assigned Only* is selected, only those records that are associated with a *ClientBedBoardInterval* that **has** a Visit Type associated with it, **and** adheres to the other criteria filtered on, will be returned.

3. **Visit Type Filter:** This filter is disabled, unless the **Visit Type Assignment filter** is set to *Assigned Only*. This filter allows the end user to restrict the results returned to only records for *ClientBedBoardIntervals* that are associated with the selected Visit Type, and adhere to the other filtered on criteria.
4. **Program Filter:** This filter is disabled unless the **Visit Type Assignment filter** is set to *Assigned Only*. This filter allows the end user to restrict the results returned to only those records for *ClientBedBoardIntervals* that are associated with the selected Program, and adhere to the other filtered on criteria.
5. **Client Name:** This filter allows the end user to select a specific Client to return results for. If this filter is not NULL, then **only** records for the filtered on Client that adhere to the other filtered on criteria will be returned.
6. **Merge Interval:** This filter will return all line items for the same client and same interval as one large record.
7. **By Client:** This filter is disabled, unless **Merge Interval** is set to True. If the *By Client* filter is set to True, all line items for all Intervals that are for the same Client, **and** that are less than or equal to the **Bed Board Gap Days value** apart, will be returned as one large record.
8. **Start Date:** This filter defaults to the first day in the previous month. This filter identifies the earliest date that records which adhere to all other filtered criteria should be returned for.
9. **End Date:** This filter defaults to the last day in the previous month. This filter identifies the latest date that records which adhere to all other criteria should be returned for.
10. **Include Check Out Date:** This filter allows/disallows the last day in an interval that has its bed released to be included or excluded. This flag should only be set to False if the Billing Payer will not allow you to bill for the Client's last day in the bed.
11. **Released Beds Only:** This filter allows/disallows only records for those intervals that have had their beds released and match all other filtered criteria to be returned.
12. **Filter Button:** This button executes a query based off of the filtered on criteria, and returns the appropriate record set.
13. **Selection Column:** Only those records that are set to True will have *ClientVisit* records created for them in the *Bed Board Billing* workflow.
14. **Start Date Column:** The start date of the record.
15. **End Date Column:** The end date of the record.
16. **Name Column:** The name of the Client whom the record is for.
17. **Bed Column:** The name of the *Facility/Room/Bed* associated with the record.
18. **Type Assignment Column:** The Visit Type that is associated with the record.
19. **Adm Date Column:** The *Admission* date for the interval that the record is associated with.
20. **Rel'd Column:** This column identifies whether or not the interval that the record is associated with has had its bed released.
21. **Residential Stay ID Column:** The *Residential/Inpatient Stay* record that the displayed record is associated with.
22. **Continue to Billing Options Button:** This button brings the end user to the *Billing Options* page in the *Bed Board Billing* workflow.

## Merging Intervals

The Bed Board Billing Module allows end users to merge intervals in 2 distinct ways:

1. Merge Interval
2. Merge Interval By Client

If the user elects to simply *Merge Interval*, then one large Visit will be created for all of the days associated with a single Interval, for the entire time period filtered on.

If the end user elects to *Merge Interval, By Client*, then all eligible intervals that are returned for the Client will be merged into one large Visit.

Intervals are eligible to be merged if:

1. The day difference between intervals less than or equal to [Bed Board Gap Days](#).
  - If Bed Board Gap Days IS NULL, Intervals will only be able to be merged together if there is a 1-minute difference between the end date/time of Interval 'A' and start date/time of Interval 'B'.
2. The Visit Type associated with the Intervals is the same for all Intervals attempting to be Merged, OR the Visit Type is NULL for all Intervals that the user is attempting to Merge.
  - If the Visit Type associated with all of the Intervals is set to *Flex on Units or Rates*, the Flex Units/Rates are congruent for all Intervals that are attempting to be Merged together.

## Billing Options Page Anatomy

**BILLING OPTIONS:**

**Employee:**  1

**Program:**  2

**Visit Type:**  3

**Location:**  4

**Recipient:**  5

**Billing Group:**  6

**Notes:**  7

**Advanced:**  Bypass authorization, merging, notification, and form group checks 8

- A total of 30 entries have been selected.
- One visit will be created for each entry with the selected parameters.

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1. **Employee dropdown:** This dropdown allows the end user to select the Employee who will be credited for the Visit.
2. **Program dropdown:** This drop down allows the end user to select the Program that Visit will be entered under. Please note: if the user selected *Assigned Only* on the *Bed Board Filtering* page, this dropdown will not be displayed; the Program data will be pulled from the *ClientBedBoardInterval* record.
3. **Visit Type dropdown:** This dropdown allows the user to select the Visit Type that will be used in the creation of the Visits. Only those Visit Types that are set to *Visit Type: Residential = True* will be displayed. Please note: if the user selected *Assigned Only* on the *Bed Board Filtering* page, this dropdown will not be displayed; the Visit Type data will be pulled from the *ClientBedBoardInterval* record.
4. **Location dropdown:** This dropdown allows the end user to select the Location that will be used for all Visits that are being generated.
5. **Recipient Type dropdown:** This dropdown allows the end user to select the Recipient Type that will be used for all Visits that are generated.
6. **Billing Group dropdown:** This dropdown allows the end user to select the Billing Group that will be used for all of the Visits that are being generated. Please note that If the end user is assigned to one or more

Billing Groups, and the end user's Profile Code has *Security Matrix: BillingGroupsView = True*, only those Billing Groups that the end user is assigned to, will be displayed in the Billing Groups dropdown.

7. **Notes field:** This field allows the end user to enter a note. The entered Note will be used to Populate the *Notes* field in the Client Visit Header (ClientVisit) record.
8. **Advanced (Bypass authorization, merging, notification, and form group checks):** If this flag is set to True (the default setting), the standard authorization, merging, notification trigger, and form group checks are bypassed, and the Visit is simply created in the system.
9. **Add All button:** By clicking this button, the user creates a single Visit for every Record they selected in the Bed Board Filtering page. Those Visits are created using the data selected in the Billing Options page.

## Bed Board Billing Options Special Cases

### Visit Generation Error – Program Selection

If the user is generating Bed Board Billing Visits for *Unassigned* Intervals, they will be required to select a Program on the Billing Options page. When selecting a Program on the Billing Options page, it is entirely possible that Visits will not be able to be created for certain intervals, due to the associated Client not being assigned to the selected Program.

To rectify this issue, Credible has designed a mechanism to notify the end user that there are Visits that will not be able to be generated due to the Program selection. In addition to notifying the end user, this mechanism also allows the end user to select a valid Program for each of the affected clients. The selected Program will then be associated with the respective Clients' Visits.

In addition to allowing a Client-specific Program selection, the end user also has the option to **not** generate Visits for the identified Clients.

**Visit Generation Error!** ✕

**Warning** If you Generate Bed Board Billing Visits under Program **Jill\_testSG** Visits will not be generated for the 2 Clients listed below:

Client	Program Selection
jklnpBed2 Test (2419)	Haverhill Boys Group Home <span style="float: right;">▾</span>
Johnny Bravo (2433)	AAK Residential Inpatient Stay <span style="float: right;">▾</span>

Do not generate visits for above clients

Use selected program

## Out Days Auto Prompt

If *Out Days* exist between intervals that were merged by client, Credible will automatically detect the Out Days, and provide the end user the option to have the system automatically add the *Occurrence Span Code* of 74 (Out Days) to the relevant Episode.

For this prompt to appear for a Client, the following must be true:

1. *Partner Config: Use Occurrence Codes, Occurrence Span Codes, and Value Codes = True.*
2. The generated Visits are associated with an Episode.
3. The Episode that the Visits are associated with does not already have the *Occurrence Span Code* of 74, for the *Out Date* range that was automatically detected.

The Out Days Auto Prompt will look similar to the picture below:

**Credible detected Out Days in Residential Interval** ✕

Bed Board Out Days have been detected for the Clients listed below. Do you want to add the Occurrence Span Code for 74 for the selected out days? \*The Occurrence Span Code will be added to the Episode identified in the table

<input type="checkbox"/>	Client	Out Date Range	Episode Program	Episode Start	Episode End
<input type="checkbox"/>	2419	06/01/2015 - 06/03/2015	HBGH	01/01/2015	-
<input type="checkbox"/>	2419	06/05/2015 - 06/22/2015	HBGH	01/01/2015	-

No, don't add Occurrence Span Code
Yes, add Occurrence Span Code

## Charts

### Action Link States Chart

Client Bed State	Assign Bed	Check In	Check Out	Hold Bed	Move Client	End RIS
Actively in Bed	Disabled	Disabled	Enabled	Enabled	Enabled	Enabled
Only Have Bed On Hold	Enabled	Enabled	Disabled	Enabled	Disabled	Enabled
On Pass	Disabled	Enabled	Disabled	Enabled	Disabled	Enabled
No Bed Assignment (None on hold or Active Assignments. Historical Intervals exist)	Enabled	Disabled	Disabled	Enabled	Disabled	Enabled
No Active RIS	Enabled	Disabled	Disabled	Enabled	Disabled	Disabled

### Bed Board Filter Chart

Filter	Use	Notes
Facility	Allow end user to limit results by a specific Facility	
Min Age	Allow end user to see only those beds that are in rooms where the youngest client is $\geq$ value, and matches all other filtered on criteria	
Max Age	Allow end user to see only those beds that are in rooms where the oldest client is $\leq$ value, and matches all other filtered on criteria	
Gender	Allows end user to see only those beds that are in rooms where there is at least 1 client of the filtered on gender, and matches all other filtered on criteria	
Show All Occupied Beds in Rooms w/ available beds	Show the Occupied beds that are in rooms where Available beds exist, and match all other filtered on criteria	This is useful for checking client Warnings, to make sure incompatible clients are not roomed together
Show All Beds in Facility	Shows all of the beds in the filtered on facility	This trumps all other filtering criteria
Restraint/Seclusion Only	Show only those beds that are in rooms that are set as <i>Is Restraint Seclusion Room = True</i> , and match all other filtered on criteria	

### Bed Details Required Fields Chart

Field	Required (Y/N/C)	Notes
Admission Date	Y	
Visit Type	N	
Team	N	Only used for filtering in Bed Board Reports
Est. Release Date	N	
Rate	C	Conditionally required when the selected Visit Type is set to Visit Type: Flex Type = Rate
Units	C	Conditionally required when the selected Visit Type is set to Visit Type: Flex Type = Units

### Client Bed Board Interval Editable Fields Chart

Interval State	In Date	Est. Release Date	Out Date	Out Reason	Type	Team	Rate	Unit
Active Interval	X	X	-	-	X	X	Based off Visit Type Selection	Based Off Visit Type Selection
Historical (Checked Out) Interval	X	X	X	X	X	X	Based off Visit Type Selection	Based Off Visit Type Selection
Hold Interval	-	-	-	-	-	-	-	-