



Help *at* Home®  
Care to Live Your Life.

# Gather and Grow!

Admissions -  
Session #1 Intake Process/Pre-Admission



# Intake process

## Terms -

**Inquiry** – prior to acceptance by the Branch.

- ◆ A “Client Details Sheet” comes from the Intake Team. They make initial contact with the person/family.
- ◆ Intake Team gathers basic information. RNCM should set up a call with the Inquiry to discuss clinical questions prior to accepting.

**Referral** – has been accepted for PA admission by the Branch.

- ◆ If able to accept the inquiry for admission, they are now a referral and should be entered into MatrixCare.

**Non – admit** – has been accepted or admitted but cannot service (home unsafe, lost Medicaid, etc.)

- ◆ The referral becomes a non-admit. Keep all their information in a non-admit binder.

## What makes the person appropriate for PA services? [Admission Criteria\\_HAH.pdf](#)

Per policy - *Clients are accepted for home health/home care services based on a reasonable expectation that the client’s health care needs can be met adequately by the home health agency in the client’s residence.* **What needs do they have, and can we meet those needs?**

- ◆ Estimated hours and days to meet those needs - Can we staff that?
- ◆ Who else lives in the home? Minors or adults? Do they help with the client’s needs in our absence?

**Clinically, if you do not feel they are appropriate, speak up. We do not have to take every referral. Involve your Administrator if needed.**

## Must have (and keep) an overseeing MD and Medicaid.

- Check the clients Medicaid, check the MD Medicaid, NPI, Indiana License!  
Medicaid: <https://portal.indianamedicaid.com/hcp/Default.aspx?alias=portal.indianamedicaid.com/hcp/provider>  
NPI: <https://npidb.org/>  
License verification: <https://www.in.gov/pla/>
- Last appointment/next appointment with their provider?
  - ▶ Face to Face required - date of MD encounter **90 days** prior to SOC –OR– **30 days** after SOC.
    - F2F form: [https://support.helpathome.com/hc/en-us/article\\_attachments/13610934904855](https://support.helpathome.com/hc/en-us/article_attachments/13610934904855)



# Pre-Admission

## If deemed appropriate for PA services, they are now a referral

- ◆ Once a referral; they must be admitted within **48 hours**. Any delay past 48 hours needs documented (client request? Waiting on VSOC?)
  - ▶ 484.55(a)(1) A Registered Nurse must conduct an initial assessment...the initial assessment visit must be held either within 48 hours of referral... or on the physician-ordered start of care date.
  - ▶ Should not be scheduled at our convenience. Another RNCM may admit and pass it off to another RNCM's caseload.
- ◆ Call the Provider for VSOC. \*hours and frequency can change once you assess in-person. Call MD and obtain new order if needed.
  - ▶ Referral forms:
    - Adaptive [https://support.helpathome.com/hc/en-us/article\\_attachments/16511713515927](https://support.helpathome.com/hc/en-us/article_attachments/16511713515927)
    - HaH [https://support.helpathome.com/hc/en-us/article\\_attachments/16511737258519](https://support.helpathome.com/hc/en-us/article_attachments/16511737258519)

## Does your client exist in MatrixCare, or do you need to create their profile?

- Not in MatrixCare? → create a new Client Profile – <https://support.helpathome.com/hc/en-us/articles/8711478556567-MatrixCare-Creating-a-New-Client-Profile>
- Client is already in MatrixCare? → use that Client Profile.

**STOP – GO NO FURTHER! Is the PA Payer in the Payer tab? Is it PRIMARY? If not, adding the PA Payer is your next step.**

## Now create the PA Admission and schedule an RN Admission visit to clock into.

- Create the PA Admission – <https://support.helpathome.com/hc/en-us/articles/8711434172183-MatrixCare-Creating-a-Client-Admission>

Client PA admission consists of:

1. MAIN HEAD TABs (name, address, etc.),
2. ADMISSION TABs (SOC date, physician, meds, etc.) and
3. POC TABs (Intake 1 and 2, Diagnosis, Orders, etc.).

# Pre-Admission

## Nursing items needed for your visit:

### Charged iPad

- Adobe forms: Comprehensive assessment, (or OASIS), Admission packet, Client signature form, Admission booklet, Individualized Emergency Plan
  - ♦ <https://support.helpathome.com/hc/en-us/sections/12300459550231-Clinical-Forms>
- MatrixCare forms completed DURING shift – home safety, Braden.

### Nursing Bag – should be wipeable and closes with a zipper

- BP cuff, stethoscope, oximeter, thermometer, bag barriers, hand sanitizer, antibacterial wipes

## To bring/leave in the home:

- OSHA kit, gloves, hand sanitizer
- Home Binder –
  - At the admission visit, you will bring a binder with clear protective sleeves and the following:
    - Copy of calendar to plot RN visits
    - Copy of handbook --- **review entire handbook with client and obtain signature of their acknowledgment!**
      - Patient rights, criteria for admission, criteria for discharge, how to file a grievance/contact Administrator, home safety
    - Fall prevention flyer
    - Special precautions handout (infection control)
      - **Binder contents** - [Home Binder Contents \(3\).docx](#)





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