



RC Optimization & Online Enrollment

Release Notes: February 16, 2021



In This Edition

RegistryConnect Optimization

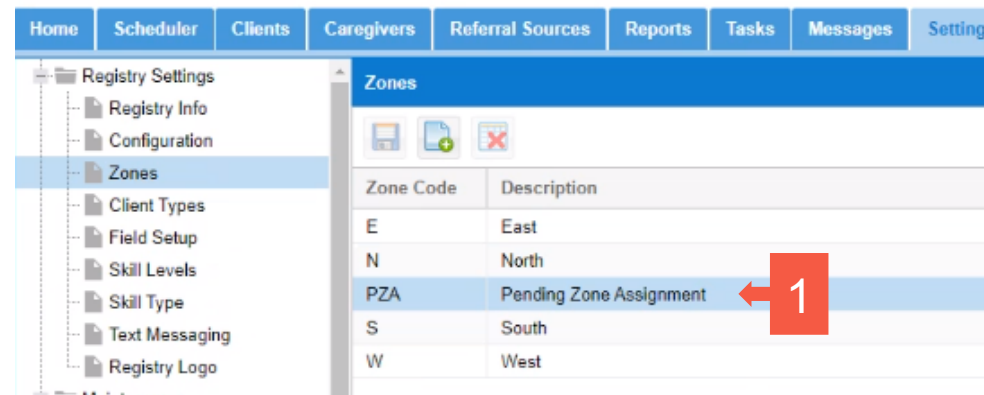
Online Client Enrollment Enhancements

1. RegistryConnect Optimization

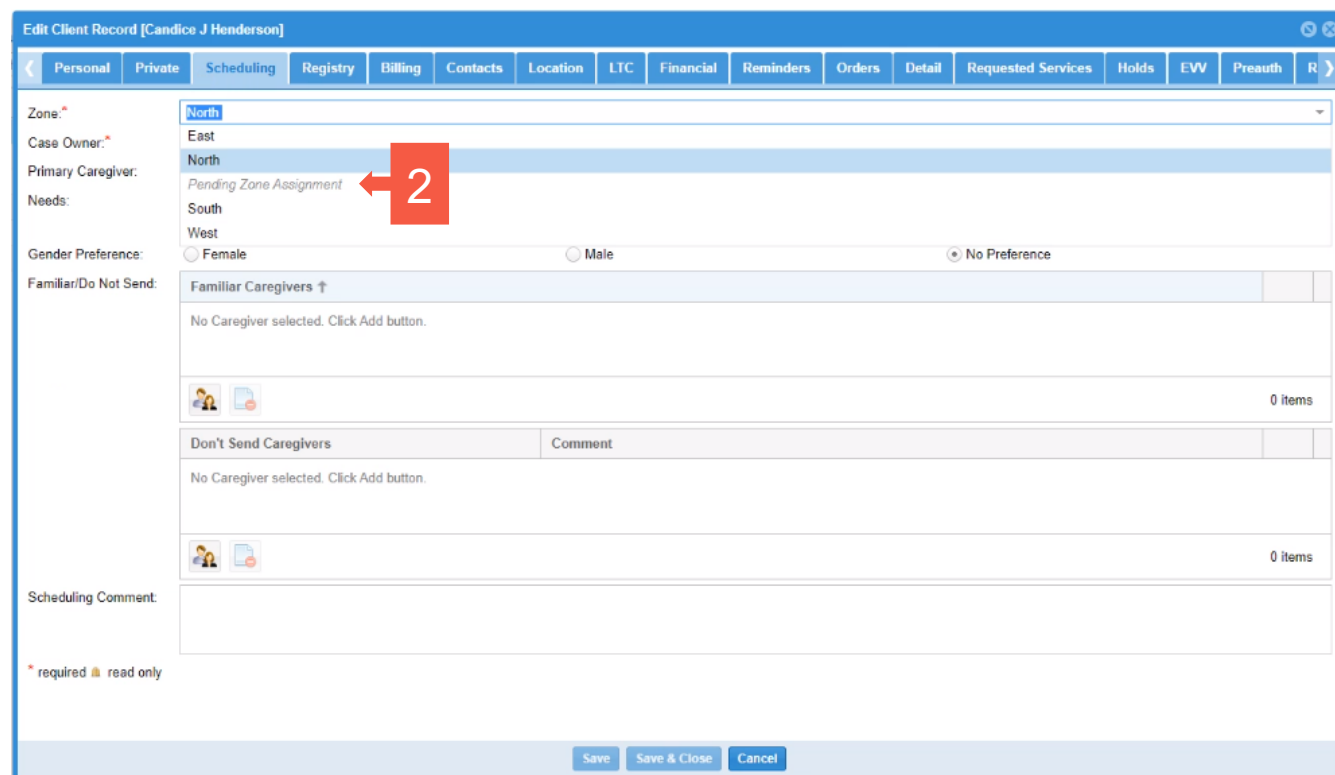
Pending Zone Assignment

UPDATES:

1. Pending Zone Assignment now appears in the Zone configuration as read-only
2. When you open the client demographics and view the picker, you can see the Pending Zone Assignment in the list, but it is not selectable



Zones	
Zone Code	Description
E	East
N	North
PZA	Pending Zone Assignment
S	South
W	West



Edit Client Record [Candice J Henderson]

Personal Private Scheduling Registry Billing Contacts Location LTC Financial Reminders Orders Detail Requested Services Holds EVV Preauth R

Zone: North

Case Owner: East

Primary Caregiver: North

Needs: Pending Zone Assignment

South

West

Gender Preference: ☐ Female ☐ Male ☒ No Preference

Familiar/Do Not Send: Familiar Caregivers ↑

No Caregiver selected. Click Add button.

0 items

Don't Send Caregivers

No Caregiver selected. Click Add button.

0 items

Scheduling Comment:

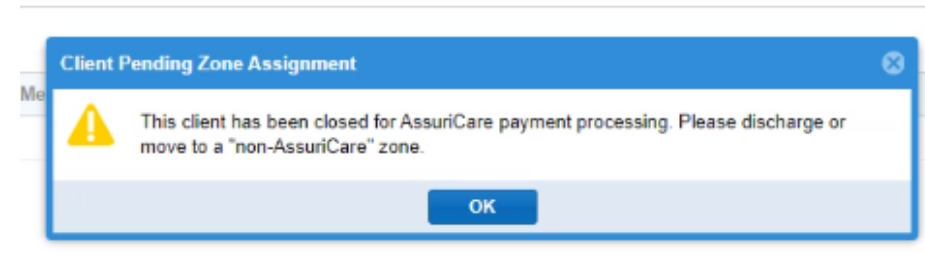
* required read only

Save Save & Close Cancel

Pending Zone Assignment

UPDATES:

1. If a client is closed on the AssuriCare side, they will be automatically assigned to the Pending Zone Assignment and you will see the following message when you open the client's demographics: "This client has been closed for AssuriCare payment processing. Please discharge or move to a "non AssuriCare" zone."
2. You cannot create new orders until the client is either discharged or a new zone is assigned – if you try to create a new order for that client, you will see the same error message as above
3. You cannot edit visits that are in Started, Completed, or Paid status for a client in the Pending Zone Assignment – if you try to edit a visit in one of those statuses, you will see that same error message



Client Status syncing RegistryConnect to AssuriCare

UPDATES:

1. When discharging a client, if there are any visits in the Started or Completed statuses, the following error message will appear: “This Client has the following Visit(s) in either the started or completed status. They must be canceled or paid before the Client can be deactivated. You may disable use of the timecard system at any time by deactivation rate IDs”

Visit Validation

This Client has the following Visit(s) in either the started or completed status. They must be canceled or paid before the Client can be deactivated. You may disable use of the timecard system at any time by deactivating rate IDs.

Caregiver	Begins On	Ends On	Status	Charge Code
Bell, Bonnita [LPN]	02/01/2021 10:30 AM	02/01/2021 12:00 PM	Started	35010 - CNA Ho...
Bell, Bonnita [LPN]	02/04/2021 10:30 AM	02/04/2021 12:00 PM	Started	35010 - CNA Ho...

Ok

Save Save & Close Cancel

Caregiver Status syncing RegistryConnect to AssuriCare

UPDATES:

1. When deactivating a caregiver in RegistryConnect, if there are any visits in the OK status, the following error message will appear: "This Caregiver has the following Visit(s) in the started status. They must be completed or cancelled before proceeding"

Visit Validation

This Caregiver has the following Visit(s) in the started status. They must be completed or cancelled before proceeding.

Client	Begins On	Ends On	Status	Charge Code
Henderson, Candice	02/01/2021 10:30 AM	02/01/2021 12:00 PM	Started	35010 - CNA Ho...
Henderson, Candice	02/04/2021 10:30 AM	02/04/2021 12:00 PM	Started	35010 - CNA Ho...

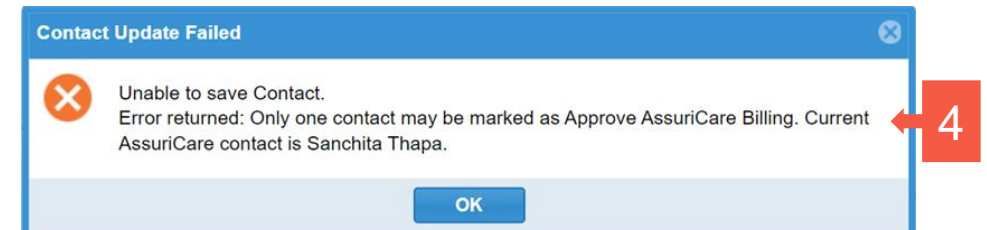
Ok

Contact/Relationship Type Syncing for clients only

UPDATES:

1. Removed “Approve Billing” as contact type in RegistryConnect and made added a checkbox labeled “Approve AssuriCare”
2. Current contacts with the “Approve Billing” type selected have been moved to “Other Contact” with the “Approve AssuriCare” box checked
3. Hover hint added to display the following information: “Approve AssuriCare contacts are authorized to approve timecards.”
4. Only one contact be marked “Approve AssuriCare.” You will receive the following error message if you try to check that box on more than on contact

The screenshot shows the 'Add New Contact' form. Annotation 1 points to the 'Approve AssuriCare' checkbox. Annotation 2 points to the 'Relationship' dropdown menu. Annotation 3 points to a hover hint that appears when the checkbox is hovered, displaying the text: 'Approve AssuriCare: Approve AssuriCare contacts are authorized to approve timecards.'



2. Online Client Enrollment Enhancements

Editing Financial Information

HOW TO USE: Edit financial information

1. Click “Edit Account details”
2. Add or edit either the checking, savings, or credit card information
3. Enter name in Signature field
4. Click “Save”

The screenshot shows the 'My Profile' section with a dropdown menu. Under 'Payment Information', there are radio buttons for 'Checking', 'Savings', and 'Credit Card' (which is selected). Below these are input fields for 'Card Number' (displaying ****4444), 'Name On Card' (displaying Donald Duck), and 'Expiry' (displaying 10/2025). A red arrow labeled '1' points to the 'Edit Account details' link. A 'View Payment History' link is also visible. A notice at the bottom states: 'Notice: Any person who knowingly and with intent to defraud any insurance company or other person files an application for insurance or statement of claim containing any materially false information, or conceals for the purpose of misleading, information concerning any fact material thereto, commits a fraudulent insurance act, which is a crime, and shall also be subject to a civil penalty not to exceed five thousand dollars and the stated value of the claim for each such violation.'

The three screenshots show the 'Edit Payment Details' form in sequence. The first screenshot (labeled '2') shows the 'Checking' radio button selected, with input fields for 'Account Number', 'Routing Number', 'First Name', and 'Last Name'. The second screenshot (labeled '3') shows the 'Credit Card' radio button selected, with input fields for 'First Name', 'Last Name', 'Card Number', 'Expiration Date', and 'CVV'. The third screenshot (labeled '4') shows the 'Credit Card' radio button selected, with input fields for 'First Name', 'Last Name', 'Card Number', 'Expiration Date', 'CVV', and a 'Signature' field. A red arrow labeled '3' points to the 'Signature' field, and a red arrow labeled '4' points to the 'Save' button. All three screenshots include a notice at the bottom: 'I authorize AssuriCare LLC to process charges to my credit card in accordance with the information above. I recognize that a 5% processing fee will be added to all services charged (6.5% if using an American Express card). I understand that this authority will remain in effect until I provide reasonable notification to terminate the authorization.'

Client Configurations

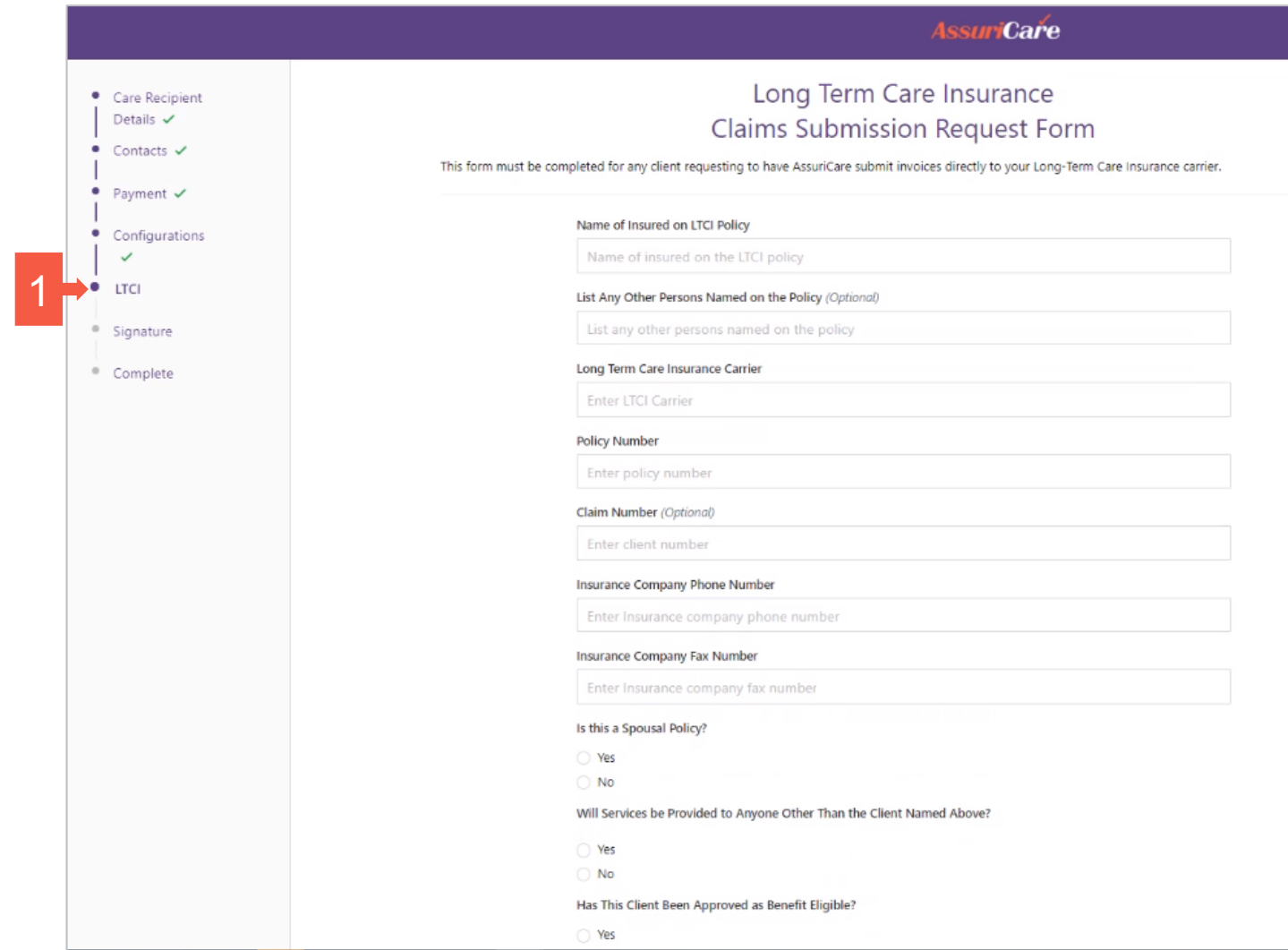
UPDATES:

1. Ability to allow clients to configure their accounts during the online enrollment process

Electronic LTCI Form

UPDATES:

1. Added the LTCI form electronically for clients to complete online



AssuriCare

Long Term Care Insurance Claims Submission Request Form

This form must be completed for any client requesting to have AssuriCare submit invoices directly to your Long-Term Care Insurance carrier.

- Care Recipient Details ✓
- Contacts ✓
- Payment ✓
- Configurations ✓
- 1** → LTCI
- Signature
- Complete

Name of Insured on LTCI Policy

Name of insured on the LTCI policy

List Any Other Persons Named on the Policy (Optional)

List any other persons named on the policy

Long Term Care Insurance Carrier

Enter LTCI Carrier

Policy Number

Enter policy number

Claim Number (Optional)

Enter client number

Insurance Company Phone Number

Enter Insurance company phone number

Insurance Company Fax Number

Enter Insurance company fax number

Is this a Spousal Policy?

☐ Yes
☐ No

Will Services be Provided to Anyone Other Than the Client Named Above?

☐ Yes
☐ No

Has This Client Been Approved as Benefit Eligible?

☐ Yes