

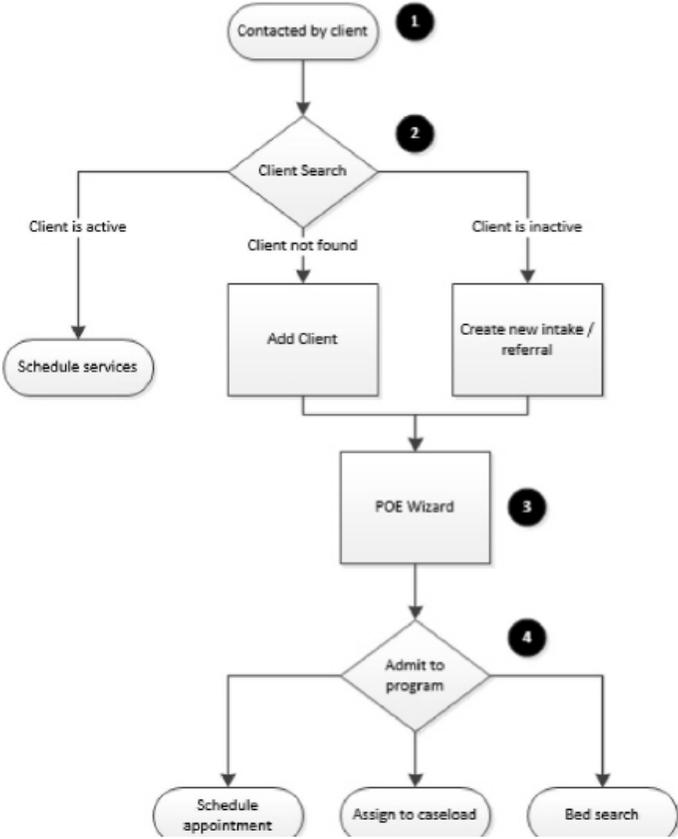
Point of Entry

Point of Entry (POE) is used to enter new clients into the system

This is done through completion of the **POE Wizard**. It collects basic information about the client, including demographic information, client guarantors, client payers, payer authorizations, and client responsibility.

Once the **POE Wizard** is complete, and the client is admitted into the system, their data can be accessed and modified in the **ECR (Electronic Clinical Record)** module. The **ECR** is used to view and manage a client's data once they are admitted into the system. The **POE** module is used only to gather initial client data and then admit clients into the system.

Point of Entry Process Flow



Process Continued

- *Contacted by Client* - Clients generally make contact with a treatment facility through a referral source or by calling directly.
- *Client Search* - The **POE** module is used to admit new clients into the system. A client search is performed in order to confirm that a client does not already exist in the system.
- “If the client is found in the system as active, the **POE Wizard** does not need to be completed. Instead, the **ECR** module can be used to add the client to a new program if needed, then the **Schedule** module should be used to schedule new services for the client.
- **POE Wizard** - The **POE Wizard** is used to collect information about the client like demographics, guarantors, payers, and payer authorizations.

Process Continued

- *Admit to Program* - There are three ways to admit a new client to a program:
 - *Schedule Appointment* - Assign the client to a treatment program while scheduling an appointment. Once an appointment is marked as Kept, the client is assigned to a staff member's caseload.
 - *Assign to Caseload* - Assign the client to a treatment program while placing them on a staff member's caseload. This is particularly useful if the clinician is adding the client to their own caseload or if one clinician provides all services in a program, like music or art therapy.
 - *Bed Search* - For inpatient or residential services, assign the client to a treatment program using the bed search. Once a bed is located, the client is admitted to the bed and an appointment is scheduled. Once the appointment is marked as Kept, the client is assigned to the caseload of the default per diem staff member. (Contact Qualifacts for assistance setting up this configuration.)

Starting the Point of Entry Wizard

Navigate to **Point of Entry**. The **Client Name Information** page appears. This page is used to search the client database to see if a record already exists for the client. The more search criteria entered on this page, the more accurate the search results will be.



The screenshot displays the QUALIFACTS carelogic interface. At the top left is the logo, and next to it is a search bar labeled "Client Search". Below the logo is a horizontal navigation menu with the following items: Favorites, Point of Entry, Front Desk, Schedule, Client, MedPass Window, Bed Whiteboard, **How To**, Reporting, Billing/AR, Employee, **Intakes**, and **Outreach**. A red arrow points to the "Point of Entry" menu item. Below the navigation menu, the "Client Name Information" form is visible, containing the following fields:

- Call Date: 05/01/2024 (with a calendar icon)
- First Name:
- Middle Name:
- Last Name:
- Birth Date: (with a calendar icon)
- Social Security Number:

Point of Entry Wizard

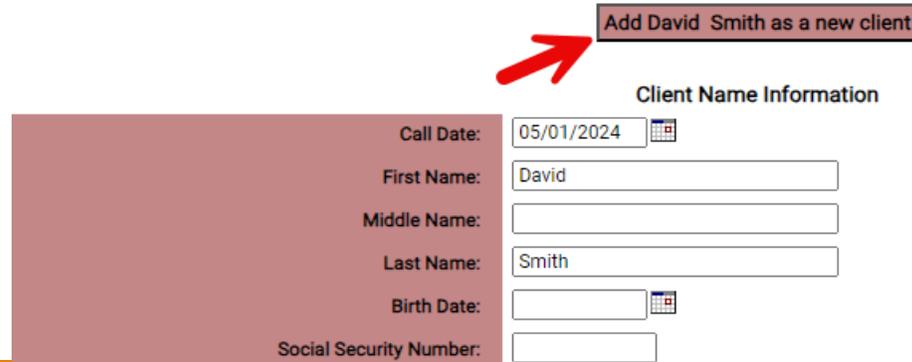
Once data is entered, click **Submit** in the status bar. The system attempts to locate an existing client record that matches the search criteria by looking across all available organizations.

If no matches are found, confirm that the information entered in the search fields is accurate.

If the system finds a record that matches the search criteria, the **Duplicate Person Search** page appears.

Click the **Add as a New Client** button

There were no duplicates found for the information provided. Please check to make sure that you entered this information correctly, and then you can create this intake as a new Client or correct any errors in your entry below and search again.



The screenshot shows a form titled "Client Name Information" with the following fields:

- Call Date: 05/01/2024
- First Name: David
- Middle Name: (empty)
- Last Name: Smith
- Birth Date: (empty)
- Social Security Number: (empty)

A red arrow points to a button labeled "Add David Smith as a new client" located above the form.

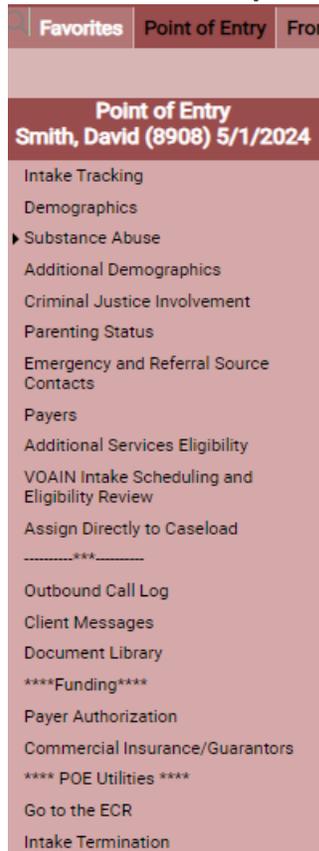
Point of Entry Wizard

Click the **Add as a New Client** button. The **Client Demographics** page appears. After completing **Client Demographics** and clicking **Submit**, the page is refreshed, and the **Point of Entry Wizard** menu appears similar to the example shown below:

The screenshot displays the QUALIFACTS carelogic interface. At the top, there is a navigation menu with the following items: Favorites, Point of Entry, Front Desk, Schedule, Client, MedPass Window, Bed Whiteboard, **How To**, Reporting, Billing/AR, Employee, **Intakes**, and **Outreach**. Below the navigation menu, the 'Client Demographics' form is visible. It includes the following fields: Admit to Organization (VOAOHIN), Call Date (05/01/2024), Client Number, Title (Select Title), First Name (David), Middle Name, Last Name (Smith), and Suffix (Select Suffix). Below the Client Demographics form, the 'Contact Information' form is visible. It includes the following fields: Phone 1 (Select Type, Primary Number?, International Number, OK to ID?), Add Phone 1 Calling Notes?, Phone 2 (Select Type, Primary Number?, International Number, OK to ID?), and Add Phone 2 Calling Notes?.

Point of Entry

After clicking submit the Point of Entry wizard will proceed to the next selection box each time. This is similar to the below example.



The screenshot shows a vertical menu with a dark red header. The header contains the text 'Point of Entry' and 'Smith, David (8908) 5/1/2024'. Below the header, the menu lists various options: Intake Tracking, Demographics, Substance Abuse (with a right-pointing arrow), Additional Demographics, Criminal Justice Involvement, Parenting Status, Emergency and Referral Source Contacts, Payers, Additional Services Eligibility, VOAIN Intake Scheduling and Eligibility Review, Assign Directly to Caseload, -----***-----, Outbound Call Log, Client Messages, Document Library, ****Funding****, Payer Authorization, Commercial Insurance/Guarantors, **** POE Utilities ****, Go to the ECR, and Intake Termination. At the top of the menu, there are three tabs: 'Favorites', 'Point of Entry', and 'Front'.

Required Fields

During the Point of Entry initial process there are 9 minimum required fields to enter information before proceeded to the next stage.

1. Social Security Number
2. Date of Birth
3. Gender
4. Birth sex
5. English Fluency
6. Race
7. Ethnicity
8. Tobacco Use/Type of User or Non-User
9. Preferred Language

Point of Entry-Adding Insurance

Each client is required to have an active payer, or can be marked as self-pay on the Guarantors page.

This can be done on the Point of Entry Page or by navigating to:

Navigate to **Point of Entry Wizard** menu > **Payers** > **Add a Client Payer** button.
The **Payer Information Entry** page appears.

Adding Client Payers

Point of Entry
Smith, David (8908) 5/1/2024

- Intake Tracking
- Demographics
- Substance Abuse
- Additional Demographics
- Criminal Justice Involvement
- Parenting Status
- Emergency and Referral Source Contacts
- Payers**
- Additional Services Eligibility
- VOAIN Intake Scheduling and Eligibility Review
- Assign Directly to Caseload
-***.....
- Outbound Call Log
- Client Messages
- Document Library
- ****Funding****
- Payer Authorization
- Commercial Insurance/Guarantors
- **** POE Utilities ****
- Go to the ECR
- Intake Termination
- Return to Point of Entry

Payer Information Entry

Begin Date: 05/01/2024

End Date:

Payer Name: Unfunded Unfunded(UNFUNDED)

Payer Address: VOAHOIN Unfunded (1099 N. Meridian Street, APT/Suite 800, Indianapolis, IN 46204)

Verification Permission: Does the client give permission to verify benefits?
 Yes No

Needs Authorization? Yes No Use Payer Default

Policy Subscriber: Smith, David (Self)

Insured Policy Information

Insurance Company Name: Enter if different from the payer name

Benefits Phone Number:
 International Number

Policy Number:

ID Number:

Subscriber Issue Date:

Group Number:

Plan Number:

Comments:

Max: 1000 characters.

Adding Payer Names

Begin Date: 05/07/2024

End Date:

Payer Name: Select Payer to filter Payer Plans

Payer Address: Select Payer to filter Payer Plans

Verification Permission: Commercial

Needs Authorization? Federal Funded

Policy Subscriber: Grant Payers

Insurance Company Name: Indiana Marketplace Payers

Benefits Phone Number: Medicaid - Ambetter

Policy Number: Medicaid - Care Connect

ID Number: Medicaid - HHW

Subscriber Issue Date: Medicaid - HIP

Group Number: Medicare Managed

Plan Number: Medicare Traditional

OH - Medicaid Payers

OH - Traditional Medicaid

OH - Unfunded

Payer - Details Unknown

Presumptive Medicaid

Self Pay After Insurance

State Funded

Traditional Medicaid

Unfunded

Begin Date: 05/07/2024

End Date:

Payer Name: OH - Traditional Medicaid

Payer Address: No records found

Verification Permission: Does the client give permission to verify benefits?

Needs Authorization? Yes No Use Payer Default

Policy Subscriber: Select Policy Subscriber

Insured Policy Information

Insurance Company Name: Enter if different from the payer name

Benefits Phone Number:

International Number

Policy Number:

ID Number:

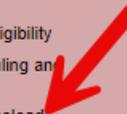
Subscriber Issue Date:

Group Number:

Plan Number:

Assigning to Caseload

Assign to Caseload - Assign the client to a treatment program while placing them on a staff member's caseload. This is particularly useful if the clinician is adding the client to their own caseload or if one clinician provides all services in a program, like music or art therapy.

- Intake Tracking
- Demographics
- Substance Abuse
- Additional Demographics
- Criminal Justice Involvement
- Parenting Status
- Emergency and Referral Source Contacts
- Payers
- Additional Services Eligibility
- VOAIN Intake Scheduling and Eligibility Review
- Assign Directly to Caseload 
- ***-----
- Outbound Call Log
- Client Messages
- Document Library
- ****Funding****
- Payer Authorization
- Commercial Insurance/Guarantors
- **** POE Utilities ****
- Go to the ECR
- Intake Termination
- Return to List

Admission Date/Time: 05/08/2024 11:01 AM PM

Organization:

Program:

Staff: [Find Staff](#)

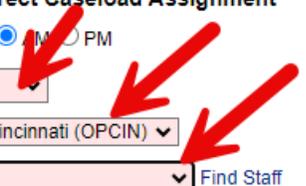
Assigning to Caseload

Direct Caseload Assignment required fields:

1. Select the organization
2. Select program
3. Select staff that will be assigned to the client

Direct Caseload Assignment

Admission Date/Time:	05/08/2024	11:01	<input checked="" type="radio"/> AM <input type="radio"/> PM
Organization:	Outpatient - Cincinnati		
Program:		Outpatient - Cincinnati (OPCIN)	
Staff:	Select Staff		Find Staff



Support

If you encounter any technical issues, please **reach out to EHR support** at **ehrsupport@voahin.org** for assistance.

