Optima 101:
Introduction to Care Operations Management (COM)
PARTICIPANT GUIDE

CONTENTS

ABOUT THIS GUIDE

Course Title:	Optima 101: Introduction to Care Operations Management (COM)
Purpose of this Guide	This participant guide is an adjunct learning tool for users who have completed Optima 101 training. This guide is designed as a "quick reference guide" to assist you while performing your daily tasks in Optima's Care Operations Management. The Participant Guide provides simple, step-by-step instructions for completing tasks. We recommend that you use this guide in conjunction with the short micro-learning videos available on Optima's YouTube channel.
Target Audience:	Clinical Administrators, clinicians, COM users
Pre-requisites:	Completion of Optima 101 training is highly recommended!

LEARNING OUTCOMES

This Participant Guide will help you:

- Log in to COM
- Access and interpret information on the Home screen
- Complete the input process for new patients
- Create a case
- Create a therapy track
- Add an encounter and billing information
- Log a missed visit
- Make revisions to existing documents
- Track Section GG information
- Add G-codes
- Add time in facility information
- Access and view reports
- Access help and support files

1. LOGGING INTO OPTIMA

Optima's Care Operations Management application (COM) is a web application for desktop computers and laptops. An Internet connection is required to work in COM.

It is important to note that Internet Explorer is the only browser you can use to access Optima's Care Operations Management Application. Don't try to access COM in Chrome or Safari because it won't work. You must use Internet Explorer.

To log into Optima's Care Operations Management application, follow these steps:

Step	Action
1.	Open **Internet Explorer**.
2.	Access the **URL** https://login.optimahcs.com
3.	Enter your **Organization code**. For example: MAINTRN
4.	Press the **RUN** button.
5.	The Login page appears.
6.	Enter your **Username**.
7.	Enter **Password**.
8.	Press the **Login** button.
This completes the login process for COM.	

After you've logged into COM, the next step is to select your Operating Unit. If you only have access to one facility, you will immediately be directed there. .

To log into a specific Operating Unit, follow these steps:

Step	Action
1.	Select your **Operating Unit** on the popup window.
2.	Press the **Login** button.
You have now successfully logged into a specific Operating Unit.	

- The Optima Deployments team is responsible for issuing Organization Codes.
- Your administrative team is responsible for issuing and resetting passwords.

2. ACCESSING INFORMATION ON THE HOME SCREEN

The Home screen is divided into different sections: **Patients**, **My Workplace**, **My Messages** and **Actions**. Let's take a closer look at each section.

Feature	Function
Patients List	The **Patients List** appears on the left side of the screen. The default view shows ALL patients who are currently in the facility. Note that all patients in the facility appear on the Patients list, even if they are not receiving therapy.
My Workplace	**My Workplace** contains daily activities. Think of the items in My Workplace as a list of helpful reminders about things you need to do each day. Note that not every organization uses My Workplace.
My Messages	**My Messages** contains messages to the user from other users in the facility. Note that not every organization uses My Messages.
My Performance	**My Performance** tracks information about the user's performance on a given date including the number of patient visits the user logged along with the treatment time, billable and non-billable NPC times. Additionally, it tracks travel time, benefit time, time in facility as well as a percentage score for overall productivity and efficiency.
Actions area	In the lower left corner of the screen, notice the **Actions** area. This field contains hyperlinks to screens within COM that are used frequently.

3. INTAKING PATIENTS

To intake a New Patient, follow these steps:

Step	Action
1.	Click on the **New Patient** button.
2.	The **New Intake Find Patient** popup screen appears.
3.	Search for the Patient by entering the **Last name, First name or SSN**.
4.	If the Patient already exists in COM, **Press View Case** to view the Patient's information.
5.	If the Patient does not yet exist in COM, highlight the line in the search results with a "New" Status.
6.	Press the **New Patient** button.
7.	The **Intake** window appears.
8.	Enter as much **Patient Information** as possible (notice all required fields are identified by a red exclamation mark.)
9.	Press **Save & Close.**
This completes the intake process for a new patient.	

4. CREATING A CASE

Once you've completed the intake for a new patient, it's time to start a Case for that patient. To start a Case, start by accessing the Case Manager. You can access the Case Manager in three ways:

- Double click on the Patient's name on the Patient List, or
- Right click on the Patient's name and select Case Manager, or
- Highlight the Patient Name and click the Case Manager hyperlink from the Actions area below the Patient List.

To create a Case, follow these steps:

Step	Action
1.	Open the **Case Manager** (as per above options).
2.	The **Case Manager** tab appears for the specific patient.
3.	Click on the **Start New Case** button.
4.	A **Case Tab** opens.
5.	Enter a **Case Description**.
6.	Enter **Start Date**.
7.	Enter **Payer Details**.
8.	Select the **Payer**.
9.	Select the **Plan**.
10.	If you Select **Medicare Part A** complete the PPS Track Information.
11.	If you have the ability to start a **Therapy Track**, you can select the relevant **Start Therapy Track** check boxes.
12.	Press the **Save** button.
13.	The completed **Case Manager** screen opens.
This completes the process of creating a case.	

5. CREATING THERAPY TRACK

Before a therapy track can be opened, a case must exist. Once you've created a case, you can create a therapy track.

To start and complete a Therapy Track, follow these steps:

Step	Action
1.	From the **Case Manager** screen, click on the **Start New Track** hyperlink for the relevant discipline.
2.	The **Therapy Track** tab opens.
3.	Complete the **Start of Care Date**.
4.	Review the **Physician** information and modify, if required.

Step	Action
5.	Click on the **Add ICD-10** button for Medical Diagnoses.
6.	Enter a **keyword** for ICD-10.
7.	Click **Search**.
8.	Click on the relevant chapter **View** hyperlink, until you reach the actual code.
9.	Click on the **Code** to add it (the code appears on the bottom).
10.	Click the **back** button to go back and add more codes.
11.	Or enter another **search keyword** and add more codes.
12.	To remove an incorrect code, click on the **code hyperlink**.
13.	Once all codes are added, select the **Default Onset Date**.
14.	Click the **OK** button.
15.	All codes now displayed in the **Medical Diagnoses** area.
16.	Follow the same steps to add **Treatment Diagnoses Codes**.
17.	Click on the **Add** button next to Plan/Modalities area to add Treatment Approaches.
18.	Use the **Services Filter** dropdown to filter codes.
19.	Select the relevant **codes**.
20.	Press **OK**.
21.	All codes now display in the **Plan/Modalities** area.
22.	Press the **Save** button.
23.	You are redirected to the **Case Manager** screen.
24.	The **Therapy Track** details now appear under the relevant discipline area.
	This completes creating a Therapy Track.

The following buttons can be found on the therapy track:

EDIT TRACK	The Edit Track button opens the case and allows you to make revisions to the information it contains.
END TRACK	Click End Track when the patient is ready to be discharged. End Track must be pressed for each discipline with an open therapy track.
END CASE	Once all therapy tracks are ended, the End Case button activates. Click this button to end the entire case.
MOVE TRACKS/SERVICES	The Move Tracks and Services button allows Rehab Directors to move services between different therapy track or to move tracks to different cases.
SHOW TIMELINE	Click Show Timeline to display a general overview of all treatment history for the patient.
HIDE TIMELINE	Click Hide Timeline to hide the timeline view.
SHOW TREATMENT HISTORY	Click Show Treatment History to display all treatment history for the specific patient.

DELETE TRACK	The Delete Track button deletes the track as a whole. If billing has been added to the track and it has been e-signed, the track cannot be deleted but it can be inactivated.

6. ADDING ENCOUNTERS AND BILLING

Once you've successfully created a Case and a Therapy Track, the next step is to add an Encounter and Billing in the Daily Activity Log.

To add an Encounter and Billing, follow these steps:

Step	Action
1.	From the Home Screen, click on the **Daily Activity Log** button.
2.	Select the **Date of Service** from the popup window.
3.	The **Daily Activity Log** tab opens.
4.	Click on the **Visits** sub tab.
5.	Review the **Clinician Name**, and change it, if required.
6.	Review the **Date of Service**, and change it, if required.
7.	Select the appropriate discipline button: **PT, OT or ST**.
8.	Select the **Patient Name**.
9.	Click **Add Encounter** to the right.
10.	All the **codes** you specified on the Therapy Track populate.
11.	Highlight the appropriate **code**, and column (MDS or Non-MDS)
12.	Enter the **Minutes** on the keypad to the right.
13.	Continue to add minutes for each code.
14.	Add any **Concurrent** or **Co-Treatment Minutes** if your organization allows it.
15.	Review the **minutes** entered.
16.	Press **OK**.
17.	Review the summary of **minutes** and overview
18.	Press **Apply**.
This completes adding an Encounter and Billing.	

Adding an Additional Visit

To add another visit for the same patient, follow these steps:

Step	Action
1.	From the **Daily Activity Log** screen, right click on the patient's name.
2.	Select **Add Visit**.
3.	A warning popup appears.
4.	Press **Add Visit** if this patient has orders for BID (or press Add Encounter if this Patient is not BID).
5.	The Patient name appearstwice, each with a different **Visit number**.
6.	Follow the same steps as above to add minutes for Visit #2.
	This completes the process for adding another visit.

7.LOGGING A MISSED VISIT

Missed visits are logged in the Daily Activity Log under the Visit sub-tab.

To log a Missed Visit, follow these steps:

Step	Action
1.	From the **Daily Activity Log** window, highlight the **visit**.
2.	Click on the **Missed Visit** button to the right.
3.	On the Missed Visit tab, review the **Clinician** name.
4.	Select a **Reason for Missed Visit** from the dropdown list.
5.	Enter **Additional Comments**.
6.	Press **OK**.
7.	Review the **Summary**.
8.	Press **Apply**
	This completes logging a Missed Visit.

8. REVISING MINUTES ON A DOCUMENT

Only users with appropriate security rights can make revisions. Contact your Rehab Director or administrative team if you find that your security rights don't allow you to perform the functions required of you in your role.

To make a revision to information already entered, follow these steps:

Step	Action
1.	From the Home Screen, click on the **Daily Activity Log** button.
2.	Select the **Date of Service** from the popup window.
3.	The **Daily Activity Log** tab opens.
4.	Highlight the **Patient Name**.
5.	Press the **Open** button next to the Treatment Encounter to the right.
6.	Select the **Code** that needs to have minutes amended.
7.	Press the **Inactivate** button above the keypad.
8.	Notice that a strike through appears on the original minutes and a new line with the same treatment approach appears at the bottom of the list.
9.	Click on the new treatment approach line.
10.	Enter the correct number of **Minutes**.
11.	Press **OK**.
12.	Press **Save and Close**.
13.	The **E-Sign** window appears.
14.	Enter your **Password**.
15.	Press the **E-Sign** button.
This completes revising minutes on a document.	

9. TRACKING SECTION GG

Section GG Admission Assessments must be done within 3 days of the PPS Track start date.

A Self Care and Mobility assessment must be done for all Patients.

To add a Section GG Admission Assessment, follow these steps:

Step	Action
1.	From the Case Manager window, click on the **Section GG** button.
2.	Press the **Add** button.
3.	Select the Type of Assessment Category:
4.	Press **OK** on the popup.

Step	Action
5.	Review or change the **Assessment Date**.
6.	Enter all **required information**.
7.	Select the **Complete and Validate Assessment** checkbox.
8.	Press **OK**.
9.	Press the **Add** button to complete the Mobility assessment.
10.	Press **OK** on the popup.
11.	Enter all **required information**.
12.	Select the **Complete and Validate Assessment** checkbox.
13.	Press **OK**.
	This completes adding a section GG Admission Assessment.

10. ADDING G-CODES

G-Codes might be required in your organization for Medicare Part B plans, or any other plan that requires G-Codes to be tracked.

To add G-Codes, follow these steps:

Step	Action
1.	Select a Patient with Medicare Part B as a payer. From the patient's Home Screen, open the **Case Manager.**.
2.	Notice the Therapy Track expanded and a **Manage Functional Limitations** button appears.
3.	Press the **Manage Functional Limitations** button.
4.	If you do not have an **Outset** yet, a popup appears to select a **Category**.
5.	Press the **Add Outset** button.
6.	Enter a **Date**.
7.	Select **Therapist**.
8.	Select a **Current Modifier**
9.	Enter a Current **Clinical Reasoning**.
10.	Select a **Projected Modifier**
11.	Enter a Projected **Clinical Reasoning**.
12.	Press **OK**.
13.	Press **Save**.
	This completes adding a G-Code.

Key Points to Remember

- ✓ Care Operations Management automatically tracks your 10th visit.
- ✓ To capture the 10th visit, press the **Add Interval** button.
- ✓ When it comes time to discharge the patient, click the **Add End** button for this category.
- ✓ If you see an error message where the patient's name is that says "One time recording G-Code is Due" it means you have:
    - A. Billed a subsequent evaluation code
    - B. Done an evaluation only
- ✓ If you bill more than one evaluation code throughout therapy, you are required to report on it and you will need to add a subsequent category (see steps below.)

To add a subsequent category, follow these steps:

Step	Action
1.	Click on the **Add Category** button.
2.	Select the **Category** from the popup window.
3.	Press **Add Outset**.
4.	Select a **Current Modifier**
5.	Enter a **Current Clinical Reasoning**.
6.	Select a **Projected Modifier**
7.	Enter a **Projected Clinical Reasoning**.
8.	Press **OK**.
9.	Notice the error message below: **Categories cannot have intersecting date ranges**.
10.	Press the **Add End** button.
11.	Enter the same **Date as Outset**.
12.	Select **Therapist**.
13.	Select a **Current Modifier**
14.	Enter a **Current Clinical Reasoning**.
15.	Select a **Projected M**odifier
16.	Enter a **Projected Clinical Reasoning**.
17.	Press **OK**.
18.	Notice the error message disappeared.
19.	Press **Save**.
This completes adding a subsequent category.	

11. ADDING TIME IN FACILITY

If your organization decides to generate productivity and efficiency reports, or if they just want to track time in facility, this functionally is available in Care Operations Management.Time in Facility and PTO requests are logged in the Labor Log area of the system.

To add Time in Facility, Drive Time and Benefit Time, follow these steps:

Step	Action
1.	From the Home Screen, click on the **Labor Log** button.
2.	Enter **Date of Service**.
3.	Review or change the **Therapist** using the dropdown menu.
4.	Press **Log**.
5.	The fields to log your minutes, for all three areas in the Labor Log, are now activated.
6.	Enter **Hours and Minutes** in the Time in Facility area.
7.	Enter any **Notes**.
8.	Press **Tab** (on your keyboard) to add an additional line.
9.	Enter more **Hours and Minutes**.
10.	Do the same for **Drive Time** and **Benefit Time**.
11.	Press **Save**.
12.	Press **OK** on the popup window.
	This completes adding Time in Facility, Drive Time and Benefit Time.

12. ACCESSING AND VIEWING REPORTS

The types of reports users can access vary based on security rights. To access the Reports Catalog, follow these steps:

tep	Action
1.	From the Home Screen, click on the **Reports** button.
2.	Enter a **Report name** or **keyword** in the filter text field.
3.	Select the **Report**.
4.	Press **Run**.
5.	The **Report** opens in a separate tab.
6.	Select the **Report Parameters**.
7.	Press **View**.
8.	Press **Print** to print the report.
9.	Press **Export**, to save the report on your computer.
This completes the accessing and viewing Reports.	

If you find you are changing the default parameters every time you run a specific report, you can save your parameter preference as a customized report. Your preferred view is only saved on your profile. No one else can see your customized report.

13. HELP AND SUPPORT

Optima has written help files and pre-recorded webinars build into the system if you require help and support while performing your daily tasks.To access the Help & Support function in Optima, follow these steps:

Step	Action
1.	From the Home Screen, click on the top **Help dropdown menu**.
2.	Select **Optima Help**.
3.	To the left, select **Contents**, **Index** or **Search** to access the information you require.

To access support webinars, follow these steps:

Step	Action
1.	From the Home Screen, click on the **Help button with the blue question mark next to it**.
2.	Select the **Webinar** topic you want to view.

To view contact information for the Optima Support team, follow these steps:

Step	Action
1.	From the Home Screen, click on the top **Help dropdown menu**.
2.	Select **Technical Support**.
3.	A popup appears with contact details for the **Technical Support team**.
This completes the Help & Support Function.	

NOTES