Support Staff Guide:

Editing Episode Details or Correcting Discharge Field Entries After Staff Discharge Completion

Occasionally, it may be necessary to Edit information entered on an episode due to incorrect payer source / insurance referral or managing clinician assignment entry. The instructions below will walk you through how to reopen the episode to edit this information without losing the staff discharge information.

- Locate and access the patient's account from the Patient Activity link.
- Click on the Details button for the episode.

In the Episode window that opens, click on the episode condition.

- The Episode Detail Window will open.

- Click on the Edit/Reopen button.

This will open the Staff Discharge that has been completed on the episode..

Scroll down to the bottom of the Staff Discharge screen, and click the "Reopen Episode and Save Response" button on the lower right corner.
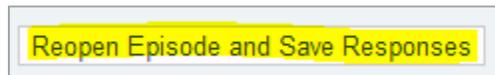
A verification window will open asking if you want to Reopen the Episode and Save the DC responses. Click Continue.

This will take you back to the patient's Episode Detail Screen.

You can now make necessary corrections to the fields as follows.

You can Edit the:

- Primary Clinician
- Payer Source
- Physician Referral
- Employer Referral
- Insurance Referral
- Other Referral
- # of Patient Surgeries
- Onset/Acuity
- Weight/Height

When finished, be sure to click the Save Changes button in the window.

Any changes you make on this screen and save will re-calibrate the Patient Specific Functional Reports.

If no changes are needed in the episode data, and only staff DC information needs to be edited, simply proceed to the next step below.

When editing is completed, click on Staff Discharge.

Episode Details

Patient ID: testusa
Patient Name: USA, James
Clinic: tpt3 ▼
Care Type: Orthopedic ▼
Condition: Shoulder
Impairment: Muscle, Tendon + Soft Tissue Disorders ▼
Surgery Type: -- Not Applicable --
Support Staff: TSH
Primary Clinician: Hoover, bubba ▼
Alt. Clinician 1: ▼
Alt. Clinician 2: ▼
Alt. Clinician 3: ▼
Payer Source: Preferred Provider ▼
Physican Referral: 1001 Joe America ▼
Employer Referral: None ▼
Insurance Referral: 0120 BCBS ▼
Other Referral: None ▼
Status: Open
Non-Participation (NPA): Participating [edit]
Physicians Quality Reporting System Non-Participation (NPA): Participating [edit]
Patient Selected Surgeries: None ▼
Patient Selected Onset: 22-91 Days ▼
Weight: 235 lbs
Height: 66 inches

Reset   Staff Discharge...   Save Changes

This will open the completed Staff Discharge screen (all of the fields that were completed previously will surface). Check to be sure no revisions are needed to the information included on the Staff Discharge. If you need to edit the last visit date, visit count, etc. please do so in the discharge screen. When all changes made, go to the bottom of the Staff Discharge screen and select DISCHARGE.

Save and Suspend   (Discharge)   Cancel

NOTE: *It may be that only the incorrect number of visits or the incorrect last visit date was entered on the staff discharge screen (all other episode detail information is correct). If so, follow the process to reopen the episode and save responses. Then immediately go back to the Staff Discharge button. In the Staff Discharge screen, correct/edit the last visit date or the number of visits and then click the Discharge button as instructed above.*