Case Management Simplified.

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Our Vision

To optimize care and increase profitability by simplifying processes and maximizing outcomes for case management companies. Our HIPAA compliant, SaaS software has been proven to reduce costs, increase revenue, and improve administrative efficiency.

Expertise

We have assembled a team that has extensive experience innovating in the case management, healthcare, and technology fields.

Collaboration

We pride ourselves on using customer feedback to improve our product and, in turn, improve their business.

Integrity

The best way to live life is to be open and honest with friends and family, and we know that's also the only way to run a company.

Built for your Business

You run one business, so why not run it on one technology? At HealtheFirst, we have created a one stop solution using a simple user interface and chameleonic data-intelligence automation technology. HealtheFirst empowers case management providers to do more work in less time leading to better client care and happier teammates.

Services

Billing & Reimbursement

Performance

Digital Documentation

Audits

HealtheFirst Dashboard

HealtheFirst was built with the user 'top of mind'. We created the dashboard to be user friendly, with one-click access and a natural flowing user interface organized vertically along the left side of the page

HealtheFirst

Michelle Rand
HealtheFirst

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- Form Library
- Settings & Exports

+ New Service

Log Out

Reminders

- 'Next Annual Evaluation' reminder for James Chen.

Expiring Units

- T2024 - Pre-enrollment and Inpatient Case Management units are expired for Annie Davis.
- T1016 - Case Management units are expired for Matthew Smith.
- A101 - Test Billing Rate units are expired for John Dinsberg.
- T1016 - Case Management units are expired for Ann Trenton.

Completed this week

2 Services

3:00 Hours

12 Units

Today's Schedule

3 Services | 3:45 Hours | 15 Units

Chen, James — 2:30 PM - 3:00 PM
Annual Review — (Home)

Davis, Annie — 3:30 PM - 4:30 PM
Incident — Good Care Home Center

Smith, Matthew — 6:00 PM - 8:15 PM
2 Activities — Good Care Home Center

Recent Actions

Today

11:51 AM Created service #85644
11:50 AM Created service #85643
8:49 AM Updated "is temporary" on service #81454 for Ann Trenton
8:49 AM Added file to service #81454 for Ann Trenton
8:16 AM Updated "created at", "started at", "finished at", "units", "is temporary" on service #85614 for Matthew Smith
8:16 AM Created service #85614 for Matthew Smith
8:15 AM Updated "created at", "started at", "finished at", "units", "is temporary" on service #85613 for James Chen
8:15 AM Created service #85613 for James Chen
8:15 AM Updated "created at", "scheduled start at", "scheduled end at", "is temporary" on service #85612 for Matthew Smith
8:15 AM Added activity to service #85612 for Matthew Smith
8:14 AM Added activity to service #85612 for Matthew Smith
8:14 AM Created service #85612 for Matthew Smith
8:14 AM Added activity to service #85611 for Annie Davis
8:14 AM Updated "created at", "scheduled start at", "scheduled end at", "is temporary" on service #85611 for Annie Davis
8:14 AM Created service #85611 for Annie Davis
8:14 AM Updated "scheduled start at", "scheduled end at" on service #82358 for James Chen
8:13 AM Updated "created at", "scheduled start at", "scheduled end at" on service #82358 for James Chen
8:12 AM Updated "due at" on service #76950 for Maria Garcia
8:11 AM Updated "scheduled start at", "scheduled end at" on service #76978 for James

Activity Durations

Activity	Expected	Calculated	Count
Annual Review	30	30	7
Family Update (Call/Email)	20	20	0
Health Status Screening Report	10	10	0
MDS-HC	45	56	10
Mobility Test	45	45	2
Monthly Authorizations	30	30	0
Nursing Level of Care	60	60	2
Patient Intake	60	60	5
PCCP	45	45	0
Residential Service Authorization	30	30	0

- "Expected" and "Calculated" durations are provided in minutes.
- "Count" is the number of services that were used to create the calculated duration. Services contribute to the calculation if they are completed with only a single activity assigned.

Settings

Client Service List

Customizable color coordinated services call attention to work due.

Admin/Supervisors can sort their list to focus in on specific users

Stay on top of your daily schedule with a view of all services due in reverse chronological order

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New Service

Log Out

Care managers...

Monday, January 6th			*0 days*
Chen, James	Annual Review	(Home)	2:30 PM - 3:00 PM
Davis, Annie	Incident	Good Care Home Center	3:30 PM - 4:30 PM
Smith, Matthew	2 Activities	Good Care Home Center	6:00 PM - 8:15 PM
Tuesday, January 7th			*1 day*
Chen, James	2 Activities	(Home)	10:00 AM - 11:00 AM
Chen, James	2 Activities	Raymond Jones	Due Tomorrow
Wednesday, January 8th			*2 days*
Garcia, Maria	New Patient Requirements 3 Activities	In Progress Alfredo Davenport, Mary Brashear, Raymond Jones	
Dinsberg, John	2 Activities		1:00 PM - 2:00 PM
Thursday, January 9th			*3 days*
Smith, Matthew	2 Activities	Mary Brashear	9:30 AM - 10:30 AM
Friday, January 10th			*4 days*
Chen, James	Annual Review	Raymond Jones	8:00 AM - 8:30 AM

Add or schedule a new service at any time by using the 'New Service' button that is always visible in HealtheFirst

HealtheFirst

Service Calendar

For those who prefer a calendar layout, you can view all scheduled, due, and complete services from our 'service calendar' view

Sort and filter as desired - client, provider, location, etc.

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+ New Service

Log Out

Clients...

Care managers...

JANUARY 2020

Today

month | week | day

Scheduled | Due | Complete

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	1	2	3	4
5	6 6a Matthew Smith 11:30a James Chen 2:30p James Chen (Annual Review) 3:30p Annie Davis (Incident) 6p Matthew Smith (2 Activities)	7 James Chen (2 Activities) 10a James Chen (2 Activities)	8 Maria Garcia (New Patient Requirements) 1p John Dinsberg (2 Activities)	9 9:30a Matthew Smith (2 Activities)	10 John Dinsberg (3 Activities) 8a James Chen (Annual Review)	11
12	13 8a James Chen	14 Maria Garcia (2 Activities)	15 John Dinsberg (Health Status Screening R	16	17 John Dinsberg (Monthly Authorizations) Matthew Smith (3 Activities) Matthew Smith (Monthly Authorizations)	18
19	20	21 10:30a James Chen (Annual Review)	22 Maria Garcia (2 Activities) 7a John Domeir (Patient Intake)	23 Maria Garcia (Annual Review)	24	25

Service Delivery

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New Service
Log Out

John Dinsberg (#76954)
jdinsberg@gmail.com
A101 - Test Billing Rate
Expired On: 12/25/2019

Notes

Track and Manage all service delivery notes
- Voice-to-Text Functionality
- Tracked in 'client history' for easy lookup

Activities

Health Status Screening Report
Health Status Screening Report
Documents a substantial change in health status or a discharge from an inpatient stay

Add an activity ...
Add Activity

Activities (as well as services) are customizable to fit the process/needs of your organization

Complete or add all forms related to activities directly from your device (pc/iPad/mobile) – see next slide for more info

Attach applicable service-related files directly to service

Save
Check-Out
Attach

SCHEDULED START
Date
Time

SCHEDULED END
Date
Time

Calendar

Details

SYSTOLIC BLOOD PRESSURE (MM HG)

DIASTOLIC BLOOD PRESSURE (MM HG)

FEELING
Happy

Our 'Custom Fields' allow you to manage and track pertinent information (specific to your organization) over time

Billing

BILLING CODE
T2024 - Pre-enrollment and Inpatient Case Management

START
Date
Time
Check-in recorded at 01/15/2020 09:50 AM

END
Date
Time

Delete

Electronic Visit Verification (Audit/Fraud Protection)
- Simply 'Check-In' & 'Check-Out' of services to track GPS location and time stamp of service delivery

Documentation Management

HealtheFirst manages all paper documents and form completion within it's secure and compliant Forms Library

We have created a tool that allows you to 'auto-fill' fields that typically would be redundant to fill out. Anything that is listed in the 'client profile' section of HealtheFirst can be automatically filled on forms to eliminate the redundancy of data entry

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John Dinsberg (#76954)
jdinsberg@gmail.com
Michelle Rand
HealtheFirst

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Notes
Activities
Health Status Screening
Health Status Screening
Add an activity ...

NEW CHOICES WAIVER
Health Status Screening Report

Whenever a New Choices Waiver participant experiences a substantial change in health status OR is discharged from an inpatient stay in a medical institution, the waiver case management agency is required to perform a screening to determine whether the participant's needs can continue to be safely met within the waiver program with services listed on the existing care plan, and whether the participant continues to meet the nursing facility (NF) level of care.

The RN case manager must perform a face to face screening and submit this form to the New Choices Waiver Unit within seven (7) business days after discovery of the substantial change or following discharge from the medical institution. Please retain a copy in the participant's record within your agency.

Name of RN case manager:	Date of face to face screening:
Case management agency:	
Waiver participant's first and last name:	
Waiver participant's Medicaid ID number:	
Date of admission to the medical institution:	
Reason for admission:	
Date of discharge from the medical institution:	
Name of the medical institution at the time of discharge:	
Type of medical institution: ☐ Skilled nursing facility ☐ Hospital ☐ Other _____	

Please certify one of the following:

☐ The participant continues to meet NF level of care and no changes are needed to the existing care plan in order to maintain health and safety within the waiver program.

☐ The participant has experienced minor changes in health status that warrant small adjustments to the existing care plan, but it is clear (without performing a full assessment) that he/she continues to meet NF level of care and that his/her needs can be safely met within the waiver program.

☐ Due to substantial changes in the participant's health status, a full level of care assessment (MDS-HC) is needed to determine whether the participant continues to meet NF level of care, and wh continues to meet the participant's needs. A full assessment will be performed.

☐ The participant no longer meets NF level of care and will be disenrolled from th
☐ Participant chooses to voluntarily disenroll.
☐ Special Circumstances Involuntary Disenrollment will be requested by the c

☐ Due to substantial changes in the participant's health status that are not expecte

FILE NAME Health Status Screening Report.pdf

Save & Close | Save Draft

All client forms are saved as both a draft (if you need to come back to finish) as well as a pdf.
- Once completed, you can always find the forms in the 'files' section of the client profile page

HealtheFirst supports signature fields to allow you to sign using your electronic device

Accept
Clear

Service Scheduler

HealtheFirst

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New Service

Log Out

PATIENT

Chen, James

ACTIVITIES

- ☐ Annual Review
- ☐ Disenrollment
- ☑ Family Update (Call/Email)
- ☐ Health Status Screening Report
- ☐ Incident
- ☐ MDS-HC
- ☑ Mobility Test
- ☑ Monthly Authorizations
- ☐ Nursing Level Of Care
- ☐ OT - Session 1
- ☐ OT - Session 2
- ☐ OT - Session 3
- ☐ OT - Session 4
- ☐ OT - Session 5
- ☐ OT - Session 6
- ☐ Patient Intake
- ☐ PCCP
- ☑ Residential Service Authorization
- ☐ RN - Session 1
- ☐ RN - Session 2
- ☐ RN - Session 3
- ☐ RN - Session 4

SERVICE DURATION

2 hrs. 15 min.

CLIENT AVAILABILITY

01/16/2020

7:00 am to 6:00 pm

Efficiently manage your workforce using our 'smart scheduler'. Activities & services match users with clients based on familiarity and availability

One-on-One and Group Chat

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New Service

Log Out

One-On-One

Clute, Steve

Groups

(no name)

New Group

Individual or group chat can be used to communicate with caregivers, clients, teams or groups within your organization. The includes functionality to easily cross reference clients and/or services inside the chat browser

Attach service...

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Client Tracking

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New Service

Log Out

Create New Patient

Approved × Pre-Approved ×

Search...

C

Chen, James
Id: 9631458963
02/15/2018
4015 Bryan Avenue, Stillwater, MN 55088
(651) 430-1318
jchen@gmail.com
Pre-Approved

D

Davis, Annie
Id: 6852345896
07/14/1942
123 Main Street, Minneapolis, MN 55433-1235
(802) 652-8332
adavis@gmail.com
Approved
T1016 - Case Management
T2024 - Pre-enrollment and Inpatient Case Management
6.3 units/week for 37.1 weeks
Expired On: 11/01/2019

Dinsberg, John
Id: 123456789
jdinsberg@gmail.com
Pre-Approved
A101 - Test Billing Rate
Expired On: 12/25/2019

Domeir, John
Id: 9756631563
10/08/1950
155 Stonybrook Way NE, Fridley, MN 55433
Jdormeir@gmail.com
Pre-Approved
T2024 - Pre-enrollment and Inpatient Case Management
100.4 units/week for 5.3 weeks

G

Garcia, Maria
Id: 12354687434
04/23/1942
123 Main Street, Minneapolis, MN 55433-1235
123 sdf
Approved

Individual clients can be tracked & sorted by status (statuses are fully customizable)

Client pre-approved units-work is tracked in real-time to effectively capture and maximize provider-employee performance and client service reimbursement

Client Profiles

The client profile section is where we keep track of everything you desire ranging from name/address/birthday to ICD-10 Diagnosis Codes and Client Caregiver information

View and export any applicable client files, history of services, and progress of the 'custom fields' that you've been tracking over time

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New Service

Log Out

Annie Davis

CARE MANAGERS

Brashear, Mary × Davenport, Alfredo × Jones, Raymond × Rand, Michelle ×

FIRST NAME

Annie

LAST NAME

Davis

GENDER

Female

BIRTHDAY

07/14/1942

STATUS

Approved

NOTES

Contact Information

Medical Details

DIAGNOSIS

G35. Multiple sclerosis

Save | Deploy Plan

Easily build and deploy custom 'service plans' for clients directly from their client profile page

Files | Services | Progress

Download (.csv)

Format for Printing

Jan 06, 2019 to Jan 07, 2020

Search...

T1016 - Case Management: 38 units
T2024 - Pre-enrollment and Inpatient Case Management: 51 units

November 22nd, 2019 — Edit
Joe Pacilio
4 Unit(s)

November 15th, 2019 — Edit
Joe Pacilio
4 Unit(s)

November 8th, 2019 — Edit
Joe Pacilio
4 Unit(s)

November 1st, 2019 — Edit
Joe Pacilio
4 Unit(s)

October 29th, 2019 — Edit
Michelle Rand
51 Unit(s)

Client 'history' of services makes it easy to see what services were performed alongside applicable notes. You can also jump back into the service by clicking 'edit' next to the service

User Profiles

Users (employees, contractors, team members, etc.) can be effectively managed by assigning applicable clients alongside appropriate supervisors

Easily stay on top of user certifications/qualifications and always be one click away from seeing all services delivered by users

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New Service

Log Out

Mary Brashear

EMAIL
healthefirst.demo+nurse2@gmail.com

Reset Password — An email will be sent to the user to start the password reset process.

FIRST NAME
Mary

LAST NAME
Brashear

TITLE
Nurse

ROLE
Default

HOURLY RATE
$0.00
This will override the default hourly rate set for the Care Manager Role.

SALARY
$0.00
This will override the default salary set for the Care Manager Role.

PHONE
(972) 988-3842

ADDRESS
2195 Stoney Lane
Grand Prairie, TX 75051

ASSOCIATED FILES

The user profile section is where we keep track of the user roles, permissions, payroll tracking information (roles, rate/salary), and contact information

Details | Certifications | History

ASSIGNED CLIENTS
Chen, James × | Davis, Annie × | Dinsberg, John × | Domeir, John × | Garcia, Maria × | Smith, Matthew ×

SUPERVISED USERS
Select a user ...

Save

Archive

Client/Caregiver Portal

With the Caregiver/Client Portal, no more need to be confused about your schedule or the schedule of the ones you care about. By logging into the Client/Caregiver Portal through HealtheFirst, you're given access to view and schedule upcoming services appointments, update personal information, chat with the service provider, pay for services, and even view the log notes from prior visits.

With full chat functionality, you can easily stay up to date with your service providers.

Using the 'Calendar' and 'New Appointment' views, you have access to easily view and schedule upcoming services and appointments.

Billings & Reimbursements

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New Service

Log Out

Jan 06, 2019 to Jan 07, 2020

Additional Filters

Billing rates...

Clients...

Statuses...

Sort, filter, track and manage services and/or billings by date/rate/client status and track them through the stages of care and reimbursement

New | Billed (Unpaid) | Paid | Denied

Download

Showing 1-9 of 9 items.

Service Date	Patient	Units	Billing Rate	Billed On	Cost ($)	Reimbursed ($)
12/16/2019	Domeir, John	1	T2024 - Pre-enrollment and Inpatient Case Management			$50.00
11/22/2019	Davis, Annie	4	T1016 - Case Management			$200.00
11/05/2019	Chen, James	1	T2024 - Pre-enrollment and Inpatient Case Management			$50.00
11/04/2019	Chen, James	7	T2024 - Pre-enrollment and Inpatient Case Management			$350.00
05/16/2019	Davis, Annie	4	T1016 - Case Management	05/16/2019	$200.00	$200.00
05/16/2019	Chen, James	4	T1016 - Case Management	05/16/2019	$200.00	$200.00
04/25/2019	Smith, Matthew	3	A101 - Test Billing Rate	04/30/2019	$60.00	$60.00
03/06/2019	Davis, Annie	4	T1016 - Case Management	03/06/2019	$200.00	$200.00
01/15/2019	Chen, James	3	T1016 - Case Management	03/01/2019	$150.00	$150.00
					$1,460.00	$1,460.00

'One-click' extract of all billings or related information into an .edi file for easy upload to a direct billing invoice, into applicable clearinghouses for reimbursement or for reporting and report generation.

Payroll

HealtheFirst works alongside your payroll system by using a 'one-click' download of all payroll information into a .csv file for easy upload into your current solution

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New Service

Log Out

Dec 23, 2019 to Jan 03, 2020

Billable | Non-Billable

Download (.csv)

Showing 1-22 of 22 items.

Name	Units	Time	Costs	Billable Total
Admin, James	0	0 minutes	$0.00	$0.00
Rand, Michelle	0	0 minutes	$0.00	$0.00
Prisco, Amy	0	0 minutes	$0.00	$0.00
Davenport, Alfredo	0	0 minutes	$0.00	$0.00
Clute, Steve	0	0 minutes	$0.00	$0.00
Gray, Marrietta	0	0 minutes	$0.00	$0.00
Brashear, Mary	0	0 minutes	$0.00	$0.00
Clute, Greg	0	0 minutes	$0.00	$0.00
Jones, Raymond	0	0 minutes	$0.00	$0.00
Johnson, Anthony	0	0 minutes	$0.00	$0.00
Pierson, Tina	0	0 minutes	$0.00	$0.00
Administrator, Jeff	0	0 minutes	$0.00	$0.00
Nurse, Jeff	0	0 minutes	$0.00	$0.00
Torrington, Hank	0	0 minutes	$0.00	$0.00
Lincoln, Kathryn	0	0 minutes	$0.00	$0.00
Ortiz, Timmy	0	0 minutes	$0.00	$0.00
Pacilio, Joe	0	0 minutes	$0.00	$0.00

Payroll can be managed and tracked as you prefer for service providers or the entire administrative staff

Customized Reports

List of HealtheFirst Reports:
Activity Durations
Duration of Care
Client Diagnoses
Client Map
Client Statuses
Revenue
Data can be used to create reports per company requirement or easily exported to preferred reporting systems

HealtheFirst has developed custom reporting functionality within the software to help you better manage your delivery of services and visualize your outcomes to maximize on ROI

HealtheFirst Custom Tools

Create Custom Activities

Create New Activity

A

Annual Review
2 Forms 30 minutes

D

Disenrollment
2 Forms 0 minutes

F

Family Update (Call/Email)
0 Forms 20 minutes

Setup Billing Rates

USER DESCRIPTION

A101 - Test Billing Rate

☐ IS THIRD PARTY

Checking this option will separate all services with this billing rate from the others on the Reimbursements page, so other steps can be taken for payment.

INPUT COMBINATION

Date + Units

If a service has this billing rate, Care Managers will be asked to fill in two fields in order to complete the service. Below you will be able to configure what those input fields are.

FIRST INPUT LABEL

Date

SECOND INPUT LABEL

Units

MINUTES PER UNIT

Please enter the number of minutes that make up one unit. This will be used to help calculate activity durations and to automatically convert service durations to units (any remainders will be rounded up to the nearest unit).

HealtheFirst was created with the customer at the top of mind. We've created the system to be customizable to fit the needs of your organization. We've done this by making activities, templates, billing rates, user roles, client statuses, service fields, and reporting customizable tools to best serve your company.

Custom Service Groups

START

01/20/2020

ASSIGN STEPS

Start +0 days
Health Status Screening Report

T1016 - Case Management

Brashear, Mary

Start +30 days
Health Status Screening Report, Family Update (Call/Email), Monthly Authorizations

T1016 - Case Management

Jones, Raymond

Start +60 days
Monthly Authorizations

T1016 - Case Management

Brashear, Mary

Create Services

Close

Custom Service Fields

Systolic Blood Pressure (mm Hg)
- Type: Number

Diastolic Blood Pressure (mm Hg)
- Type: Number

Feeling
- Type: Dropdown
- Default: 1

Manage Forms

Add forms to your private or the public library and have them readily available for services

HealtheFirst

Greg Clute
HealtheFirst CRM

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- Configuration

New Service

Log Out

Attendant Unit Allocations
Unit allocation for attendant care services.
New Choices Waiver | Utah

Authorization to Disclose Medical Eligibility Information
Utah | April 2019

Authorization to Release Information
Utah | myCase | September 2019

C

Case Management Agency Notice of Decision
New Choices Waiver | Utah

Critical Incident Investigation
Utah | New Choices Waiver | Aging Waiver

D

DME Information Sheet
Includes information about the ordering and use of wheelchairs, medical beds, hoyer lifts, and oxygen.

Discharge Checklist

Disenrollment Form (DPF-1)
Medicaid home and communicate based program disenrollment notice
New Choices Waiver | Utah | October 2018

Disenrollment Form (DPF-2)
Special circumstance involuntary disenrollment notice of intent
New Choices Waiver | Utah

F

Facesheet
A quick look at the patient's basic information.
New Choices Waiver

Disenrollment Form (DPF-1)

Remove from Collection | Configure Auto-Complete

Medicaid Home and Community Based Program Disenrollment Notice
Disenrollment Form DPF-1
New Choices Waiver

Waiver Program Name: New Choices Waiver
CMA Name: Contact Person: Phone:
CMA Contact's Mailing Address:
Client's Name: Medicaid ID#:
Client's Phone Number:
Representative Name (if applicable):
Representative's Phone Number:
Representative's Mailing Address:
Client's residence type while enrolled in the waiver program:
☐ Private Home ☐ Private Apartment ☐ Assisted Living Facility, Type 1 or 2
☐ Memory Care/Secured Unit ☐ Independent Living Facility ☐ Other:
Facility Name (if applicable): _____
Date of waiver enrollment: | Date of waiver disenrollment:

Voluntary disenrollment: (Notify NCW within 10 calendar days of disenrollment)
☐ Client has chosen to voluntarily disenroll from the New Choices Waiver program.
Client's signature is required and cannot be substituted with a designated representative's signature unless the client has been previously assessed to be unable to make informed decisions as verified by a clinician or by legal documentation. Attach signed clinician statement or signed legal documentation.
Client's Signature: _____ Date: _____
Representative's Signature: _____ Date: _____
Representative's Authority: _____
Client's new address (if known):
Client's new phone number (if known):

Pre-Approved Involuntary Disenrollment: (Notify NCW within 10 calendar days of disenrollment)
Client must be disenrolled from the New Choices Waiver program for the following reason:
☐ Death of the client (Date: _____ Was the client receiving hospice services? _____
Cause/circumstances of death: _____
☐ Client has been determined to no longer meet the financial requirements for Medicaid eligibility by the Department of Workforce Services
☐ Client has entered an inpatient setting and the expected length of stay will exceed 90 days (as verified by a physician– attach signed physician statement)
Date of inpatient admission: _____ Name of inpatient setting: _____
☐ Client has entered an inpatient setting and the actual length of stay has reached or exceeded 90 days
Date of inpatient admission: _____ Name of inpatient setting: _____

NCW Disenrollment Form DPF-1 Revised 10/25/2018

Configure 'auto-complete' on forms to eliminate redundant data entry

Adjust and Customize Settings

Easily upload your existing data including Client Profile information using our templated import functionality

Configuration

Please be patient as some settings may take several minutes to work their way through the performance cache.

Search for setting...

Forms

FONT SIZE

11

Set the font size that should be used for the text inputs on the digital forms. By default, the forms are designed for size 11 font - the result of any deviation from that size will be outside of our testing and optimization.

Clients

☐ **TRACK REMAINING BILLING RATE BY MONTH**

By default, the rate will be displayed as 'per week'. If this option is enabled, the rate will be displayed as 'per month'.

☑ **TRACK REMAINING BILLING RATE IN TIME**

By default, the rate will be displayed as 'remaining units'. If this option is enabled, the rate will be displayed as 'remaining hours'.

Reimbursements

☐ **ENABLE EDI TEST MODE**

When enabled, all EDI exports will be in "test" mode. If submitted to a clearinghouse, the services will simply be eligible for format validation and will not be submitted for actual reimbursement.

☐ **ENABLE EDI VALIDATION**

When enabled, rows that do not have all of the information needed to form a complete EDI file will be highlighted in red.

PAGE SIZE

50

Set the number of services to display on each reimbursement page. Be sure to set this value appropriately to balance visibility and performance.

Service List

☐ **ONLY SHOW SERVICES IN SERVICE GROUPS**

This setting only affects the Service List and, when enabled, means that any service associated with a service group/template will only appear within the group, and

Save

Import

Relevant import templates and instructions can be found on our support site. Errors from the import will be provided in a downloaded results file.

Clients

Export

Your browser will need to accept pop-ups from this site in order for the exports to work properly. If you get an alert, please click "allow." Additionally, it may take some time for each export to complete, so please be patient and wait for the download(s) to complete before navigating away from this page.

Client Profiles (.csv)

Completed Services (.csv)

Completed Forms & Files (.zip)

Minimize your audit headaches with our 'one-click' exports of important client and service information

Mobile Accessible & Secure

HealtheFirst is compatible with your mobile device. Whether that be your Android/iOS/Google device. Our development team has adapted the technology to fit the different array of screen sizes that we use everyday

Along with being hosted on HIPAA compliant servers, HealtheFirst utilizes two-factor authentication across devices to ensure proper security of your company's sensitive data

By using the menu bar, you can easily access your HealtheFirst menu

HealtheFirst on Android

HealtheFirst on iOS both in portrait (left) and landscape view (right)

1 One Solution

- Billing & Reimbursement
- Client Profiles
- Work/Case Assignments
- Document/Form Management
- Unit and/or Time Tracking
- Electronic Visit Verification (EVV)
- Audits
- Payroll
- Workforce Management

Services Management

Create patient profiles and store secure client information, timelines, notes, medical history and files. Assign user tasks and requirements.

Billing & Reimbursement

Communicate directly with clearinghouse while managing codes, timelines, services, and reports.

Performance Management

Provide optimal services by tracking unit/time availability and maximizing capture rates.

Digital Documentation

Access and store frequently used and customized forms and documents digitally.

Audits & EVV

Fully functional EVV solution and one-click audit support, with the capability to easily export client forms, history, and data.

HealtheFirst

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