New Client Set-up

Enter Client

1. Enter client in CarePaths
    a. Click Home, click Membership. Click Add New Patient.
    b. Create a user name and password for your client. HIPAA does not approve of use of name or birthdate in a user name or password. Please note that CarePaths requires a minimum of 6 characters for each.
    c. Fill out the sections that you wish to use- many are not needed or required.
    d. Click Create Record.
    e. The Demographics and Health tabs are optional.
    f. Click Contacts and set up emergency or other contacts for client. Save record.
    g. Click Relationships, click Care Manager, select yourself or appropriate person. Use other tabs under Relationships as desired/appropriate.

Insurance Coverage

2. Set up insurance for client
    a. Click Home, click Membership. Click on client's name. You are now on the client's Membership page. Under the large font blue client name, click the membership drop down menu and click Claims.
    b. Click Coverage Wizard. Click Add New Coverage/Payer.
    c. From the drop down menus, select a payer and a coverage type.
    d. Under Signature Source, use Signed HCFA 1500 Claim form if you use the actual forms. If you have the HCFA language in your financial

agreement or consent to treatment, change that box to "Signed form for HCFA-1500 Claim Form blocks 12 and 13."

e. Optional: Add benefits and eligibility information.

3. Add appointment to calendar

Appointment

   a. Click home, click Scheduling.
   b. Click on desired time and day. Weeks other than the current one can be accessed with the back and next buttons.
   c. Select the type of appointment, modify start and ends times as needed, and save.
   d. Click on attendees. Type in first 2-3 letter of client surname, select client. Save
   e. Optional: Use the recurrences tab for recurring appointments up to 15 sessions in advance.

4. Optional: Orient client regarding Patient Portal

Patient Portal

   a. By phone or encrypted email, give instructions to the client on how to access their patient portal, how to change their password, and how to complete and electronically sign any documents you have chosen for them (see Carepaths Set Up document for more information).

5. When you have completed an appointment:

Appointment completed

   a. Click home, click scheduling.
   b. Click on the client's appointment. Click on attendees. Click on Status? and choose what applies. When you choose Completed, the linked document will auto-generate in your document list in draft status. If you have set up billing, a claim will automatically be generated.

Create Document

6. To manually create a document for a client:
    a. Click Home, click membership.
    b. Click on client's name. You are now on the client's Membership page. Under the large font blue client name, click the membership drop-down menu and click clinical.
    c. Click on Create New Document. Choose a document from the drop-down menu. Click on Create New Document. Please note: manually created documents list the day of document creation as the day of service, so be sure to correct if needed.