ANKOTA

healthcare delivery management

TRAINING GUIDE

System Training 2019

Presented by David Cole

2-day (16 hour) Training Overview

DAY 1

Clients (approx. 2 hours)

- Adding new clients
- Making clients “Active”
- Entering authorizations
- Creating visits from authorizations
- Enter Plans of Care

Staff (approx. 2 hours)

- Adding new staff
- HR requirements
- Adding skills & IDs
- Making new staff “Active”

Scheduling (approx. 4 hours)

- Find Matching Caregivers
- The Dispatch Board
- The Visits Screen
- The Visit Approval Dashboard

DAY 2

Payroll (approx. 2 hours)

- Creating Payroll
- The Payroll Report
- Completing Draft payrolls
- Exporting payroll to your payroll system

Billing (approx. 2 hours)

- Creating Billing
- The Billing Report
- Completing Draft billings
- Batching claims
- Submitting claims
- Managing remittances & payments

Management (approx. 4 hours)

- The Actions & Requests board
- Performing Eligibility checks
- The Authorize Service Warnings dashboard
- Reporting & reports
- Settings

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Training Guide

*Please note this is **generalized training**. Specific training for your organization's workflows may differ from those shown here.*

Getting Started

Ankota is a software product accessed and managed over the internet. This is known as *software as a service* or a "SaaS" model, and it means you only need a browser and an internet connection in order to access Ankota.

Your Implementation Manager (IM) will provide you with your initial credentials so you can log into Ankota. We will always provide you with a generic password since the first time you log in Ankota will require you to create your own unique password that only you will know.

**** IMPORTANT *** Ankota does not know and cannot access your password. If you lose your password we will reset it to the generic password so you can log in, but then you must immediately change your password from the generic one to one that is unique to you.*

To login go to: **www.ankota.net**

There are three items to enter when logging in:

1) User ID (assigned by Ankota)
2) Password (unique to you)
3) Organization Code (assigned by Ankota)

Desired Function	Directions
Access the system (login)	Go to: **https://ankota.net** Enter your: 1) Username 2) password 3) organizational code
Main Menu and Working in Multiple Tabs	The Main Menu will appear down the left side of the screen. You can click on a menu item to open it, or you can 'right click' on a menu item to "open in another tab". This will allow you to work in several screens at the same time.

<u>You can create your own users</u>!

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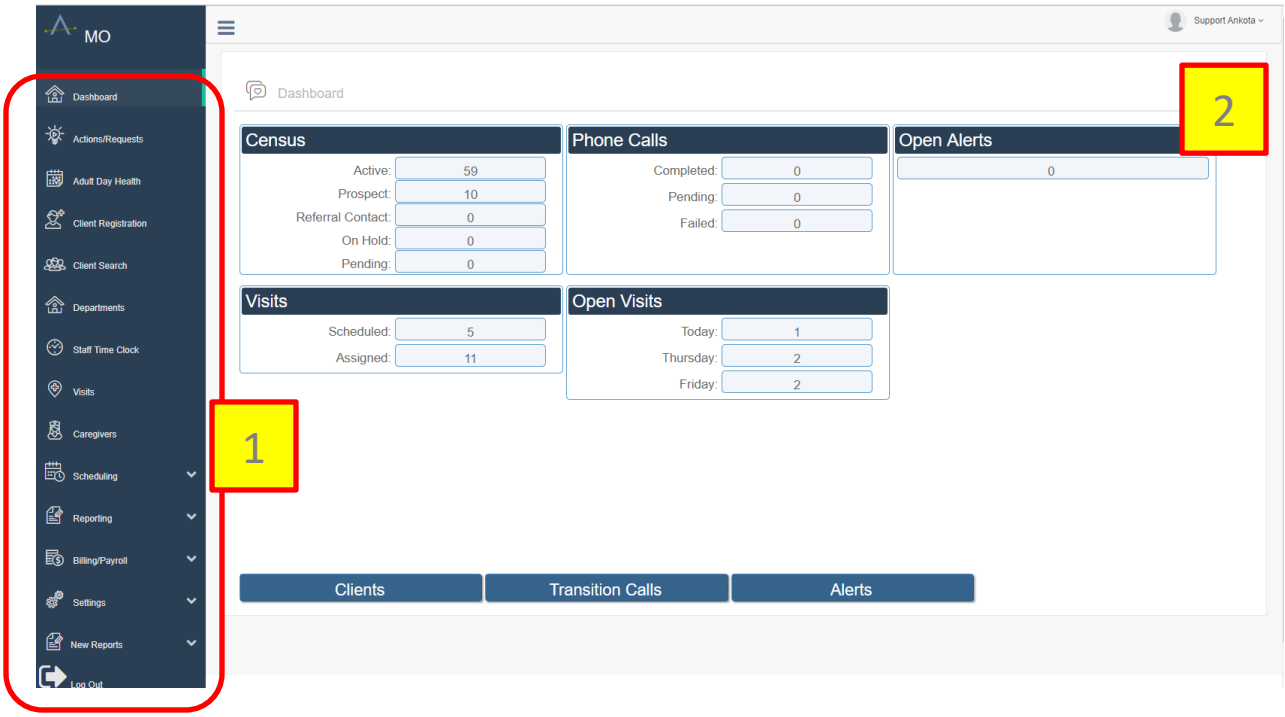
Basic Functions

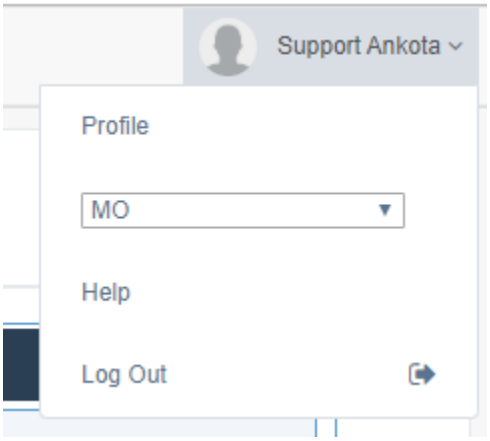
Getting Around



The **Main Menu** (1) runs down the left side of the screen and is always there. Click on a **Main Menu** item to go to that item. Some items also have *submenus* that will open when clicked to give you additional options. **Main Menu** items with submenus are marked with a *down arrow* "⮟".

In the upper right corner of the screen you will see your login name with a down arrow next to it (2). If you click on the down arrow it will open another set of menu options. This is where you can:

1) View your profile and change your password
2) Move from viewing one office or Department to another (this applies only if you have multiple offices or Departments set up.)
3) Access the Help Site to get articles and videos that explain virtually every aspect of Ankota.
4) Log out of Ankota (There is also a button at the bottom of the Main Menu that will also let you logout.)



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Daily System Processes

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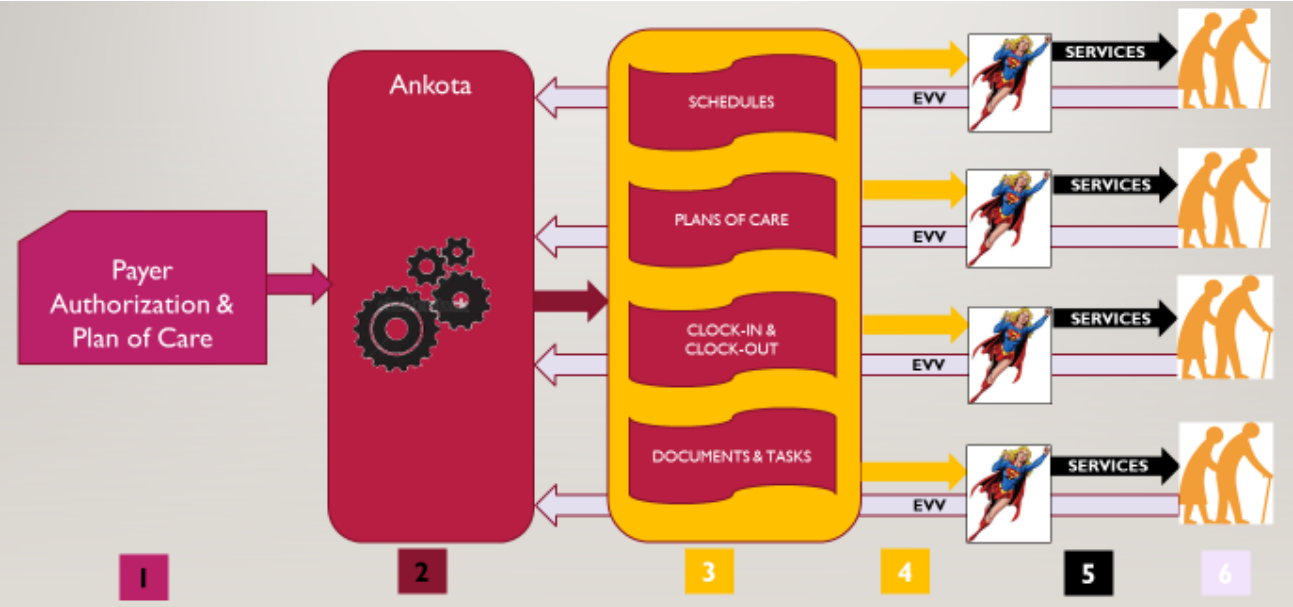
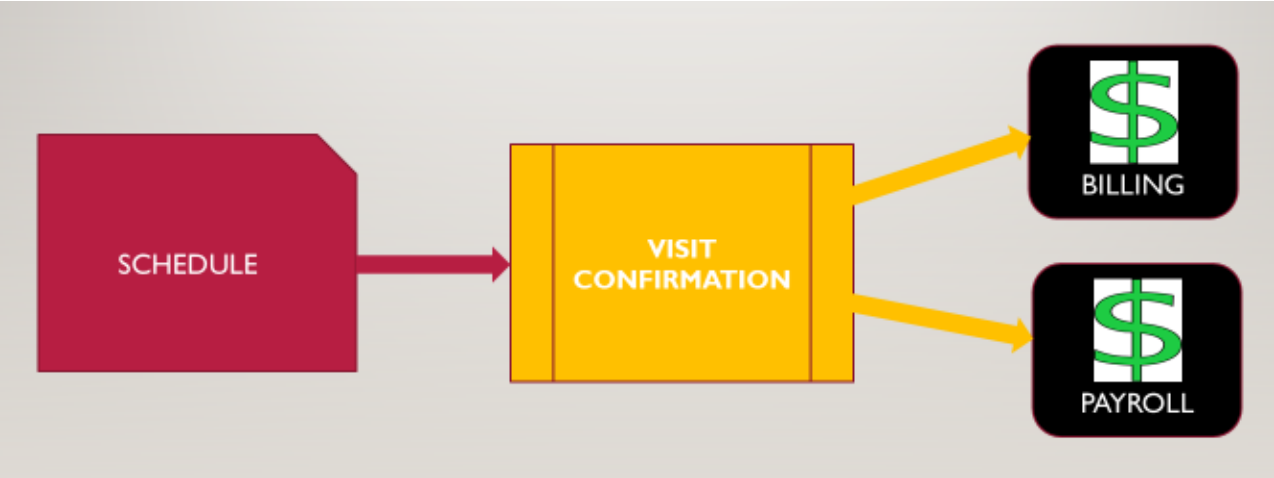
Understanding the Workflow

The 6-Step Service Model



How Services Get to Billing & Payroll



"Once you understand this… the rest is simple!"

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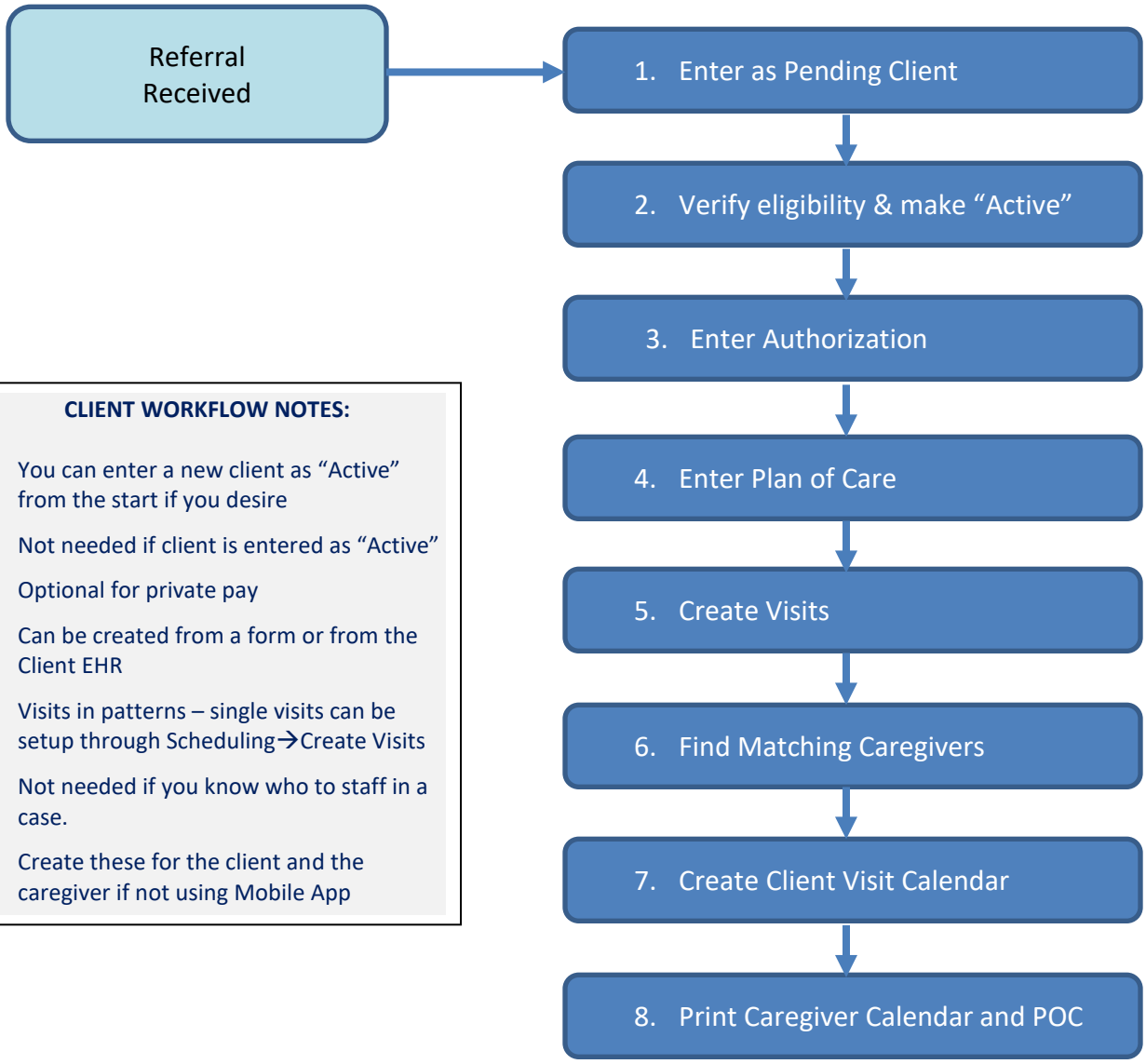
Typical Client Workflow



CLIENT WORKFLOW NOTES:

1. You can enter a new client as "Active" from the start if you desire
2. Not needed if client is entered as "Active"
3. Optional for private pay
4. Can be created from a form or from the Client EHR
5. Visits in patterns – single visits can be setup through Scheduling→Create Visits
6. Not needed if you know who to staff in a case.
7. Create these for the client and the caregiver if not using Mobile App

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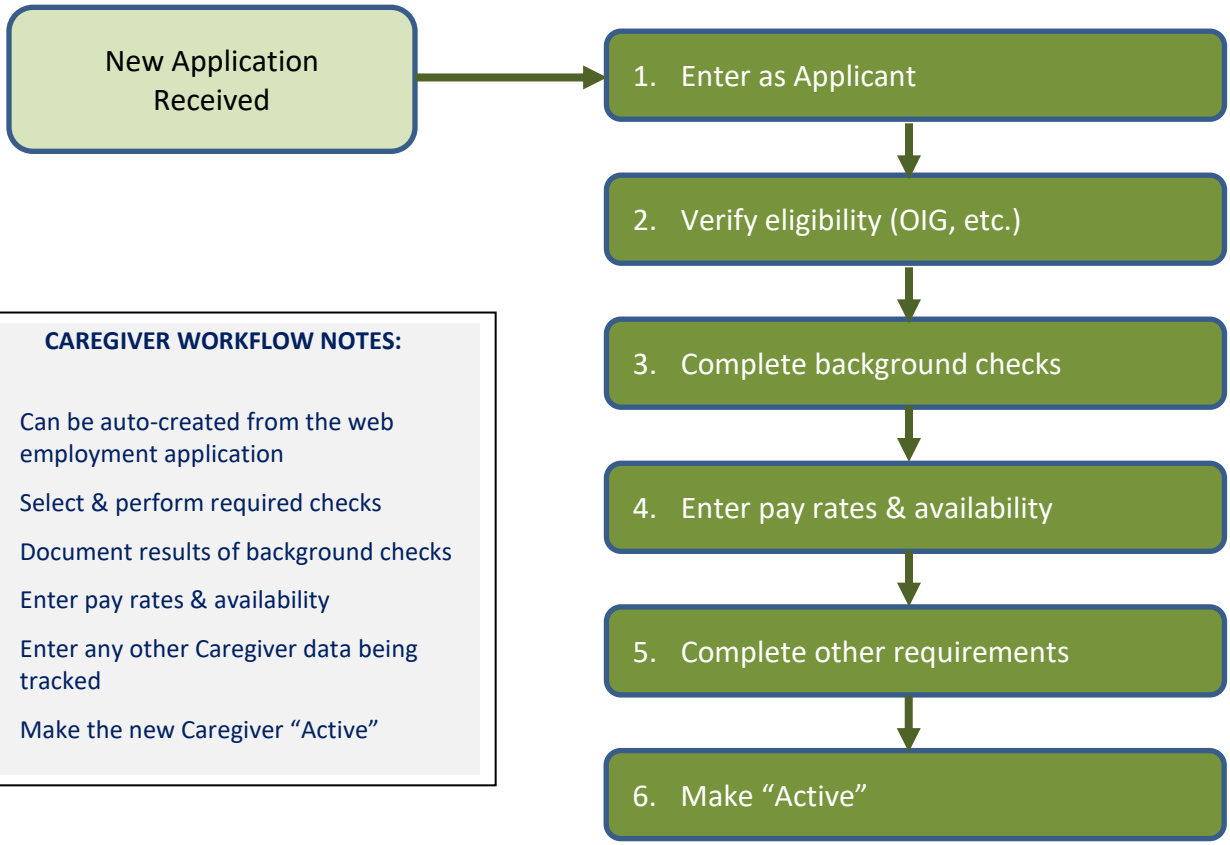
Typical Caregiver Workflow



CAREGIVER WORKFLOW NOTES:

1. Can be auto-created from the web employment application
2. Select & perform required checks
3. Document results of background checks
4. Enter pay rates & availability
5. Enter any other Caregiver data being tracked
6. Make the new Caregiver "Active"

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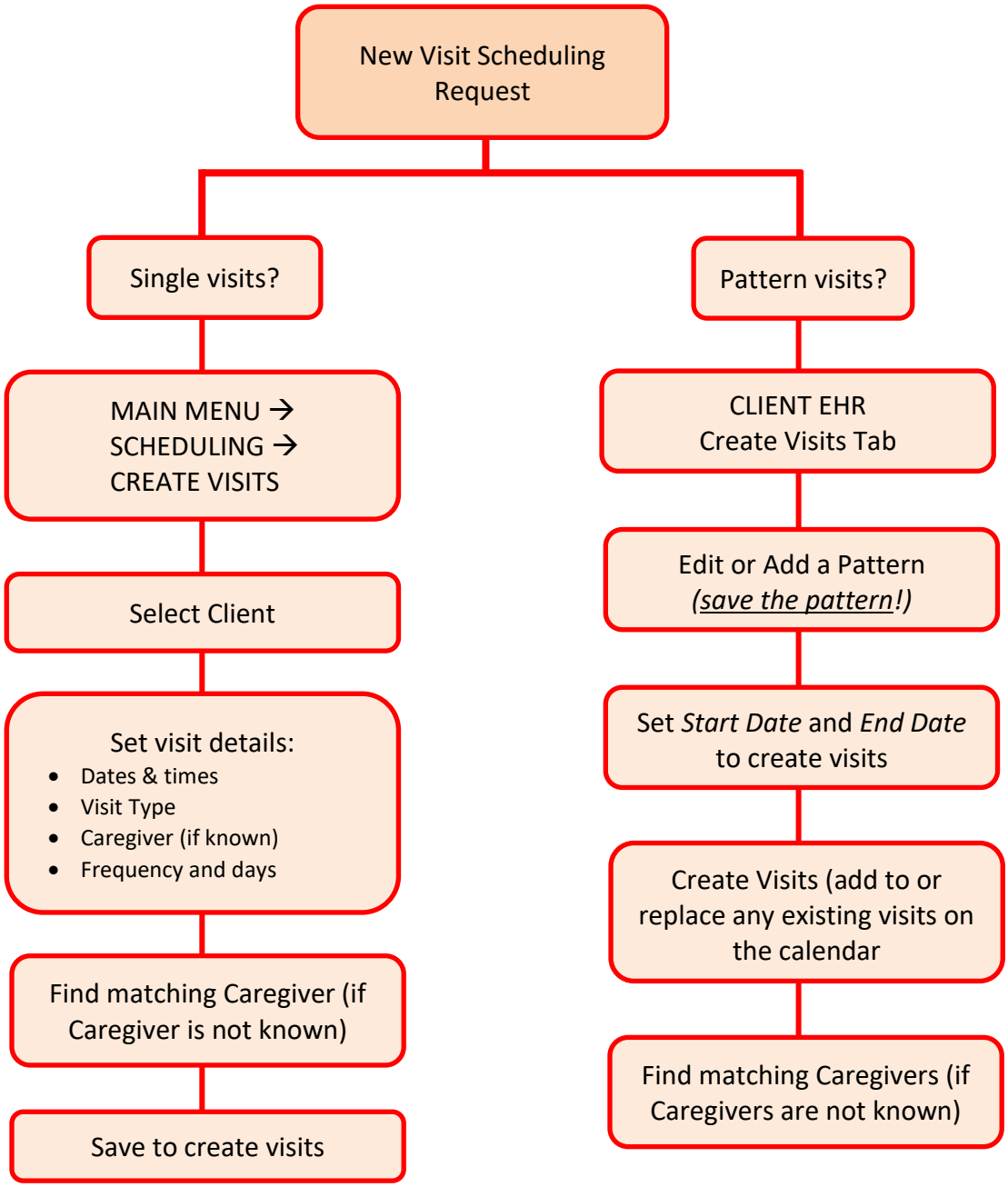
Typical Scheduling Workflow



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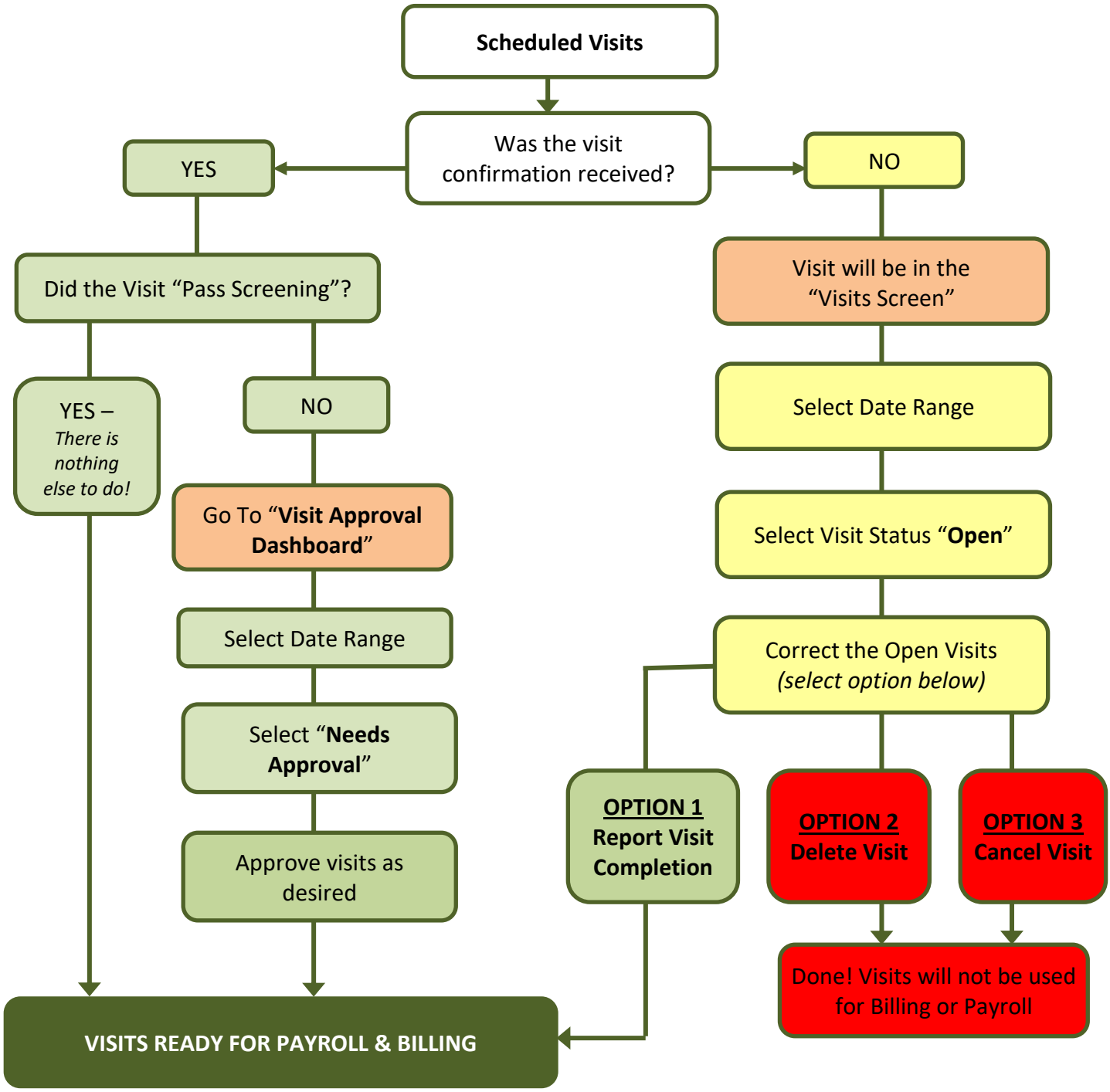
Preparing Visits for Billing & Payroll



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Typical Payroll Workflow

1. From the MAIN MENU select Billing/Payroll
2. Calculate Billing/Payroll
3. Select "Payroll"
4. Enter the *Start Date* and *End Date* for the payroll period *(HINT: Set the Start Date back several months to pick up late timesheets and authorizations)*
5. Select the Departments (if used) or the Caregiver (if only paying one Caregiver)
6. Search for "Payable Items"
7. Create Payroll
8. Go to "Payroll Report"
9. Review & complete draft payrolls
10. Select and export to the payroll system

PAYROLL WORKFLOW NOTES:

1. Payroll and Billing are run from the same Main Menu item
2. Select this function
3. Choose the correct function (payroll vs. billing)
4. Ankota will never double-pay workers so set the Start Date back as far as you want
5. Ignore this if running payroll for all Caregivers in all Departments
6. Search for Payable Items will bring up the list of unpaid services
7. "Create Payroll" will batch the visits by Caregiver and create the gross payroll ledgers for each Caregiver
8. The "Payroll Report" will show the results of the payroll batching as "draft payrolls"
9. Select and complete the draft payrolls.
10. Select and export the Completed Payrolls to your payroll system.

NOTE: Any adjustments made during the payroll period will show under the Completed Payrolls and will be included in exported payroll batches

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Typical Billing Workflow

1. From the MAIN MENU select Billing/Payroll
2. Calculate Billing/Payroll
3. Select "Billing"
4. Enter the *Start Date* and *End Date* for the billing period *(HINT: Set the Start Date back several months to pick up late timesheets and authorizations)*
5. Select the Departments (if used) and the Payer (if only billing one Payer)
6. Search for "Billable Items"
7. Create Billing
8. Go to "Billing Report"
9. Review & complete draft billing
10. Select and create the Claims file
11. Submit the Claims file to the Payer

BILLING WORKFLOW NOTES:

1. Payroll and Billing are run from the same Main Menu item
2. Use the "operation" drop down
3. Select the "Billing" operation
4. Enter the Start and End Dates for the billing period – go back several months to pick up late timesheets and authorizations
5. Use if you have multiple Departments or if you don't want to bill all payers
6. Click to "Search" for billable items
7. Select all and "Create Invoice"
8. From the Main Menu select Billing→ Billing Report
9. Select & complete Drafts
10. Select Completed Invoices and create the Claims File
11. Submit the Claims File to the Payer

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