

Managing Supplies Overview

The NDoc Patient Supplies function has powerful features for order approval and delivery tracking, yet can be set up as a simple supply recording utility for use by the nurse during the course of rendering care during the clinical episode. By using a concept called “supply type,” an intelligent classification assigned to each supply, the two extremes can be blended to meet most agencies’ diverse supply needs.

Specifically, in its simplest structure, supplies may be “used” on the patient and immediately sent to billing. In a more complex scenario, supplies may be “ordered,” then “approved” by a supervisor, then “delivered” to the patient and ultimately sent to billing. Each agency can choose to implement supply processing in one or both of these two ways by first determining the global strategy and recording its related settings – activate the appropriate supply statuses - in Settings>Supply, and then optionally overriding these settings for appropriate supply types.

Some examples of what may be structured within the NDoc supplies function:

- An agency’s policy may dictate that the nurse from his/her personal inventory dispenses all supplies except wound care supplies because wound care supplies are ordered and shipped to the patient’s home. To use NDoc in accordance with this policy, all non-wound care supplies are recorded in the Patient Supplies (under Care Pilot or Administration>Patient) function as “used” on the date they are dispensed to the patient. However, wound care supplies are recorded as an “order” to await supervisory approval, at which time the order is released to a vendor for drop-shipment to the patient’s home.
- Perhaps no approval is necessary; a supply order goes directly to “delivered” status when the agency receives notification of delivery to the patient. Use/order/approve/deliver procedures distinctive to a supply type - that override agency-wide supply settings in Settings>Supply - are established in the Administration>System>Tables>Supply Type table.
- An agency may wish to “order” supplies at intake and record the dispensing of the supplies at time of service. In this scenario, the intake department would record the appropriate supplies as status “order” and the nurse would record the supply as “delivered” when making the visit to dispense the supply. (Note that once a supply has been “ordered”, it must follow the approval and delivery path (where each of these steps is optional). It cannot be “used” after being “ordered”.

The moment a supply transaction goes to billing is also a flexible setting. The billing system may be updated with the supply transaction immediately upon “use” or “order,” or the update may be delayed until “approval” or “delivery.” NDoc behavior relating to billing system updates is completely regulated by the settings on the Administration>System>Settings>Supply page. It is also possible to prevent, either intentionally or in error, the supply from entering the billing system by setting each of the four “Bill After” statuses to “No.”

Implementation Overview

To implement the Patient Supplies function quickly and efficiently at your agency, follow these three steps:

- 1) Review supply system settings in **Administration>System>Settings>Supply**
- 2) Verify the contents of the **Supply Quantity Type** table under **Administration>System>Tables**, and add new entries as desired
- 3) Configure the **Supply Type** table under **Administration>System>Tables**
- 4) Add supplies to the **Supply** table under **Administration>System>Tables**
- 5) Train staff in the Patient Supplies function.

Supply Recording Only

For agencies using Patient Supplies as a basic recording utility, configure NDoc as follows:

- In **Administration>System>Settings>Supply** set entries as follows:
 - Turn all Supply Statuses off (set to “No”).
 - Set “Bill After Used” to ‘Yes’; all others to “No”.
 - Leave Billing Rate Charting and Delivery Charting options unselected.
 - Do not establish Approval Criteria.
- In **Administration>System>Tables>Supply Quantity Type** table verify or add quantity types (e.g., each, box, case) as needed.
- In **Administration>System>Tables>Supply Type** table:
 - Create supply types with overrides (Order, Approval, Delivery) set to “N/A”. *NOTE:* To implement simple supply recording, any number of supply types may be established but their overrides must all be set to N/A so as not to affect the general settings created in Step 1 above. Supply types are, at their simplest, classifications for reporting purposes and you may establish as many as desired.
 - Use Supply Types primarily for classification and reporting.
- In **Administration>System>Tables>Supplies** table
 - Add a record for each supply item to be tracked/used in NDoc. *NOTE:* As with any table, use **Add** mode to create new entries and **Change** mode to edit existing entries.
 - Import Code and Export Code are **ONLY** applicable for agencies with certain interfaces and are not required for general supply entries.
 - Provider fields are optional. However, if providers for the supply are recorded in the Supplies Table, the Provider drop down field found within the Patient Supplies function will be populated with the associated entries for possible selection by the user. Please note that the Provider field will be view-only if the supply status selected is Use. If charted as Order, the Provider field can be charted at any time (Approval, Delivery and Modify) but is never a required field.)
 - Charge Code is required. If no Charge Code is entered for a supply, the supply transaction will not pass to billing. For integrated billing customers, Charge Code charting will trigger the need to also enter default Bill Rate information.

Ordered, Approved, and Delivered Supplies

For agencies managing supplies that require ordering, approval, and delivery, a more complex configuration process is necessary. In this scenario agency settings will be established to accommodate simple supply recording and order/approval/delivery will be handled at the Supply Type level as follows:

- In **Administration>System>Settings>Supply**
 - Turn all four Supply Statuses off (set to “No”).
 - Set “Bill After Used” and “Bill After Delivered” to “Yes” to accommodate supplies of a type that will require order/approval/delivery.
 - Leave the Billing Rate Charting option unselected.
 - Select the applicable Delivery Charting user type(s) to accommodate supplies of a type that will require order/approval/delivery.
 - Select at least one Approval Criteria option to accommodate supplies of a type that will require order/approval/delivery.
- In **Administration>System>Tables>Supply Quantity Type** table add new entries as desired. The table may be customized by each agency as desired, but many agencies may be satisfied with the initial content.
- In **Administration>System>Tables>Supply Type** table, set the table as follows:
 - Create a Supply Type with Order, Approval, and Delivery set to “Yes”.

- Set “Order or Use Allowed?” to control whether supplies may be directly used or must follow the order process.
- Use “Order Required” if all supplies of this type must be ordered before delivery.
- In the **Administration>System>Tables>Supply** table use the applicable Supply Type configured above to apply the necessary logic.

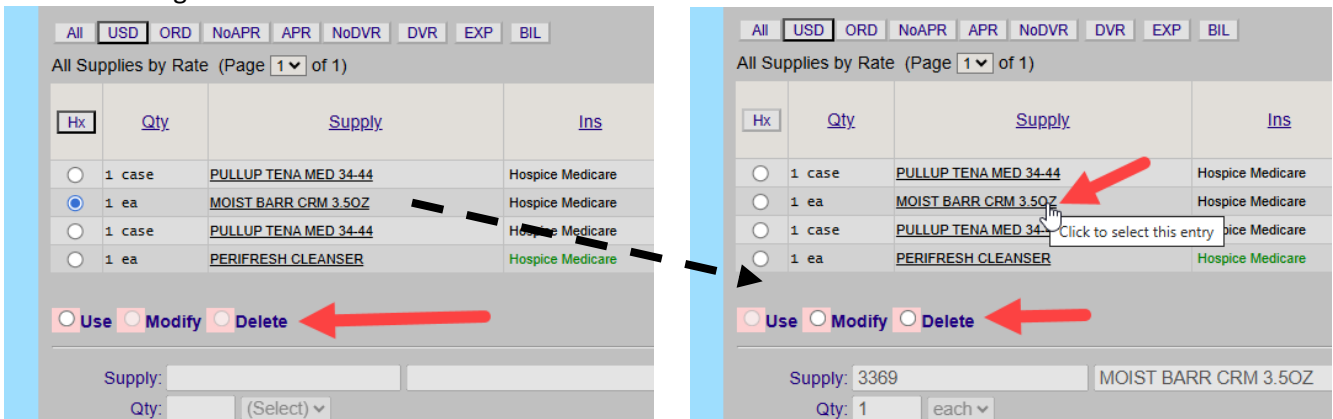
NOTE: Supplies recorded as “Used” cannot be changed to “Ordered” and vice versa. Incorrect entries must be deleted and re-entered.

Patient Supplies Function

The Patient Supplies function (Administration>Patient>Patient Supplies or Care Pilot>Patient Supplies) allows users to record, modify, and manage supply transactions. It supports actions such as Use, Order, Approve, Deliver, Modify, and Delete.

Each action creates a record displayed in the table at the top of the page. Users may sort by column, and fields highlighted in green indicate overrides. Up to four supplies can be entered per action before saving.

Deleting a supply permanently removes it and issues an automatic billing credit if it has already been billed. In order to access the Delete option, users must click the hyperlink (underlined) supply entry to select the item to be deleted using the Delete radio button.



The interface displays a table titled "All Supplies by Rate (Page 1 of 1)". The table has columns: Hx, Qty, Supply, and Ins. The first screenshot shows four entries: "PULLUP TENA MED 34-44", "MOIST BARR CRM 3.5OZ", "PULLUP TENA MED 34-44", and "PERIFRESH CLEANSER". The second screenshot shows the same table with the second entry selected. A red arrow points to the "Delete" radio button, and a tooltip points to the selected entry with the text "Click to select this entry".

Insurance and Billing

The insurance information for each supply that is displayed in the Patient Supplies function’s table is the actual insurance that will be passed with the supply into billing. If no override is recorded, insurance is assigned automatically based on effective dates when the supply is ready for billing. Entries in green denote insurance overrides.

Billing Rate visibility depends on user roles specified under Administration>Settings>Supply>Billing Rate Charting. Specifically, the function will not be visible or accessible if a Primary User Type is not defined. You may use CTRL to select multiple types who may see/edit the billing rate in the Patient Supplies function.

Additional Notes

- A “Yes” or “No” in Supply Type overrides whatever corresponding setting is in the Settings>Supply option.

- “N/A” defaults to system configuration.
- Supply status recalculation occurs automatically each time Patient Supplies is accessed and again during nightly processing. Since settings in Settings>Supplies and in the Supply Type table can be changed at any time, which in turn may alter the appropriate current status of unbilled supplies, the supply status for each active patient's supply that has not been exported and/or billed is automatically updated when the Patient Supplies function is selected, and again at Nightly Processing.
- If all supplies must be ordered, set “Order Required” to “Yes” to enforce process integrity. Specifically, the Patient Supplies function will prevent a supply that must be charted as Order (Order Req is Yes) from being charted as Use. Similarly, it is not possible to chart a supply as Order a supply that must be charted as Use (Order or Use Allowed is No).

Reports

- **Reports>Auditing>Supply Activity Log** - Lists all supply transactions based on selected “run-time” criteria.
- **Reports>Patient>Patient Supplies** includes options to view information including:
 - **Supplies** lists Patient Supplies entries by date, Company, Location, Team and supply status criteria selected.
 - **Supplies Awaiting Approval/Delivery Lists** – Lists supplies pending processing.
 - **Supplies Awaiting Export/Billing** – Identifies supplies ready for billing export.