

EOC Hold

There are times when we place a patient on “hold” within the episode of care (EOC) for a variety of reasons. If the hold is intentional, the reports we run need to be able to tell us “don’t schedule the patient yet, they’re still on hold”. Our new EOC Hold feature helps to accomplish this.

This feature is not intended to put all EOC on hold to reuse an EOC a year from now when the patient returns. This is intended for short holds to remain within the patient’s current clinical presentation and progress, but helps ensure that when running daily and weekly reports like the “patients not seen in the last x days”, it is obvious that the patient shouldn’t be called to schedule until the end of the “hold”.

Examples of patient holds:

- Patient is on vacation for the next month
- Patient is in the middle of the sport season and you anticipate a potential flare-up
- Patient will attempt being independent with his/her HEP for the next three weeks

In our example, the patient is going to trial being independent with his/her HEP for the next 4 weeks. I don’t want my office to schedule the patient but I want to make sure we contact the patient at the end of the hold to check how they’re doing and either schedule another appointment or discharge the patient.

In the patient EOC screen:

The screenshot shows the OptimisPT interface. At the top, there are navigation tabs: Home, Patients, Scheduling, Billing, Reports, Dashboard, Embedded Resources, and Admin. Below this, a breadcrumb trail shows 'Low Back and Abdomen None (...)' with 'Visits: 3 Used' and '0 Remain'. A warning message states 'Current plan of care has expired.' The main heading is 'Low Back and Abdomen None (04/29/20)' with a 'Put on Hold' button highlighted in a red box. The left sidebar contains a patient profile for Rommel Canon, including his name, ID, D.O.B., and age. The main content area is divided into 'General Information' and 'Referral Source(s)'. The 'General Information' section lists fields like Injury Type, Therapist, Default Schedule, Category, Next Physician Visit, and External Identifier. The 'Referral Source(s)' section shows 'Doctor Seuss, DO' as the primary source with contact information. At the bottom, a 'Body Region(s)' table lists 'Low Back and Abdomen' with 'Rename' and 'Deactivate' actions.

Region	Actions
Low Back and Abdomen	Rename Deactivate

OptimisPT® Home Patients Scheduling Billing Reports Dashboard Embedded Resources Admin

Low Back and Abdomen None (04/29/20) **On Hold**

Current plan of care has expired.

General Information

Injury Type: None
 Therapist: Cheryl Dimapasoc
 Default Schedule: None
 Category: None
 Next Physician Visit: None Scheduled
 External Identifier: None

Referral Source(s)

Doctor Seuss, DO
 PRIMARY
 1
 1, AL 92029
 United States
 P: (321) 654-9877
 E: (123) 456-7890

Body Region(s)

Region	Actions
Low Back and Abdomen	Rename Deactivate

Episode of Care Holds

Action	Hold Reason	Held By	Date	Release Reason	Released By	Date
Release	Patient attempting HEP independently until 9/6/2021	Chae Dimapasoc	08/10/2021 09:59AM			

If the patient is pulled up on the schedule:

OptimisPT® Home Patients Scheduling Billing Reports Dashboard Embedded Resources Admin

Patient: Canon, Rommel [Edit Patient](#) Episode of Care: Low Back and Abdomen N **HOLD** No Authorizations [Add new?](#)

Phone: — [Upcoming Visits](#) Referral Source: [Doctor Seuss](#) Schedule Note: 0 Insurance: Medicare Member: N/A Copay: N/A Deductible: N/A [Primary](#) [Secondary](#) [Tertiary](#)
 Age/Gender: 74 (01/01/1947) / M Therapist: Cheryl Dimapasoc Group: N/A Co-insurance: N/A [Print Benefits](#)

Auth. Visits: 0 Auth. Exp. Date: [Plan Visits](#)
 Auth. Visits Remaining: 0 N/A

Tuesday, August 10, 2021 for 6 Resources [Daily View](#) [Print](#) [Show Reminders](#)

Cheryl Dimapasoc, DPT Rachel Bettini, PT Blue Moon, PT Cheryl Canon, PT, DPT, OCS

8am

The reports that allow you to see if the patient is on hold:

- Patient Retention
- Patients Not Seen in Last X Days
- Expiring Authorizations

OptimisPT® Home Patients Scheduling Billing Reports Dashboard Embedded Resources Admin Support Maui Chae D. Logout

Reports [Download PDF](#) [Download Excel \(CSV\)](#)

Patient Retention Report
 Live-Test-OLD
 05/10/2021 to 08/11/2021
 Active Patients

You can resort the report To look at all of your holds

MRN	Patient Name	Phone Number	Date Last Schedule	Last Visit Status	Insurance Name	Therapist	Clinic	Hold
1000201396	Canon, Rommel		05/12/2021	IN PROGRESS	Medicare	Dimapasoc, Cheryl	Maui	Y
1000000642	Aurora, Jessamyn	909-957-8797	08/11/2021	PENDING	Kaiser		Maui	
1000000688	Hicks, Bill	818-396-7478	08/10/2021	PENDING	V311 Post Release	Willis, Berni	Maui	