PointClickCare®

Canadian Rate Transition Quick Reference

This Quick Reference Guide provides a high level overview of the steps required to complete the new Canadian Rate Enhancement configuration.

NOTE

Complete the steps in the order provided!

Step	Action	
1.	**Enable New Rates Configuration** • Enabling new rates must be completed by a PointClickCare employee. • Management Console > Standards > Financial Management >	AR Configuration has a new field: **Use Enhanced Billing as of**. New setup items appear at Management Console (Standards tab) and Facility level under **Setup**.
2.	**Room Rate Type Categories** • Do one of the following: Single facility > Admin > Setup • Multi-facility > Management Console > Standards	To rename the default rate type, click **Edit**. Select your most common room. Example: basic. To add Categories, click **New**.
3.	**Room Rate Type** Do one of the following: Single facility > Admin > Setup Multi-facility >Standards > Setup	To add Room Rate Types, click **New**. Complete the configuration by clicking **Edit** to assign the Category if necessary.
4.	**Room Listing** Single facility > Admin > Setup	Update Default Rate as needed for each room.
5.	**Room Rate Type Relationships** Do one of the following: Single facility > Admin > Setup Multi-facility > Management Console > Standards	Optional mapping of room rates to room types controls the rates available in census entries based on room type.
6.	**Payers** Do one of the following: Single facility > Admin > Setup Multi-facility > Management Console > Standards	Edit each Active Payer to configure the new fields as needed: Bill in Advance, Stop Billing Day, Payer Coverage, Allow Custom Rates.

Step	Action	
7.	**Schedules** Do one of the following: Single facility > Admin > Setup Multi-facility > Management Console > Standards	Schedules are used in configuration of the rates. Click **New** to create schedules.
8.	**Schedule/Status by Payer** Do one of the following: Single facility > Admin > Setup Multi-facility > Management Console > Standards	To associate the status code in census entries for each Payer, complete mapping to assign status codes to appropriate schedules.
9.	**Rate Templates** Do one of the following: Single facility > Admin > Setup Multi-facility > Management Console > Standards	Configure optional rate templates for use in rate schedules. These help with the completion of the rate schedules.
10.	**Payer Rules** Do one of the following: Single facility > Admin > Setup > Payer rules & rate schedules. Multi-facility > Management Console > Standards>	Payer rules are used as part of the census entries. Configure Payer rules for each of the payers to be used as defaults in census entries.
11.	**Creating Ancillary Rules** Do one of the following: Single facility > Admin > Setup > Payer Rules & Rate Schedules > edit ancillary rules Multi-facility > Management Console > Standards > Payer Rules > edit ancillary rules	This is optional. If you have secondary Payers that cover ancillary charges consider configuring ancillary rules for those charges. In Ancillary Rules, you define ancillary billing and contractual requirements specific to each Payer.
12.	**Payer Rules & Rate Schedules** Single facility > Admin > Setup.	Configure rate schedules and mapping for all schedules and their associated room rates.
13.	**Creating Care Level Templates** Do one of the following:	Configure care level templates to provide further rate options and levels.

Step	Action	
	Single facility> Admin > Setup > Rates Configuration > Care Level Templates Multi facility > Standards > Care Level Templates	
14.	**AR Configuration** Single facility > Admin > Setup • **Use Enhanced Billing date** • **Enhanced Billing Transition link**	Update the date to be future dated and for the first day of the month. Consider when you anticipate completion of all configuration steps. Click **Enhanced Billing transition** link when you complete all the steps above.