

Residential Specific Mini-Manual

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Ver. 3/12/2025

Service Note Daily RES

Starting the Note

Start Individual service from your Home Page:

The screenshot shows the 'Enter New Service' form. Callout 1 points to the 'Type of Service' dropdown set to 'Individual'. Callout 2 points to the 'Client' text box. Callout 3 points to the 'Note Template' dropdown set to 'Service Note Daily RES CaAIM 24-04'. Callout 4 points to the 'Start Indiv Service' button. A note box states: '*Note: your name should be the Primary Clinician'.

1. Select 'Individual' under Type of Service
 - a. Note: your name will be selected as the primary clinician
2. Enter the Name or Number of your client or leave Blank
3. Select the Note Template 'Service Note Daily RES'
4. Click 'Start Indiv Service'

After clicking start, the Service Entry Page opens:

The screenshot shows the Service Entry Page. Callout 1 points to the 'Provider' dropdown set to 'CLINICIAN GATEWAY TEST SUD RES'. Callout 2 points to the 'Potential Harm' dropdown set to 'Information received in con'. Callout 3 points to the 'Service date' field set to '03/07/2025'. Callout 4 points to the 'Procedures' dropdown set to 'Select Procedure'. Callout 5 points to the 'Service Location' dropdown set to 'Residential Substance Abuse Facility' and the 'Mode of Delivery' dropdown set to 'Face-to-face'. Callout 6 points to the 'Principal Diagnosis' dropdown set to 'Encounter for observation for other suspected diseases and conditions rul...'. The 'Billing time' section is also visible.

1. **Always select a provider before anything else. Due to strict SUD rules, if you do not set the provider to one you are assigned, you will not be able to re-open the note.**
2. Select the potential harm of the client (if applicable)
3. Select the date of services being documented
4. Select the procedure that most defines the service
5. Select 'Residential Substance Abuse Facility' for service location and the proper mode of delivery for the service
6. Select the proper principal diagnosis for the client (Usually the principal diagnosis that is in bold and appears first in the dropdown)

Under the instructions and pre-existing Diagnosis, you will be entering a total service time for the client on that day (Primary FF Time), the language used for services, and can view the clients diagnosis.

Instructions & Pre-Existing Diagnoses

Progress notes must be completed within 3 business days of providing a service, with the exception of notes for crisis services, which must be completed within 24 hours.

Primary FF/Contact Time: Hours:Minutes

Services were provided in: by interpreter or clinician

ICD-10:
DSM 5:

Episode Diagnosis Information

Primary Secondary Tertiary SU GMC

1. Skip FF Time for now and we will be coming back later to enter a duration in this field.
2. If the Services were given in English, no change necessary. If the services given were in another language, select the language and check whether an interpreter was present or if the clinician provided the service in that language.
3. Under Episode Diagnosis Information there are two rows, ICD-10 and DSM 5.
 - a. ICD-10 is pulled from SmartCare Opening. To update this would require an SmartCare staff person to update the Episode in episode Maintenance.
 - b. DSM 5 is pulled from the latest Assessment Full ASAM or Diagnosis Form. To update this field, your LPHA must finalize a service type of 'Assessment Full ASAM' or 'Diagnosis Form'

Secondary Procedure (Child's Bed Day): Number Of Children:

If applicable, there is an option to add a Child's Bed Day code on this service. After selecting a Secondary procedure 303, enter the number of children staying at the facility.

Summary of Daily Services

Summary of Daily Services

Instructions: The daily note must be completed by a LPHA/counselor who provided a service on the date this note is documenting or by a supervisor who worked that day. Additional services may be added if a beneficiary receives more than 1 service on a day.

Daily Service 1	
Type of service rendered	Session Topic/Purpose
<input type="text" value="Select Session Type"/>	<input type="text" value="Select Session Topic"/>
Individual or Group: <input type="text" value="Select Indiv/Group"/>	Location: <input type="text" value="Residential"/>
Primary staff: <input type="text" value="Select One"/>	Co-staff: <input type="text" value="Select One"/> Duration: <input type="text"/>
Comments (Optional): <input type="text"/>	

Next is the Summary of Daily Services; this is where you will log all services provided to the client for this date by any Clinician/Counselor at this site.

- This is the Service entry box, you can enter up to ten services on one note

For Each service you will need to Log the required fields

Type of service rendered

Select Session Type ▼

Select Session Type

- Assessment
- Family Therapy
- Group Counseling
- Group Patient Education
- Individual Counseling
- Individual Patient Education
- SUD Crisis Intervention Services

Session Topic

Select Session Topic ▼

- Select Session Topic
- Anger Management
- Art Therapy
- Assessment - gather information with client
- ASAM Assessment/Re-Assessment
- Cognitive Behavioral Therapy (CBT)
- Co-Dependency
- Co-Occurring
- Criminal/Addictive Thinking
- Domestic Violence
- Healthy Habits (physical & mental health care)
- Life Skills
- Medication Management
- Men's Support
- Motivational Interviewing (MI)
- Parenting
- Psycho-Social
- Recovery Support
- Relapse Prevention (Motivational Enhancement Therapy)
- Seeking Safety (Trauma-Informed Care)

1. First select a 'Type Of Service Rendered'
2. Select a 'Session Topic' if you need to write in a Topic select 'Other' and use the provided text box

Session Topic

Other ▼ Write in Topic

3. Select if this an 'Individual' or 'Group' Service
4. Enter the Time Duration.
 - a. Very important to note the Time Format. Must be 12 hr clock. Enter the Hour followed by a Colon (:) then minutes, use two digits.
 - b. Duration will be calculated for you

Select Indiv/Group ▼

Select Indiv/Group

- Individual
- Group

Daily Service 1

Type of service rendered: **Assessment** ▼ Session Topic/Purpose: **Anger Management** ▼

Individual or Group: **Individual** ▼ Location: **Residential** !▼

Primary staff: [dropdown] Co-staff: [dropdown] **Duration: 05:30**

Comments (Optional): [text box]

TOTAL DURATION: 5 hr 30 min

5. Select the Primary Staff, if there was a Co-Staff (optional), and the location of the Service

Primary staff: **Select One** ▼ Co-staff: [dropdown] Location: **Select One** ▼

6. The last box is used for any comments you want to add on this specific service, and is optional

Comments (Optional):

7. Repeat steps 1-6 for any service provided today (up to 7)

Example Completed Service:

Daily Service 1	
Type of service rendered	Session Topic/Purpose
Assessment ▼	Assessment - gather information w ▼
Individual or Group: Individual ▼	Location: Residential : ▼
Primary staff: [Redacted] ▼	Co-staff: Select One ▼
Duration: 05:30	
Comments (Optional): Do you want to add a comment or description of the service?	

Daily Service 2	
Type of service rendered	Session Topic/Purpose
Select Session Type ▼	Select Session Topic ▼
Individual or Group: Select Indiv/Group ▼	Location: Residential : ▼
Primary staff: Select One ▼	Co-staff: Select One ▼
Duration: [Empty]	
Comments (Optional): [Empty]	

TOTAL DURATION: **5 hr 30 min**

Once you have entered all services provided on a given day you can see the 'Total Duration' under your last service box.

TOTAL DURATION: **3 hr 45 min**

We will now update the FF Time with this duration, formatted Hours Colon (:) Minutes, HH:MM

Instructions & Pre-Existing Diagnoses	
When writing progress notes, respond to problems/goals/objectives of treatment plan and signs and symptoms related to diagnosis. Include treatment interventions and address changes in the client's functioning. If there is little progress, include an explanation of the limited progress. Reminder: Providers are required to establish and maintain a sign-in sheet for every group counseling session, independent from CG. Sign-in sheet shall contain: 1) legibly printed Counselor/LPHA name & signature who conducts the session; 2) start & end time of group session; 3) date of group session 4) topic of session; and, 5) client legibly printed name and signature.	
<u>Episode Diagnosis Information</u>	
Primary Secondary Tertiary SU GMC	
Primary FF Time: 3:45 Hours:Minutes	Services were provided in: English ▼
by <input type="checkbox"/> interpreter [Empty] or <input type="checkbox"/> clinician	ICD-10: F11.23
	DSM 5:

Daily Narrative

The Daily Narrative is a brief description/summary of how all SUD residential services provided throughout the day

Daily Narrative

Instructions: A brief description/summary of how all SUD residential services provided throughout the day addressed the member's behavioral health needs (e.g., symptom, condition, diagnosis, and/or risk factors).

Previous Entries: (Select Note) ▼

A Brief Summary of Next Steps

Describe the next steps to move forward

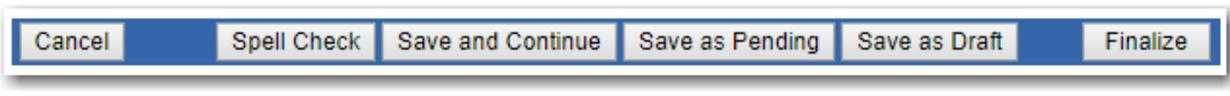
A brief summary of next steps

Instructions: Including, but not limited to, planned action steps by the provider or by the beneficiary, collaboration with the beneficiary, collaboration with other provider(s), and any update to the problem list as appropriate.

Previous Entries: (Select Note) ▼

Saving/Finalize

At the bottom of the service, you will have the following buttons
(see pg. 41 of the CG Manual for more Information on each button)

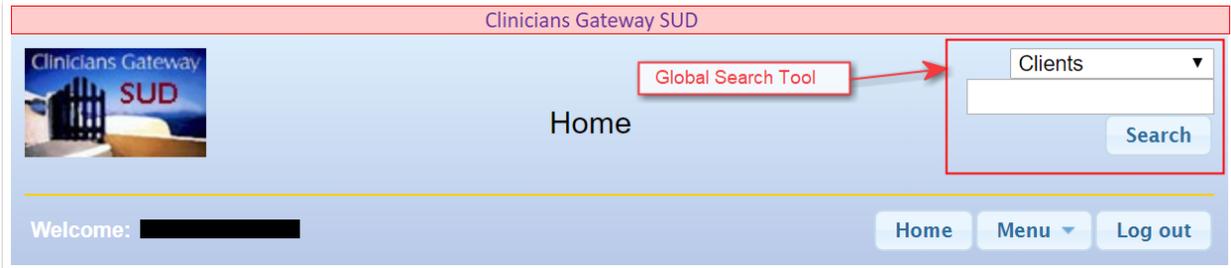


When you are ready to **submit billing** and **all** documentation is complete select 'Finalize'

Services Search

*Note – all client information on the following pages are test clients with test data; no real clients will be used.

Services search by client



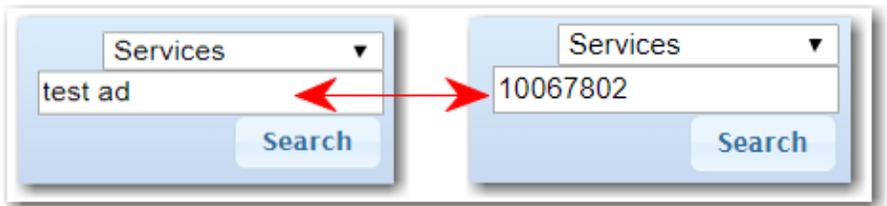
At the top right of Clinician’s Gateway is what we refer to as the ‘Global Search Tool’. This is where you can search for various information based on a specific Client Name or Number.



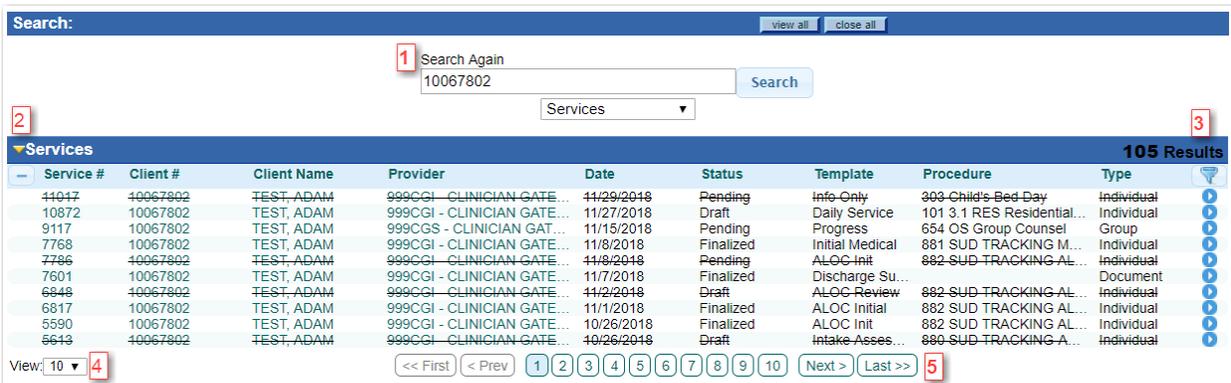
Here are the various options you can search. The most common selections are Clients, Treatment Plans, Services, and occasionally Staff or Providers.

For this guide we will select Services. In the text box below you will enter the Name (Lastname Firstname) or the Client/SmartCare Number. When you have your Client entered click ‘Search’.

In this example, I will look for my client Adam Test’s services. **Please note if you want only an exact match please use the Client/SmartCare number.*



After clicking search, you will be taken to the results Page:



1. Search again: this can be used to change the client you are searching for or if you search by name and decide to switch to using a specific number (in cases where two clients have identical names)
2. This is the Search Results list. You will be given every service this client has received, written by staff in your agency.
 - a. The columns give you a description of the service including, Service date, Provider/RU, Status, Template, Procedure, etc.
 - b. *Note the Services with a strike throughout were deleted services and are only visible by IS Staff
3. This is the count of services returned, looks like Adam Test has 105 Notes entered in Clinician's Gateway
4. The view is the limit of how many results are displayed on each page. This is defaulted to ten but can be adjusted to up to fifty results per page.
5. At the bottom of the results pane is the page count. You can click next, previous, or jump to a specific page.

To view a Service Click either the Service # or the Blue 'Action'

Services									106 Results
Service #	Client #	Client Name	Provider	Date	Status	Template	Procedure	Type	
12900	10067802	TEST, ADAM	999CGS - CLINICIAN GAT...	12/5/2018	Pending	Progress	654 OS Group Counsel	Group	
44047	10067802	TEST, ADAM	999CGI - CLINICIAN GATE...	44/29/2018	Pending	Info-Only	303-Child's Bed-Day	Individual	
10872	10067802	TEST, ADAM	999CGI - CLINICIAN GATE...	11/27/2018	Draft	Daily Service	101 3.1 RES Residential...	Individual	
9117	10067802	TEST, ADAM	999CGS - CLINICIAN GAT...	11/15/2018	Pending	Progress	654 OS Group Counsel	Group	

To view a Service Click either the Service # or the Blue 'Action Button'

By Reporting Unit

On your home page scroll down to the section labeled 'Advanced search'

Advanced Search

For: Clients Type: Any Status: Any Date: Anytime

at provider: Everywhere Search

For: Clients

ider: Clients

rch Services

Treatment Plans

You can search 'For:' the following:

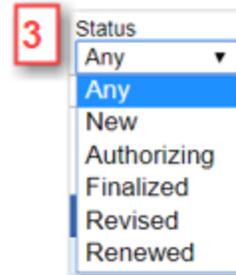
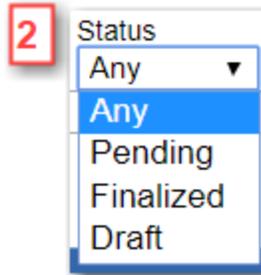
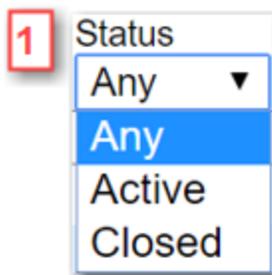
- Clients
- Services or
- Treatment Plans



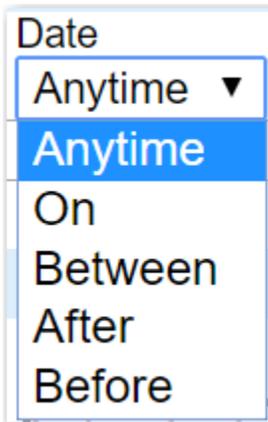
The Options for 'Type' include Any, Mine, and My Serviceable:

- Any – All clients, services, or plans at the selected RU
- Mine – the Services or plans you are the Author, or the clients assigned to you from SmartCare on the episode
- My Serviceable – Only an option when searching for clients, this will list all clients you can write notes for

Status will change depending on what you are searching for:



1. Searching for Clients will have the options Any, Active/Open, and Closed.
2. Searching for Services will have the options Any, Pending, Finalized, and Draft
3. Searching for Treatment Plans will have the options Any, New, Authorizing, Finalized, Revised, and Renewed



The following Date Selection are available:

- Anytime – All Clients, Services, or Plans in the selected RU
- On – All clients, Services, or Plans on a specific date. Selecting this option will add a Date Field
- Between – All clients, Services, or Plans between, and including, two specified dates. Selecting this option will add two Date Fields
- After - All clients, Services, or Plans on and after the specified date. Selecting this option will add a Date Field
- Before - All clients, Services, or Plans on and before the specified date. Selecting this option will add a Date Field

As an Example, I will search for **all Services** in a **Test RU 999CGS** for the **first week of November**

Advanced Search

For: Type: Status: Date: and

at provider:

To do this I select Services, leave Type and Status as Any, select Date Between* 11/04/2018 and 11/10/2018, and select my Provider-RU 999CGR. Now Click Search to return your results.

*note the results will include 11/04 and 11/10 services

Search for:

1 For: Services Type: Any Status: Any Date: Between 11/04/2018 and 11/10/2018
 at provider: 999CGR CLINICIAN GATEWAY TEST SUD RES Search

2 **Service Records** 13 Results

Service #	Client #	Client Name	Provider	Date	Status	Template	Procedure	Type
13030	10087955	TEST, GANDALF	999CGR - CLINICIAN GAT...	11/10/2018	Draft	Daily Service	101 3.1 RES Residential...	Individual
11917	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/10/2018	Finalized	Daily Service	101 3.1 RES Residential...	Individual
11926	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/10/2018	Finalized	Weekly Sum...		Document
13029	10087955	TEST, GANDALF	999CGR - CLINICIAN GAT...	11/9/2018	Draft	Daily Service	101 3.1 RES Residential...	Individual
13028	10087955	TEST, GANDALF	999CGR - CLINICIAN GAT...	11/8/2018	Draft	Daily Service	101 3.1 RES Residential...	Individual
11916	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/8/2018	Finalized	Daily Service	101 3.1 RES Residential...	Individual
11914	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/7/2018	Finalized	Daily Service	101 3.1 RES Residential...	Individual
11913	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/6/2018	Finalized	Daily Service	101 3.1 RES Residential...	Individual
13027	10087955	TEST, GANDALF	999CGR - CLINICIAN GAT...	11/6/2018	Draft	Daily Service	101 3.1 RES Residential...	Individual
13021	10087955	TEST, GANDALF	999CGR - CLINICIAN GAT...	11/5/2018	Finalized	Daily Service	101 3.1 RES Residential...	Individual
11912	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/5/2018	Finalized	Daily Service	101 3.1 RES Residential...	Individual
11885	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/4/2018	Finalized	Daily Service	101 3.1 RES Residential...	Individual
13020	10087955	TEST, GANDALF	999CGR - CLINICIAN GAT...	11/4/2018	Finalized	Daily Service	101 3.1 RES Residential...	Individual

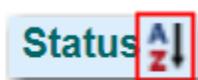
View: 20 4 << First < Prev 1 Next > Last >> 5

1. Search for: this can be used to change the criteria you are searching, if you change your criteria make sure to click search again to get your new results
2. This is the Search Results list. You will be given all items meeting your criteria
 - a. The columns give you a description of the service, client, or plans including, Service/Plan/Client #, Provider/RU, Status, etc.
3. This is the count of records returned; looks like this RU has 13 Services the first week of November
4. The view is the limit of how many results are displayed on each page. This is defaulted to ten but can be adjusted to up to fifty results per page.
5. At the bottom of the results pane is the page count. You can click next, previous, or jump to a specific page.

Sorting

When you have large amounts of data to go through the sorting and filter tools will be very helpful.

In order to start a sort simply click on the column name to start sorting.



The first time you click a column it will sort A to Z alphabetically, or special sorts based on column (e.g. dates oldest to newest, or Status sorted Draft, Pending, Finalized)



The Second time you click a column it will sort Z to A alphabetically, or special sorts based on column (e.g. dates newest to oldest or Status sorted Finalized, Pending, Draft)



The Third click will remove the sort



Next, you may want to sort multiple columns, grouping all the services of this type, by this author, etc. If you click multiple columns, you will see an index number appear next to the sort icon.

Example: Sort Status Z to A, making finalized services at top, then sort by client name grouping the finalized service by client

Service #	Client #	Client Name	Provider	Date	Status
13021	10087955	TEST, GANDALF	999CGR - CLINICIAN GAT...	11/5/2018	Finalized
13020	10087955	TEST, GANDALF	999CGR - CLINICIAN GAT...	11/4/2018	Finalized
11914	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/7/2018	Finalized
11913	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/6/2018	Finalized
11885	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/4/2018	Finalized
11912	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/5/2018	Finalized
11917	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/10/2018	Finalized
11926	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/10/2018	Finalized
11916	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/8/2018	Finalized
13030	10087955	TEST, GANDALF	999CGR - CLINICIAN GAT...	11/10/2018	Draft
13028	10087955	TEST, GANDALF	999CGR - CLINICIAN GAT...	11/8/2018	Draft
13027	10087955	TEST, GANDALF	999CGR - CLINICIAN GAT...	11/6/2018	Draft
13029	10087955	TEST, GANDALF	999CGR - CLINICIAN GAT...	11/9/2018	Draft

As you can see above the first sort is on Status Z to A (1) this orders the services Finalized on top. The next sort is Client Name A to Z (2) now this takes the subset, sorted by finalized services, and groups Services together by client name alphabetically. ***Note Gandalf has two groups because Finalized and Draft services are sorted separately**

 When you are ready to remove sorts and return to the default results order click this icon [-] on the far left of the results window.

Service #	Client #	Client Name	Provider	Date	Status	Template
13030	10087955	TEST, GANDALF	999CGR - CLINICIAN GAT...	11/10/2018	Draft	Daily Service
11917	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/10/2018	Finalized	Daily Service
11926	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/10/2018	Finalized	Weekly Sum...
13029	10087955	TEST, GANDALF	999CGR - CLINICIAN GAT...	11/9/2018	Draft	Daily Service
13028	10087955	TEST, GANDALF	999CGR - CLINICIAN GAT...	11/8/2018	Draft	Daily Service
11916	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/8/2018	Finalized	Daily Service
11914	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/7/2018	Finalized	Daily Service
11913	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/6/2018	Finalized	Daily Service
13027	10087955	TEST, GANDALF	999CGR - CLINICIAN GAT...	11/6/2018	Draft	Daily Service
13021	10087955	TEST, GANDALF	999CGR - CLINICIAN GAT...	11/5/2018	Finalized	Daily Service
11912	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/5/2018	Finalized	Daily Service
11885	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/4/2018	Finalized	Daily Service
13020	10087955	TEST, GANDALF	999CGR - CLINICIAN GAT...	11/4/2018	Finalized	Daily Service

Filtering

Another handy tool is the filter; this is the icon, on the far right, that looks similar to a funnel. Clicking this will expand the columns to enter keywords used to filter results.



Service #	Client #	Client Name	Provider	Date	Status	Template	Procedure	Type
<input type="text"/>								



Once you have the expanded columns you can enter text to filter on, select a date, or select an option from a dropdown list. Once you have criteria to filter click this icon under the funnel, to apply filter.

In this example, I will filter my results to display Finalized, Daily Services (This is the short name for Service Note Daily RES)

Service #	Client #	Client Name	Provider	Date	Status	Template	Procedure	Type
11917	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/10/2018	Finalized	Daily	101 3.1 RES Residential...	Individual
11916	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/8/2018	Finalized	Daily Service	101 3.1 RES Residential...	Individual
11914	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/7/2018	Finalized	Daily Service	101 3.1 RES Residential...	Individual
11913	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/6/2018	Finalized	Daily Service	101 3.1 RES Residential...	Individual
13021	10087955	TEST, GANDALF	999CGR - CLINICIAN GAT...	11/5/2018	Finalized	Daily Service	101 3.1 RES Residential...	Individual
11912	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/5/2018	Finalized	Daily Service	101 3.1 RES Residential...	Individual
11885	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/4/2018	Finalized	Daily Service	101 3.1 RES Residential...	Individual
13020	10087955	TEST, GANDALF	999CGR - CLINICIAN GAT...	11/4/2018	Finalized	Daily Service	101 3.1 RES Residential...	Individual

I selected Finalized from the dropdown under the Status column and entered the text 'Daily' under Template. Now we can see there are 8 of 13 results; meaning 5 services in my original search do not meet the criteria. You can use these functions to verify services have been entered in Clinician's Gateway.



Again, when you are ready to remove Filters and return to the default results click this icon [-] on the far left of the results window.

Service #	Client #	Client Name	Provider	Date	Status	Template	Procedure	Type
13030	10087955	TEST, GANDALF	999CGR - CLINICIAN GAT...	11/10/2018	Draft	Daily Service	101 3.1 RES Residential...	Individual
11917	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/10/2018	Finalized	Daily Service	101 3.1 RES Residential...	Individual
11926	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/10/2018	Finalized	Weekly Sum...		Document
13029	10087955	TEST, GANDALF	999CGR - CLINICIAN GAT...	11/9/2018	Draft	Daily Service	101 3.1 RES Residential...	Individual
13028	10087955	TEST, GANDALF	999CGR - CLINICIAN GAT...	11/8/2018	Draft	Daily Service	101 3.1 RES Residential...	Individual
11916	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/8/2018	Finalized	Daily Service	101 3.1 RES Residential...	Individual
11914	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/7/2018	Finalized	Daily Service	101 3.1 RES Residential...	Individual
11913	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/6/2018	Finalized	Daily Service	101 3.1 RES Residential...	Individual
13027	10087955	TEST, GANDALF	999CGR - CLINICIAN GAT...	11/6/2018	Draft	Daily Service	101 3.1 RES Residential...	Individual
13021	10087955	TEST, GANDALF	999CGR - CLINICIAN GAT...	11/5/2018	Finalized	Daily Service	101 3.1 RES Residential...	Individual
11912	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/5/2018	Finalized	Daily Service	101 3.1 RES Residential...	Individual
11885	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/4/2018	Finalized	Daily Service	101 3.1 RES Residential...	Individual
13020	10087955	TEST, GANDALF	999CGR - CLINICIAN GAT...	11/4/2018	Finalized	Daily Service	101 3.1 RES Residential...	Individual

Empty Note Screenshots

Here are empty examples of the Notes outlined in this Manual...

Service Note Daily RES

Service #: New Title: Service Note Daily RES CalAIM 24-04		Potential Harm: (Select One) ▼								
Client: <table border="1"><tr><td>Number</td><td>Last Name</td><td>First Name</td><td>...</td></tr><tr><td>Unknown</td><td></td><td></td><td></td></tr></table>		Number	Last Name	First Name	...	Unknown				Service date: 02/11/2025
Number	Last Name	First Name	...							
Unknown										
Procedures: (Select Procedure) ▼		Util. review date:								
Service Location: (Select Location) ▼		Plan due date:								
Mode of Delivery: (Select One) ▼										
Med. Compliant: Yes ▼ Side Effects: No ▼										
Pregnant/Post-Partum? <input type="checkbox"/>										
Principal Diagnosis: (Select ICD-... ▼) (Select ICD-10 description ▼)										
Billing time										
Primary Clinician: ▼										
Provider: Select a Provider ▼										
Instructions & Pre-Existing Diagnoses										
Progress notes must be completed within 3 business days of providing a service, with the exception of notes for crisis services, which must be completed within 24 hours.										
Primary FF/Contact Time: <input type="text"/> Hours:Minutes	Services were provided in: English ▼ by <input type="checkbox"/> interpreter <input type="text"/> or <input type="checkbox"/> clinician	<u>Episode Diagnosis Information</u> Primary Secondary Tertiary SU GMC								
ICD-10: DSM 5:										
Secondary Procedure (Child's Bed Day): None ▼										

Summary of Daily Services

Instructions: The daily note must be completed by a LPHA/counselor who provided a service on the date this note is documenting or by a supervisor who worked that day. Additional services may be added if a beneficiary receives more than 1 service on a day.

Daily Service 1	
Type of service rendered	Session Topic/Purpose
<input type="text" value="Select Session Type"/>	<input type="text" value="Select Session Topic"/>
Individual or Group: <input type="text" value="Select Indiv/Group"/>	Location: <input type="text" value="Residential"/>
Primary staff: <input type="text" value="Select One"/>	Co-staff: <input type="text" value="Select One"/>
	Duration: <input type="text"/>
Comments (Optional): <input type="text"/>	

TOTAL DURATION:

Daily Narrative

Instructions: A brief description/summary of how all SUD residential services provided throughout the day addressed the member's behavioral health needs (e.g., symptom, condition, diagnosis, and/or risk factors).

	Previous Entries: <input type="text" value="(Select Note)"/>
<input type="text"/>	

A brief summary of next steps

Instructions: Including, but not limited to, planned action steps by the provider or by the beneficiary, collaboration with the beneficiary, collaboration with other provider(s), and any update to the problem list as appropriate.

	Previous Entries: <input type="text" value="(Select Note)"/>
<input type="text"/>	

Cancel	Spell Check	Save and Continue	Save as Pending	Save as Draft	Finalize
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