

DIRECT SERVICE NOTES

1. After notes are migrated from CG-InSyst to CG-SmartCare, they will be in the Pending Services List on the Home page of the author, will have a service # starting with 5 and a blue dot. All migrated notes will have the status of Draft to indicate that work is needed to adapt to the new CalAIM procedure codes and billing formats. To Edit the note, click on the service # or the blue dot to move to the View Service Screen.

Enter New Service:
Type of Service: Select ----
To start a new service note, select the type of service.

Service #s starting with 5 were from CG-InSyst. Blue dot indicates are are editable

Click on Service # or blue dot to view to start editing.

Pending Services 346 Results

Svc #	Gsr #	Client #	Client Name	Provider	Date	Template	Procedure	Sort	Reviewer
5701171				EDEN MHS ADU...	7/11/2023	Physician ...	99214 E/M ES...	○ Draft	●
5701200				EDEN MHS ADU...	7/11/2023	Physician ...	(99212- 9921...	○ Draft	●
5701234				EDEN ADULT ME...	7/11/2023	Physician ...	99213 E/M ES...	○ Draft	●
5701378				EDEN MHS ADU...	7/11/2023	Physician ...	99214 E/M ES...	○ Draft	●
5701416				EDEN MHS ADU...	7/11/2023	Physician ...	MEDICATION ...	○ Draft	●
5701523				EDEN ADULT ME...	7/11/2023	Physician ...	99214 E/M ES...	○ Draft	●
5701529				EDEN ADULT ME...	7/11/2023	Physician ...	MEDICATION ...	○ Draft	●
5701581				EDEN MHS ADU...	7/11/2023	Physician ...	MEDICATION ...	○ Draft	●
5701598				EDEN MHS ADU...	7/11/2023	Physician ...	99214 E/M ES...	○ Draft	●
5701606				EDEN MHS ADU...	7/11/2023	Indirect	695 - Paid Tim...	○ Draft	●
5702176				OAKLAND ADUL...	7/12/2023	Physician ...	MEDICATION ...	○ Draft	●
5702180				OAKLAND ADUL...	7/12/2023	Physician ...	MEDICATION ...	○ Draft	●
5702267				EDEN MHS ADU...	7/12/2023	Physician ...	99214 E/M ES...	○ Draft	●
5702368				EDEN MHS ADU...	7/12/2023	Physician ...	99214 E/M ES...	○ Draft	●
5702396				OAKLAND ADUL...	7/12/2023	Physician ...	CG INFORMA...	○ Draft	●

View: 15 << First < Prev 1 2 3 4 5 6 7 8 9 10 Next > Last >>

2. Note the procedure code, service location, duration and if there are any add-on codes on the migrated notes before proceeding to Edit. Then click **"Edit Service"** on the bottom right of the screen.

Clinicians Gateway View Draft Service

Welcome: Home Menu Log out

Individual Service (5701171), Primary Clinician: Type: Physician's Progress Note

Client: EDEN MHS ADULT SERVICE TEAM 1
Provider: EDEN MHS ADULT SERVICE TEAM 1
Procedure: 99214 E/M EST OP MOD COMPL 25M
Service Location: Office Mode of Delivery:
Emergency: No

Service 7/11/2023
Med. Compliant: N/A Side Effects: N/A

Role	Staff #	Staff Name	Preferred Name	NPI	Time	Approved
Primary Clinician					00:39 Edit	☑
					Service Travel Documentation Clinician time	00:39

Additional E/M, Psychotherapy or Crisis Minutes: None 2nd FF/Contact/E-M Time:
Interactive Complexity: Not Present

Cancel Default Summary Custom Summary Print Spell Check Delete Service Edit Service Archive Approve Addendum

3. Update the billing details

- A new code must be chosen on each note. The * indicates that the displayed code came from InSyst. It needs to be re-chosen to get a SmartCare code ID in the CG-SmartCare database.
- Reference the CPT code guidance from ACBH QA and BBS units** for which codes are allowed for your staff type and for code combinations that cannot be used on the same day (lock-outs). CPT Code training and code charts can be found on the Providers Website in the Quality Assurance Training page. [ACBH Providers Website - Quality Assurance Training \(acbhcs.org\)](http://acbhcs.org) Some restrictions have not yet been applied in SmartCare so they are not available yet in CG.
- Verify the Service Location. SmartCare has different choices, so it may need to be changed.
- Add Mode of Delivery
- Verify or add the Principal Diagnosis
- A Service Start of midnight was defaulted. You may leave it or update it as you wish.
- The service Duration may need to be spread across the Duration, Travel and Documentation fields.
- Sometimes the new primary Procedure Code accepts less time than the old code. If the new primary code doesn't allow the amount in the service duration, you will get an error message when you try to Submit, Save as Pending, or Finalize.
- You may need an Add-On code. If so, spread the service Duration across the primary and add-on codes.

Service #: 5701171 Title: Physician's Progress Note Potential Harm:

Service date: 07/11/2023

Client: [Redacted] [X] [More]

Client opened: 1/11/2017

Util. review date:

Client Plan due date: 12/31/2022
C/P has expired!

Procedures: *99214 E/M EST OP MOD COMPL 25M

Update the code. The * indicates that this is the old InSyst code

Service Location: Office (Primary)

Update the Location if needed since new types exist for CalAIM

Mode of Delivery: (Select One)

Add Mode of Delivery

Med. Compliant: N/A Side Effects: N/A

Emergency?

Principal Diagnosis: F25.1 Schizoaffective disorder, depressive type

Verify or Add Principal Diagnosis

Billing time

Primary Clinician: [Redacted]

Optional to update the defaulted Service Start

Provider: EDEN MHS ADULT SERVICE TEAM 1 (0112T1)

Service Start: 12:00 AM

Duration: 00:39

Travel Time: 00:00

Documentation Time: 00:00

Distribute the duration across the three time fields as appropriate. New primary codes may result in some duration shifting to an Add-on code

Clinician Time: 00:39

Add Additional Clinicians

Care Team Members 0 Result

Name	Company	Phone	Role	Removal Date
No Records				

View: 10

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Additional E/M, Psychotherapy or Crisis Minutes: None

2nd FF/Contact/E-M Time: []

Interactive Complexity: Not Present

Add the Primary code duration + the Add-On code duration to calculate the Contact Time duration.

Billing time

Primary Clinician: 10904 - Peterson, Camille E
 Provider: VALLEY ADULT MEDICATION ONLY (0132M1)

Service Start: 12:00 AM
 Duration: 00:15
 Travel Time: 00:00
 Documentation Time: 00:00
 Clinician Time: 00:15

Add-on Codes: G2212 Prolonged E/M (each add'l 15min) Add-On Time: 00:14
 Interactive Complexity: None

Instructions and Pre-Existing Diagnoses
 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.

Primary FF/Contact/E-M Time: 00:39
 Hours:Minutes

Services were provided in: English
 by interpreter or clinician

ICD-10: Primary Secondary Tertiary SU GMC
 DSM 5:

- 4. Move to Finalization:** After making changes to the billing header, process as your program normally does. Either Submit for Review, Save as Pending, or Finalize.

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

Note is complete.

HELPFUL HINT:

Use the Home and End keys on your keyboard to quickly move to the top or bottom of a screen or to the top or bottom of a drop-down menu.

- When you first land on the View Draft Service screen, hit “End” key to fly to the bottom of the screen where the Edit button is.

Clinicians Gateway View Draft Service Clients Search

Welcome: Home Menu Log out

- In a drop-down menu, hit the “Home” key on your keyboard to go to the top of the list.

Procedures: Select Procedure

- Select Procedure
- H0034 Medication Train/Supp. per 15 Min (99212- 99215) E/M Est Office/OTP
- 90792 Psy Diag Eval w-medical, 15 min. 300 - No Show
- 197 - CG Informational Note
- (98966 - 98968) Tel. Assess and Mng Svc., 5-30 min (99202 - 99205) E/M New Office/OTP
- (99212- 99215) E/M Est Office/OTP
- (99307 - 99310) E/M SNF Sub Minor Comp
- (99441 - 99443) Tel. Assess and Mng Svc., 5-30 min
- 197 - CG Informational Note

INDIRECT SERVICE NOTES

Indirect Services are processed in the same manner as Direct Service notes, but with fewer fields.

1. Click on the blue dot or the Service # to View the Note.

A screenshot of a 'Pending Services' table. The table has columns: Svc #, Gsr #, Client #, Client Name, Provider, Date, Template, Procedure, Sort, and Reviewer. The 'Review' column shows 'Draft' for all entries. A red box highlights the 'Indirect' status in the 'Procedure' column for the last row. Red arrows point from the 'Svc #' and 'Review' columns to the highlighted row.

Svc #	Gsr #	Client #	Client Name	Provider	Date	Template	Procedure	Sort	Reviewer
5710954				OAKLAND ADUL...	7/21/2023	Physician ...	MEDICATION ...	○ Draft	
5710957				OAKLAND AD M...	7/21/2023	Physician ...	MEDICATION ...	○ Draft	
5711177				OAKLAND LEVE...	7/21/2023	Physician ...	99214 E/M ES...	○ Draft	
5711218				OAKLAND ADUL...	7/21/2023	Indirect	Paid Time Off	○ Draft	

2. Note the Procedure, Location, and Time (Sometimes the Procedures don't get displayed on the edit screen. If the procedure doesn't forward to the edit screen, you can arrow back to see it.)

A screenshot of the 'Indirect Service (5711218) Primary Clinician: [Name] Type: Indirect Note' edit screen. Fields include: Provider: OAKLAND ADULT SERVICE TEAM 2; Procedure: Paid Time Off; Service Location: Home; Mode of Delivery: [blank]; Emergency: No; Pregnant/Post-Partum: No. A table below shows the Primary Clinician: Roxas, Luisito, MD (NPI: 1295713386) with a Time of 00:30. A red box highlights the 'Time' field.

Role	Staff #	Staff Name	Preferred Name	NPI	Time
Primary Clinician	2651	Roxas, Luisito, MD		1295713386	00:30

3. Click Edit Service

A screenshot of a service action menu with buttons: Cancel, Default Summary, Custom Summary, Print, Spell Check, Delete Service, Edit Service, Archive, Approve Addendum. The 'Edit Service' button is circled in red.

4. Verify and update the billing data for Procedure and Location. The time is not editable.

A screenshot of the billing data form. Fields include: Client (Unknown), Procedures (Select Procedure), Service Location (Patient's Home), Client Location (Select Location), Reporting Unit (OAKLAND ADULT SERVICE TEAM 2), Primary Clinician (Roxas Luisito), Service Date (07/21/2023), Recipient Code, and Primary Clinician Time (00:30). Annotations include: 'Reselect the Procedure' pointing to the dropdown arrow; 'Carefully check the Service Location, options have changed. Mapping may not be correct' pointing to the Service Location dropdown; and 'Optional Field' pointing to the Reporting Unit field.

5. **Move to Finalization:** After making changes to the billing header, process as your program normally does. Either Submit for Review, Save as Pending, or Finalize.

A screenshot of the finalization buttons: Cancel, Spell Check, Save and Continue, Save as Pending, Save as Draft, and Finalize. A text box above the buttons says: 'After making changes move to Submit for Approval, Save as Pending, or Finalize as you usually do depending on your program'. A 'Submit' button is also visible, and a checkbox 'Note is complete.' is checked.

CLIENTS WHO WERE REGISTERED IN INSYST AFTER THE CUT-OFF DATE:

Clients were last migrated from InSyst to SC on 7/27/23. Providers were informed that clients should no longer be registered in InSyst. A few clients were registered and opened in InSyst after the cutoff date. Those clients IDs and enrollments do not exist in SmartCare and therefore also do not exist in CG-SC.

- When the InSyst client IDs and enrollments do not exist in CG-SmartCare, their notes will migrate but the client ID # will not be included on the note.
- The clients will need to be registered in SmartCare to obtain an SC client ID # and enrolled in the program.
- Those IDs and enrollments will then transfer to CG-SC.
- After the new SmartCare client ID # and program enrollment has transferred to CG-SC, clinicians will need to find the notes in in CG-SC and add the new SmartCare client ID # using the ellipsis button

Service #: 8000007 Title: Clinician's Progress Note CalAIM 23-07 Potential Harm:

Service date: 07/02/2023

Util. review date:

Client Plan due date:

Client: Number: Unknown Last Name: TESTING First Name: TEN

Procedures: 90792 Psy Diag Eval w-medical, 15 min.

Search for client

Search for clients containing: testing, ten Search

type name, click Search

Client #	Client Name	Status	Gender	Age
75138646	TESTING, TEN	Active	Male	17

Cancel

Click on name in results to add to note

NOTES BY STAFF WHO HAVE LEFT YOUR ORGANIZATION:

We are researching a possible solution for notes that were completed by a staff person who has left your organization. We will post a separate notice when the issue has been resolved.