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CLINICIAN'S GATEWAY

What is Clinician's Gateway?

Clinician's Gateway is an integrated "On-line Progress Notes System".

The primary objective of Clinician's Gateway is to allow HIPAA-compliant electronic entry of clinical notes.

Clinician's Gateway is designed to reduce audit exceptions due to missing data or missing notes, and assist management and staff in capturing all staff activity.

Clinician's Gateway is a stand-alone front-end add-on to INSYST and is the first of a series of add-on packages that can be used instead of the standard built in data entry screens for INSYST.

Web Based application utilizing Electronic Signatures.

Allows Clinic Managers and QA/QI staff to review the work of treatment staff; a daily log report is available on demand to assist staff in capturing all staff activity.

Clinician's Gateway integrates progress notes with the INSYST billing module and can be used for approximately 100% of the data entry into INSYST.

HIPAA-compliant "Password Security" to keep your password unique and confidential. This is accomplished by allowing each User access to change their own Passwords whenever necessary.

New Modules

Treatment Plans - Coming Soon!

MHSA (Data Forms and Submission): installed 2008

MAA Claiming - Individual Staff Log Form: installed 2007

Have Questions? Need Help? Contact your Administrative Support Person. v1.0 2/13/2009



CLINICIAN'S GATEWAY

Features

Automated creation of direct services for individual, group and case review

Retrieval of notes for printing or review of work as well as for the sharing of information between colleagues. May also be used by medical records personnel who assist in the administrative work of treatment team members and by clinic managers to review the work of treatment staff

Fully integrated with current system (INSYST)

Built in timesheets to track service provider activity

Creation of client groups and group service notes with individual addendums

Multiple co-staff notes for case review

Medical spelling checker

Allows you to input correct Progress Note information into the computer and have it automatically bill the State.

Client information is available on any authorized computer with a few clicks no matter where the client is located.

Ability to track the number of completed Notes and view any Progress Notes for individual clients, or view by any given date range.

Ability to place uncompleted Progress Notes in Pending Mode to be completed at another time.
Addendums can be made to Finalized notes

View interval (time lapse) between date of service and date recorded.

View total hours accumulated per clinic, per staff, by month or day.

✤No lost Notes.

No more having to track down charts in order to review previous notes.

♦ All Progress Notes will be readable.

Reduced errors in billing.

◆Be in compliance with audits (a note for each billing).

♦MORE REVENUE.

Have Questions? Need Help? Contact your Administrative Support Person. v1.0 2/13/2009

LOGGING INTO CLINICIAN'S GATEWAY

Login – Security

Find the link to this page at <u>http://covenet</u>, click on Clinician's Gateway in the right hand column.

🚰 Clinician's Gateway version 3.0 (Login) - Microsoft Internet Explorer		_ 8 ×
<u>Eile Edit Vi</u> ew Favorites <u>I</u> ools <u>H</u> elp		-
← Back • => - ∞ 🗗 🚮 🔞 Search 💽 Favorites 🔇 🔂 • 🚑 🐨 • 📃 👯		
Address http://cg	è Go	Links »
Clinicians Gateway Welcome to Clinician's Gateway version 3.0 (Formerly OLPN)		
Staff ID #: Password: Log In		
		×
🖉 Done	anet	

- Log on page This invokes your digital signature.
- Keep your password secure Important: To be kept as secure as a bank card pin number.
- Passwords must be at least seven characters one uppercase and one lowercase alpha character, and one numeric character.
- If you have three failed attempts at entering your password, your account will be locked, and you will need to contact the helpdesk at (510) 567-8181 (tie line 38181) for assistance.



Client Face Sheet

	Gateway							Clients	<mark>1</mark> ▼					
	Home													
Welcom	e: Natalie Courson						Hom	e Help	Log Out					
Enter N	ew Service:													
Type of Ser Select	vice To start a new service note, se	ect the type of service												
Pending	Services 15 Results													
Srv.#▽	Procedure 🖓	Group Svc # 🍸	Client # 🍸	Client Name 🍸	Provider 🝸	Date 🍸	Sort 7	Туре 🍸						
284101	361 Medication Support		75087772	TEST CINDYTWO	99991 West County Mental Health Sv	3/8/2007		Indiv.	Update					
284109	361 Medication Support		75087772	TEST CINDYTWO	99991 West County Mental Health Sv	3/8/2007		Indiv.	Update					
284110	361 Medication Support		75087772	TEST CINDYTWO	99991 West County Mental Health Sv	3/8/2007		Indiv.	Update					
288470	361 Medication Support		75087772	TEST CINDYTWO	99991 West County Mental Health Sv	6/25/2007		Indiv.	Update					
289361	456 90853 GROUP PSYCHOTHERAPY	106	75130257	TESTY CINDY	0112M1 EDEN ADULT MEDICATION ONLY S	7/16/2007		Group	Update					
289363	456 90853 GROUP PSYCHOTHERAPY	107	75130257	TESTY CINDY	0112M1 EDEN ADULT MEDICATION ONLY S	7/16/2007		Group	Update					

- **1** To get to the client Face Sheet, select "clients" from the drop list.
- 2 Type the clients' last name first, then first name. (with a space in between...do not use a comma)
- **3** Click on Search

Clinicians Gateway			Search Results	3		Clients Search
Welcome: Natalie C	ourson					Home Help Log Out
Search for: test da	ive					view all close all
		Search	h Again			
		test c	lave	Search		
1			Clients 🗸			
▼Clients, All	1 Result					
Client # 🍸	Client Name 7	Status 🖓	Gender 🖓	Age 🖓	Services 🖓	Indv. Service
75122885	2 TEST DAVE	Active	М	59	1	Start
▼Clients, Service	able 1 Result					
Client # 🝸	Client Name 🖓	Status 🖓	Gender 🖓	Age 🖓	Services 🖓	Indv. Service
75122885	TEST DAVE	Active	М	59	0	Start
Client Plans	0 Results					
		PERSON	IAL INFO SECURITY (PASSWORI	D) GUIDES/HELP		

- **1** The search results screen will show the list of clients.
- 2 Click on the client's name to get the Face Sheet for that client.

🖉 Clinicia	n's Gateway version 3.2 (Client Inf	ormation Facesheet) -	Windows Internet F	ixplorer					- BX						
00	 Ittp://cg/CG-Training/FaceSheet.as 	px?CLIENT_NUMBER=75122	85				*	😽 🗙 Google	₽ -						
File 1	View Favorites Tools Help														
Google	8 -	🔽 Search 🔶 🧔 🔹 🛖	🦻 🔹 🏠 Bookma	arks 🔹 🔍 Find 🔹 💞 Check 🔹	📔 AutoFill 🔹				🔦 🔹 🔵 Sign In 🔹						
🚖 🏘	Clinician's Gateway version 3.2 (Client In	formation Fa						🟠 • 🔊 ·	🖷 🖶 🔹 🔂 Page 👻 🎲 Tools 👻						
				This sits is far training (
Clinician	s Gateway			This site is for training of	лцу				Clients						
	Client Information Facesheet Search														
Welcom	Welcome: Natalie Courson Help Log Out														
Switch to Ad	count View														
				CONSUMER INFORMATION	DN										
Aliases	TEST DAVE N	Number	7510005 //aam	ad an (/01/2005)		Date of	Birth	1/1/1050 (Age 50	2)						
Address	2008 UNKNOWN	SSN	000-00-0000	50 011 472 172003)		Gende	r	Male							
	OAKLAND 94606	Account	856458 (TEST DAV	/E)		Langua	ige	Unknown/Not Reported							
Phone		Marital	Unknown			Educat	ion	Grade 12							
Staff	Staff General	Disability	None			Ethnici	ty	Unknown							
RP Owes	\$0.00	Problem	None			Ethnic	Origin								
Medicaid	Coverage	nher	Eligib	le Nate	Special De	19500									
Covered			Liigio		Special Ne										
#	Cor	npany	Policy	/#	Effective			Expires							
				SIGNIFICANT OTHER											
Name	Relation	Addı	ess	Effective		E	xpires	PI	hone						
				CLINICAL HISTORY											
Status 🖓	Provider 🕎	Opened 🍸 Closed	🍸 🛛 Prim. Diag. 🍸	Clinician 🍸	Physician 🍸	Units 🍸	Last Service 🍸	Legal Status 🍸	Consent 🖓						
Open	99991 West County Mental Health Svs	3/29/2007	295.70	6624 SMITH AMBREE	0 Staff General	0	111510007	Voluntary	Temporary Conservatorship						
Open	01275 LA CHEIM DAY OAK PARK INT	10/1/2004	296.44	1221 DEFAULT CONVERSION	U Statt General	1	1/15/2007	Not Guilty	Unknown						
TOTAL EF	PISODE COUNT: 2														
MICROFIL	.M INFORMATION:														
			TE	STDAVE N (751228	85)										
			ELECTRON	IC PROTECTED HEALTH	INFORMATION										
			PERSONAL	. INFO SECURITY (PASSWORD)	GUIDES/HELP										

• To print the Face Sheet, click on file (1),

Clinician's Gateway version 3.2 (Client Information Facesheet) - Windows Internet Explorer												
🌀 🕤 👻 🙋 http://cg/CG-Training/Fac	eSheet.aspx?CLIENT_NUMBER=751228	185		🖌 🛃 🗙 Google	P -							
File Edit View Favorites Tools Hel	p											
New Tab Ctrl+T	🔽 🔮 Search 🕂 🦪 🔹 👘	🖌 🔊 🕈 🔀 Bookmarks 🔹 🖳 Find 🔹 💝 Check 🔹 🧏 Auto	oFill *		🖏 🔹 🔵 Sign In 🔹							
Open Ctrl+0	(Client Information Fa			🐴 • 🔊 - 🖶 • 🗟	Page + 🙆 Tools + '							
Edit with Microsoft Office Word					- w							
Save Ctrl+S		This site is for training only										
Save As		This site is for training only										
Close Tab Ctrl+W				Clie	ents 💌							
Page Setup	age Setup											
	k on Print	Client Information Facesheet			Search							
Print Preview	· · · · · · · · · · · · · · · · · · ·											
Send				Jame I I								
Import and Export				Hume								
Properties												
Work Offline												
EXIC		CONSUMER INFORMATION										
Aliases Name TEST DAVE N	Number	75422005 (Instantion 4/24/2005)	Date of Birth	1/1/1050 (Age 50)								
Address 2008 LINKNOWN	SSN	000_00_0000	Gender	Male								
04KLAND 94606	Account	856458 (TEST DAVE)	Language	Linknown/Not Reported								
Phone	Marital	Unknown	Education	Grade 12								
Staff Staff General	Disability	None	Ethnicity	Unknown								
RP Owes \$0.00	Problem	None	Ethnic Origin									

Medicaid Coverage												
Covered	Number	Eligible Date	Special Reason									

• Click on print.

🛃 Print	This site is for training only		
General Options Select Printer Add Printer St4650DN on coveprn Click on th printer you	Client Information Eacesheet e name of the u want to use	l	Clients V Search Home Help Log Out
Status: Ready Location: Across from Jennifer's Office Comment:	CONSUMER INFORMATION		
Page Range Image All Selection Current Page Pages: 1 Enter either a single page number or a single page range. For example, 5-12	885 (Issued on 4/21/2005) 10000 (TEST DAVE) In	Date of Birth Gender Language Education Ethnicity Ethnic Origin	1/1/1950 (Age 59) Male Unknown/Not Reported Grade 12 Unknown
Print C	lick on Print	Special Reason	
# Company	Policy #	Effective	Expires

• Then select the printer you want to send the form to, and click on "Print."

Alternately, you can use the printer icon and the Face Sheet will print at your default printer....

Clinician's Gateway version 3.2 (Client Information Facesheet) - Microsoft Internet Explorer File Edit View Favorites Tools Help Search Sear	Lick on the icon to print at the default printer.
Client Information	Clients Clients Clien
Welcome: Robert Forsythe	Home Help Log Out
Switch to Account View CONSUMER INFOR	MATION

Client Services Search

Home Help Log											
Enter New Service:											
Select To start a new service note, select the type	of service										
Pending Services 18 Results											
Srv. # ♀ Procedure ♀ Group Svc # ♀	Client # 🍸 🕚	Client Name 🍸	Provider 🝸	Date 🍸	Туре ү	Sort ∇ Reviewer ∇					
284109 361 Medication Support	75087772	TEST CINDYTWO	99991 - West County Mental Health Svs	3/8/2007	Clinician's Progress Note		Update				
284110 361 Medication Support	75087772	TEST CINDYTWO	99991 - West County Mental Health Svs	3/8/2007	Clinician's Progress Note		Update				
288470 361 Medication Support	75087772	TEST CINDYTWO	99991 - West County Mental Health Svs	6/25/2007	Clinician's Progress Note		Update				
289361 456 90853 GROUP PSYCHOTHERAPY 106	75130257	TESTY CINDY	0112M1 - EDEN ADULT MEDICATION ONLY SVS	7/16/2007	Clinician's Progress Note		Update				

- **1** To create a list of Services for a client, select "Services" from the drop list.
- **2** Type the client's last name first, then the first name. (with a space in between... do not use a comma)
- 3 -Click on Search.

1																				
Services Search																				
		All	• s	Servic	e An	whe	re	•	Reno	lered	for	Clie	nt N	ame	e or l	ID	S	earc	h	
Search Services by Date Click day to see services performed on that day																				
2	< May 2009					June 2009						July 2009								
2	Su	Мо	Tu	We 1	ħ Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su I	Mo	Tu	₩e	Th	Fr S	Sa
					1	2		1	2	3	4	5	6				1	2	3	4
	3	4	5	6	78	9	7	8	9	10	11	12	13	5	6	7	8	9	10 1	11
	10	11	12	13 f	4 15	16	14	15	16	17	18	19	20	12	13	14	15	16	17	18
	17	18	19	20 2	1 22	23	21	22	23	24	25	26	27	19	20	21	22	23	24 [25
	24	25	26	27 2	8 29	30	28	29	30					26	27	28	29	30	31	
	31																			

• **1** – Alternately, you can use the Services Search, or (**2**) Search Services by Date, at the bottom of the Home Page

Cinicians G	teway 201		Search Resu	lts		Clients Search And Tag	Search
Welcome:	Natalie Courson					Home Help	Log Out
Search for	: test dave				view all o	lose all	
	1		Search Again test dave Services	Search			
Services	, Finalized 📩	1 Result					
Srv. # 🍸	Client # 🍸	Client Name 🍸	Reporting Unit 🕎	Procedure 🖓	Date 🍸	Туре 🍸	Note
315281	75122885	TEST DAVE	99991 West County Mental Health Svs	Medication Support	3/23/2009	Indiv.	View
▼ Services	, Pending 2	0 Results					
Srv. # 🍸	Client # 🍸	Client Name		Procedure 🖓	Date 🍸	Туре 🝸	Note
▼ Services	, Draft 3	2 Results					
Srv. # 🍸	Client # 🍸	Client Name 💎	Reporting Unit 🖓	Procedure 🖓	Date 🖓	Туре 🍸	Note
315412		test dave	0108T1 OAKLAND ADULT SERVICE TEAM 1	CG PRE-EPISODE NOTE	5/28/200	9 Indiv.	View
315300	75122885	TEST DAVE	9999CG CLINICIAN GATEWAY TEST MHS AD	Crisis Stabilization	3/27/200	19 Indiv.	View

Search results list (1) Finalized, (2) Pending, and (3) Draft services separately.

4 – You also have the option of searching for a different client's services from this page.

Search and Tag

Search and Tag is used to collect, display and save sets of service notes so they may be viewed in sequence, such as a client's history of services. Notes can be filtered by one or more parameters. (Client, Service Dates, Note Status, Text, Clinician, Procedure, Record Type, Reporting Unit, Location)

DEFINE YOUR SEARCH CRITERIA

- 1. From your home screen, click on the "Search and Tag" button in the upper right hand corner.
- 2. The Services radio button should be checked.
- 3. Select the first search parameter by clicking on the "Select Search Item" drop down menu. Click on the parameter that you wish search, such as "Client."
- 4. Click on "Lookup" and enter the specific search item i.e. if client enter: last name first name-no comma, click "Search for Clients," and wait for the list of possible clients to appear.

Check the box for the appropriate client and click OK.

- 5. Choose your next parameter, if desired, to narrow your search, by clicking on the "Select Search Item" drop down menu. Click on the parameter that you wish search, such as "Service Date." i.e.. choose whether you would want to see services on, between, after, or before a certain date and click on the calendars icons to define the dates.
- 6. Continue until you have narrowed your search as many ways as desired.
- 7. Click the Search button to assemble your results.

REVIEW, PRINT OR SAVE YOUR RESULTS

- 1. To sort your items by a certain topic, click the top of that column (e.g. Date of Service)
- 2. Check the items that you wish to view or save.
- 3. Click on one of the Review/Print buttons (all checked items or all results).
- 4. Choose "Open" to view them or "Save" as desired.
- 5. To read them, use the big blue arrows at the top of the page to move through the documents.
- 6. Click the Printer Icon or File/Print.

TO SAVE A COLLECTION

- 1. To retain your collection in Search and Tag for later reading, click the blue <u>message "click</u> <u>here to add a new collection name</u>"
- 2. Enter the name of the collection and click OK
- 3. Click the "Save Tagged" button and all items checked will be moved to the collection. You can do this multiple times or "tag" and move them all together.

TO RETRIEVE A PREVIOUSLY SAVED COLLECTION

- 1. Click on the words "select an existing collection name"
- 2. The Drop Down menu indicator appears. Click on the down arrow.
- 3. Click on the collection that you would like to view.

INDIVIDUAL NOTES USING CLIENT NAME OR NUMBER

Individual Notes Using Client Name or Number

Clinicians	Gateway			<mark>1</mark> Home			Clients	Search
Welcome	Natalie Courson						Home Help	Log Out
Enter N	ew Service:							
Type of Service Select	To start a new service note, se	lect the type of service						
Pending	Services 12 Results	;						
Srv. # 🍸	Procedure 🕎	Group Svc # 🍸	Client # 🍸	Client Name 🍸	Provider 🍸	Date 🍸	Sort 🍸 🛛 Type 🍸	
288470	361 Medication Support		75087772	TEST CINDYTWO	99991 West County Mental Health Sv	6/25/2007	Indiv.	Update
289361	456 90853 GROUP PSYCHOTHERAPY	106	75130257	TESTY CINDY	0112M1 EDEN ADULT MEDICATION ONLY S	7/16/2007	Group	Update
289363	456 90853 GROUP PSYCHOTHERAPY	107	75130257	TESTY CINDY	0112M1 EDEN ADULT MEDICATION ONLY S	7/16/2007	Group	Update
289364	456 90853 GROUP PSYCHOTHERAPY	107	75135386	TESTCASE DAVE	0112M1 EDEN ADULT MEDICATION ONLY S	7/16/2007	Group	Update
293490	456 90853 GROUP PSYCHOTHERAPY	160	75130257	TESTY CINDY	0112M1 EDEN ADULT MEDICATION ONLY S	10/4/2007	Group	Update
293491	456 90853 GROUP PSYCHOTHERAPY	160	75135386	TESTCASE DAVE	0112M1 EDEN ADULT MEDICATION ONLY S	10/4/2007	Group	Update
295244	444 90804 Indiv Psy 20-30 min		75130257	TESTY CINDY	0112M1 EDEN ADULT MEDICATION ONLY S	10/29/2007	Indiv.	Update
298095	444 90804 Indiv Psy 20-30 min		75130257	TESTY CINDY	0112M1 EDEN ADULT MEDICATION ONLY S	12/10/2007	Indiv.	Update
323901	274 Psych Serv Medicare Component		75135386	TESTCASE DAVE	99996 Habilitative Day Treatment	9/24/2008	Indiv.	Update
343508	571 Brokerage Services		75087772	TEST CINDYTWO	0112M1 EDEN ADULT MEDICATION ONLY S	10/14/2008	Indiv.	Update
			<< F	irst < Prev -12-	Next > Last >>			
Advance	ed Search							
	For	Туре	Status	Provider	Date			
	Client	s 💌 Any	Any 💽	Everywhere	Anytime	Search		
Service	s Search							
		All	Service Anyw	here 🔽 Rendered fo	r Client Name or ID Search			
Search S	ervices by Date Click day to see services per	ormed on that day						
		<	March 2009	April 2009	May 2009			
		Su Mo	Tu We Th Fr	Sa Su Mo Tu We Th	Fr Sa Su Mo Tu We Th Fr Sa			
				1 2	3 4 1 2			
		1 2	3 4 5 5	/ 0 6 / 8 9	10 11 3 4 5 6 7 8 9 17 19 10 11 12 12 14 15 18			
		0 9 15 16	17 18 19 20	21 19 20 21 22 23	24 25 17 18 19 20 21 22 23			
		22 23	24 25 26 27	28 26 27 28 29 30	24 25 26 27 28 29 30			
		29 30	31		31			

- **1** This is your home page.
- 2 Click on the drop arrow to select "Individual" for the type of service.

Clinicians	Gateway						Clients	▼
				Home	9			Search
Welcom	x Natalie Courson						Home Help	Log Out
Enter N Type of Ser Individual	ew Service: 1 vice Primary Clinician 1 TEST NATALIE Edit Primary Clinician Lis	Client test cindy	2	Note Template Clinician's Progr	3 ess Note	Start I	4 ndiv Service	
Pending	Services 12	Results						
Sru. # ♥ 288470 289361 289363 283864 293491 295244 298095 323901 343508	Procedure ♥ 361 Medication Support 456 90853 GROUP PSYCHOTHERAPY 456 90853 GROUP PSYCHOTHERAPY 456 90853 GROUP PSYCHOTHERAPY 456 90853 GROUP PSYCHOTHERAPY 456 90853 GROUP PSYCHOTHERAPY 444 90804 Indiv Psy 20-30 min 444 90804 Indiv Psy 20-30 min 274 Psych Serv Medicare Component 571 Brokerage Services ed Search	Group Svc 106 107 160 160 160 160 Type Clients	# ♥ Client # ♥ 75087772 75130257 75130257 75130257 75135386 75130257 751305 75130257 751305 75150505 75150505 75150505 75150505 75150505 75150505 75150505 7515	Client Name TEST CINDYTWO TESTY CINDY TESTY CINDY TESTY CINDY TESTCASE DAVE TESTY CINDY TESTCASE DAVE TESTY CINDY TESTCASE DAVE TESTY CINDY TESTCASE DAVE TEST CINDYTWO First < Prev -12- Provider Everywhere	Provider ♥ 99991 West County Mental Heath Sy 0112M1 EDEN ADULT MEDICATION ONLY S 0112M1 EDEN ADULT MEDICATION ONLY S 99996 Habilitative Day Treatment 0112M1 EDEN ADULT MEDICATION ONLY S Next > Last >> Date ■ Anytime ▼	Date ▼ Sort 6/25/2007 7/16/2007 7/16/2007 7/16/2007 10/4/2007 10/4/2007 10/4/2007 12/10/2007 12/10/2007 9/24/2008 10/14/2008 Search	t Y Type Y Indiv. Group Group Group Group Indiv. Indiv. Indiv.	Update Update Update Update Update Update Update Update Update
Service	s Search							
			All 💌 Service Any	where 💌 Rendered 1	or Client Name or ID Search			
Search S	Services by Date Click day to see serv	ices performed on that day						
			 March 2009 Wao Tu We Th Fr 2 3 4 5 6 9 10 11 12 13 16 17 18 19 20 22 23 24 25 26 27 30 31 	Sa Su Mo Tu We T 1 7 5 6 7 8 14 12 13 14 15 2 21 19 20 21 22 2 28 26 27 28 29 3	Image: Weight of the state of the			

- **1** Verify the Primary Clinician name is correct.
- 2 Enter the client name (Last name then First name with no commas, ex. Mouse Mickey) or the client number.
- **3** Select the template name from the drop list.
- 4 Click on "Start Indiv Service."

Clinicians Gates	Nay					Client, Pro	ovider and Ti	tle				Clients	Search
Welcome: Nat	alie Courson										Н	ome Help	Log Out
Servicable Cl	ients Matching, "	test cindy"											
						Search For Different Client test cindy	Sea	rch					
Clients Match	ed 1 Client Name ⊽	2 Status ⊽	Result Gender 🔽	Age 🔽	Services V	7 Select Provider			Select Title				5
75087772 1 record found.	TEST CINDYTWO	Active	F	49	0	99993 Take Care Case	Management	T	Clinician's Progra	ess Note		•	Select
						PERSONAL INFO SECURI	ITY (PASSWORD)	GUIDES/HELP					

- **1** Verify the client name.
- 2 Verify the status for that client. "Active" indicates that the client has an open episode.
- **3** Verify the appropriate provider name is indicated.
- **4** Select the Title of the type of note you will enter.
- **5** Click on "Select"

Clinicians Gateway		Clients
	Service Entry, Individual	Search
Welcome: Natalie Courson		Home Help Log Out
Service #: New Client: CINDYTWO TEST (75087772) Provider: 95	993 Take Care Case Management Title: Clinician's Progress Note	
Procedures: Select Procedure Service Location: Select Location Primary Clinician: TEST NATALIE Add additional clinicans	Or Service Utilization review Med. Con Primary Clinician	vened: 3/30/2007 P Date: 5/5/2009 V date: 5/2/2/2/ Vitization review has expired! vplant: 1//A Side Effects: 1//A Time: 00:00
Instructions Respond to problems/goals/objectives of treatment plan and signs and symptor	is related to diagnosis. Include treatment interventions and address changes in the client's functioning. If there is lit	tle progress, include an explanation of the limited progress.
Face To Face Time Hours: Minutes	A F	Episode Disgnosis Information txis I Axis II Axis III Axis IV Axis V 799.9 V71.09 799.9 J 000
Presenting Problem(s)	Use the "F Entries" dr view the las enterd for t	Previous op list to st 5 notes this client
Evaluation		Preucus Enlies: (Select Note)
	×.	
Intervention		Pitulous Enlites: (Select Note)

- Complete all of the progress note fields.
- Utilize the "previous entries" drop list to review or use information from the last five notes.
- Click on "Save as pending."

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1 – The system message at the top of the window notifies you of a successful entry. If you do not see this message, your entry has not been saved.

Notes: Draft versus Pending, Archive, and Finalize?

Drafts: Save as Draft when you have <u>incomplete</u> information. Perhaps you need to leave the note before finishing it. Perhaps you are writing a note for a client before they are registered or may never be registered (Pre-episode Note). Drafts can be found on your Home page Pending list or the View Staff page Draft list.

Pending: Save as Pending when the note has been <u>completed</u>, including client ID #. This note is ready to be finalized. Be sure to check the "Note is Complete" box before saving.

Archive: Save to the Archive when you want to <u>store a Draft</u> you *probably* will not need to retrieve. This will unclutter your Home page Pending list. Only Drafts may be stored to the Archive. Think of the Archive as an attic, a place to store things you *probably* will not need, however, you are not 100% sure. Drafts may be retrieved from the Archive via a services search or from the Drafts list on your View Staff page.

Finalized: When you are sure all of the information on a Note is correct and complete, including the client account # and your time, you may finalize. This will <u>seal it with your</u> <u>electronic signature</u> and add it to your services that are <u>transferred nightly to InSyst for</u> <u>claiming.</u>

Draft Notes

- **1. Draft Notes** are extremely flexible, can be saved before all the information is input, retrieved later and amended in multiple ways.
- 2. Choose Individual Service as you normally would on the Home page.
- 3. Enter the client's name or number (Name format is Last Name First Name with a space, not a comma), or leave it blank if the client does not have or has never had an open episode in your RU.
- 4. Choose your template and
- 5. Click the **begin service** button.
- 6. On the Service Entry Screen, if you did not already enter the client name, fill in the Last Name and First Name fields. You can also delete a client using the **[X] button**, or search for a new client using the Ellipsis [+++] button. You will only be able to enter clients who have had episodes in your RU.
- 7. The Procedure Code, Location and Clinician's time must be entered in order to save it as a draft
- **8.** Fill in as much or as little of the form as is appropriate.
- **9.** Incomplete forms may be saved as a Draft! Just click "Save as Draft" in the lower right hand corner of the note.

When you know more information:

- 1. Find the draft note in multiple ways.
- 2. It will be listed in the author's Home page Pending Services List. Alternatively, using the Search Box in the upper right hand corner, choose Services, enter the name or client #, and click the Search button. You may also use the Services Search in the middle of your Home page.

3. Changes to the note can be made in the fields of:

The client's name and account # can be updated: Use [+++] to search for (enter last name first name, click Search, and wait) and choose another client from the search results list. **Procedure**

Location Clinician (after building your customized Primary Clinician List) Provider (RU = Reporting Unit) Clinician's Time Face-to-Face Time Additions to the text of the Progress Note

4. When the Note is complete:

When the note is complete, check the "**Note Complete**" box at the bottom. Click the **Save as Pending** button.
Archiving Draft Notes

Draft notes that will not be needed immediately can be sent to the Archive to remove them from your pending list. They can be recalled using a Services Search by client name.

Archiving the Note:

- 1. Write up your Draft Note as completely as possible.
- 2. Click the "Save as Draft" button.
- 3. Find the Draft Note in your Pending List on your Home Page or in the Draft List on your View Staff Page
- 4. Click "Update" or the specific Service # that you want to archive.
- 5. Click the "Archive" button in the lower right hand corner.
- 6. The service is no longer listed in your pending services list.

Recalling the Archived Note:

- 1. You can find the note in three ways:
 - a. Do a Services Search from your Home Page (found in the middle of the page) using the client name (last name first name with no comma).
 - b. Do a services search using the Search Box in the upper right hand corner by choosing "Services", entering the client name (last name first name no comma) and clicking "Search"
 - c. Look for the service in the Draft List on your View Staff page.
- 2. A search results list will appear. Find the service in the list.
- 3. Click on "View" or the service # of the desired Draft note.
- 4. Click the "Edit" button in the bottom right hand corner.
- 5. Make changes as needed. (Use the [+++] button to search for a new client if they now have a client account #. Use the **[X]** button to delete a client first if you need to replace one client account # with another).
- 6. Click the "Save as Draft" button to save changes and return it to your Pending List.

blank

Informational Notes – Procedure Code 197 - No time to be claimed

Informational only Notes can be used to write notes for clients using procedure code 197 and claiming zero minutes. Your time is billed as an indirect service. The procedure varies according to whether the client has an open episode or is registered.

To write a note for a registered client with an open episode in your Reporting Unit:

- 1. Write a progress note as usual, using Procedure Code 197, Informational Note
- 2. <u>Enter zero minute's time</u>. (actual data entry of 0 minutes required)
- 3. Write the note, check Note Complete and Save as Pending.
- **4.** This note can be finalized and so will show up as a finalized service in the Electronic Health Record for the client.
- 5. It will show up on the Staff Log with zero minutes.
- 6. Write an Indirect service for your time.

To write a note for a client who is not yet registered (Outreach – Treatment Refused by Prospective Client):

- 1. Choose Individual Service as you normally would on the Home page but
- 2. Leave the Client Name/ID field blank.

Clinicians Gateway	Home	Clients Search And Tag	Search
Welcome: Camille Peterson	e name/ID field empty when g a note for an unregistered	Home Help	Log Out
Enter New Service: client	9		
Type of Service Primary Clinician Client	Note Tem	nplate	
Individual - PETERSON CAMILLE - Enter Clie	nt Name or ID or leave blank Clinicia	an's Progress Note 📃 🔽	Start Indiv Se
Edit Primary Clinician List		_	
p II o I			

- 3. Choose your template
- 4. Click the Start Individual Service button.

- 5. On the Service Entry Screen, enter the client's Last Name and First Name in their respective data field boxes.
- **6.** USE PROCEDURE CODE 197 INFORMATIONAL NOTE and enter 0 MINUTES time. Designate the Provider Reporting Unit from the drop down menu.

								· · · · · ·
Service #: New	Title: Clini	ician's Progress I	lote Enter Name					
	Number	Last Name	First Nam	e				
Client:	Unknown	Duck	Daffy		X			
Procedures:	197 CG INF	FORMATIONAL NOT	E Ente	r Code 197			Service Date: 12/29/2	009
							Utilization review date:	
Service Location:	Office	•	Emergency? 🗆 🛛	Pregnant? 🗆 📘	Enter Reporting Unit		Med. Compliant: N/A	Side Effec
Primary Clinician:	10904 - Pe	terson, Camille 💌	Provider: 9999CG - C	CLINICIAN GAT	EWAY TEST MHS AD	-	Primary Clinician Time: 0:00	
	Add Addition	al Clinicians					Enter 0:00 m	inutes
Instructions								

- 7. The Procedure Code, Location, Provider, Date, and Clinician's time must be entered in order to save it as a draft.
- 8. Fill in as much or as little of the form as appropriate.
- 9. Save as a Draft! Write an Indirect Service for your time.

To recall the Draft note: (To add the client's # when available)

10. Find the note in one of three ways:

- Use the Global Search box in the upper right hand corner by choosing "Services" from the drop down menu and entering the client name (last name first name – no comma). Click the "Search" button.
- Look in the author's **Home Page Pending** List (or Staff View page Drafts list).
- Use the **Services Search** in the middle of the Home Page.

🙆 Clinic	ian's Gateway version 3	3.4 (Home) -	Microsoft	Internet Exp	lorer					
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Address 🗊 http://cg/CG/Default.aspx?INDV_SERVICE_SAVED=true&SERVICE_NUMBER=448514										
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Welc	ome: Camille Peterson						Home Het	D Log Out		
	Service record 448514 was succesfully saved.									
Ente	r New Service:									
Type of Select	Service t To s	start a new se	rvice note, s	select the type (of service					
Pend	ing Services		24 Resul	its						
Srv. # 🍸	Procedure 🖓	Group Svc # 🍸	Client # 🍸	Client Name 🍸	Provider 🖓	Date 🍸 🛛 Type 🖓	Sort P Revie	ewer 🖓		
422752	391 Group Rehabilitation	1187	75130257	TESTY CINDY	9999CG - CLINICIAN GATEWAY TEST MHS AD	10/28/2009 Clinician's Note	s Progress 🔿 Wait	Update		
422807	381 Individual Rehabilitation		75135386	TESTCASE DAVE	9999CG - CLINICIAN GATEWAY TEST MHS AD	10/28/2009 Clinician's Note	s Progress 🔿 Wait	Update		
444625	321 Evaluation		75087772	TEST CINDY TAVO	0108T1 - OAKLAND ADULT SERVICE TEAM 1	12/18/2009 Clinician's Note	s Progress	Update		
448514	197 CG INFORMATIONAL NOTE		(Duck Daffy	9999CG - CLINICIAN GATEWAY TEST MHS AD	12/29/2009 Clinician': Note	^{s Progress} O Draft	Update		
				<< First < F	Prev -123- Next > Last	>>				
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To update the Draft Note

11. Update the client's name and account number (after they have had an episode opened in your RU). You cannot type in the client's PSP number. Use the [***] button to search for the client (enter last name first name, click Search, wait). Choose the new client from the search results.

Clinician's Gateway version 3.4 (Service Entry, Individual) - Microsoft Internet Explorer	
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Address Http://cg/CG/serviceentry/IndivSvcEdit.aspx?SERVICE_NUMBER=448514	🔽 🄁 Go 🛛 Links 🎽
Service #: 448514 Title: Clinician's Progress Note	-
Number Last Name First Name Client: Unknown Duck Daffy	
Procedures: 197 CG INFORMATIONAL NOTE	Service Date: 12/29/2009
	Utilization review date:
Service Office Emergency? Pregnant?	Med. Compliant: N/A Side Effects: N/A V
Primary Clinician: 10904 - Peterson, Camille 💌 Provider: 9999CG - CLINICIAN GATEWAY TEST MHS AD	Primary Clinician Time: 00:00
Add Additional Clinicians	T
Cone Cone Cone Cone Cone Cone Cone Cone	Local intranet

12. Updates to the note can also be made in the fields of:

Procedure Code (do not change it if you claimed time on an indirect) Location Clinician (if you have built a customized Primary Clinician List) Provider (RU = Reporting Unit) Clinician's Time (do not change if you claimed time on an indirect) Face-to-Face Time Additions to the text of the Progress Note

If you claimed your time on an Indirect service note, do not claim time now, or you will double claim.

If the note is complete: (And the service falls within an open episode)

13. When the note is complete, check the "Note Complete" box.

14.Click "**Save as Pending.**" The note can be finalized if the service is within the episode dates. Otherwise it will remain as a Draft note in that client's records.

blank

Co-staffed Individual Notes

Clinicians	Gateway			1 Home	9		Clients	▼ Search		
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Enter N	ew Service:									
Type of Ser Select	Type of Service. Select Image: Constant a new service note, select the type of service									
Pending	Services 12	Results								
Srv. # 🍸	Procedure 🍸	Group Sv	c # 🝸 👘 Client # 🍸	Client Name 🍸	Provider 🍸	Date 🍸 🕴 S	Sort 🖓 🛛 Type 🍸			
288470	361 Medication Support		75087772	TEST CINDYTWO	99991 West County Mental Health Sv	6/25/2007	Indiv.	Update		
289361	456 90853 GROUP PSYCHOTHERAPY	106	75130257	TESTY CINDY	0112M1 EDEN ADULT MEDICATION ONLY S	7/16/2007	Group	Update		
289363	456 90853 GROUP PSYCHOTHERAPY	107	75130257	TESTY CINDY	0112M1 EDEN ADULT MEDICATION ONLY S	7/16/2007	Group	Update		
289364	456 90853 GROUP PSYCHOTHERAPY	107	75135386	TESTCASE DAVE	0112M1 EDEN ADULT MEDICATION ONLY S	7/16/2007	Group	Update		
293490	456 90853 GROUP PSYCHOTHERAPY	160	75130257	TESTY CINDY	0112M1 EDEN ADULT MEDICATION ONLY S	10/4/2007	Group	Update		
293491	456 90853 GROUP PSYCHOTHERAPY	160	75135386	TESTCASE DAVE	0112M1 EDEN ADULT MEDICATION ONLY S	10/4/2007	Group	Update		
295244	444 90804 Indiv Psy 20-30 min		75130257	TESTY CINDY	0112MT EDEN ADULT MEDICATION ONLY S	10/29/2007	indiv.	Update		
298095	444 90804 Indiv Psy 20-30 min		75130257	TESTY UNDY	00000 Helviketive Dev Treetment	12/10/2007	Indiv.	Update		
323901	274 Psychi Services		75135300	TEST CASE DAVE	0112M1 EDEN ADULT MEDICATION ONLY S	3/24/2000	Indiv.	Update		
343300	SFI Drokelage Services		<	First < Prev -12-	Next > Last >>	10/14/2000	interv.	opuare		
Advanc	ed Search									
		For Type	Status	Provider	Date					
		Clients 💌 Any	💌 Any	 Everywhere 	Anytime 💌	Search				
Service	s Search									
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Search	Services by Date Click day to see ser	vices performed on that day								
			K March 2009 Su Mo Tu We Th Fr 1 2 3 4 5 6 8 9 10 11 12 13 15 16 17 18 19 20 22 23 24 25 26 27 29 30 31	Sa Su Mo Tu We T 1 7 5 6 7 8 14 12 13 14 15 21 19 20 21 22 2 28 26 27 28 29 3	B V May 2009 H Fr Su Mo Tu We Th Fr Sa 2 3 4 5 6 7 8 9 10 11 3 4 5 6 7 8 9 16 17 18 10 11 12 13 14 15 16 13 4 5 0 20 21 22 23 40 - 18 10 11 12 13 16 17 18 10 20 4 25 2 20 21 22 23 90 - 24 25 20 27 28 29 30 31 - - - - - - - -					

- **1** Start all notes from your home page.
- 2 Click on the drop arrow to select "Individual" for the type of service.

Clinicians	Gateway						Clients	
				Home				Search
Welcom	e: Natalie Courson						Home Help	Log Out
Enter N Type of Ser Individual	ew Service: 1 vice Primary Clinician TEST NATALLE	Client Client	<mark>2</mark> y	Note Template Clinician's Progr	3 ess Note	T	4 Start Indiv Service	
Pending	Services 1	2 Results						
Srv. # 🍸	Procedure 7	Group St	c # 🍸 Client # 🍸	Client Name 🍸	Provider 🍸	Date 🖓	7 Sort 🖓 Type 🏹	
288470	361 Medication Support	400	75087772	TEST CINDYTWO	99991 West County Mental Health	Sv 6/25/20	07 Indiv.	Update
289363	456 90853 GROUP PSYCHOTHERAPY 456 90853 GROUP PSYCHOTHERAPY	106	75130257	TESTY CINDY	0112M1 EDEN ADULT MEDICATION	VONLYS 7/16/20	07 Group 07 Group	Update
289364	456 90853 GROUP PSYCHOTHERAPY	107	75135386	TESTCASE DAVE	0112M1 EDEN ADULT MEDICATION	ONLYS 7/16/20	07 Group	Update
293490	456 90853 GROUP PSYCHOTHERAPY	160	75130257	TESTY CINDY	0112M1 EDEN ADULT MEDICATION	NONLY S 10/4/20	07 Group	Update
293491	456 90853 GROUP PSYCHOTHERAPY	160	75135386	TESTCASE DAVE	0112M1 EDEN ADULT MEDICATION	NONLY S 10/4/20	07 Group	Update
295244	444 90804 Indiv Psy 20-30 min		75130257	TESTY CINDY	0112M1 EDEN ADULT MEDICATION	NONLY S 10/29/20	007 Indiv.	Update
298095	444 90804 Indiv Psy 20-30 min		75130257	TESTY CINDY	0112M1 EDEN ADULT MEDICATION	NONLYS 12/10/2	007 Indiv.	Update
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- **1** Verify the Primary Clinician name is correct.
- 2 Enter the client name (Last name then First name with no commas, ex. Mouse Mickey) or the client number.
- **3** Select the template name from the drop list.
- 4 Click on "Start Indiv Service."

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- **1** Verify the client name.
- 2 Verify the status for that client. "Active" indicates that the client has an open episode.
- **3** Verify the appropriate provider name is indicated.
- **4** Select the Title of the type of note you will enter.
- **5** Click on "Select"

• Complete the billing information above the blue line.

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Number Last Name First Name Client: 75087772 TEST CINDYTWO	Opened: 3/8/2007
Procedures: 321 Evaluation	Service Date: 3/27/2009
	Utilization review date review has expired!
Service Office Emergency? Pregnant?	Med. Compliant: N/A Side Effects: N/A
Prinary Clinician: 8141 - Courson, Natalie Provider: 9999CG - CLINICIAN GATEWAY TEST MHS AD	Primary Clinician Time: 0:00
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- **1.** Click on "Add Additional Clinician's."
- 2. Choose the Co-staff from the drop down menu.
- **3.** Enter time for both clinicians

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Service Office Emergency? Pregnant? Med. Compliant: N/A Side Effects: N/A									
Primary Clinician: 8141 - Courson, Natalie 🔽 Provider: 9999CG - CLINICIAN GATEWAY TEST MHS AD 🔽 Primary Clinician Time: 0:00									
Co-Staff: Select Clinician									
6557 - Sullivan, Kenya									
Res 2 problem 5 (3140 - 1est, Mary nd signs and symptoms related to diagnosis. Include treatment interventions and address changes in the client's fund If the 1454 - Txurdiker Jane or of the limited progress.									
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4038 - VIERA MICHELLE D									
💶 8384 - Williams, Donna 🚽									
🖹 Done 3618 - Wilson, Carolyn L 🗾									

- Complete all of the progress note entries. Check "Note is Complete."
- Click on "Save as pending."

- 1 The note will be listed on the primary and co-staff's pending lists with a yellow dot and the word "wait" which displays the message "Waiting for clinicians to approve this service" when pointed at with the cursor. This is an advisory message only. Either Clinician may finalize at any time.
- 2 The co-staff have the opportunity to add an <u>optional</u> addendum to the note <u>before the Primary finalizes</u>. To add an addendum, click on "update."

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3 – If desired, add the addendum at the bottom of the note and click "Approve Addendum"

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- **4** When the co-staff approve their addendum, a checkmark is placed in the "Approved" checkbox at the top of the note. Co-staff approval is optional.
- **5** Co-staff may edit their time before the Primary finalizes.

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• **6** - If the Co-staff have added an addendum, the note disappears from the Costaff's Home page Pending list. It is no longer available for editing. The dot on the Primary's Home page Pending list then turns green.

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 The note will also disappear from the Co-staff's Home page Pending list when the Primary finalizes because it is no longer available to the Co-staff to edit. **CO-STAFF AND PRIMARY CLINICIANS CAN FINALIZE WHEN DESIRED. CO-STAFF WILL BE GIVEN TIME ON THEIR STAFF LOG ON THE DAY THAT THEY FINALIZE**. (However, the time will be transferred into InSyst on the day the Primary finalizes.)

 1 - The Co-staff and Primary will both see the service listed on their Daily Approval tally and added into their total time. In this example, the co-staff are given credit for the one hour of co-staff time, even though the Primary has not finalized. ("Waiting on Finalization")

•	2 – Click Approve	Time to add the time to your Staff Log.
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3 – The service is listed on the Co-Staff's log and the Co-Staff time is added to the Staff Log total time, whether or not the Primary has finalized.

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The time will appear on the InSyst reports the day after the Primary clinician finalizes, not on the day that the Co-Staff clinician finalizes.

The service is listed in the Primary Clinician's Finalized Services, not the Co-Staff's Finalized Services.



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Group Notes

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- **1** Select "group" under "type of service."
- **2** Select group description.
- **3** If this is a new group then click on "Edit your groups"

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Select Group 107 DEMO	Rename Delete Group		1 New Group
Client # 🖓	Client Name 🖓	Last Service Date 🖓	
75087772	TEST CINDYTWO	2/26/2009	Remove
75122885	TEST DAVE		Remove
75053807	TESTCASE CINDY	11/28/2008	Remove
75135386	TESTCASE DAVE	10/2/2008	Remove
75139951	TESTING ACCT		Remove
75138646	TESTING TEN		Remove
75130257	TESTY CINDY	12/10/2007	Remove
Default Provider: (No Provider	Save Provider		
Add Clients	Search 0 Results		
	PERSONAL II	NFO SECURITY (PASSWORD) GUIDES/HELP	

• **One** –Click on the "New group" button.

Clinicians Gateway	Edit Groups
Welcome: Natalie Courson	Home Help Log Out
Select Group 256 New Untitled Group Rename Delete Group Default Provider: (No Provider Save Provider Add Clients Mouse Mickey Search	New Group Please search for and add clients to this group before proceeding
PERSONAL INFO J	SECURITY (PASSWORD) GUIDES/HELP

• Type in the clients name in the "Add Clients" field (Last name then first name, with a space between) then click on the "Search" button and wait for the list to populate.

Clinicians Gateway			Edit Groups			Clients 💌
Welcome: Natalia	e Courson					Home Help Log Out
Select Group 2	56 New Untitled Group 🔽 Renam	e Delete Group	1	Please searc	ch for and add clie	New Group ents to this group before proceeding
Add Clients tes	t dave Search 1 Resu		-			
Client # 🏹	Client Name 💎	Gender 🍸	Birth Date 🍸	Age 🖓	Services 🍸	
75122885	TEST DAVE	м	1 <i>111</i> 950	59	0	Add
		PERSONAL INF	0 SECURITY (PASSWORD) GUID	ES/HELP		

- When the client information appears, click on the "Add" button.
- Follow the same steps to add all of the other members to the group listing.

Clinicians Gateway			Edit Groups			Clients
Welcome: Natalie Cour	son 2					Home Help Log Out
Select Group 256 Ne	w Untitled Group 💌 Rename	Delete Group				New Group
Client # 🖓	Client Name 🖓	,	Last Service Date 🍸			
75087772	TEST CINDYTWO		2/26/2009			Remove
75122885	TEST DAVE					Remove
75053807	TESTCASE CINDY		11/28/2008			Remove
75135386	TESTCASE DAVE		10/2/2008			Remove
75071955	TESTER MICHELLE					Remove
75130257 1	TESTY CINDY		12/10/2007			Remove
Default Provider: (No Prov	ider	 Save Provider 				
Add Clients test	Search 16 Result					
Client # 🍸	Client Name 🖓	Gender 🍸	Birth Date 🖓	Age 🍸	Services 🍸	
75087772	TEST CINDYTWO	F	2/1/1960	49	0	Add
75122885	TEST DAVE	м	1/1/1950	59	0	Add
75053807	TESTCASE CINDY	F	12/28/1960	48	0	Add
75135386	TESTCASE DAVE	М	1/1/1950	59	0	Add
75071955	TESTER MICHELLE	F	8/28/1986	22	11	Add
75139951	TESTING ACCT	м	10/10/1950	58	0	Add
75138646	TESTING TEN	м	10/19/1950	58	0	Add
75130257	TESTY CINDY	F	3/21/1966	43	0	Add
		<< First <	Prev -12- Next > Last >> SECURITY (PASSWORD) GUIDES/HE	LP		

- **1**-Select a default provider from the drop list and click on Save Provider
- 2-Click on Rename to enter the name of the group you have created. When naming the group, you can use names that remind you of the days the group meets, and the type of group they are...e.g. "Wednesday Rehab" or "Tue&Thu Skill Building"

Explorer User Prompt	×
Script Prompt: Enter new name	OK Cancel
Monday skills testers	

- Click on "OK" to save the name of the group.
- Click on home to go back to the home page and start the group note.

	is Gateway				Home				0	lients	_ Search
Welcon	ne: Natalie Courson								Home	Help	Log Out
Enter I	New Service: ervice Primary		Group	lla tastara 💌	Note Templa	e 3			4	Ponico	
Group	Edit Prin	hary Clinician List	Edit Your Groups	iis lesters -		Flogless Note			Start Orbug	Service	_
Pendin Sen #S	g Services	13 Results	Croup Sue #	Client #	Client Name	Provider 🔽		Date 🔽	Sort 27	Turne 🔽	
284101	261 Medication Sunnort		sroup svc # Y	75087772		99991 West County Men	tal Health Sv	3/8/2007	SOL Y	Indiv	Lindate
284109	361 Medication Support			75087772	TEST CINDYTWO	99991 West County Mer	tal Health Sv	3/8/2007		Indiv.	Update.
284110	361 Medication Support			75087772	TEST CINDYTWO	99991 West County Men	tal Health Sv	3/8/2007		Indiv.	Update.
288470	361 Medication Support			75087772	TEST CINDYTWO	99991 West County Mer	tal Health Sv	6/25/2007		Indiv.	Update.
289361	456 90853 GROUP PSYCH	IOTHERAPY '	106	75130257	TESTY CINDY	0112M1 EDEN ADULT M	EDICATION ONLY S	7/16/2007		Group	Update
289363	456 90853 GROUP PSYCH	IOTHERAPY '	107	75130257	TESTY CINDY	0112M1 EDEN ADULT M	EDICATION ONLY S	7/16/2007		Group	Update
289364	456 90853 GROUP PSYCH	IOTHERAPY '	107	75135386	TESTCASE DAVE	0112M1 EDEN ADULT M	EDICATION ONLY S	7/16/2007		Group	Update
293490	456 90853 GROUP PSYCH	IOTHERAPY '	160	75130257	TESTY CINDY	0112M1 EDEN ADULT M	EDICATION ONLY S	10/4/2007		Group	Update
293491	456 90853 GROUP PSYCH	IOTHERAPY '	160	75135386	TESTCASE DAVE	0112M1 EDEN ADULT M	EDICATION ONLY S	10/4/2007		Group	Update
295244	444 90804 Indiv Psy 20-30	Jmin		75130257 << F	irst < Prev -12-	Next > Last >>	EDICATION ONLY S	10/29/2007		Indiv.	Update
Advan	ced Search										
		For Ty	/pe	Status	Provider		Date				
		Clients 💌 🖡	Any 🔽	Any	Evenywhere		 Anytime 	Search			
Servic	es Search										
			All 💌 s	Service Anyw	here 💌 Rendered fo	r Client Name or ID	Search				
Search	Services by Date Clid	k day to see services perf	ormed on that day								
			< Febru Su Mo Tu	uary 2009 We Thi Fr	March 2009 Sa Su Mo Tu We Th	April 2 h Fr Sa Su Mo Tu We	009 e Th. Fr. Sa				
			1 2 3 8 9 10	4 5 6	7 1 2 3 4 5	1 6 7 5 6 7 8 2 13 14 12 13 14 15	2 3 4 9 10 11 16 17 18				
			15 16 17 22 23 24	18 19 20 26 26 27	21 15 16 17 18 19 28 22 23 24 25 20	20 21 19 20 21 22 3 27 28 26 27 28 29	23 24 25 30				

- **1** Select group under "Type of service."
- <mark>2</mark> Select the group.
- **3** Select note template.
- 4 Click on "Start group service."

Clinicians (îateway				_	Service Entry, Gro	up Search
Welcome:	Natalie Courson					Record	
Group: MOI	uday skills testers (25	6) Title:Clinicia	an's Prog	ress Note		here	
Group Me	mbers	6 Mem	bers			_	Show client RUs for: TEST NATALLE (8141)
Client #	Name	Gender	Age	Present	Med Compliant	Side Effects	Provider
75087772	TEST CINDYTWO	F	49		N/A 🗸	N/A 🗸	99993 Take Care Case Management
75122885	TEST DAVE	М	59		N/A 💉	N/A 👻	99991 West County Mental Health Svs 💌
75053807	TESTCASE CINDY	F	48		N/A 💌	N/A 🗸	99992 West Adult Residential
75135386	TESTCASE DAVE	М	59		N/A 🔽	N/A 🗸	99996 Habilitative Day Treatment
75071955	TESTER MICHELLE	F	22		N/A 🔽	N/A 💙	01122R EDEN MHS CHILD REFERRAL
75130257	TESTY CINDY	F	43		N/A 💙	N/A 💌	99991 West County Mental Health Svs 🛛
	Procedures: Sele Service Location: Sele Primary Clinician:TEST Add a	ct Procedure ct Location NATALIE Idditional clinicans					Service Date 4/16/2009
Presenting Pr	oblem(s)						Prestour Britter: (Select Note) 🗸
Evaluation							Prestous Brites: (Select Note) 💌

- Click on the square box under the "Present" column for each client in attendance. A check mark should appear.
- Complete the fields for the procedure, service location, co-staff, service date, primary clinician time, and co-staff time (if co-staff were entered).
- Be sure to select the correct provider for the client from the Drop list!
- Enter the number of additional participants (clients without open episodes)

Group Member	S			6 Mem	bers	3		Show client RUs for: PETERSON CAMILLI	E (10904) 💌
Client # Name	Gende	r Age P	resent	Med Complia	nt	Side Effec	ts		Provide
75087772 TEST CINDYTVA	o F	49		N/A	•	N/A	•	9999CG CLINICIAN GATEWAY TEST MHS AD	•
75136699 TEST TRAINING	F	3		N/A	Ŧ	N/A	7	No matching providers	V
75053807 TESTCASI CINDY	F	49		N/A	•	N/A	•	99991 West County Mental Health Svs	•
75135386 TESTCASI DAVE	≡ м	59		N/A	•	N/A	•	9999CG CLINICIAN GATEWAY TEST MHS AD	•
75071955 TESTER MICHELLE	F	23		N/A	•	N/A	•	01632R ASIAN MHS CHILD REFERRAL	•
75130257 TESTY CINDY	F	43		N/A	•	N/A	•	9999CG CLINICIAN GATEWAY TEST MHS AD	•
Additional particip	ants in gr	oup:	1 - 	Enter the n participant	umb s wi	er of addit thout an o	iona pen	l episode	

• Complete each text box as appropriate.

e Edit Yew Favorites Iools Help		
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dress 🕘 http://covenet/CG/ServiceEntryGro	p.aspx?GROUP_NUMBER=1018CLINICIAN=58568TITLE=16	💙 🔁 Go Links
ratructions		Person Briller
resenting Problem(s)		Persona Brates: (Select Note) 🗸
	8	/
	YOU CAN USE THE DROP A	ARROWS
	TO SELECT FROM THE LI	IST OF
	AVAILABLE PREVIOUS EI	NTRIES
aluation	<u>.</u>	Reduce Dates: (Select Note) ¥
	×.	
evention		Persona Brates: (Select Note) 👻
	<u></u>	
	×	(Columbia) to a
sponse		Perdinar Bridles: (3404ctt Note)
	a .	

• View previous notes if desired.



1 – When all of the fields have been completed click on the "Save as pending" button. (If your notes require review, refer to the notes review section of this users guide).

Clinicians	Gateway							Clients	•
				Home					Search
Welcome	e: Natalie Courson						Hom	e Help	Log Out
Enter N	ew Service:								
Type of Ser	vice								
Select	- 💌 To start a new service	e note, select the type of servic	e						
Pending	Services 12	Results							
Srv. # 🍸	Procedure 🏹	Group Svc #"		Client Name 🍸	Provider 🖓	Date 🍸	Sort 🖓	Туре 🍸	
288470	361 Medication Support		75087772	TEST CINDYTWO	99991 West County Mental Health Sv	6/25/2007		Indiv.	Update
289361	456 90853 GROUP PSYCHOTHERAPY	106	75130257	TESTY CINDY	0112M1 EDEN ADULT MEDICATION ONLY S	7/16/2007		Group	2 Updat
289363	456 90853 GROUP PSYCHOTHERAPY	107	75130257	TESTY CINDY	0112M1 EDEN ADULT MEDICATION ONLY S	7/16/2007		Group	Upda
289364	456 90853 GROUP PSYCHOTHERAPY	107	75135386	TESTCASE DAVE	0112M1 EDEN ADULT MEDICATION ONLY S	7/16/2007		Group	Upda
293490	456 90853 GROUP PSYCHOTHERAPY	160	75130257	TESTY CINDY	0112M1 EDEN ADULT MEDICATION ONLY S	10/4/2007		Group	Upda
293491	456 90853 GROUP PSYCHOTHERAPY	160	75135386	TESTCASE DAVE	0112M1 EDEN ADULT MEDICATION ONLY S	10/4/2007		Group	Updat
295244	444 90804 Indiv Psy 20-30 min		75130257	TESTY CINDY	0112M1 EDEN ADULT MEDICATION ONLY S	10/29/2007		Indiv.	Updat
298095	444 90804 Indiv Psy 20-30 min		75130257	TESTY CINDY	0112M1 EDEN ADULT MEDICATION ONLY S	12/10/2007		Indiv.	Updat
323901	274 Psych Serv Medicare Component		75135386	TESTCASE DAVE	99996 Habilitative Day Treatment	9/24/2008		Indiv.	Updat
343508	571 Brokerage Services		75087772	TEST CINDYTWO	0112M1 EDEN ADULT MEDICATION ONLY S	10/14/2008		Indiv.	Updat
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Auvanu	eu Jealch	For Tune	Statue	Provider					
			Status		4				
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					Sometimes you will				
Service	s Search								
			All Service Any	vhere 💌 Rendered f	or Clier have more than one				
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Jearen	ocivides by outer click day to see set	ordes performed on that day	Merch 2000	0-sil 2000	page of Pending				
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		8	9 10 11 12 13	14 12 13 14 15 1	6 17 18				
		16	5 16 17 18 19 20	<mark>21 19</mark> 20 21 22 2	3 24 25 17 18 19 20 21 22 23				
		21	2 23 24 25 26 27	28 26 27 28 29 3	0 24 25 26 27 28 29 30				

- **1**-You will see your group service listed in your Pending services.
- 2-Click on "Update" to enter individual notes for each of the clients in the group.

Respond to problems/goals/objectives of treatment plan and a changes in the client's functioning. If there is little progress, in	signs and symptoms related to diagnosis. Include treatment interventions and address clude an explanation of the limited progress.
Face To Face Time 01:00 Hours:Minutes	Episode Diagnosis Information Axis IAxis IIAxis IVAxis V 311 V71.0999 H 056
Presenting Problem(s)	
Hunger. the most hungry of the group, demands to	be fed immediately
Evaluation	
Testy	
Intervention	
Apply food.	Click here to edit
Apply food. Response	Click here to edit
Apply food. Response Mmmm Good!	Click here to edit the service
Apply food. Response Mmmm Good! Plan	Click here to edit the service
Apply food. Response Mmmm Good! Plan Regular feedings.	Click here to edit the service
Apply food. Response Mmmm Good! Plan Regular feedings. Cancel	Click here to edit the service
Apply food. Response Mmmm Good! Plan Regular feedings. Cancel PERSONAL IN	Click here to edit the service Print Delete Service Edit Service

On the next screen, click on "Edit Service" to add information for the client you have selected.



Now you can enter client specific notes for the group service. You will see that the (1) Med compliant and (2) Side effects drop lists can be utilized, (3) Face-to-Face time will need to be entered, and the (4)note fields can be used to enter additional information specific to that client.

Click on "Save as Pending" when your entries are completed.

Each individual service note will be listed separately on your Daily Staff Log.

Each service will be given part of the time, according to how many participants attended. If you gave services to clients who did not have an open episode, their time will not be added to your staff log. Write up their time as an indirect service.

elenne: Camille P	eterson		Home	Help Log Out
aff Information for Pet	erson Camille (109	04)		
SSN: Gender: BirthDate: Ethnicity:	***_**_**** Female ***/**	License # License Renew: License State: Taxonomy: National Provider Id:	Start date: End date: Last Changed On: Record Created On:	9/3/2008 3/3/2009 11/4/2008
Medicaid PIN: Medicare PIN: DEA Number: UPIN:				
Staff Type:	Unlicensed Worke	ər		
Languages:	English		Lotal group the total # ir (including a	time divided by the group dditional
	Service 11/23/2009 Dates All	thru 12/23/2009	participants to each noto Search indirect noto time given t	a) = the time give by Write an to enter the by additional
Statistics	Seruice			
Statistics Daily Approval . # Date Type (Service Date: 7/23/2009	Reporting Unit Procedu	re Status Approve Time	on to your day In Approve
Statistics Daily Approval . # Date Type (.7507/23/2009 Group 7	Service 7/23/2009 Date: 7/23/2009 Client # Client Name 1 5130257 TESTY CINDY	Reporting Unit Procedure 3999CG CLINICIAN GATEWAY 391 Group FEST MHS AD Rebabilitat	re Status Approve Time Dian PENDING Pending 01:00 3	on to your day In Approve Group Time

To add the time to your Staff Log for the additional participants, write an indirect note for group time not given to opened clients listed on the Log.

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Address 📾 http://cg/CG-QA/ViewStaff.aspx?ST	AFF_NUMBER=10904			•	🔁 Go 🛛 Links	; »
✓ Daily Approval Service 7/23/2009 Date: 7/23/2009	Search Search					
Srv. # Date Type Client # Client Name	Reporting Unit	Procedure	Status Approve	Time ^{#In} Grou	Approve p Time	
394751 7/23/2009 Indirect	9999CG CLINICIAN GATEVVAY TEST MHS AD	401 Mental Health Promotion		00:20 1	00:20	
394750 7/23/2009 Group 75130257 TESTY CINDY	9999CG CLINICIAN GATEVVAY TEST MHS AD	391 Group Rehabilitation	PENDING Pending	01:00 3	00:20	
394749 7/23/2009 Group 75135386 TESTCASE DAVE	9999CG CLINICIAN GATEWAY TEST MHS AD	391 Group Rehabilitation	PENDING Pending	01:00 3	00:20	
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E				🔰 🍕 Local i	intranet	_/_

Additional Participants Feature

Occasionally, there will be a client in a group who does not have an open episode and cannot be claimed. Using the Additional Participants feature, the additional clients are added into the group total, increasing the accuracy of the claim for Medical billing. Only the part of the time dedicated to clients with open episodes is claimed. The remainder of the time can be reported using an Indirect service note for the clients without an open episode.

- Start the group note as usual. Click on the square box under the "Present" column for each open client in attendance. Verify the Reporting Units.
- Enter the number of additional participants (clients without open episodes) into the "Additional Participants in group" field. CG will calculate the group total by adding the additional participants to the clients checked present.

Group I	Members	;			6 Mem	nbers	8		Show client RUs for: PETERSON CAMILLE (109	04) 👱
Client #	Name	Gender	Age P	resent	Med Complia	nt	Side Eff	ects	Pi	rovide
75087772	TEST CINDYTVVC	F	49		N/A	•	N/A	•	9999CG CLINICIAN GATEWAY TEST MHS AD	•
75136699	TEST TRAINING	F	3		N/A	V	N/A	~	No matching providers	v
75053807	TESTCASE CINDY	F	49		N/A	•	N/A	•	99991 West County Mental Health Svs	•
75135386	TESTCASE DAVE	м	59		N/A	T	N/A	•	9999CG CLINICIAN GATEWAY TEST MHS AD	•
75071955	TESTER MICHELLE	F	23		N/A	•	N/A	•	01632R ASIAN MHS CHILD REFERRAL	•
75130257	TESTY	F	43		N/A	T	N/A	•	9999CG CLINICIAN GATEWAY TEST MHS AD	-

• Complete the group note and the individualizations as usual.

- Each individual service will be listed separately in Daily Approval.
- Each service will be given part of the total time, divided by how many total participants attended. (open clients plus additional participants)

elenme: Camille Pe	eterson		Home Help Log Out
aff Information for: Pet	erson. Camille (10	1904)	
SSN: Gender: BirthDate: Ethnicity:	****_*** Female **/**/**** White	License # License Renew: License State: Taxonomy: National Provider Id:	Start date: 9/3/2008 End date: Last Changed On: 3/3/2009 Record Created On: 11/4/2008
Medicaid PIN:			
Medicare PIN: DEA Number: UPIN:			
Medicare PIN: DEA Number: UPIN: Staff Type:	Unlicensed Wor	rker	
Medicare PIN: DEA Number: UPIN: Staff Type: Languages:	Unlicensed Wor English	rker	Total group time divided by the total # in the group (including additional
Medicare PIN: DEA Number: UPIN: Staff Type: Languages: Statistics	Unlicensed Wor English Service 11/23/200 Dates All	rker 19 ES thru 12/23/2009 ES	Total group time divided by the total # in the group (including additional participants) = the time given to each note. Write an indirect note to enter the ime isome to additional
Medicare PIN: DEA Number: UPIN: Staff Type: Languages: Statistics Daily Approval	Unlicensed Wor English Service 11/23/200 Dates All Service 7/23/2009	rker 19 🔢 thru 12/23/2009 🔛 💌 Search	Total group time divided by the total # in the group (including additional participants) = the time given to each note. Write an indirect note to enter the time given to additional participants on to your day
Medicare PIN: DEA Number: UPIN: Staff Type: Languages: Statistics Daily Approval v. # Date Type C	Unlicensed Wor English Service 11/23/200 Dates All Service 7/23/2009 Date: 7/23/2009 Client # Client Name	rker 19 Es thru 12/23/2009 Es V Search Reporting Unit Procedure	Total group time divided by the total # in the group (including additional participants) = the time given to each note. Write an indirect note to enter the time given to additional participants on to your day e Status Approve Time # In Approve Group Time
Medicare PIN: DEA Number: UPIN: Staff Type: Languages: Statistics Daily Approval v. # Date Type C	Unlicensed Wor English Service 11/23/200 Dates All Service 7/23/2009 Date: 7/23/2009 Client # Client Name	rker 19 Est thru 12/23/2009 Est Reporting Unit Procedur 9999CG CLINICIAN GATEVXAY 391 Group TEST MHS AD Rehabilitati	Total group time divided by the total # in the group (including additional participants) = the time given to each note. Write an indirect note to enter the time given to additional participants on to your day e Status Approve Time # In Group Time PENDING Pending 01:00 3 00:20

 If you gave services to clients who did not have an open episode, their time will not be added to your staff log.

- To add the time to your Staff Log for the additional participants:
 - Write an indirect note.
 - Use an appropriate procedure code.
 - Use the amount of group time not given to opened clients already listed on your Daily Approval list and Staff Log.

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Address a http://cg/CG-QA/ViewStaff.aspx?S	TAFF_NUMBER=10904				Go Links »
▼ Daily Approval Service 7/23/2009 Date: 7/23/2009	Search Search		,,,,		
Srv. # Date Type Client # Client Name	Reporting Unit	Procedure	Status Approve	Time ^{#In} Group	approve time
394751 7/28/2009 Indirect	9999CG CLINICIAN GATEVVAY TEST MHS AD	401 Mental Health Promotion	PENDING Pending	00:20	00:20
394750 7/23/2009 Group 75130257 TESTY CINDY	9999CG CLINICIAN GATEVVAY TEST MHS AD	391 Group Rehabilitation	PENDING Pending	01:00 3	00:20
394749 7/23/2009 Group 75135386 TESTCASE DAVE	9999CG CLINICIAN GATEWAY TEST MHS AD	391 Group Rehabilitation	PENDING Pending	01:00 3	00:20
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The opened client's time plus the indirect time should equal your total group time. (In this example, 2 open clients at 20 minutes each, plus the indirect time for the unopened client at 20 minutes = 60 minutes total group

blank

Groups with Mixed Procedure Codes

When different procedure codes are needed for individuals in a group such as an AB3632/non-AB3632 mixed group, the Additional Participants feature can be used to write group notes even when only one individual per code is present. The progress note will be in each client's electronic health record.

The note is written twice with each note having its correct procedure code. The clients who require the other procedure code are counted as "Additional Participants." CG will calculate the correct time for each individual.

For example: A group of three clients meets:

Two are not AB3632 eligible. One is AB3632 eligible.

- Note One: Write the first note marking the two non-AB3632 clients present.
- Indicate that there is one additional participant (the AB3632 client) in the group.
- Use the non-AB3632 procedure code.

🏉 Clin	nician's	s Gate	way ver	sion 3.4 (9	ervice	e Entry, (Group) - Microso	oft Inte	ernet Explorer	<u>- 🗆 ×</u>
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Addres	ss 🔂	http://c	:g/CG-QA	/ServiceEnt	Grou	p.aspx?G	ROUP_NUMBER=2	45&CLI	NICIAN=10904&TITLE=1	Links »
7507	1955 M	ICHELLE	F	23	ন	N/A	▼ N/A	•	TOTO32K ASIAIN WHS CHILD KEPEKKAL	
7513	9951 <mark>TI</mark> A	ESTING CCT	м	58		N/A	N/A	-	No matching providers	V
7513	8646 TI	ESTING	TEN M	13		N/A	▼ N/A	•	99994 Works Hard Crisis Unit	-
7513	0257 TI	ESTY C	NDY F	43 🤇		DIA	▼ N/A	-	9999CG CLINICIAN GATEWAY TEST MHS AD	
A	dditiona	al partici	pants in <u>c</u>	group: 1	\supset					
Se	Proc ervice L	cedures	: 391 G	roup Reha	bilitati	on 🔽			Service Date: 9/8/2009	
Pr	rimary (Clinician	PETERS	SON CAMI	LLE				Primary Clinician Time: 2:30	
			Add add	ditional clinic	ans					
Prese	enting f	Problem	[s]						Preulous Entres: (Select Note	
			Тур	e in one N	ote, th	en copy :	and paste into th	ie othe	r note	•
e									Second	//

CG will calculate that there are three total in the group and give 1/3rd of the time to each of these two clients).

- Note Two: Write a second note marking the one AB3632 client present.
- Indicate that there are two additional participants (the non-AB3632 clients) in the group.
- Use the AB3632 procedure code.

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75130257 TESTY CINDY F 43 N/A S9999CG CLINICIAN GATEWAY TEST MHS AD	•
Additional participants in group: 2	
Procedures: 392 Group Rehab-AB3632 Service Date: 9/8/2009	
Primary Clinician: PETERSON CAMILLE Primary Clinician Time: 2:15	
Presenting Problem(s) Presenting Inters: (Select Note	2) 🗸
Type in one Note, then copy and paste into the other note	
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- This client will also be given $1/3^{rd}$ of the time.
- You can copy and paste the text from one note into the other. (You may want to open two sessions of CG and write these simultaneously.)

Make sure to write both notes!

Both notes will appear on the Daily Approval list and the Staff Log with the total time divided equally between all the attendees.

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	394757	Group	9999CG CLINICIAN GATEWAY TEST MHS AD	75135386	TESTCASE DAVE	391 Group Rehabilitation	00:20	3	Office			
	394756	Group	81092 CHILDRENS SPECIALIZED SVS MHS	75138646	TESTING TEN	392 Grup Rehab AB3632	00:20	3	Office			
	3 service records on 6/8/2009 for a total time of 01:00 I hereby certify, under penalty of perjury, that the information contained in this document is accurate and free from fraud claiming.											
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	Staff ID: 10904 CAMILLE PETERSON							Computer Operato				
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INDIRECT NOTES

Indirect Notes

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288470	361 Medicati	on Support				750	87772		TEST CI	NDYT	NO	9999	11 Wes	st Count	ty Men	tal Heat	th Sv		6/25/2007		Indiv.	Update
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- 1 From the "Enter new service" section, (2) click the "Type of service" drop arrow and select "Indirect"; (3) click the "Reporting unit" drop arrow and select the appropriate RU.
- 4 Click on "Start indirect service."

Clinician's Gateway version 3.0 (Service En	try, Indirect) - Microsoft Internet Explorer	
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- Select the appropriate procedure code (1), service location (2), Service date (3), Recipient code (4), and time (5).
- **6** Click on "Save as pending."

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284109	361 Medication Support		75087772	TEST CINDYTWO	99991 West County Mental Health Sv	3/8/2007		Indiv.	Update
284110	361 Medication Support		75087772	TEST CINDYTWO	99991 West County Mental Health Sv	3/8/2007		Indiv.	Update
288470	361 Medication Support		75087772	TEST CINDYTWO	99991 West County Mental Health Sv	6/25/2007		Indiv.	Update
289361	456 90853 GROUP PSYCHOTHERAPY	106	75130257	TESTY CINDY	0112M1 EDEN ADULT MEDICATION ONLY S	7/16/2007		Group	Update
289363	456 90853 GROUP PSYCHOTHERAPY	107	75130257	TESTY CINDY	0112M1 EDEN ADULT MEDICATION ONLY S	7/16/2007		Group	Update
289364	456 90853 GROUP PSYCHOTHERAPY	107	75135386	TESTCASE DAVE	0112M1 EDEN ADULT MEDICATION ONLY S	7/16/2007		Group	Update
293490	456 90853 GROUP PSYCHOTHERAPY	160	75130257	TESTY CINDY	0112M1 EDEN ADULT MEDICATION ONLY S	10/4/2007		Group	Update
293491	456 90853 GROUP PSYCHOTHERAPY	160	75135386	TESTCASE DAVE	0112M1 EDEN ADULT MEDICATION ONLY S	10/4/2007		Group	Update
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• After you click "Save as pending" you will be returned to your "Home" screen, where you will see the pending services listed (1).

INDIVIDUAL STAFF LOG FORM

Approval printout

	1			View St	aff		Clients	Search
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- **1** From your home screen, click on your name to get the "View staff screen.
- 2 In the daily approval section of the screen, enter the service date (3) for the staff log (MAA) you wish to create.
- 4 Click on "Search."

IMPORTANT!

It is very important that you review all of the information on the daily log before approving!

When you click on "APPROVE TIME", you are **finalizing** all of the services listed.

Finalized services cannot be changed!



Clinici	ans Gateway				V	iew Staff				[Clients Search
Welco	ume: Natalie	Courson								Home	Help Log Out
Staff Inf	formation for: C	ourson,	Natalie (81	41)							
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Please be sure to REVIEW THE DAILY LOG BEFORE YOU CLICK ON "APPROVE TIME"

Once you click on "Approve Time," the Services are finalized.

- **1** To edit any "Pending" note click on the "Srv. #"
 - Add any additional service to the log, click on "Home," and enter a new note.
 - Continue to repeat these steps until you are satisfied with the log----then click on the "Approve Time" button.

	ns Gateway				Vie	w Staff			[Dients
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▼ Dail	y Approval		S	ervice Date: 3/8/2007	ОК	Cancel				
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▶ Fina	lized Servi	ice Reco	ords	18 Results						
_					PERSONAL INFO SECUR	ITY (PASSWORD) GUIDES/HELP				

IMPORTANT! REVIEW THE DAILY LOG BEFORE YOU CLICK ON "APPROVE TIME"

Once you click on "Approve Time," the service notes and log are finalized.

Service Notes are sealed with the clinician's Electronic Signature

Clinicians Gateway					Pr	int Daily /	Approval						Client Search And Tag	ts 💽
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		28	54120 hidlu	99991 West County Wental Health Sus	15087772	TEST CINDYTWO	361 Medication Support	01:00	1	Office				
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			l hereby certif	y, under penalty of p	erjury, that	the information o	ontained in this docum	entis accura	te and	free from :	fraudulent			
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- 1. Decide which pages to print using the blue arrows and page numbers.
- 2. Click on the printer icon this will print the electronic Individual Staff Log form (MAA) as well as direct and indirect services.
- 3. You may specify which pages to print, eliminating unneeded pages.

All printed electronic Individual Staff Log (MAA) forms must be signed!

Provider:	01082 OAKLAND MHS CHILD	Recipient: Location:		U Off	5 ice	
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Provider:	01082 OAKLAND MHS CHILD	Location:		U Off	5 ice	
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Clinician's Dr	agrass Nota	Service Number.		3/9/2007				
Provider	99991 West County Mental Health Sve	Jervice Date.		Office				
Provider. Procedure:	35331 West County Mental Health SVS	Number in Group:		1				
Client:	75087772 TEST CINDYTWO	Med Compliant?	t? N/A Side N// Effects?					
Primary Clinician:	8141 NATALIE TEST	Staff Time:	0	hr(s). 30 min(s)				
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Printing from Daily Approval

To print your Staff Log and progress notes after Daily Approval, use the printer icon and blue arrows above and adjacent to their images. (Circled below) Do not use File/Print

- First, decide which pages to print. Use the set of blue arrow icons and page numbers (circled in red below) located above the staff log to navigate through the pages.
- Then use the printer icon (also circled in red) to bring up the printing menu.

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• Use the printing menu to designate which pages to print.

After clicking the Print icon next to the Staff Log image, choose the pages you wish to print in the Print Range box. The Staff Log will be the first page.

Print	×
Print Printer Name: \\COVEPRN\IS4650DN Status: Ready Type: HP Color LaserJet 4650 PS Frint Range All C All C Current view	Properties Comments and Forms: Document and Markups Preview: Composite K 8.5 → 3 T
Current page Pages 1 - 9 Subset: All pages in range Subset: All pages in range Reverse pages Page Handling Copies: 1 Collate Page Scaling: Fit to Printable Area Auto-Rotate and Center Cobooce paper course by PDE page size	1
Use custom paper size when needed Print to file	Units: Inches Zoom : 99%
Printing Tips Advanced	1/1 (1)

- Designate the pages you wish to print.
- Check that the page scaling is set to "Fit to Printable Area." If not the outer edges of the document may be cut off.



Gateway Tips

Here are some special Tips to help you to get the full benefits from Clinician's Gateway.

Creating a Larger Font for Viewing on Screen and for Printing...

•In Internet Explorer, you can set the Font Size Larger by selecting "View-Font Size-Largest" on the Menu Bar. This feature may need to be reset whenever you login to your PC.

Setting Margins so all the Information is Displayed when Printing...

•In Internet Explorer, you can change your Margins by selecting "File-Page Setup", change the Left=0.25, Right=0.25, Top=0.25, and Bottom-0.25. This feature should stay once it is set.

•The Header is needed to print client info on the OLPN

UTILIZATION REVIEW..

•It is very important that you keep all Client Record in Compliance. When ever you see the Utilization Review up-to-date. Make sure your Client Assessments and Service/Treatment Plans are completed in a timely manner.



Support Person.



CLINICIAN'S GATEWAY

Are there any requirements for having a note deleted?

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- Yes. If an error is made to any billing information, the note has to be deleted from VAX and redone by the clinician/physician in Clinician's Gateway. We can not modify any notes that have been finalized. Notes are deleted <u>ONLY</u> if there is an error in any of the billing information such as:.
 - Wrong client number
 - Wrong staff number
 - Wrong procedure code
 - Wrong reporting unit
 - Wrong service hours
 - Wrong service date
 - Wrong treatment location
 - Wrong number of clients in group
- Incorrect text is <u>NOT</u> an acceptable reason for deleting electronic notes.

• What do I do to get my note deleted?

- If it is before 4p.m. on the day that the note has been finalized:
- Print the note out and write "DELETE" diagonally across the middle of the page
- Write the reason for deletion (from list above) on the Request to Delete CG Note.
- FAX the note & Request form immediately to the IS Dept. at (510) 567-8161
- Contact the helpdesk via phone at (510) 567-8181 (tie line 38181) to inform them that a "<u>Clinician's</u> <u>Gateway Same Day Delete</u>" has been faxed.
- If it is after 4p.m. of the day that the note has been finalized:
- Print the note out and write "DELETE" diagonally across the middle of the page
- Write the reason for deletion (from list above) on the Request to Delete CG Note.
- Have the designated staff person in your office delete the InSyst Service Record and complete the middle section on the Request to Delete CG Note
- FAX the note & Request form immediately to the IS Dept. at (510) 567-8161

Be sure to fax delete requests as soon as an error is discovered. If notes are faxed after the service has been claimed, the note cannot be deleted.

Have Questions? Need Help? Contact your Administrative Support Person.

v1.0 2/13/2009

ALAMEDA COUNTY Behavioral Health Care Services Request to Delete Clinician's Gateway Note

CG Service Number:	Service Date:
Service RU:	Clinician Staff Number:
Clinician Name:	Signature:
Reason:	
This is a:	
Same-Day Delete NON Same-D	Day Delete
NOTE: This deletion will affect the total hours of you have already printed the form, you need ma the form	n your Individual Staff Log (MAA form). If ke any corrections necessary and reprint in the second state of
Use For NON Same-Day deletes only:	
(To be completed by staff deleting the InSyst service r	record.)
InSyst Service Delete Date:	
Staff Name:	
Signature:	

INSTRUCTIONS:

Please fill out a separate form for each service delete requested. There are two kinds of deletes, a **Same-Day** delete and a **NON Same-Day** delete. A **Same-Day** delete is for a service that was **FINALIZED TODAY** and can only be done before the 5 PM transfer from CG to InSyst. A **NON Same-Day** delete is for a service that was **FINALIZED** previous to today, and has already been **TRANSFERRED** to InSyst. If a note has not been finalized and is still listed as pending, the Help Desk cannot delete it, you must delete it yourself.

If this is a **Same-Day** delete, call the Help Desk **immediately** at 3-8181 or 510-567-8181 so that the service can be deleted from Clinician's Gateway before it is transferred to InSyst. Note that the Help Desk closes at 4:30 PM.

- 1. Print out the first page of the note you want deleted.
- 2. Draw a diagonal line across the note.
- 3. Write "Please delete this note" and the reason for the deletion.
- 4. If you have printed any copies of the note that have gone into the client's chart, be sure to mark on the note that it has been deleted from the system, but do not remove from chart.
- 5. Sign the note. If this is a **Same-Day** delete, skip to step 8.
- 6. Give the note and this form to your input staff and have them delete the service from InSyst.
- 7. Input person should sign and date this form that the service was deleted.
- 8. Fax this form and a copy of the note to IS at 3-8161 or 567-8161.

For IS Use ONLY		
Log #	Date deleted:	Name:

CONSUMER/CLIENT LIFE PLAN TREATMENT PLAN

Consumer/Client Life Plan, Treatment Plan

The **electronic treatment plan** in Clinician's Gateway is based on the principles of Wellness, Recovery and Resilience and family, client and consumer involvement while also addressing the need to establish medical necessity for treatment.

The Consumer/Client Life Plan consists of two main sections: the Medical Necessity documentation and the Plan. Throughout the Plan, some items will be brought forward for reference, such as Risks and Needs to address, and Goals and Objectives to reference.

The general procedure is:

- 1. Write the Plan (using correct RU and End Dates to match InSyst).
- 2. Submit for Approval.
- 3. Print for Client Signature. (before submitting for approval the Plan will say "Pending")
- 4. Finalize the Plan in CG after signatures are noted and approvals obtained in CG.
- 5. Enter Plan approval into InSyst.
- 6. "Edit" the Plan when objectives are achieved. Minor edits are allowed without re-approval.
- 7. Revise and obtain new signatures/approvals as needed.
- 8. Renew the Plan every six months as needed.

To **start writing a Plan**, Choose "Client Plan" from the Enter New Service menu on your Home page, enter the client name and click the "Start" button.

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Enter New Service:						
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This will bring up the Client Plan entry screen.

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Welcome: Sandy TEST		Home Help Log Out
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Plan # New		Status: New
Revision: 1		Plan Start: 6/14/2010
Client: TESTY, CINDY(75130257)	3	Plan End:
Provider: (99996 - Habilitative Day Treatment 4		
Medical Necessity Consumer/Client Life Plan		
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1. The Plan # is "New" before it is submitted for authorization. When submitted, it will be given a unique identifying number. Each time the plan is revised, the plan # will change.

The "Revision" number will tell you if it is revision #1, 2, 3, etc.

- 2. The Status can be "New" before submitting for authorization, "Authorizing" if submitted or "Finalized" after approved by approvers and finalized by the clinician.
- 3. The Plan Start Date will default to today's date. Back dating is not allowed.

Enter the Plan End Date to match InSyst. An easy way to find it is to start a progress note in CG and look at the UR date below the Service Date. This is generally calculated by starting with the beginning of the month that the episode was opened, then entering the last day of the sixth month (ex. If opened Jun 15th, calculate from Jun 1 to Nov 31. Enter the End Date of Nov. 31st using the calendar icon.)

- 4. Choose the Correct Reporting Unit for the client.
- 5. Fill out the Medical Necessity tab.

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Medical Necessity Consumer/Client Life Plan DSM: Diagnosis	dress 🖻 http://cg/CG-QA/treatmentplan2/edit.aspx?CLINICIAN=8142&CLIENT_NUMBER=75130257 🔄 🂽 Go 🛛 Links	»
DSM: Diagnosis	Medical Necessity Consumer/Client Life Plan	
	DSM: Diagnosis	
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If established by waivered clinician, also provide licensed supervisor's name and licensure.	If established by waivered clinician, also provide licensed supervisor's name and licensure.	
2 Staff member waivered None	2 Staff member waivered None	
Diagnosis updated since last Consumer/Client plan?	☐ Diagnosis updated since last Consumer/Client plan?	
DSM: Axis I	DSM: Axis I	
Start by typing a DSM number in the input box Image: Start by typing a DSM number in the input box	Start by typing a DSM number in the input box	
Current Signs & Symptoms that Support Primary Diagnosis or Per History: 6	Current Signs & Symptoms that Support Primary Diagnosis or Per History:	
4	4	
5 Add Additional Diagnosis	5 Add Additional Diagnosis	_
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- 1. Enter the date and name of the person establishing the diagnosis, whether BHCS or outside staff.
- 2. Enter the licensed supervisor if the responsible person is waivered.
- 3. For Axis I, II, and III, enter the diagnosis by typing the first number of the DSM code and arrowing down through the list of possible diagnoses. Choose "None" to erase your choice if needed.
- 4. Enter current signs, or per history.
- 5. Click "Add Additional Diagnosis, if needed.
- 6. Check the "Is Primary" box for only one diagnosis between Axis I and II.
- 7. Proceed to Axis IV and V

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DSM: Axis IV				
Psychosocial & Environmen	tal Problems (check all that apply)			
Severity	Problem	Additional Information		
1 d 🔽	Problems with primary support group	2		
Moderate 💌	Problems related to the social environment			
3 vere 🔹	Educational problems			
None	Occupational problems			
None 💌	Housing problems			
None 💌	Economic problems			
None 💌	Problems with access to healthcare services			
None 💌	Problems related to interaction with legal system/crime			
None 💌	ADL: Activities of daily living			
None 💌	Other psychological or environmental problems			
None	Unknown/unavailable			
DSM: Axis V				
Global Assessment of Functioning Scale				
4 ent Score:				
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- 1. Choose a severity rating for problems that may exist.
- 2. Information is required for any item marked as mild to severe.
- 3. Axis IV problems marked as "Severe" will be displayed in the Objectives section of the Plan.
- 4. GAF scores are required.
- 5. Co-occurring conditions and Population specific concerns are addressed next.

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Population Specific Concerns			
Population	Brief Description	Additional Information	
Child/Youth			
Criminal Justice		<mark>7</mark>	
Crisis Response			
Older Adult			
Transition Aged Youth			
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- 1. Check all co-occurring conditions. Additional fields will open. Co-occurring conditions will be displayed in the Objectives section of the Plan.
- 2. Mark if it is the consumer/client or another person in their life, adding who that other person is.
- 3. Fill in details of the condition
- 4. Click the "Add Additional" button if needed.
- 5. Describe the impact of these conditions on the Mental Health.
- 6. Add a brief description of any Population specific concerns. The brief description will be displayed in the Objectives section of the Plan.
- 7. Additional information may be added to describe the concern.

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Risk	Assessment				
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	None 💌	Victim of Neglect			×
	None 🔽	Dependent/Fiduciary Abuse			×
	None 🔽	Danger to Property			×.
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	None 💌	Failure to Achieve Developmental Milestones			14 17
	None 💽	Other			×
Auth	orization/Reject N	otes:			
		Note to authorizing staff person: IF THIS IS A REVISION OF A PLAN, LIST T	HE ITEMS REVISED	*	5
			Spell Check	Save as Draft	Submit for Authorization
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- 1. Note the severity of the Risks.
- 2. Additional information is required for severe risks.
- 3. Add a note to the staff persons who will be asked to authorize the Plan. If this is a revision of the Plan, list the items revised so that they know what to look for.
- 4. Save as Draft if not finished or wish to safeguard your work so far.
- 5. Move to the top of the page to work on the Life Plan section. (The **Home key** on your keyboard is a convenient way to do this. The "End" key takes you to the bottom of the page.)
- 6. Click on the Consumer/Client Life Plan tab to begin working on this section.

Consumer/Client Life Plan Tab

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	-
Medical Necessity Consumer/Client Life Plan	
Consumer/Client's Strengths and Supports: What Works Now?	
In collaboration with Consumer/Client, please describe in context of cultural self-identification, strengths and supports in the following areas: Living Arrangements, Daily Activities, Family and Social Relationships, Meaningful Life Role, Education, Employment, Health, Spirituality, Personal Care and Safety as applicable.	
What do you do well now? What have you done well in the past? What are you proud of now and in the past?	
What helps you now and in the past? Who helps you now and in the past?	
2	
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- 1. Enter the **Consumer/ Client's strengths**. You may return to add to this section as you work through the goals and objectives, as more strengths come to light.
- 2. Enter the **Consumer/Client's supports.** You may return to add to this section as you work through the goals and objectives, as more supports come to light.

GOALS

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Consumer/Client's Goals: Hopes For a Better Life	
	_
(brief identifier will appear in Objectives section)	
Calm Peaceful Life	
Vyhat are your hopes for a better life?	
Consumer/Client's Goal (whenever possible, use consumer/client's words)	
	_
What gets in the way of having a better life?	
Other Barriers:	
Add Another Goal 5	*
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- 1. Name the Goal. This name will appear in the Objectives section,
- 2. Describe the Goal.
- 3. Describe Mental Health Barriers to the Goal.
- 4. Describe other barriers to the Goal.
- 5. Add another Goal if appropriate
- 6. Continue on to the Objectives section.
OBJECTIVES

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Objectives: Steps to Change What "Gets in the Way"	
In collaboration with Consumer/Client, and in context of Consumer/Client's outrural identification, please address the following areas of need that apply: Living Arrangements, Daily Activities, Family & Social Relationships, Meaningful Life Role, Education, Employment, Health, Spirituality, Personal Care and Safety. Include relevant family participation in establishing and implementing the treatment objectives.	
Objective Name (brief identifier will appear in Interventions section):	
1 Associated Consumer/Client Goal:	
Calm Peaceful Life	
What are the smaller steps to change what gets in the way? Objective Description (must be measureable and/or observable, indicate current baseline, provide target timeframe):	
3	
What happened in the last 6 months to change what gets in the way? Progress Toward Achieving Objective (omit if Initial Consumer/Client Plan)	_
4	
Where are you in the change process? Stage of Change: (optional) N/A Objective Time Frame: 6 Achieved? Achievement Date: 7	
Please be sure to address the items below in this Plan's Objectives:	
Associated Severe Axis IV: Educational problems Associated Co-occurring Conditions:	
Substance Abuse	
Population Related Concerns:	
Associated Risk Assessments:	
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- 1. Name the Objective. This name will appear in the Interventions section.
- 2. Check any Goals associated with this Objective.
- 3. Describe the steps involved with this Objective.
- 4. Describe any changes to barriers in the last 6 months if this is a revision of a Life Plan.
- 5. Indicate the Stage of Change using the drop down menu.
- 6. Define the Time Frame for the Objective.
- 7. Mark and date it as achieved if appropriate.
- 8. Check all of the concerns associated with this Objective.
- 9. Add another Objective if desired.

INTERVENTIONS

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Interventions: What We Will Do to Help You	
Service types: Brokerage / Case Management Add Additional Service	
Intervention description (incorporate consumer's strengths; stage-specific if utilizing stages of change. Provider input before finalization of plan. Use addendum for post finalization of notes.) Describe the intervention here. Do not enter a Provider below unless it differs from your RU.	
2 If an outside provider was to provide the service, the Reporting Unit would be entered below. This option is for situations when one treatment plan is shared among multiple Reporting Units.	
Provider:]
Alternate Provider:]
Session frequency:	
Case Manager Case Manager Add Additional Contact	
Associated Objectives:	
6 by e Intervention	
7	<u> </u>

- 1. Define the types of service offered for this intervention. Multiple types can be listed per intervention.
- 2. Describe the intervention. Interventions to be carried out by other providers (shared Plan situations) may be described. Staff from the defined Provider can enter notes here.
- 3. If an outside provider is providing the intervention, enter that Reporting Unit here by typing part of the name or RU #. Arrow down the list to find the provider and click to insert.
- 4. Define the session frequency.
- 5. List all of the contact types involved.
- 6. Check off all Objectives that are associated with this intervention. More than one may be checked. Only the checked items will appear on the printed copy of the Plan.
- 7. Add or remove Interventions if desired.

1. The Discharge Plan is required.

2. Check and define any **Special Needs**. A description of the action to be taken is required if a Need has been checked.

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Special Needs Special Needs (Services Utilized)					
Special needs (Services Stillzen)					
Need	Issues/Description		Action 📕		
Vision accommodations	Significantly reduced Visual Acuity 💽		Required field if a r	need is checked	
	Unspecified 💌				
Written interpretation needs			,		
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Mobility needs	can't drive	A	will help obtain bus	; pass	
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Fill in any **Medication information**. Any medication noted must be accompanied by the last date of contact with an outside provider.

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	Links »
Medication Regimen	
Current Psychiatric Medication:	
Prescribed by Program MD See medication records	
✓ Prescribed by Outside MD (If box checked, complete information below)	
Prescribing MD Phone Number Last Collateral Contact Date Required	
Dr. Serene 510-777-7777 6/9/2010	
Medication Dosage Frequency	
Zoloft 800 mg daily	
Add Additional Medication	
Non-Psychiatric Medication:	
Curvently Lising Nep Revelopment and institute Industrian Network Medicines	
Medication:	
Prescribing MD Phone Number Last Collateral Contact Date Description	
Dr. Flowers 510-111-1111 6/9/2010	_
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Check and define all staff who are required to authorize the Plan. If the author of the Plan is not a licensed professional (LPHA), an LPHA co-signature is required.

×
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Fill out the **Consumer/Client Participation** Section now or after authorization.

Check and date all applicable fields. This information can also be added after the Plan has been authorized.

If the Consumer/Client is unable to sign, write the reason under, "Declines to sign"

Enter the date of the progress note that the Plan was discussed with the Consumer/Client

Use the consumer/client comment box if the consumer/client wishes to add their own comments.

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Address http://cg/CG-QA/treatmentplan2/Edit.aspx?PLANID=338t=1	🗾 🔁 Go	Links »
Consumer/Client Participation		
Consumer/Client was offered a copy of this Plan		
Clinician attests that Consumer/Client signed plan. Plan		
Clinician attests that legal representative (Parent, Legal Guardian, Convervator, etc.) signed or verbally accepted this Plan on this date due to Consumer/Client inability to sign.		
Consumer/Client verbally accepts this plan but not able to sign on this date (explain below).	6/16/2010	
Consumer/Client declines to sign (explain below).		
Reason: Unavailable Client not willing to leave their home to come in to sign	×	
See progress note dated 06/16/2010		
Consumer/Client comments:		
If this doesn't work, I will be really frustrated, so I intend to work really hard at meditating.		
		Ľ
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NOTES: The last section is an area for notes which will <u>not</u> be printed when the Plan is printed.

Addendum/Notes may be entered without triggering re-authorization.

The Authorization notes are only seen by the author and the authorizers of the Plan.

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Addendum/Notes	-
Addendum/Notes: (Additional information from Consumer/Client's treatment team. Any changes to plan require re-signing by client and clinician)	
Notes can be added to this field without triggering the re-authorizing process between updates.	
Authorization/Reject Notes:	
Notes between the Plan author and the authorizers are entered here.	
Spell Check Save as Draft Submit for Authorizat	ion I
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Save as Draft if incomplete or Submit for Authorization if complete. (Before or after client signs)

The Plan will now appear on the Home Page, in the list of Client Plans, with its unique Plan number.

Client Plans are listed below Pending services.

						Home	•					Sea	rch And Tag
Welcon	ie: Sandy TEST											Ho	me Help
Enter I	New Service:												
Type of Se Select	•	To start a new service i	note, select the ty	pe of service									
Pendin	g Services	3 R	esults										
Srv. # 🖓	Procedure 🖓	G	roup Svc # 🍸	Client # 🖓	Client Name 🍸	Provider 🖓			Date 🖓	Туре 🏹		Sort 🖓	Reviewer
402718	311 Collateral			75087772	TEST CINDYTWO	9999CG - CLINICIAN	GATEWAY TEST I	MHS AD	9/11/2009	Clinician's Pr	rogress Note	⊖ vvait	
482445	433 90801 Initial Ps	ych Evaluation		75130257	TESTY CINDY	9999CG - CLINICIAN	GATEWAY TEST I	MHS AD	10/21/2009	Physician's	Progress Note	O \/vait	
454498	433 90801 Initial Ps	ych Evaluation		75135386	TESTCASE DAVE	9999CG - CLINICIAN	GATEWAY TEST I	MHS AD	1/13/2010	Physician's	Assessment		
Pendin	g Client Plans	2 R	esults										
Plan # 7	Client # 🍸	Client Name 🍸	Provider 5	7		Date 🍸	Revision 🖓	Author 🖓	You	r Role 🍸	Status 🏆	Super	sedes Plan
33	75130257	TESTY, CINDY	99996 - Hab	pilitative Day Tre	eatment	6/15/2010	1	8142	O Auth	ior	Authorizing		

PRINT FOR CLIENT SIGNATURE

FIRST SAVE THE PLAN OR SUBMIT THE PLAN. (When the Plan has not yet been submitted for approval by the supervisor, etc., the Plan will have "Pending" splashed across it)

THEN VIEW IT TO INVOKE THE PRINT BUTTON.

To view the Plan, click on it's Plan Number (#33 in this example).

	🍯 Clinicia	Clinician's Gateway version 3.4 (Home) - Microsoft Internet Explorer										
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٢	33	75130257	TESTY, CINDY	99996 - Habilitative Day Treatment	6/15/20101	8142	Author	New	•			
	🙆 http://cg/CG-QA/ViewRU.aspx?RU=99996											

The Plan appears on your screen.

You can Print, Delete or Edit from this screen using the buttons at the bottom of the page.

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Editing will allow you to Submit for Authorization.

Editing also requires you to resubmit the Plan for authorization.

AUTHORIZING THE PLAN

1. After "Submitting for Authorizing" the yellow dot on the Author's Home page indicates that they are waiting for Plan authorization. The status has changed from "New" to "Authorizing".

1						Home)				Search And T
Welcon	ne: Sandy TEST										-ome He
Enter I	New Service:										
Type of Se Select	ervice T	To start a new servic	ce rate, select the ty	pe of service							
Pendin	g Services	3	Results								
Srv. # 402718 432445 454498	Procedure ♥ 311 Colsteral 433 90801 nital Ps; 433 90801 nital Ps;	yon Evaluation yon Evaluation	Group Svc #マ	Client # 🖓 75087772 75130257 75135365	Client Name 🏹 TEST CNDY TWO TESTY CINDY TESTCASE DAVE	Provider 🏹 999900 - Clinic Af 999900 - Clinic Af 999900 - Clinic Af	I GATEWAY TEST V I GATEWAY TEST V I GATEWAY TEST V	/HS 40 /HS 40 /HS 40	Date 7 9/11/2009 10/21/2009 1/13/2010	Type 🖓 Clinician's Progress Note Physician's Progress Note Physician's Assessment	Sort 🖓 Reviewa Ĉ (Vait Ĉ (Vait
Pendin	g Client Plans	2	Results						_		
Plan # ☆ 33	Client # 7 75130257	Client Name 🖓 TESTY CNDY	Provider 5 99996 - Hal	7 bilitalive Day Tre	ealment.	Date 🖓 3/15/2010	Revision 🖓 1	Author 🖓 8142	You Mick Q	r Role 🖓 🦳 Status 🏹 :cr Authorizing	Supersedes Pla

2. The Plan now appears on the <u>Authorizer's</u> Pending Client Plan list. Their role is listed as LPHACosign, Supervisor, etc. as defined on the Plan.

-										
Pending Client Plans			Plans	2 Results						
	Plan #√	Client # 🍸	Client Name 🍸	Provider 🖓	Date 🝸 Revisio	n 🖓 Author 🏹	Your Role 🗸	Status $\nabla \frac{Su}{\#^3}$		
ľ	33	75130257	TESTY, CINDY	99996 - Habilitative Day Treatment	6/15/20101	8142	Iphacosign	Authorizing		
	12	75053807	TESTCASE, CINDY V	99995 - Short Term House	5/13/20101	10904	Author	New		
<u>.</u>										

- 3. The Authorizer views the Plan by clicking on the Plan number.
- 4. The Authorizer reviews the Plan. At the bottom of the screen are notes from the Plan Author. The Authorizer is required to write a note to the Author.
- 5. The Authorizer has options to Print, Delete, Edit (minor), Authorize or Reject.

Actions:							
Action	User Name			Date		Note	
Submit	TEST, Sandy			6/16/2010 11:	14:48 PM		
Authorizatio	on/Reject Notes:						
		THE REVIEWER READS MADE TO UPDATE THE HERE	3 THE NOTES FROM THE AU PLAN, THOSE CHANGES S	JTHOR. IF CHANGE HOULD BE INDICAT	SWERE		
		→	Print for Signature	Print De	ete Edit	Authorize	Reject

- 6. After Authorizing or Rejecting it, the Plan is removed from the Authorizer's Home page.
- 7. A "**Rejected**" Plan will have the status returned to "New" on the Author's Home page.

Plan Client Clien	ant .					
#🍸 #🏹 Name	ne 🖓 🛛 Pro	vider 🖓	Date 🍸 🛛	Revision $ abla$ Author $ abla$	Your Role 🍸	Status
33 75130257 TEST	TY, CINDY 999	96 - Habilitative Day Treatment	6/15/20101	1 8142	Author	New

- 8. The Author works on the Plan after reading the Authorizer's notes and resubmits the Plan for Authorization until it has been Authorized.
- 9. An "**Authorized**" Plan will have a green dot and the status of "Authorizing" on the Author's Home page. "Edits" are restricted to minor changes now. Major changes would be handled by finalizing the plan and then revising it.

	Pendir	ng Client	Plans	2 Results					
(Plan # 🗸	Client # 🍸	Client Name 🍸	Provider 🖓	Date 🝸 Revision 🤉	7 Author 5	Your Role Y	Status	an
	33	75130257	TESTY, CINDY	99996 - Habilitative Day Treatment	6/15/20101	8142	 Author 	Authorizing	

- 10. The Plan is now ready to be **Finalized** by the Author. (Have the client sign if not already done and update the Plan with the information) First, View the Plan by clicking on the Plan Number.
- 11. Click "Finalize" at the bottom of the Page. (after reading the notes)

Actions:		
Action	User Name	Date Note
Submit	TEST, Sandy	6/16/2010 11:14:48 PM
Reject	Peterson, Camille	6/17/2010 12:13:07 AM 5/17/2010 12:13:07 AM 5/17/2010 12:13:07 AM THE AUTHOR. IF CHANGES WERE MADE TO UPDATE THE PLAN, THOSE CHANGES SHOULD BE INDICATED HERE
Submit	TEST, Sandy	6/17/2010 12:20:18 AM
Authorize	Peterson, Camille	The Author should have written the 6/17/2010 12:23:02 AM Authorizer a note so they know what to look for.
Authorization	Reject Notes:	
		Print for Signature Print Delete Edit Reject Finalize

12. The Plan is removed from the Pending Client Plan list on the Home page.

VIEWING, EDITING AND REVISING A FINALIZED PLAN

1. Use the Global Search function to Search for a Plan. Choose "Client Plans" from the drop down menu. Enter the Client's <u>name</u> and click "Search".



2. Search Results are displayed. Click on the Plan number to view it. Note that the Status is now "Finalized".

Search for: Testy Cindy					view all	close all
	Sea	arch Again				
	Testy Cindy		Search			
	Client F	Plans 🔻				
	L					
-Client Plans	1 Result					
Plan # 🏹 Client # 🏹 Client Name 🏹	Provider 🍸	Date 🔻	Revision 🝸	Author	Status 🝸	Supersedes Plan # 🖓
33 75130257 TESTY, CINDY	99996 - Habilitative Day Treatment	6/15/2010	1	TEST, Sandy	Finalized	
					\bigcirc	

- 3. The Plan may be Printed, Edited or Revised.
- 4. A **Finalized note** may be **edited in minor ways** only. (Objectives may be marked as achieved, Plans sent to an additional person may be noted, Addenda for future planning may be written)

Edit

Print

Revise

5. Any substantial change is a Revision and must be re-authorized and re-signed by the client. New Revisions of Plans supersede earlier versions.

- Cli	ent Plans		4 Results				\sim	
Plan #	🖓 Client # 🖓	Client Name 🍸	Provider 🖓	Date 🔻	Revision ∇	Author	Status 🍸	Supersedes Plan # 🍸
34	75139951	TESTING, ACCT	99991 - West County Mental Health Svs	6/16/2010	4	Peterson, Carville	Finalized	16
16	75139951	TESTING, ACCT	99991 - West County Mental Health Svs	5/25/2010	3	Peterson, Canille	Revised	15
14	75139951	TESTING, ACCT	99991 - West County Mental Health Svs	5/24/2010	1	Peterson, Camille	Revised	
15	75139951	TESTING, ACCT	99991 - West County Mental Health Svs	5/24/2010	2	Peterson, Camile	Revised	14
\smile							\smile	

RENEWING OF PLANS ANNUALLY OR AT 6 MONTHS

During the 30 days preceding and following a plan's expiration date, an additional button will appear. A "Renew Plan" button will be available.

Print	Delete Plan	Edit	Renew
HELP			

- 1. Click the Renew button.
- 2. All of the entries from the previous plan will be brought forward into the new plan.
- 3. After you make revisions, obtain the signatures and approvals just the same as when you make a new plan or revise a plan.

CHANGING THE AUTHOR OF THE PLAN

- 1. Once a note is Finalized, it may be viewed and revised by any clinician. If the clinician revises the Plan, they are the new author of the Plan.
- 2. The Information Systems Help Desk can change the author of the Plan on request.



Changing your password

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Welcome: Robert Forsythe		Home Help Log Out
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Type of Service		
Select To start a new service note, select	the type of service	
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Advanced Search		
For Type	Status Provider Date	
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Services Search		
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Search Services by Date Click day to see services perform	ed on that day	
	K January 2009 February 2009 March 2009	
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- Click on security from the bottom of the home page.
- > Choose the "Change Password" tab

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Welcome: Sandy TEST	Home Help Log Out
Profile Preferences Change Password Security Questions Electronic Signature Agreement	
First Name: Sandy Middle Initial: Last Name: TEST	
	
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Address 💼 http://cg/CG-QA/Security.aspx	🔽 🄁 Go 🛛 Links 🌺
Clincians Gateway Clincians Gateway Security & Personalization	Clients Clients Search And Tag Search
Welcome: Sandy TEST	Home Help Log Out
Profile Preferences Change Password Security Questions Electronic Signature Agreement El 1 r Old Password:	
E 2. Ir New Password: C 3 Password: 4 date Password	
Done	Local intranet

1 – Enter your current password in the first field.

2 – Enter your new password in the second field. (Your password must contain at least one uppercase alpha, one lowercase alpha, and one numeric character. It also must be at least seven characters in length).

 $\frac{3}{2}$ – Re-enter your new password in the third field to confirm the change.

4 - Click on "Update password"

ADMINISTRATION TOOLS

Administration Home Page

Clinicians Gat	eway			F	lome		Clients Search
Welcome: S	andy TEST						Home Help Log Out
irv. # 🝸	Procedure	Group Svc # 🍸	Client	#7	Client Name 🍸	Provider 🖓	Date 🍸 🛛 Type 🖓
Advanced	Search						
	For Clients	Type Any	Status	Provider	ere	Date	• Search
Services S Search Sen	earch vices by Date	All 🗖	Service Anywhe	re 💌 Ren	ndered for Client Nam	ne or ID Search	
		;ل >	nuary 2008	Feb	oruary 2008	March 2008	
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		13 14	5 16 17 18 19	10 11 12	2 13 14 15 16 9	10 11 12 13 14 15	
		20 21 2 27 28 2	2 23 24 25 <mark>26</mark> 9 30 31	17 18 19 24 25 26	20 21 22 23 16 27 28 29 23 30	17 18 19 20 21 22 24 25 26 27 28 29 31	
	nstrator Access						
Clinical Admi Search Sta	Π /						

- > This is your home page
- Either search for client services via the Search functions in the center of the page or through the Global Search in the upper right hand corner (choose Services and enter the client name).
- Search for an individual staff person's Staff View page through the Global Search in the upper right corner (choose Staff and enter the staff name)
- Search for a report on Clinical Staff by Reporting Unit through Search Staff notes (Finalized, Pending and Draft) at the bottom of the page

SUPERVISOR TOOLS Staff Reviewing

1. A Staff Report by RU can be generated using provider and time parameters:



Tallies of services by staff are generated:

Children a	ateway version 3.4 (Searc	th Staff Re	sults) - Microsoft	: Internet E	kplorer			
<u>File E</u> dit <u>V</u> ie	w F <u>a</u> vorites <u>T</u> ools <u>H</u> el	p						4
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Staff		48 re	COLO					
staff # 🍸	Name 💎	# Service: Finalized	s Average Interv V Finalized V	al Time Finalized	# Serv	vices Average Inter ing 🔽 Pending 🔽	val Time Pending	# Services
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1077 1093 1225 1252 1436	LAVALLE PETER LAFFERTY MICHAEL KRETZMER KATHLEEN LUCAS MARGARET	0 20 1 0	0 0 1 0 0	00:00 00:00 07:29 00:20 00:00	0 0 0 0 0 0		00:00 00:00 00:00 00:00 00:00	0
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1077 1093 1225 1252 1436 1454 1457 1641 1960 2038 2337 2651 2955 3004 4038	MILLER JEINWER LAYALLE PETER LAFFERTY MICHAEL KRETZMER KATHLEEN LUCAS MARGARET TZUDIKER JANE HARRIS CONNIE MARCUS LYNN ELLEN COHEN ALAN GROSS MARN RODZY JOHNN ROXAS LUISITO DIAMOND MARC GILDEN ROBERT VIERA MICHELLE	0 20 1 0 0 0 19 130 0 130 0 112 0 28	0 1 0 0 0 0 0 0 6 0 0 0 0 0 5	00:00 07:29 00:20 00:00 00:00 00:00 00:00 00:00 06:15 132:45 00:00 52:10 00:00 52:10 00:00 00:00 80:30			00:00 00:00 00:00 00:00 00:00 00:00 00:00 00:45 00:00 00:00 00:00 00:00 00:00	0 0 0 0 0 0 0 5 0 0 0 0 0 0 0 0 0
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This information can be pasted into an Excel spreadsheet.

Clicking on a staff person's name will bring up their **staff view page** that displays their **service notes and statistics**. (Example of staff view page shown in next section)

2. Staff Search can be done by individual staff person via Global Search to see their notes or statistics by defined times.

🚰 Clinician's Gateway version 3.4 (Home) - Microsoft Internet Explorer	
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Address 🖬 http://cg/CG/default.aspx	🔽 🄁 Go 🛛 Links 🎽
Clinicians Gateway Home Welcome: Camille Peterson	State test Su Search And Tag Home Help Log Out
Enter New Service:	
Type of Service Select To start a new service note, select the type of service	
Pending Services 22 Results	
	Local intranet

Click on the staff name to bring up the Staff View Page

🕘 Clinician's	Gateway version 3.4 (9	earch Results) - M	icrosoft Internet Explo	rer	
<u>Eile E</u> dit	<u>V</u> iew F <u>a</u> vorites <u>T</u> ools	Help			2
승 Back 🝷	🕗 - 💌 😫 🎸) 🔎 Search 🚽	🕇 Favorites 🥝 🔗) • 🌺 🔟 • 🛄 🏭	
A <u>d</u> dress 🔂	http://cg/CG/searchResults.	aspx			💌 🄁 Go 🛛 Links 🌺
Search t	or: test san			view all	close all
		test san	Search Again	Search	
▼ Staff		1 Result			
Staff # 🏹	Name 🖓 🥄	Role 🖓	Open Cases 🍸	Closed Cases 🖓	Staff
8142	TEST SANDY	User	0	0	View
Client	Plans	0 Results			
		PERSONAL INFO	SECURITY (PASSWORI	D) GUIDES/HELP	· · · · · · · · · · · · · · · · · · ·
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The **Staff View** page has **statistics** that can be calculated according to the date and Provider parameters that you define. It also lists all of the **services** generated by that individual.

🎒 Clinicia	n's Gatewa	ay version 3.4 (Vie	w Staff) - Microso	oft Intern	et Explorer					-02
<u>F</u> ile <u>E</u> dit	t <u>V</u> iew f	= <u>a</u> vorites <u>T</u> ools <u>H</u>	<u>t</u> elp							- R
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Address	🗟 http://cg,	/CG/ViewStaff.aspx?S	TAFF_NUMBER=81	42				-] 🔁 Go	Links `
Staff Info	rmation for:	TEST, Sandy (81	42)							-
SSN:	:	***_**_****	Licens	se #:			Start date:		1/1/2006	
Gen	der:	Female	Licens	se Renew:	:		End date:	1.00	12000000	,
Ethn	icity:	White	Taxon	omy:			Record Creat	ed On:	9/26/2006	
Med Med DEA UPIN	licaid PIN: licare PIN: Number: I:		Nation	al Provide	r Id:					
Staff	f Type:	Unlicense	ed Worker							
Lanç	gu, ets:	English								
🔻 Stati	stics Servi	ce Dates 10/19/2009	9 🔛 thru 1	1/19/2009	All			-	Search	
Type of \$	Service	Clinican Role	Number of Servi	ces	Average Interv	al Time	T	ime Reporti	ing	_
Indivdual		Primary Clinician	0		0	00:00	Enter	r Estimated Ti	me	
Group		Co-Clinician Primary Clinician	0		0	00:00	00:1	00	Calcula	ite
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) Deer		Totals:	3		0	01:30				_
Proc	edures	t a	04 Results	3						
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► D	Service	Records	0 Results							
Penc	ding Serv	ice Records	1 Result							
- Final	lized Ser	vice Records	11 Results	3						
Srv. X	Client # 7	🛛 Client Name 🖓	Reporting Unit *	7		Proced	ure 🖓	Date 🍸	Туре 🍸	Note
420337	75135386	TESTCASE DAVE	9999CG CLINICIAI	N GATEWA	VY TEST MHS AD	Group R	ehabilitation	10/22/2009	Group	View
420338	75130257	TESTY CINDY TEST CINDY DAO	9999CG CLINICIAI	N GATEWA	VT TEST MHS AD	Group R Group P	enapilitation ebabilitation	10/22/2009	Group	View
388080	73007772	TEST GIND THYO	01122 EDEN MHS	CHILD	A TEST WITS AD	General	Administration	8/3/2009	Indirect	View
332513	75087772	TEST CINDYTWO	9999CG CLINICIAI	N GATEWA	Y TEST MHS AD	Collatera	al	11/24/2008	Indiv.	View
332454	75087772	TEST CINDYTWO	9999CG CLINICIA	N GATEWA	Y TEST MHS AD	Collatera	al	11/24/2008	Indiv.	View
331431	75087772	TEST CINDYTWO	9999CG CLINICIA	N GATEWA	Y TEST MHS AD	Evaluatio	n	11/17/2008	Indiv.	View
326841	75087772	TEST CINDYTWO	9999CG CLINICIA	N GATEWA	Y TEST MHS AD	Collatera	al	10/16/2008	Indiv.	View
326772	75087772	TEST CINDYTWO	9999CG CLINICIA	N GATEWA	Y TEST MHS AD	Collatera	al	10/14/2008	Indiv.	View
326776			9999CG CLINICIA	N GATEVVA	Y TEST MHS AD	Mental H	lealth Promotion	10/14/2008	Indirect	View
			<< First	< Prev -1	2- Next >	Last >>				
e								📃 🖳 Loc	al intranet	

Click on the Service # or the word "View" to examine any individual note.

3. Search and Tag can be used to assemble sets of notes based on multiple parameters, including Primary Therapist, Types of Notes, Time parameters, etc.

🚰 Clinician's Gateway version 3.4 (Home)	- Microsoft Internet Explorer	
<u>File E</u> dit <u>V</u> iew F <u>a</u> vorites <u>T</u> ools <u>H</u> elp		200
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Address 🗟 http://cg/CG/Default.aspx		💌 🄁 Go 🛛 Links 🎽
Clinicians Gateway	Home	Search And Tag Search Home Help Log Out
Enter New Service:		Local intranet

Define up to five parameters to narrow your search criteria.

http://cg/CG/SearchAndTag.a	spx - Microsoft Internet Explorer	
<u>File E</u> dit <u>V</u> iew F <u>a</u> vorites <u>T</u> oo	ls <u>H</u> elp	A.
Ġ Back 👻 🕗 – 💌 💈 🔇	🏠 🔎 Search 🤺 Favorites 🧭 😓 💹 🔹 📒	11
Address 🐻 http://cg/CG/SearchAnd1	ag.aspx	💌 🄁 Go 🛛 Links 🂙
		_
Clinicians Gateway		Clients
	Search and Tag	Search And Tag Search
Welcome: Camille Peterson		Home Help Log Out
Se	arch for:	
	E leak via deleted vecevia is essenti vecevite.	
	Include deleted records in search results	
	04.40	
Primary therapist 💌 =	8142	
Service Date	Between 💌 10/19/2009 🔛 and 11/19/2009 🔛	
[Select search item]		
Medical Compliance		_
Note Status		
Prize v therapist		
Procedure		
Record Type		
Service Date		
Service duration		
E Done		Local intranet

Click Search. Search results display at the bottom of the page. Tag (check) the ones to examine, click Review/Print.

🚰 http://cg/CG/SearchAndTag.aspx - Microsoft Internet Expl	orer		
<u>File Edit View Favorites Tools H</u> elp			
🚱 Back 🔹 🕥 👻 😰 🏠 🔎 Search travori	ites 🐼 🔗 🍡 📲 🔹	_	
Address 📾 http://cg/CG/SearchAndTag.aspx			💌 🔁 Go 🛛 Links 🎽
Primary therapist 💽 = 8142			•
Service Date Between 10/14/2008	and 11/13/2008		
[Select search item] 💌			
[Select search item] 💌			
[Sele gearch item] 💌			
Search			
Select existing collection 💌 Add Collection			
Search Results - Service Notes			
Un/Check all Check Items On All Pages	Review/Print All Checked	Review/F	Print All Results
Tagged Date of Service 🗸	Client 💎	Client # 🔽	Proc. code 🔽
14-Oct-2008	TEST CINDYTWO	75087772	311
14-Oct-2008			401
2 records found.			
· · · · · · · · · · · · · · · · · · ·			•
C Done			Local intranet

Services can now be viewed, saved as an electronic file or printed.



Complete directions for Search and Tag are available at the two websites below:

1.<u>http://covenet/gateway/CG_search_and_tag.pdf</u>, (TEXT)

2.<u>http://covenet/gateway/Search_and_tag_swf.html</u> (VIDEO)

CG staff who "require review" for the Progress Note

Step 1: Setup CG account

For Staff who need their notes approved by Supervisor: Add "require review" to their CG account

For Supervisor who review the notes for Staff: Add "can review" to their CG account

RU# for required approval added to Staff and Supervisor CG account

Procedure: Staff creates Progress note and Supervisor "Accepts" the notes

1. At bottom of the Progress note (after completing the note boxes), complete the "Assign to be reviewed by" section:

Plan				(Select Note) 😽
Assign to be reviewed by	this is only a test		×	
Reviewer: Select Reviewer		Notes:	< >	
Cancel	PERSONAL INFO SECURITY I	Spell Check PASSWORD) GUIDES/HELP	Submit for review	Save as Pending

2. Select Reviewer from the drop down box:

Assign to be reviewed by	9	
Reviewer: Select Reviewer Select Reviewer SMITH SHANNON (8612) TEST NATALIE (8141)	Notes:	Ξ
TEST SHERYL (8144) WORDEN DAVE (8139)	Spell Check Submit for review Save as Pending PERSONAL INFO SECURITY (PASSWORD) GUIDES/HELP	

3. Complete Notes and click "submit for review." Note is sent to Supervisor for review and approval:

Assign to be reviewed by		K	-
Reviewer: SMITH SHANNON (8612)	Notes: please review and approve my notes		
Cancel	PERSONAL INFO SECURITY (PASSWORD) GUIDES/HELP	II Check Submit for review Save as Pending	ŀ

4. The Progress Note appears in "pending services" of the Supervisor's home page and the "type" is "Approve": waiting for approval:

Clinicians Gatew	A Diedrick			Home					Home	Clients	Search Log Out
Enter New S	rvice:										
Type of Service Select	To start a new servic	e note, select the t	ype of service								
Pending Serv	es 1	Result									
Srv. # 🍸 🛛 Proce	lure 🝸 🛛 Group Svc # 🍸	Client # 🍸	Client Name 🖓	Provider S	7			Date 🍸	Sort 🖓	Туре 🍸	
332083 311 C	lateral	75087772	TEST CINDYTWO	9999CG CL	INICIAN GA	TEVVAY TEST MH	SA	11/21/2008		Apprv.	Update
Advanced Se	arch										
	For Type Clients Any	•	Status Pro Any 🔽 E	vider verywhere			[oate Anytime 💌	Search		
Services Sea	rch										
		All 💌 Ser	vice Anywhere	Rendered for	or Client	Name or ID	Bearch				
Search Servic	s by Date Click day to see se	vices performed or	n that day								
	-	< Septemb	er 2008	October 200	8	November	2008				
		Su Mo Tu W	e Th Fr Sa S	u Mo Tu We Th	n Fr Sa	Su Mo Tu We	Th Fr Sa				
		1 2 3 7 8 9 10	4 5 6 0 11 12 13 6	12 6789	3 4 10 11	2 3 4 5	6 7 8				

5. Supervisor clicks "update," at bottom of note complete "notes" section with comments – click "accept." The "accept" button removes the note from the Supervisor's "pending services" section of their home page and moves the note back to the Staff's "pending services" section of their home page and the "sort" is "Accept": Supervisor Approved the note:

	s Gateway				ł	Home				Ţ	Clients	Search
Welcom	a: Sheryl Diedr	ick								Home	Help	Log Out
Enter N	ew Service:											
Type of Ser	- 💌	To start a new se	ervice note, select the	type of service								
Pending	Services		1 Result									
Srv. # 🍸	Procedure 🖓	Group Svc #	♥ Client # ♥	Client Name	🝸 Pro	wider 🍸			Date 🍸	Sort 🖓	Туре 🍸	
332083	311 Collateral		75087772	TEST CINDYTV	VO 999	I9CG CLINICIAN	GATEWA	AY TEST MHS A	11/21/2008	Accept	Indiv.	Update
Advanc	ed Search	F	T	Olation .	Description				D-t-			
		Clients <u> </u>	Any	 Any 	Everywh	ere		•	Anytime 💌	Search		
Service	s Search											
			All 💌 s	ervice Anywhe	re 💌 Re	ndered for Clie	ent Nam	e or ID Search				
Search	Services by D	ate Click day to se	ee services performed	on that day	na n	sensense sense		la a a a a a a a a a a a a a a a a a a				
			< Septen Su Mo Tu 1 2	nber2008 We Th Fr Sa 3 4 5 <mark>6</mark>	Oo Su Mo Ti	tober 2008 J We Th Fr 1 2 3	Sa Su 4	November 2008 Mo Tu We Th Fr	Sa 1			

6. Note is now ready to be "finalized" via "daily approval" screen:

Response							
this is only a	test						
Plan							
this is only a	test						
Review Notes							
Date 44 04 0009	Staff	Action	Notes				
11/21/2008	DIEDRICK SHERYL	Submit	Please review and approve my notes				
11/21/2000	TEST SHEATE	Ассерг	mave reviewed and approve your note				
Cancel			Print Delete Service Edit Service				
	PERSONAL INFO SECURITY (PASSWORD) GUIDESHELP						

Procedure: Staff creates Progress note and Supervisor "Rejects" the notes before "Accepting" the note

- 1. Follow steps 1 thru 4 above
- 2. Supervisor clicks "update," at bottom of note, completes the "notes" section with comments clicks "reject." The "reject" button removes the note from the Supervisor's "pending services" section of their home page and moves the note back to the Staff's "pending services" section of their home page and the "sort" is "Reject": Supervisor Rejected the note:

Clinicians Gateway	edrick				Home					Home	Clients	Search Log Out
Enter New Servi	:e:											
Type of Service Select	To start a new servic	e note, select th	e type of service									
Pending Services	1	Result										
Srv. # 🏆 🛛 Procedure	Group Svc # 🖓	Client # 🍸	Client Name	Pro Pro	ovider 🍸				Date 🍸	Sort 🖓	Туре 🏆	
332099 311 Collate	al	75087772	TEST CINDYTN	VO 99:	199CG CLINICIAN	GATEW	AY TEST MHS A		11/21/2008	B Reject	Indiv.	Update
Advanced Searc	1											
	For Ty Clients A	oe ny	Status ▼ Any ▼	Provider Everywh	here			D /	ate Anytime 💌	Search		
Services Search												
		All 💌	Service Anywhe	re 💌 Re	endered for Clin	ent Nam	e or ID Se:	arch				
Search Services	y Date Click day to see se	rvices performed	on that day									
		< Septe	mber 2008	0	lctober 2008		November 20	108				
		Su Mo Tu	We Th Fr Sa	Su Mo T	Tu We Th Fr	Sa Su	Mo Tu We T	h Fr Sa	3			
		7 8 9	3 4 5 5 10 11 12 13	5 6	1 2 3 7 8 9 10	4	3456	1 7 8				

3 Staff clicks "update" at bottom of note. Click "edit service", Make necessary changes, verify the correct Supervisor is listed in the "Reviewer" box and complete the "notes" section with comments back to the Supervisor. Click "submit for review". The note is sent to Supervisor for review and approval:

Plan					Preulous Entres: (Sele	ct Note) 💽
	this is o	niy a test			×	
Assign to be reviewe	ed by					
Date	Staff	Action	Notes			
11/21/2008	DIEDRICK SHERYL	Submit	Please review and appro	ive		
11/21/2008	TEST SHERYL	Reject	Please document the pla	n with more detail		
11/21/2008	DIEDRICK SHERYL	Submit	made necessary change	s please approve this	note	
11/21/2008	TEST SHERYL	Reject	please update the interve	ention		
Reviewer: TEST SHERYL (8144)	×	made neceaary changes	Notes: s, please approve		A Y	
Cancel				Spell Check	Submit for review	Save as Pending

4 Supervisor clicks "update," at bottom of note complete "notes" section with comments – click "accept." The "accept" button removes the note from the Supervisor's "pending services" section of their home page and moves the note back to the Staff's "pending services" section of their home page and the "sort" is "Accept": Supervisor Approved the note:

Plan					
this is only a test					
Paviau Mataa					
Review Notes	01.07	• - 1'			
Date	Starr	Action	Notes		
11/21/2008	DIEDRICK SHERYL	Submit	Please review and approve		
11/21/2008	TEST SHERYL	Reject	Please document the plan with more detail		
11/21/2008	DIEDRICK SHERYL	Submit	made necessary changes please approve this note		
11/21/2008	TEST SHERYL	Reject	please update the intervention		
11/21/2008	DIEDRICK SHERYL	Submit	made neceaary changes, please approve		
			Notes:		
		I now accept this note	*		
			_		
			Y		
				Print	Accept Reject
🛃 Done					🧐 Local intranet

5 Note is now ready to be "finalized" via "daily approval" screen:

Enter New Consiss		
Enter New Service:		
Type of Service		
Select To start a new ser	ice note, select the type of service	
Pending Services	I Result	
Srv. # 🖓 🛛 Procedure 🌱 🛛 Group Svc # 🤉	Client # 🖓 Client Name 🏹 🛛 Provider 🥎	Date 🏹 🛛 Sort 🏹 🛛 Type 🏹
332099 311 Collateral	75087772 TEST CINDYTWO 99999CG CLINICIAN GATEWAY TEST MHS A	11/21/2008 Accept Indiv. Update
Advanced Search		
For	ype Status Provider	Date
Clients 💌	Any Any Everywhere	Anytime V Search
·		
Services Search		
	All Carving Amowhere Represent for Client Name or ID Search	
Search Services by Date Click day to see	services performed on that day	
	< September 2008 October 2008 November 2008	
	Su Mo lu We In Fr Sa Su Mo lu We In Fr Sa Su Mo lu We In Fr	5a
	7 8 9 10 11 12 13 5 6 7 8 9 10 11 2 3 4 5 6 7	8
	14 15 16 17 18 19 20 12 13 14 15 16 17 18 9 10 11 12 13 14	15
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6 Staff can click "update" to see Supervisor's comments:

Plan			
this is only a t	est		
Review Notes			
Date	Staff	Action	Notes
11/21/2008	DIEDRICK SHERYL	Submit	Please review and approve
11/21/2008	TEST SHERYL	Reject	Please document the plan with more detail
11/21/2008	DIEDRICK SHERYL	Submit	made necessary changes please approve this note
11/21/2008	TEST SHERYL	Reject	please update the intervention
11/21/2008	DIEDRICK SHERYL	Submit	made neceaary changes, please approve
11/21/2008	TEST SHERYL	Accept	I now accept this note
Cancel			Print Delete Service Edit Service

Change Reviewer Procedure

The designated reviewer on a service can be changed by a staff person who has been given the "Change Reviewer" role in Clinician's Gateway.

The Clinic Manager must first inform System Support which individuals will be given this role. After the role is assigned to that staff person, they may change the reviewer to any available reviewer in the Reporting Unit.

1. Locate the service. You can search for the client's services by client name or service # (#xxxxxx) if known, or search for the Staff person's Pending services.

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Address 📾 http://cg/CG-QA/Default.aspx	🔽 🔁 Go 🛛 Links 🎽
Clinicians Gateway Ho	me Search And Tag Search
Welcome: Sandy TEST	Home Help Log Out
Enter New Service:	
Type of Service Select To start a new service note, select the type of set	rvice
Pending Services 1 Result	
Srv. Procedure ⊽ Group Svc Client Client #☆ Procedure ⊽ #♡ #♡ Name ♡ Provider	♀ Date ♀ Type ♀ Sort ♀ Reviewer ♀
344757 381 Individual 75087772 TEST 9999CG - Rehabilitation 75087772 CINDYTWO GATEWAY	CLINICIAN 2/3/2009 Clinician's Update
Advanced Search	
For Type Status Provider Clients Any Parcel Any Everywhere Services Search	Date Search
All Service At 01122 EDEN MHS CHILD	Rendered for test cindytwo Search
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Clinicians Gateway	Home	Staff Test Mary Search and Tag Search
Welcome: Sandy TEST		Home Help Log Out
Enter New Service:		
Type of Service Select To start a ne	ew service note, select the type of service	
Pending Services	1 Result	
Srv. Procedure ⊽ Group Svc #▽ #▽	Client Client #♡ Name♡ Provider♡	Date
344757 381 Individual Rehabilitation	75087772 TEST 9999CG - CLINICIAN CINDYTWO GATEWAY TEST MHS AD	2/3/2009 Clinician's Update
Advanced Search		
For Type Clients Any	Status Provider Status Provider Image: Any Im	Date ▼ Anytime ▼ Search
Services Search	F	
All Service At	01122 EDEN MHS CHILD	Rendered for [test cindytwo] Search
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2. View the note by clicking on View or the Service number.

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Group	s		6 Results						
Draft S	Service R	ecords	0 Results						
Pend	ng Servic	e Records	5 Results						
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372871		TEST CINDYTWO	0108T1 OAKLAND ADULT	SERVICE TEAM 1	CG PRE-EPISODE NOTE	6/5/2009	Indiv. 7	View	
362020 1	75087772	TEST CINDYTWO	9999CG CLINICIAN GATEV	VAY TEST MHS AD	Collateral	4/22/2009	Indiv.	View	-
368328	5087772	TEST CINDYTWO	9999CG CLINICIAN GATEV	VAY TEST MHS AD	96105 ASMT APHASIA, INTER, RPT	4/15/2009	Indiv.	View	_
359393			01333 VOCATIONAL PRO	GRAM MHS ADLILT	Paid Time Off	4/9/2009	Indirect	VIEw	-
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3. At the bottom of the Service Note, choose a new reviewer from the list. Click Update.

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Address a http://cg/CG-QA/serviceentry/ViewSe	rvice.aspx?INDV_SRV_NUMBER=368328		💌 🌛 Go 🛛 Links 🌺
Review Notes			
Date	Staff	Action	Notes
5/15/2009	Test, Mary	Submit	
This service has currently been submitted to be re Cancel	Viewed by: 8141 - Courson, Natalie 8809 - Diedrick, Sheryl 10931 - Forsythe, Robert 10904 - Peterson, Camille	Update	Print
	PERSONAL 8141 - Courson, Natalie	BUIDES/HELP	
	8144 - Diedrick, Sheryl 8139 - Worden, Dave		•
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3. The service will be transferred from the original reviewer's Home Page Pending to the replacement reviewer's Home Page Pending list.

MANAGING REPORTS
Rejected Service Notice

- 1. Duplicate or Rejected Service notices may be sent for research.
- 2. Clerical Staff must justify the daily InSyst MHS 442 Direct Service Audit Report and MHS 443 Indirect Service Audit Report against Clinician's Gateway services. Examples of the reports follow. Use the search functions from the Home page to find services.

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Welcome: Sandy TEST					Home Help Log Out
Srv. # 🏹 Procedure	Group Svc # 🍸	Client # 🍸	Client Name 🍸	Provider 🍸	Date 🏹 🛛 Туре 🏹
Advanced Search					
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Clinical Adminstrator Access Search Staff	01333	VOCATIONAL PROGRAM N PERSONAL INFO SECUR	IHS ADULT I Anytime	Search	
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- Search for client services via either the Search functions in the center of the page or through the Global Search in the upper right hand corner (choose Services and enter the client name).
- Search for an individual staff person's Staff View page through the Global Search in the upper right corner (choose Staff and enter the staff name) From the staff page, lists of Finalized, Pending and Draft service notes may be accessed.

EXAMPLE ONLY

Help Desk, BHCS, Problem Reporting
Wednesday, November 24, 2010
Clinic Supervisor
Help Desk, BHCS
REJECTED SERVICE NOTICE – Clinician's Gateway RU #011XX1

Good Morning,

The Clinician's Gateway service listed below was rejected during the transfer from Clinician's Gateway to InSyst. The reason for the rejection is that someone added a closing date of 08/22/10 to the client's episode before the evening transfer. Thus InSyst was unable to accept the services when Clinician's Gateway tried to transfer them. It might be easier to wait for the Clinician's Gateway services to show up on the MHS442 report before closing the episodes to which they belong. Or, search for a draft or pending services in Clinician's Gateway could reveal outstanding services for the client.

REJECTED SERVICES:

Client Number	Reporting Unit	Service Date	Proc Code	Staff ID	Time	Co- Staff ID	Time	Tx Loc	Num Grp	EBP SS	Ref Num
75117018	01191	17 Aug 10	311	3473	01:15	0	00:00	1	1		396262

REASON: Cannot find an episode for client

If the Clinician's Gateway service is valid, you will need to re-open the episode in InSyst, enter the service manually in InSyst (so that it matches the service in Clinician's Gateway), and then close the episode again with a date after the final service. Clinician's Gateway will not attempt to transfer this service.

If the Clinician's Gateway service is invalid, please complete a request to have the Clinician's Gateway note deleted and fax it to the Help Desk. Re-enter a corrected service if necessary.

Thank you for your attention to this matter.

Alameda County BHCS Information Systems Support Staff 510-567-8181

Report MHS 442 Direct Service Audit Report

Report Description

This shows all direct services (based on the date the service was entered) entered into the computer for each clinician for the day of the report run. Information includes service date, clinician, client served, procedure code, number in-group, service duration, and co-staff. "Number in Group" and "Co-Staff" contains an asterisk for non-group procedures.

How to Get the Report

The report is generated and queued to your printer automatically the day after services are input.

How to Use the Report

Review the report for accuracy. The report is intended as a data entry management tool to assist in making sure all services performed in a clinic are being entered on a timely basis. If service entry is abnormally low, an audit of the data collection and service entry process may be needed. If there is incorrect information, episode, and service updating may be required.

REPORT EXAMPLE

Mental Health Service Audit	Services Report		dd-mmm-yyyy Page 1			
REPORT MH Provider: Input Date:	S442 Oakland Ment dd-mmm-yyy	al Health Servi	ices (RU ####)			
Service Audit Primary Thera	Date: dd/mm pist: Clinici	m/yyyy an's Name		Staff#:	####	
Case # Client 0123459 *****	Name Sample, John **	Procedure 130	#Group **	HH-MM 24:00	Location 9	Co-Staff
Service Audit Date: dd/mmm/yyyy Primary Therapist: Clinician's Name Staff#: ####						
Case # Client 0123458 *****	Name Schmoo, Joe	Procedure 131	#Group **	HH-MM 24:00	Location 9	Co-Staff
0123457	Schmoz, Janet	131	**	24:00	9	*****

Report MHS 443 Indirect Service Audit Report

Report Description

This shows all direct services (based on the date the service was entered) entered into the computer for each clinician for the day of the report run. Information includes service date, clinician, client served, procedure code, number in-group, service duration, and co-staff. "Number in Group" and "Co-Staff" contains an asterisk for non-group procedures.

How to Get the Report

The report is generated and queued to your printer automatically the day after services are input.

How to Use the Report

Review the report for accuracy. The report is intended as a data entry management tool to assist a manager in making sure all services performed in a clinic are being entered on a timely basis. If service entry is abnormally low, an audit of the data collection and service entry process may be needed. If there is incorrect information, episode, and service updating may be required.

REPORT EXAMPLE

Mental Health Service Service Audit Report	28		dd-mm Page 1	пт-уууу	
REPORT MHS443 Reporting Period: Reporting Unit:	16 July 2010 to 16 Ju REPORTING UNIT	ly 2010 23:59: NAME (RU ##	00 !###################################)	
Service Audit Date: Primary Therapist:	dd/mmm/yyyy Clinician's Name		Staff#:	####	
Case # Client Name 0123459 Sample ******	Procedure e, John 130	#Group **	HH-MM 24:00	Location 9	Co-Staff

CLINICIAN NAME

Procedure	Recipient	Service Date	Time	Cost
684 PLAN &DEV \$.00	5 Other		16 June 2010	0.50
684 PLAN & DEV \$.00	5 Other		17 June 2010	0.40
699 OTHER ACTV \$.00	5 Other		19 June 2010	0.40
684 PLAN & DEV \$.00	5 Other		20 June 2010	0.6
684 PLAN & DEV \$.00	5 Other		24 June 2010	0.475
684 PLAN & DEV \$.00	5 Other		25 June 2010	0.650
684PLAN & DEV \$.00	5 Other		3 July 2010	0.50
Total Indirect Services for \$0.00	CLINICIAN NAME	2 7	Total Hours:	34.75

Total Indirect Services for E CLINIC RECOVERY SAMPLE for 16 July 2010 to 16 July 2010 23:59:99:8