

Clinician's Gateway

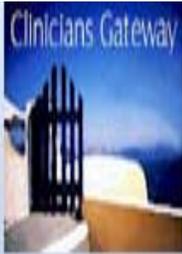
Admin Support Servs & Clinical Managers
**HANDS-ON INTRODUCTION
TRAINING**

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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!

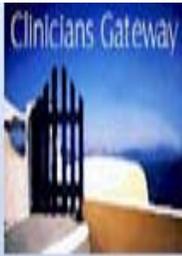
MHSA (Data Forms and Submission): installed 2008

MAA Claiming - Individual Staff Log Form: installed 2007

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

v1.0
2/13/2009

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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

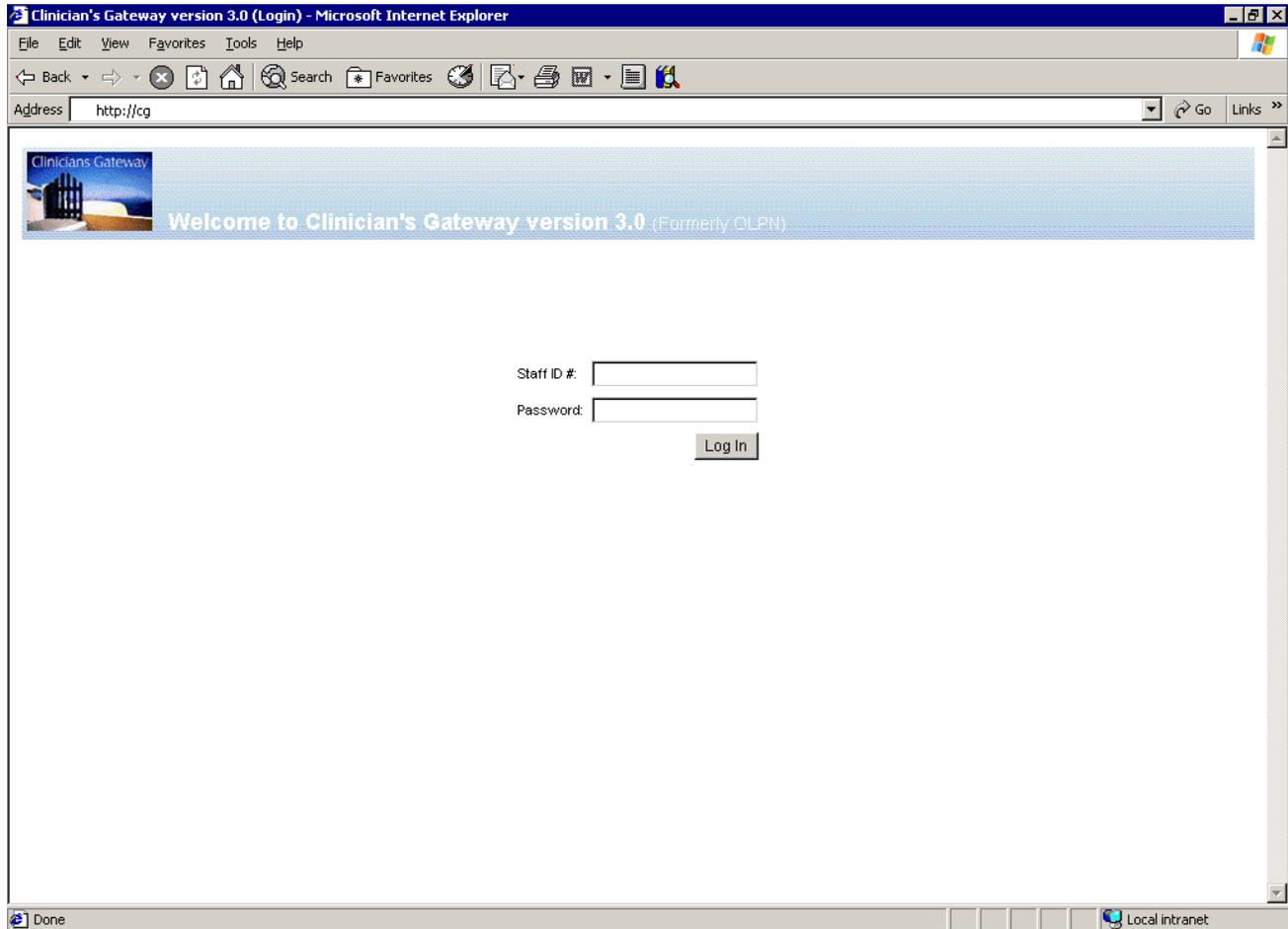
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***LOGGING INTO
CLINICIAN'S GATEWAY***

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Login – Security

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



- **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.**

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CLIENT INFORMATION

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Client Face Sheet

Home

Welcome: **Natalie Courson**

Home Help Log Out

Enter New Service:

Type of Service
 Select ---- To start a new service note, select the type of service

Pending Services 15 Results

Srv. #	Procedure	Group Svc #	Client #	Client Name	Provider	Date	Sort	Type
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

Search Results

Welcome: **Natalie Courson**

Search for: test dave

Search Again: test dave

1

2

Client #	Client Name	Status	Gender	Age	Services	Indv. Service
75122885	TEST DAVE	Active	M	59	1	Start

Client #	Client Name	Status	Gender	Age	Services	Indv. Service
75122885	TEST DAVE	Active	M	59	0	Start

Client Plans: 0 Results

PERSONAL INFO | SECURITY (PASSWORD) | 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.

Clincian's Gateway version 3.2 (Client Information Facesheet) - Windows Internet Explorer

http://cg/CG-Training/FaceSheet.aspx?CLIENT_NUMBER=75122885

File **1** View Favorites Tools Help

Google Search

Clincian's Gateway version 3.2 (Client Information Fa... Sign In

This site is for training only

Clincian's Gateway Clients

Client Information Facesheet Search

Welcome: **Natalie Courson** Home Help Log Out

Switch to Account View

CONSUMER INFORMATION

Aliases

Name	TEST DAVE N	Number	75122885 (Issued on 4/21/2005)	Date of Birth	1/1/1950 (Age 59)
Address	2008 UNKNOWN OAKLAND 94606	SSN	000-00-0000	Gender	Male
Phone		Account	856458 (TEST DAVE)	Language	Unknown/Not Reported
Staff	Staff General	Marital	Unknown	Education	Grade 12
RP Owes	\$0.00	Disability	None	Ethnicity	Unknown
		Problem	None	Ethnic Origin	

Medicaid Coverage

Covered	Number	Eligible Date	Special Reason

Insurance

#	Company	Policy #	Effective	Expires

SIGNIFICANT OTHER

Name	Relation	Address	Effective	Expires	Phone

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		Voluntary	Temporary Conservatorship
Open	01275 LA CHEM DAY OAK PARK INT	10/1/2004		296.44	1221 DEFAULT CONVERSION	0 Staff General	1	1/15/2007	Not Guilty	Unknown

TOTAL EPISODE COUNT: 2

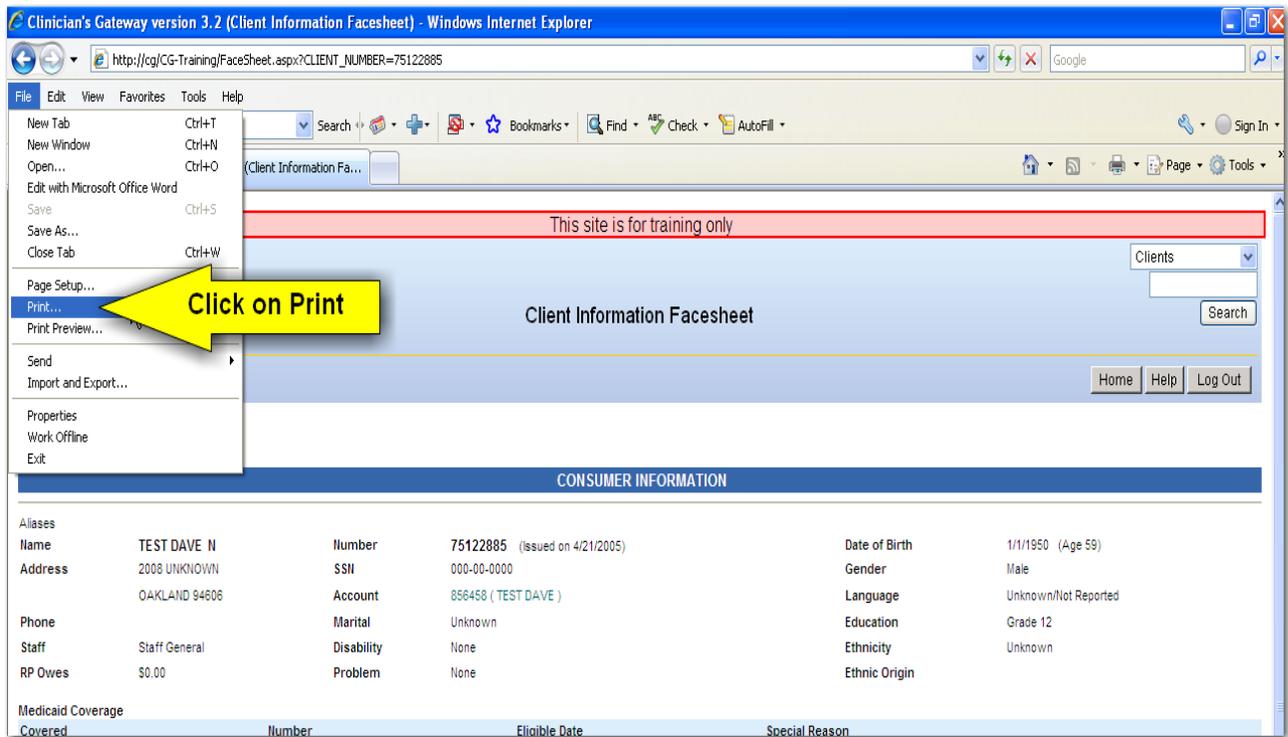
MICROFILM INFORMATION:

TEST DAVE N (75122885)

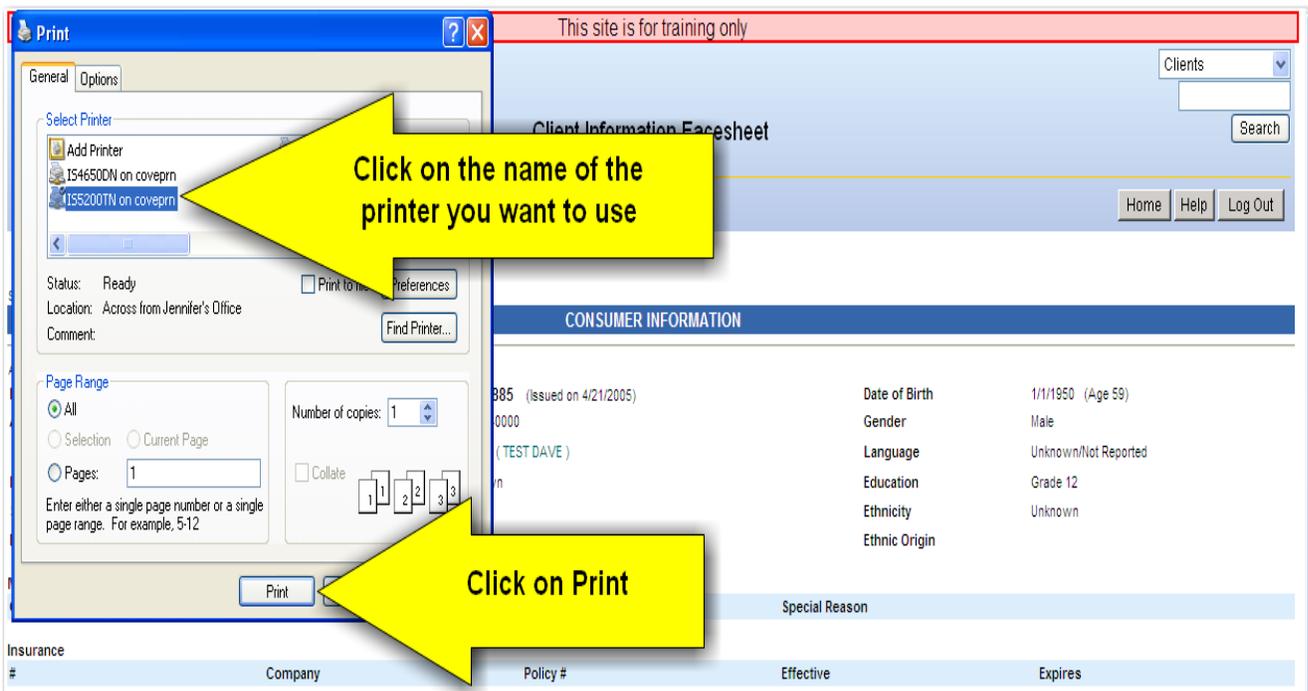
ELECTRONIC PROTECTED HEALTH INFORMATION

PERSONAL INFO | SECURITY (PASSWORD) | GUIDES/HELP

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

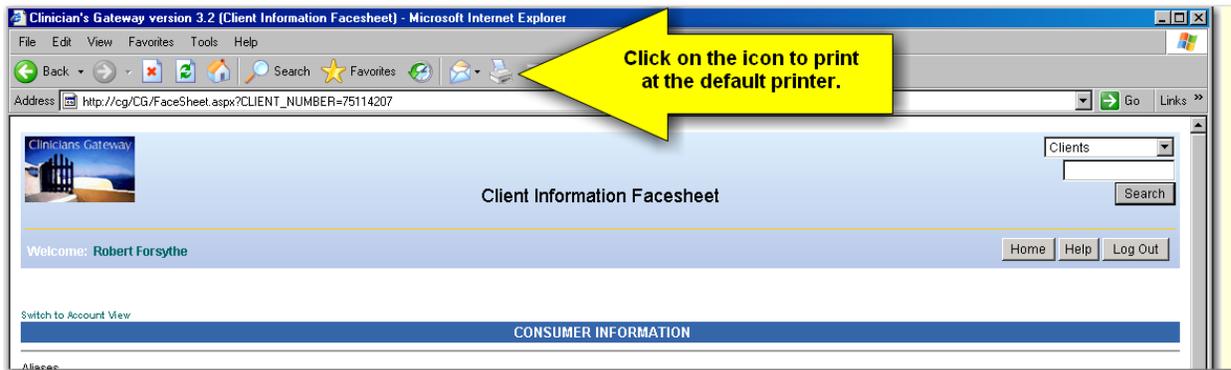


- Click on print.



- 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....



blank

Client Services Search

Home

Welcome: [Natalie Courson](#)

Enter New Service:

Type of 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	Type	Sort	Reviewer
284109	361 Medication Support		75087772	TEST CINDYTWO	99991 - West County Mental Health Sys	3/8/2007	Clinician's Progress Note		Update...
284110	361 Medication Support		75087772	TEST CINDYTWO	99991 - West County Mental Health Sys	3/8/2007	Clinician's Progress Note		Update...
288470	361 Medication Support		75087772	TEST CINDYTWO	99991 - West County Mental Health Sys	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.

Services Search

All Service Anywhere Rendered for Client Name or ID Search

Search Services by Date Click day to see services performed on that day

May 2009							June 2009							July 2009							
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	
					1	2	1	2	3	4	5	6					1	2	3	4	
3	4	5	6	7	8	9	7	8	9	10	11	12	13	5	6	7	8	9	10	11	
10	11	12	13	14	15	16	14	15	16	17	18	19	20	12	13	14	15	16	17	18	
17	18	19	20	21	22	23	21	22	23	24	25	26	27	19	20	21	22	23	24	25	
24	25	26	27	28	29	30	28	29	30												
31													26	27	28	29	30	31			

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

Search Results

Welcome: **Natalie Courson**

Search for: test dave view all close all

Search Again

test dave

Services

1 Services, Finalized **1** Result

Srv. #	Client #	Client Name	Reporting Unit	Procedure	Date	Type	Note
315281	75122885	TEST DAVE	99991 West County Mental Health Svs	Medication Support	3/23/2009	Indiv.	View

2 Services, Pending **0** Results

Srv. #	Client #	Client Name	Reporting Unit	Procedure	Date	Type	Note
--------	----------	-------------	----------------	-----------	------	------	------

3 Services, Draft **2** Results

Srv. #	Client #	Client Name	Reporting Unit	Procedure	Date	Type	Note
315412		test dave	0108T1 OAKLAND ADULT SERVICE TEAM 1	CG PRE-EPIISODE NOTE	5/28/2009	Indiv.	View
315300	75122885	TEST DAVE	9999CG CLINICIAN GATEWAY TEST MHS AD	Crisis Stabilization	3/27/2009	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 [message "click here to add a new collection name"](#)
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.

blank

***INDIVIDUAL NOTES USING CLIENT
NAME OR NUMBER***

blank

Individual Notes Using Client Name or Number

1 Home

Welcome: **Natalie Courson**

Enter New Service:
 Type of Service: Select ---- **2** To start a new service note, select the type of service

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 Habitative 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...

<< First < Prev -1- -2- Next > Last >>

Advanced Search
 For: Clients | Type: Any | Status: Any | Provider: Everywhere | Date: Anytime | Search

Services Search
 All | Service: Anywhere | Rendered for: Client Name or ID | Search

Search Services by Date Click day to see services performed 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	6	7	5	6	7	8	9	10	11	3	4	5	6	7	8	9	
8	9	10	11	12	13	14	12	13	14	15	16	17	18	10	11	12	13	14	15	16	
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.

The screenshot shows the 'Home' page of the 'Clinicians Gateway' application. At the top, there is a 'Welcome: Natalie Courson' message and navigation buttons for 'Home', 'Help', and 'Log Out'. Below this is the 'Enter New Service' section, which includes a form with four numbered callouts: 1 (Primary Clinician dropdown), 2 (Client text input), 3 (Note Template dropdown), and 4 (Start Indiv Service button). The form is populated with 'Individual' for Type of Service, 'TEST NATALIE' for Primary Clinician, 'test cindy' for Client, and 'Clinician's Progress Note' for Note Template. Below the form is a 'Pending Services' table with 12 results, listing service details such as Srv. #, Procedure, Group Svc #, Client #, Client Name, Provider, Date, Sort, and Type. At the bottom of the screenshot are sections for 'Advanced Search' and 'Services Search', both with search filters and buttons.

- **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.”

Client, Provider and Title

Welcome: Natalie Courson

Search For Different Client

test cindy Search

Client #	Client Name	Status	Gender	Age	Services	Select Provider	Select Title
75087772	TEST CINDYTWO	Active	F	49	0	99993 Take Care Case Management	Clinician's Progress Note

1 record found.

PERSONAL INFO | SECURITY (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: **99993 Take Care Case Management** Title: **Clinician's Progress Note**

Procedures: Service Location:

Primary Clinician: **TEST NATALIE** Add additional clinicians

Opened: 3/30/2007 Service Date: Utilization review date: Utilization review has expired!

Med. Compliant: Side Effects: Primary Clinician Time:

Instructions
Respond to problems/goals/objectives of treatment plan and signs and symptoms related to diagnosis. Include treatment interventions and address changes in the client's functioning. If there is little progress, include an explanation of the limited progress.

Face To Face Time: Hours:Minutes

Episode Diagnosis Information

Axis I	Axis II	Axis III	Axis IV	Axis V
799.9	V71.09	799.9	J	000

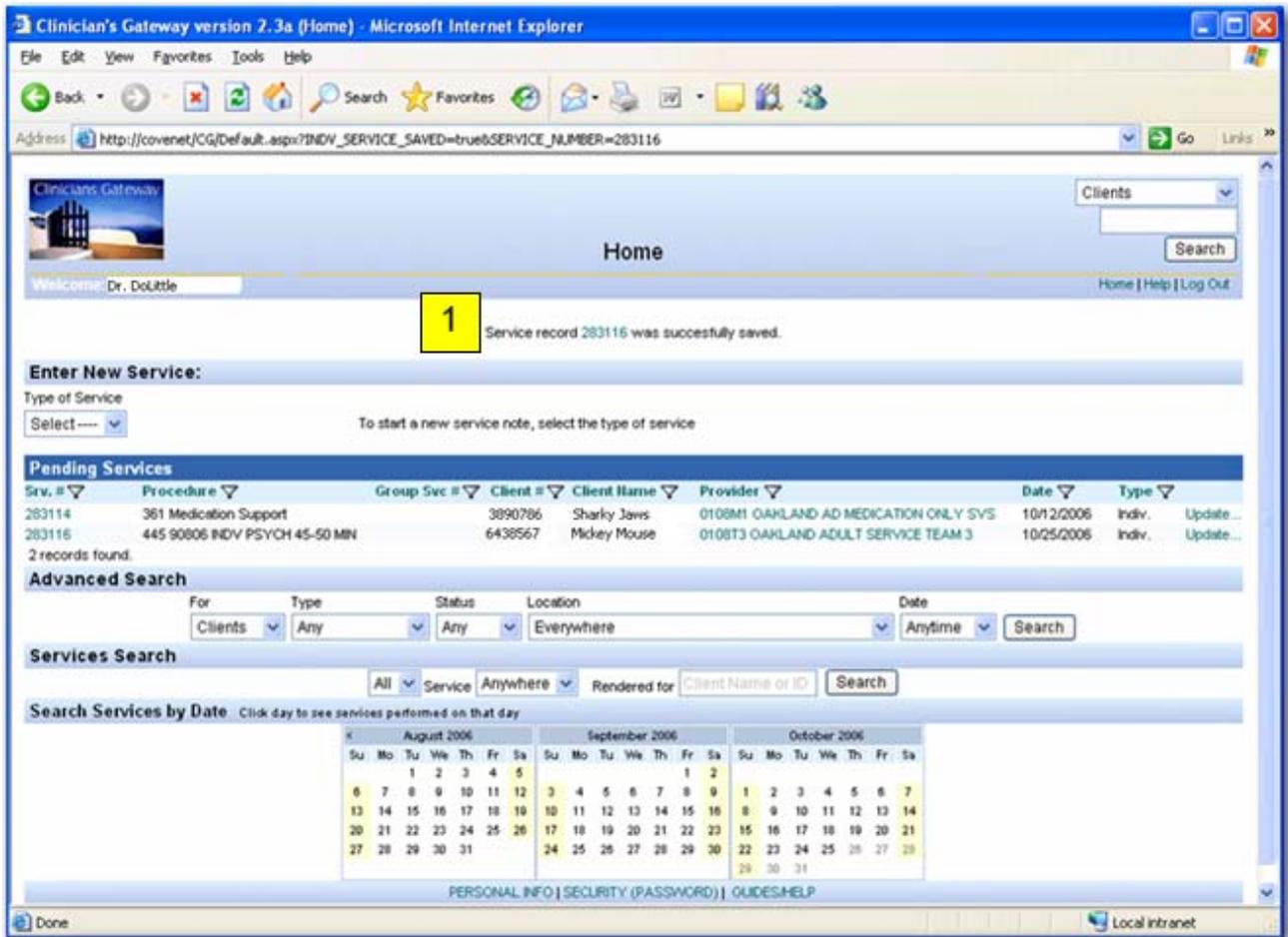
Presenting Problem(s) Enter: (Select Note)

Evaluation Previous Entries: (Select Note)

Intervention Previous Entries: (Select Note)

Use the "Previous Entries" drop list to view the last 5 notes entered for this client

- 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.”



- 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.

blank

Notes: Draft versus Pending, Archive, and Finalize?

Drafts: **Save as Draft** when you have incomplete 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 completed, 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 store a Draft 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 seal it with your electronic signature and add it to your services that are transferred nightly to InSyst for claiming.

blank

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.

blank

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. **Enter zero minute's time.** (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.**

The screenshot shows the 'Clinicians Gateway' Home page. The user is logged in as Camille Peterson. The 'Enter New Service' section is active, showing a form with the following fields: 'Type of Service' (set to Individual), 'Primary Clinician' (PETERSON CAMILLE), 'Client' (with a callout box), and 'Note Template' (Clinician's Progress Note). The callout box contains the text: 'Leave name/ID field empty when writing a note for an unregistered client'. There is also a 'Start Individual Service' button.

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

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

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

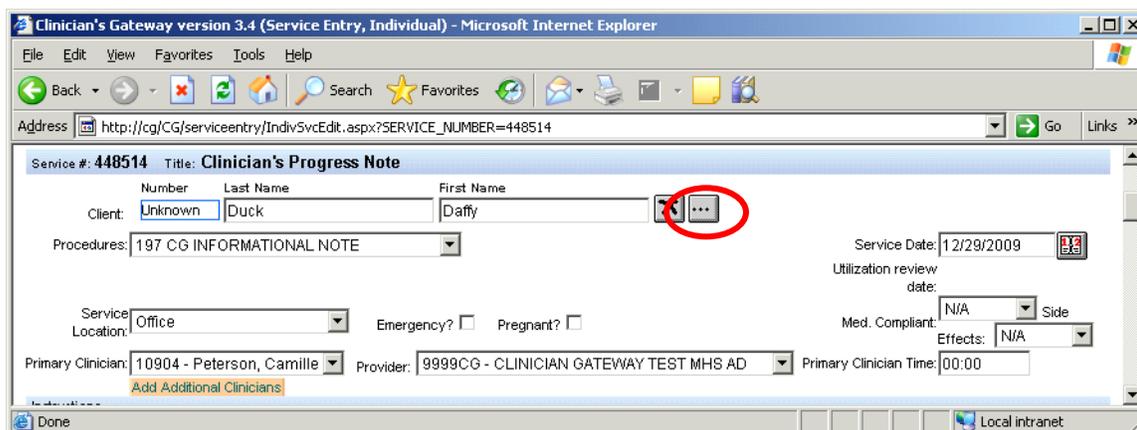
To recall the Draft note: (To add the client's # when available)

- 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.

Srv. #	Procedure	Group Svc #	Client #	Client Name	Provider	Date	Type	Sort	Reviewer
422752	391 Group Rehabilitation	1187	75130257	TESTY CINDY	9999CG - CLINICIAN GATEWAY TEST MHS AD	10/28/2009	Clinician's Progress Note	Wait	Update...
422807	381 Individual Rehabilitation		75135386	TESTCASE DAVE	9999CG - CLINICIAN GATEWAY TEST MHS AD	10/28/2009	Clinician's Progress Note	Wait	Update...
444625	321 Evaluation		75087772	TEST CINDY DWO	0108T1 - OAKLAND ADULT SERVICE TEAM 1	12/18/2009	Clinician's Progress Note		Update...
448514	197 CG INFORMATIONAL NOTE			Duck Daffy	9999CG - CLINICIAN GATEWAY TEST MHS AD	12/29/2009	Clinician's Progress Note	Draft	Update...

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.



The screenshot shows a web browser window titled "Clinician's Gateway version 3.4 (Service Entry, Individual) - Microsoft Internet Explorer". The address bar shows the URL: http://cg/CG/serviceentry/IndivSvcEdit.aspx?SERVICE_NUMBER=448514. The main content area displays a form for "Service #: 448514 Title: Clinician's Progress Note". The form includes several fields: "Client" with sub-fields for "Number" (Unknown), "Last Name" (Duck), and "First Name" (Daffy); "Procedures" (197 CG INFORMATIONAL NOTE); "Service Date" (12/29/2009); "Utilization review date"; "Med. Compliant" (N/A) and "Side"; "Effects" (N/A); "Primary Clinician" (10904 - Peterson, Camille); "Provider" (9999CG - CLINICIAN GATEWAY TEST MHS AD); and "Primary Clinician Time" (00:00). A red circle highlights a search button (***). The status bar at the bottom indicates "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

1 Home

Welcome: **Natalie Courson**

Enter New Service:

Type of Service
 Select ---- **2** To start a new service note, select the type of service

Pending Services 12 Results

Srv. #	Procedure	Group Svc #	Client #	Client Name	Provider	Date	Sort	Type
288470	361 Medication Support		7508772	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 Rehabilitative Day Treatment	9/24/2008		Indiv. Update...
343508	571 Brokerage Services		7508772	TEST CINDYTWO	0112M1 EDEN ADULT MEDICATION ONLY S	10/14/2008		Indiv. Update...

<< First < Prev -1- -2- Next > Last >>

Advanced Search

For: Clients | Type: Any | Status: Any | Provider: Everywhere | Date: Anytime | Search

Services Search

All | Service: Anywhere | Rendered for: Client Name or ID | Search

Search Services by Date Click day to see services performed 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	6	7	5	6	7	8	9	10	11	3	4	5	6	7	8	9	
8	9	10	11	12	13	14	12	13	14	15	16	17	18	10	11	12	13	14	15	16	
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** – 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

Welcome: **Natalie Courson** Home Help Log Out

Enter New Service:

Type of Service: Individual Primary Clinician: **1** TEST NATALIE Client: **2** test cindy Note Template: **3** Clinician's Progress Note **4** Start Indiv Service

Edit Primary Clinician List

Pending Services 12 Results

Srv. #	Procedure	Group Svc #	Client #	Client Name	Provider	Date	Sort	Type
288470	361 Medication Support		7508772	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		7508772	TEST CINDYTWO	0112M1 EDEN ADULT MEDICATION ONLY S	10/14/2008		Indiv. Update...

<< First < Prev -1- -2- Next > Last >>

Advanced Search

For: Clients Type: Any Status: Any Provider: Everywhere Date: Anytime Search

Services Search

All Service: Anywhere Rendered for: Client Name or ID Search

Search Services by Date Click day to see services performed 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	5	6	7	5	6	7	8	9	10	11	3	4	5	6	7	8	9
8	9	10	11	12	13	14	12	13	14	15	16	17	18	10	11	12	13	14	15	16
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** - 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.”

The screenshot shows a web application interface with the following elements:

- Header:** "Clinicians Gateway" logo on the left, "Client, Provider and Title" title in the center, and a "Clients" dropdown menu on the right.
- User Area:** "Welcome: Natalie Courson" on the left and "Home", "Help", "Log Out" buttons on the right.
- Search Section:** "Servicable Clients Matching, 'test cindy'" followed by a "Search For Different Client" section with a text input containing "test cindy" and a "Search" button.
- Table:** A table with columns: "Client #", "Client Name", "Status", "Gender", "Age", "Services", "Select Provider", "Select Title", and "Select".

Client #	Client Name	Status	Gender	Age	Services	Select Provider	Select Title	Select
75087772	TEST CINDYTWO	Active	F	49	0	99993 Take Care Case Management	Clinician's Progress Note	Select
- Footer:** "PERSONAL INFO | SECURITY (PASSWORD) | GUIDES/HELP" navigation links.

Numbered callouts in the image point to:

- Client Name field
- Status field
- Select Provider dropdown
- Select Title dropdown
- Select button

- **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.

Service #: **New** Title: **Clinician's Progress Note**

Client: Number: 75087772 Last Name: TEST First Name: CINDYTWO

Procedures: 321 Evaluation

Service Location: Office Emergency? Pregnant?

Primary Clinician: 8141 - Courson, Natalie Provider: 9999CG - CLINICIAN GATEWAY TEST MHS AD Primary Clinician Time: 0:00

Instructions

1 Add Additional Clinicians

- 1. Click on “Add Additional Clinician’s.”
- 2. Choose the Co-staff from the drop down menu.
- 3. Enter time for both clinicians

Service Location: Office Emergency? Pregnant?

Primary Clinician: 8141 - Courson, Natalie Provider: 9999CG - CLINICIAN GATEWAY TEST MHS AD Primary Clinician Time: 0:00

Co-Staff: Select Clinician

Instructions

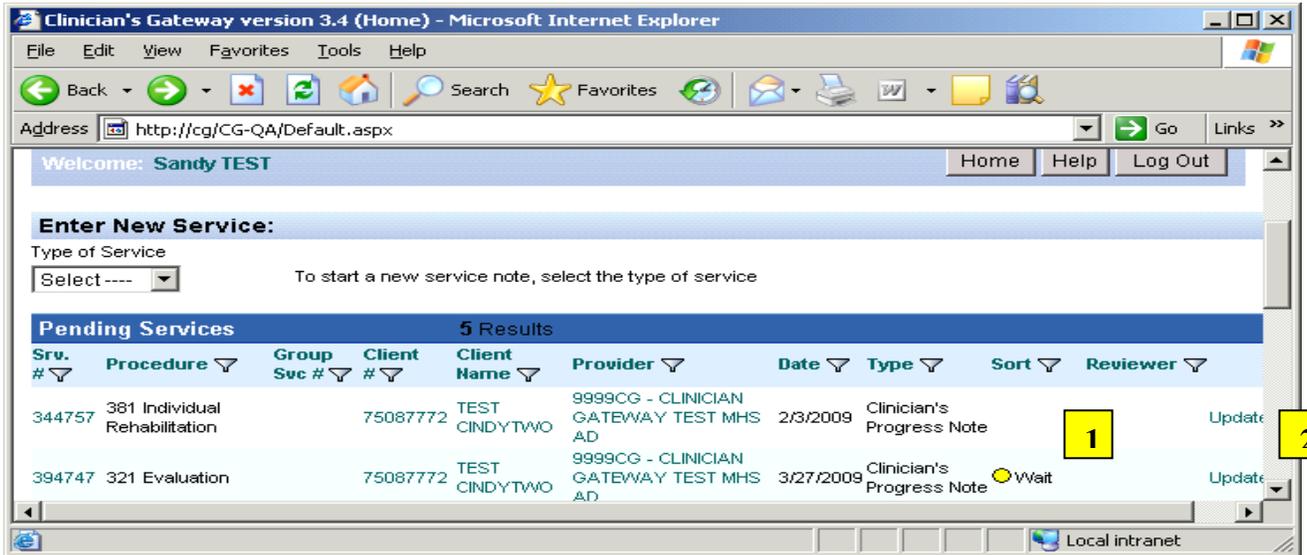
2 8142 - TEST, Sandy

3 Co-Staff Time: 0:00

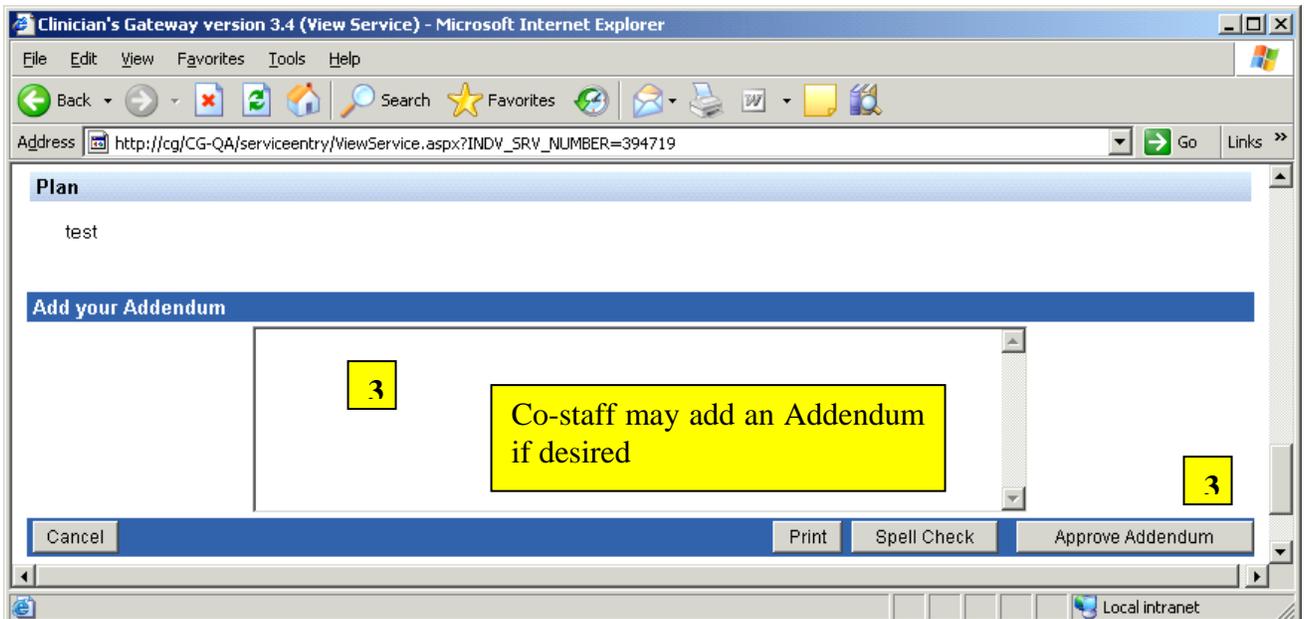
Episode Diagnosis Information				
Axis I	Axis II	Axis III	Axis IV	Axis V
296.44	799.9	305.80	J	000

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

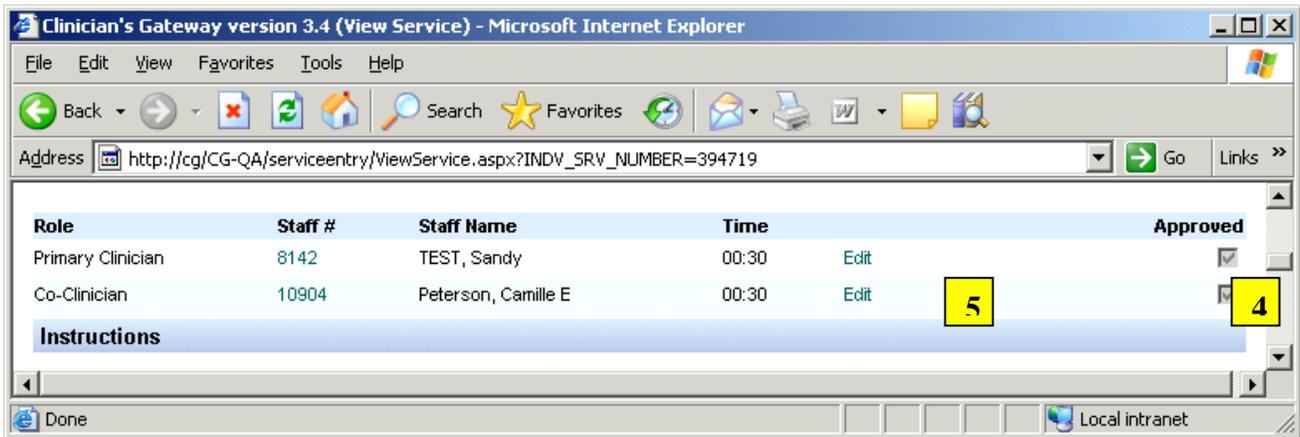
- **1** – The note will be listed on the primary and co-staff’s pending lists with a yellow dot and the word “wait” which displays the message “Waiting for clinicians to approve this service” when pointed at with the cursor. This is an advisory message only. Either Clinician may finalize at any time.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



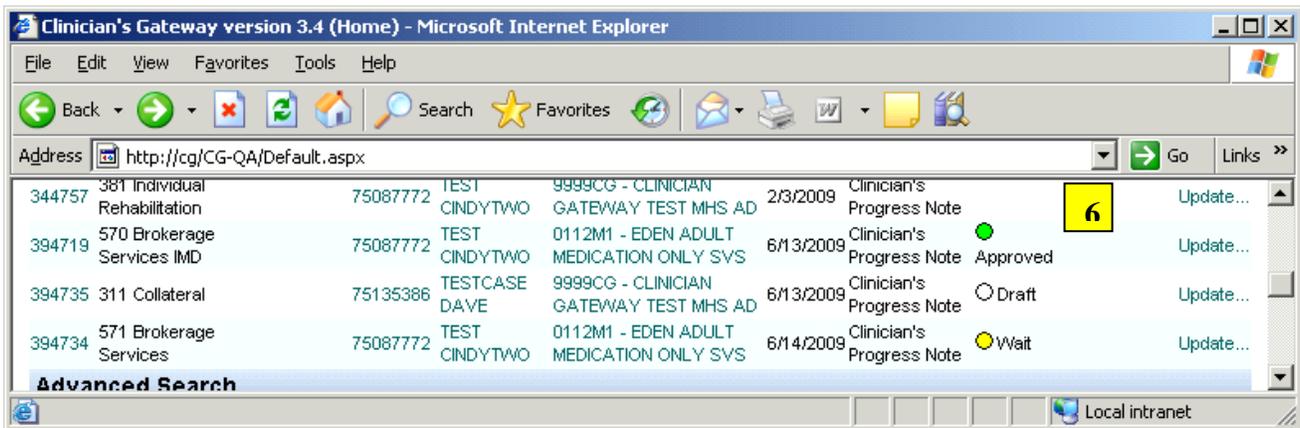
- **3** – If desired, add the addendum at the bottom of the note and click “Approve Addendum”



- **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.



- **6** - If the Co-staff have added an addendum, the note disappears from the Co-staff’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.

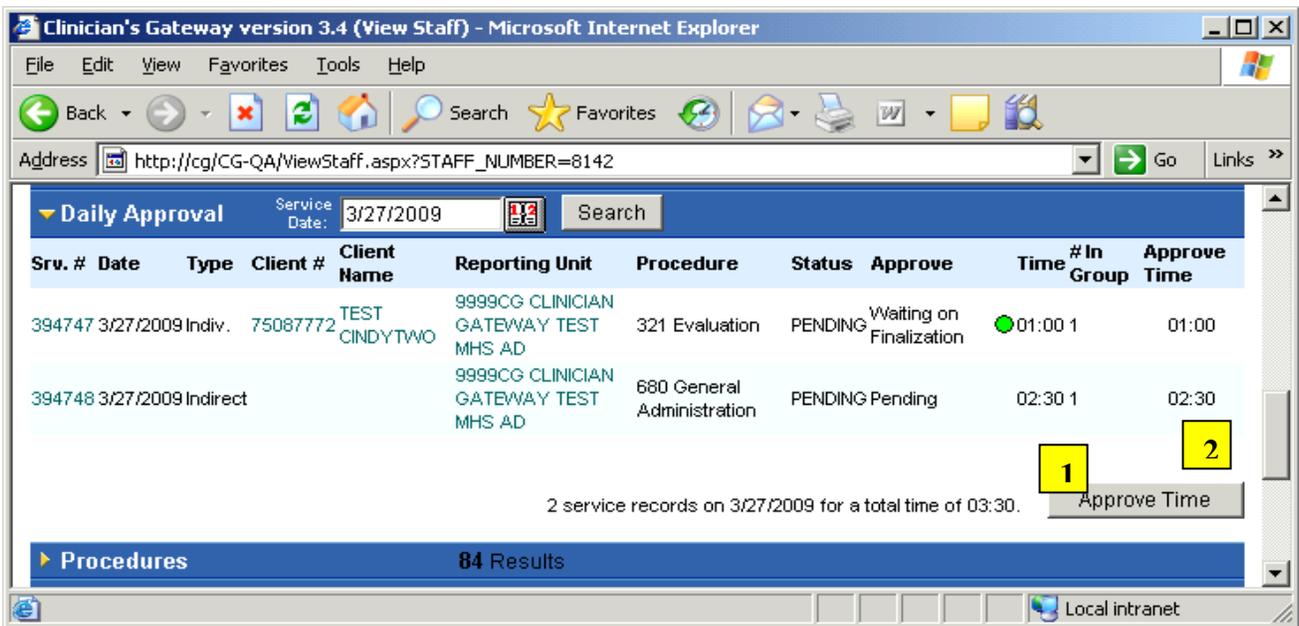


- The note will also disappear from the Co-staff’s Home page Pending list when the Primary finalizes because it is no longer available to the Co-staff to edit.

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”)

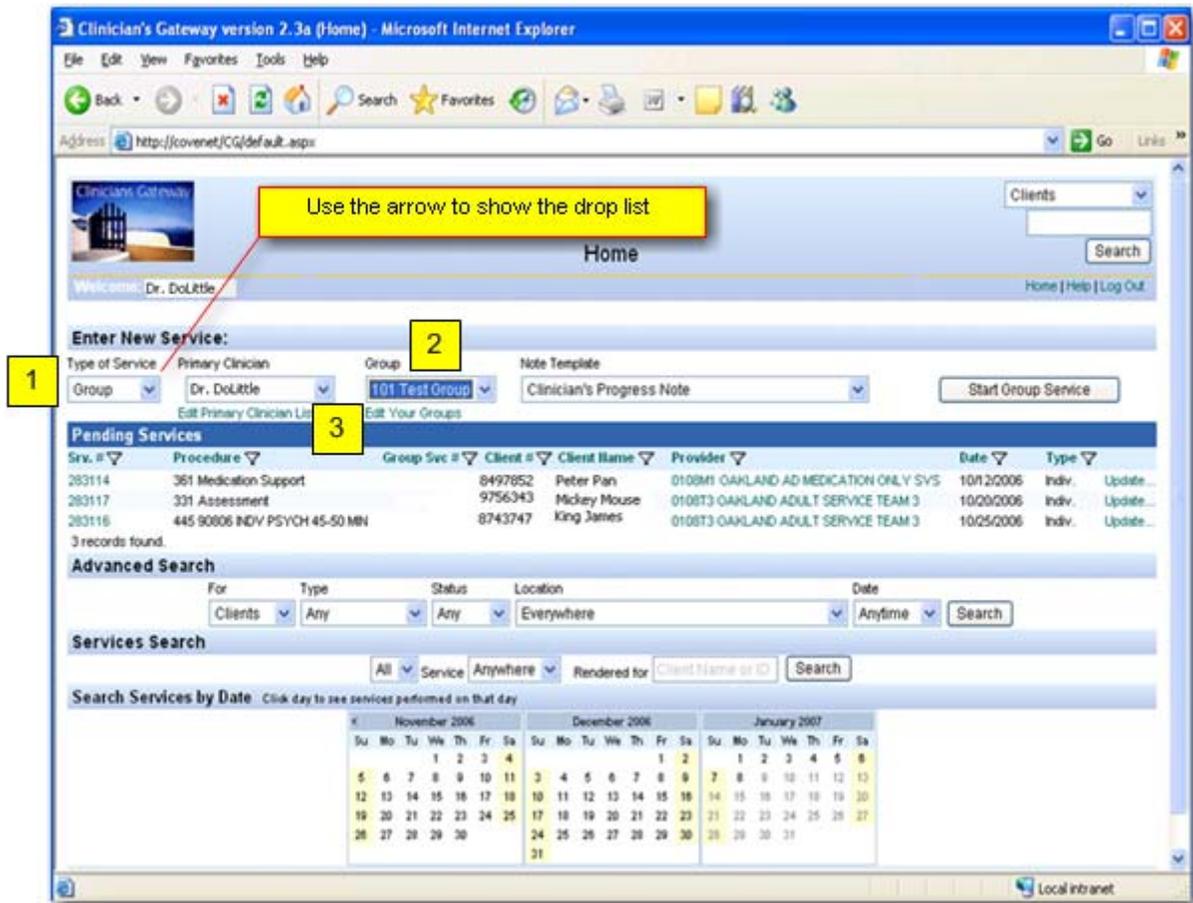
- **2** – Click Approve Time to add the time to your Staff Log.



GROUP NOTES

blank

Group Notes



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

Clinicians Gateway

Clients

Edit Groups

Welcome: **Natalie Courson**

Select Group: **1**

Client #	Client Name	Last Service Date	
75087772	TEST CINDYTWO	2/26/2009	<input type="button" value="Remove"/>
75122885	TEST DAVE		<input type="button" value="Remove"/>
75053807	TESTCASE CINDY	11/28/2008	<input type="button" value="Remove"/>
75135386	TESTCASE DAVE	10/2/2008	<input type="button" value="Remove"/>
75139951	TESTING ACCT		<input type="button" value="Remove"/>
75138646	TESTING TEN		<input type="button" value="Remove"/>
75130257	TESTY CINDY	12/10/2007	<input type="button" value="Remove"/>

Default Provider:

Add Clients: 0 Results

[PERSONAL INFO](#) | [SECURITY \(PASSWORD\)](#) | [GUIDES/HELP](#)

- **One** –Click on the “New group” button.

Clinicians Gateway

Clients

Edit Groups

Welcome: **Natalie Courson**

Select Group:

Please search for and add clients to this group before proceeding

Default Provider:

Add Clients:

[PERSONAL INFO](#) | [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

Clients

Edit Groups

Welcome: **Natalie Courson**

Home Help Log Out

Select Group: 256 New Untitled Group Rename Delete Group New Group

Default Provider: (No Provider) Save Provider

Add Clients: test dave Search 1 Result

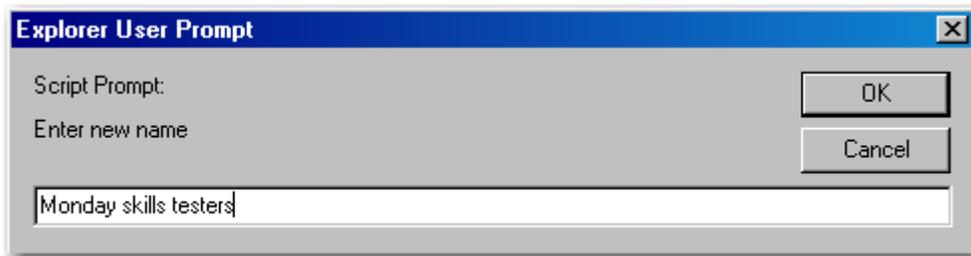
Please search for and add clients to this group before proceeding

Client #	Client Name	Gender	Birth Date	Age	Services	
75122885	TEST DAVE	M	1/1/1950	59	0	Add

PERSONAL INFO | SECURITY (PASSWORD) | GUIDES/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.

- **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”



- 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.

Clinicians Gateway Clients

Home

Welcome: Natalie Courson Home Help Log Out

Enter New Service:

1

Pending Services 13 Results

Srv. #	Procedure	Group Svc #	Client #	Client Name	Provider	Date	Sort	Type
284101	361 Medication Support		75087772	TEST CINDYTWO	99991 West County Mental Health Sv	3/6/2007		Indiv. Update...
284109	361 Medication Support		75087772	TEST CINDYTWO	99991 West County Mental Health Sv	3/6/2007		Indiv. Update...
284110	361 Medication Support		75087772	TEST CINDYTWO	99991 West County Mental Health Sv	3/6/2007		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...
295244	444 90804 Indiv Psy 20-30 min		75130257	TESTY CINDY	0112M1 EDEN ADULT MEDICATION ONLY S	10/29/2007		Indiv. Update...

<< First < Prev -1- -2- Next > Last >>

Advanced Search

For: Clients | Type: Any | Status: Any | Provider: Everywhere | Date: Anytime |

Services Search

All | Service: Anywhere | Rendered for: Client Name or ID |

Search Services by Date Click day to see services performed on that day

February 2009							March 2009							April 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	5	6	7	1	2	3	4	5	6	7	5	6	7	8	9	10	11
8	9	10	11	12	13	14	8	9	10	11	12	13	14	12	13	14	15	16	17	18
15	16	17	18	19	20	21	15	16	17	18	19	20	21	19	20	21	22	23	24	25
22	23	24	25	26	27	28	22	23	24	25	26	27	28	26	27	28	29	30		
							29	30	31											

- 1 – Select group under “Type of service.”
- 2 - Select the group.
- 3 – Select note template.
- 4 – Click on “Start group service.”

Clinicians Gateway

Clients

Service Entry, Group

Welcome: Natalie Courson Home Help Log Out

Group: Monday skills testers (256) Title: Clinician's Progress Note

Group Members 6 Members Show client RUs for: TEST NATALIE (8141)

Client #	Name	Gender	Age	Present	Med Compliant	Side Effects	Provider
75087772	TEST CINDYTWO	F	49	<input type="checkbox"/>	N/A	N/A	99993 Take Care Case Management
75122886	TEST DAVE	M	59	<input type="checkbox"/>	N/A	N/A	99991 West County Mental Health Svs
75053807	TESTCASE CINDY	F	48	<input type="checkbox"/>	N/A	N/A	99992 West Adult Residential
75135386	TESTCASE DAVE	M	59	<input type="checkbox"/>	N/A	N/A	99996 Habilitative Day Treatment
75071955	TESTER MICHELLE	F	22	<input type="checkbox"/>	N/A	N/A	01122R EDEN MHS CHILD REFERRAL
75130257	TESTY CINDY	F	43	<input type="checkbox"/>	N/A	N/A	99991 West County Mental Health Svs

Procedures: Service Date: 4/16/2009

Service Location: Primary Clinician: TEST NATALIE Primary Clinician Time: 00:00

Presenting Problem(s) Previous Entries: (Select Note)

Evaluation Previous Entries: (Select Note)

Record attendance here

- 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)

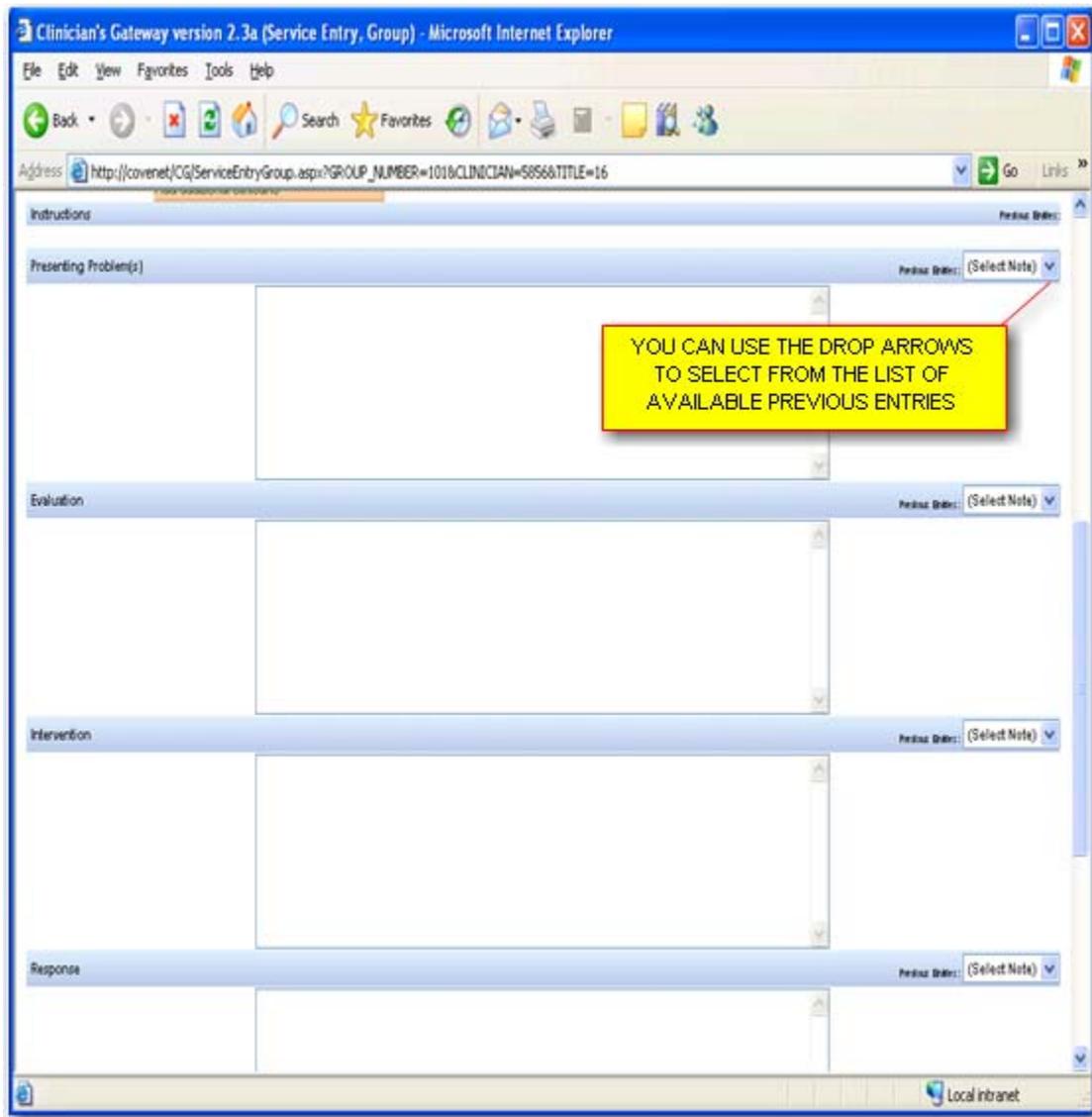
Group: Monday Skills Group (333) Title: Clinician's Progress Note

Group Members 6 Members Show client RUs for: PETERSON CAMILLE (10904)

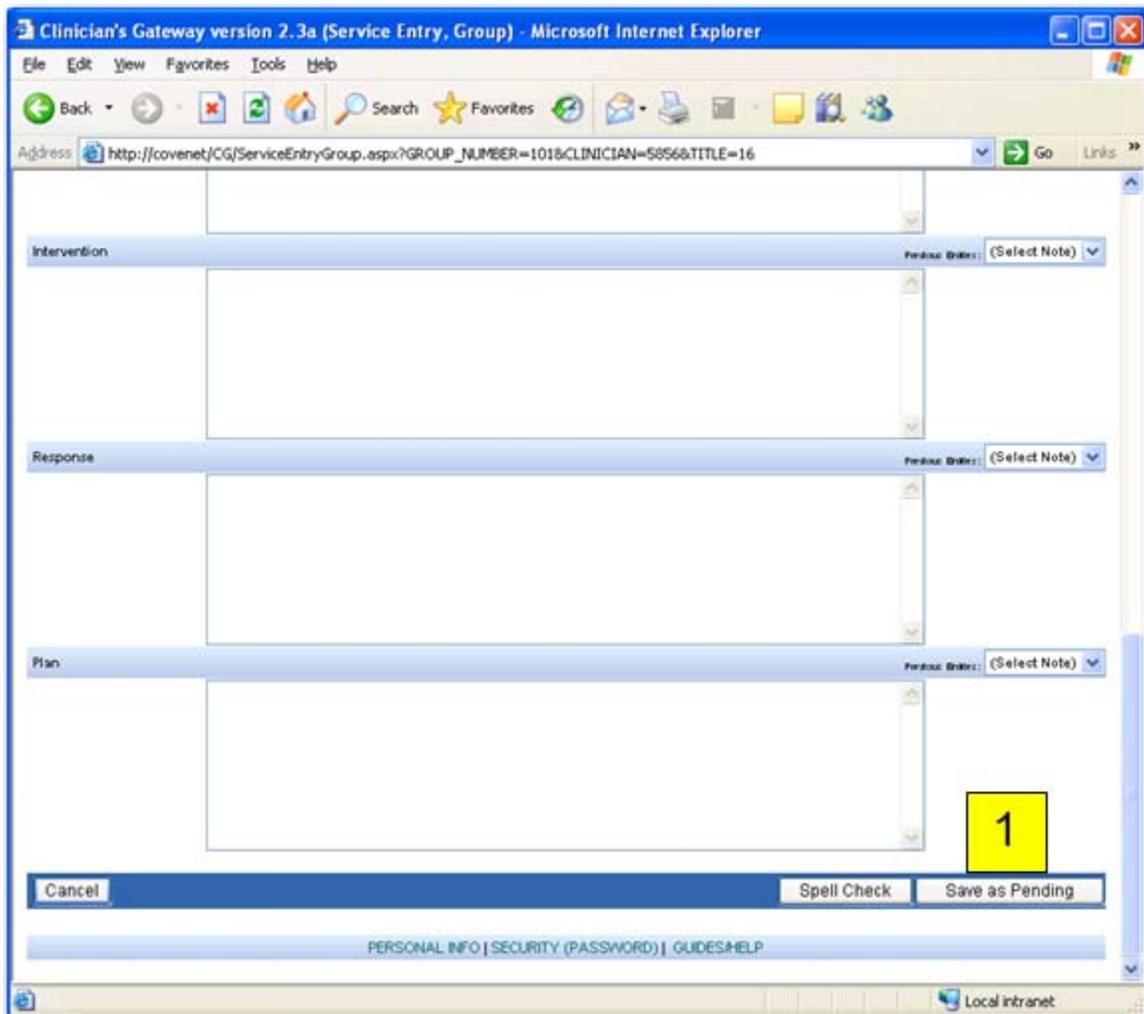
Client #	Name	Gender	Age	Present	Med Compliant	Side Effects	Provider
75087772	TEST CINDYTWO	F	49	<input type="checkbox"/>	N/A	N/A	9999CG CLINICIAN GATEWAY TEST MHS AD
75136699	TEST TRAINING	F	3	<input checked="" type="checkbox"/>	N/A	N/A	No matching providers
75053807	TESTCASE CINDY	F	49	<input type="checkbox"/>	N/A	N/A	99991 West County Mental Health Svs
75135386	TESTCASE DAVE	M	59	<input checked="" type="checkbox"/>	N/A	N/A	9999CG CLINICIAN GATEWAY TEST MHS AD
75071955	TESTER MICHELLE	F	23	<input type="checkbox"/>	N/A	N/A	01632R ASIAN MHS CHILD REFERRAL
75130257	TESTY CINDY	F	43	<input checked="" type="checkbox"/>	N/A	N/A	9999CG CLINICIAN GATEWAY TEST MHS AD

Additional participants in group: Enter the number of additional participants without an open episode

- Complete each text box as appropriate.



- 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

Home

Welcome: Natalie Courson

Enter New Service:

Type of Service
 Select----- To start a new service note, select 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...

<< First < Prev -1- -2- Next > Last >>

Advanced Search

For: Clients Type: Any Status: Any Provider: Everywhere

Services Search

All Service Anywhere Rendered for Client

Search Services by Date Click day to see services performed on that day

March 2009							April 2009						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
									1	2	3	4	
1	2	3	4	5	6	7	5	6	7	8	9	10	11
8	9	10	11	12	13	14	12	13	14	15	16	17	18
15	16	17	18	19	20	21	19	20	21	22	23	24	25
22	23	24	25	26	27	28	26	27	28	29	30		
29	30	31											

Sometimes you will have more than one page of "Pending" services

- **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.

Instructions

Respond to problems/goals/objectives of treatment plan and signs and symptoms related to diagnosis. Include treatment interventions and address changes in the client's functioning. If there is little progress, include an explanation of the limited progress.

Face To Face Time 01:00 Hours:Minutes

Episode Diagnosis Information
Axis I Axis II Axis III Axis IV Axis 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.

Response

Mmmm Good!

Plan

Regular feedings.

Cancel Print Delete Service Edit Service

PERSONAL INFO | SECURITY (PASSWORD) | GUIDES/HELP

Local intranet 100%



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

Service Entry, Group

Welcome: Natalie Courson

Group: DEMO (107) Title: Clinician's Progress Note Client: TESTY CINDY (75130257)

Group Members 7 Members Show client RUs for: TEST NATALIE (3141)

Client #	Name	Gender	Age	Present	Med Compliant	Side Effects	Provider
75087772	TEST CINDYTWO	F	49	<input type="checkbox"/>	N/A	N/A	01057 LA FAMILIA EPSDT MHS CHILD
75122885	TEST DAVE	M	59	<input type="checkbox"/>	N/A	N/A	99991 West County Mental Health Sys
75053807	TESTCASE CINDY	F	48	<input type="checkbox"/>	N/A	N/A	99992 West Adult Residential
75135386	TESTCASE DAVE	M	59	<input type="checkbox"/>	N/A	N/A	0112M1 EDEN ADULT MEDICATION ONLY SYS
75139951	TESTING ACCT	M	58	<input type="checkbox"/>	N/A	N/A	No matching providers
75138646	TESTING TEN	M	58	<input type="checkbox"/>	N/A	N/A	99994 Works Hard Crisis Unit
75130257	TESTY CINDY	F	43	<input checked="" type="checkbox"/>	N/A	N/A	0112M1 EDEN ADULT MEDICATION ONLY SYS

Procedures: 456 90853 GROUP PSYCHOTHERAPY Service Date: 7/16/2007
 Service Location: Office Utilization Review Date: 6/30/2007 Utilization review has expired!
 Primary Clinician: TEST NATALIE Primary Clinician Time: 01:00

Instructions: Respond to problems: 3 aspects of treatment plan and signs and symptoms related to diagnosis. Include treatment interventions and address changes in the client's functioning. If there is little progress, include an explanation of the limited progress.
 Face To Face Time: Hours: Minutes
 Episode Diagnosis Information:
 Axis I: 309.9 Axis II: V71.09 Axis III: 99 Axis IV: A Axis V: 060

Presenting Problem(s): 4 test

Evaluation: test

Intervention: test

Response: test

Plan: test

Cancel Spell Check Save as Pending

PERSONAL INFO | SECURITY (PASSWORD) | GUIDES/HELP

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.

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.

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: **Monday Skills Group (333)** Title: **Clinician's Progress Note**

Group Members 6 Members Show client RUs for: **PETERSON CAMILLE (10904)**

Client #	Name	Gender	Age	Present	Med Compliant	Side Effects	Provider
75087772	TEST CINDYTWO	F	49	<input type="checkbox"/>	N/A	N/A	9999CG CLINICIAN GATEWAY TEST MHS AD
75136699	TEST TRAINING	F	3	<input checked="" type="checkbox"/>	N/A	N/A	No matching providers
75053807	TESTCASE CINDY	F	49	<input type="checkbox"/>	N/A	N/A	99991 West County Mental Health Sys
75135386	TESTCASE DAVE	M	59	<input checked="" type="checkbox"/>	N/A	N/A	9999CG CLINICIAN GATEWAY TEST MHS AD
75071955	TESTER MICHELLE	F	23	<input type="checkbox"/>	N/A	N/A	01632R ASIAN MHS CHILD REFERRAL
75130257	TESTY CINDY	F	43	<input checked="" type="checkbox"/>	N/A	N/A	9999CG CLINICIAN GATEWAY TEST MHS AD

Additional participants in group: Enter the number of additional participants without an open episode

- 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)

View Staff Search And Tag Search

Welcome: **Camille Peterson** Home Help Log Out

Staff Information for: **Peterson, Camille (10904)**

SSN: ***_**_**** License #: Start date: 9/3/2008
 Gender: Female License Renewal: End date:
 BirthDate: **/**/**** License State: Last Changed On: 3/3/2009
 Ethnicity: White Taxonomy: Record Created On: 11/4/2008
 National Provider Id:
 Medicaid PIN:
 Medicare PIN:
 DEA Number:
 UPIN:
 Staff Type: Unlicensed Worker
 Languages: English

Statistics Service Dates: 11/23/2009 thru 12/23/2009 All Search

Daily Approval Service Date: 7/23/2009 Search

Srv. #	Date	Type	Client #	Client Name	Reporting Unit	Procedure	Status	Approve Time	# In Group	Approve Time	
394750	7/23/2009	Group	75130257	TESTY, CINDY	9999CG CLINICIAN GATEWAY 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

2 service records on 7/23/2009 for a total time of 00:40. Approve Time

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

- 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.

Srv. #	Date	Type	Client #	Client Name	Reporting Unit	Procedure	Status	Approve	Time	# In Group	Approve Time
394751	7/23/2009	Indirect			9999CG CLINICIAN GATEWAY TEST MHS AD	401 Mental Health Promotion	PENDING	Pending	00:20		00:20
394750	7/23/2009	Group	75130257	TESTY CINDY	9999CG CLINICIAN GATEWAY 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

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.

ID	Name	Gender	Age	Check	Procedure
75071955	TESTER MICHELLE	F	23	<input checked="" type="checkbox"/>	N/A
75139951	TESTING ACCT	M	58	<input type="checkbox"/>	N/A
75138646	TESTING TEN	M	13	<input type="checkbox"/>	N/A
75130257	TESTY CINDY	F	43	<input checked="" type="checkbox"/>	N/A

Additional participants in group: 1

Procedures: 391 Group Rehabilitation

Service Date: 9/8/2009

Service Location: Office

Primary Clinician: PETERSON CAMILLE

Primary Clinician Time: 2:30

Presenting Problem(s): Type in one Note, then copy and paste into the other note

- CG will calculate that there are three total in the group and give $1/3^{\text{rd}}$ 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.

- This client will also be given 1/3rd 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.

blank

INDIRECT NOTES

blank

Indirect Notes

1 Enter New Service:

Type of Service: Indirect **2** Primary Clinician: TEST NATALIE Reporting Unit: 0108T1 OAKLAND ADULT SERVICE TEAM 1 **3** Note Template: Indirect **4** Start Indirect Service

Pending Services 15 Results

Srv. #	Procedure	Group Svc #	Client #	Client Name	Provider	Date	Sort	Type
284101	361 Medication Support		75087772	TEST CINDYTWO	99991 West County Mental Health Sv	3/8/2007		Indiv.
284109	361 Medication Support		75087772	TEST CINDYTWO	99991 West County Mental Health Sv	3/8/2007		Indiv.
284110	361 Medication Support		75087772	TEST CINDYTWO	99991 West County Mental Health Sv	3/8/2007		Indiv.
288470	361 Medication Support		75087772	TEST CINDYTWO	99991 West County Mental Health Sv	6/25/2007		Indiv.
289361	456 90853 GROUP PSYCHOTHERAPY	106	75130257	TESTY CINDY	0112M1 EDEN ADULT MEDICATION ONLY S	7/16/2007		Group
289363	456 90853 GROUP PSYCHOTHERAPY	107	75130257	TESTY CINDY	0112M1 EDEN ADULT MEDICATION ONLY S	7/16/2007		Group
289364	456 90853 GROUP PSYCHOTHERAPY	107	75135386	TESTCASE DAVE	0112M1 EDEN ADULT MEDICATION ONLY S	7/16/2007		Group
293490	456 90853 GROUP PSYCHOTHERAPY	160	75130257	TESTY CINDY	0112M1 EDEN ADULT MEDICATION ONLY S	10/4/2007		Group
293491	456 90853 GROUP PSYCHOTHERAPY	160	75135386	TESTCASE DAVE	0112M1 EDEN ADULT MEDICATION ONLY S	10/4/2007		Group
295244	444 90804 Indiv Psy 20-30 min		75130257	TESTY CINDY	0112M1 EDEN ADULT MEDICATION ONLY S	10/29/2007		Indiv.

Advanced Search

For: Clients Type: Any Status: Any Provider: Everywhere Date: Anytime Search

Services Search

All Service Anywhere Rendered for Client Name or ID Search

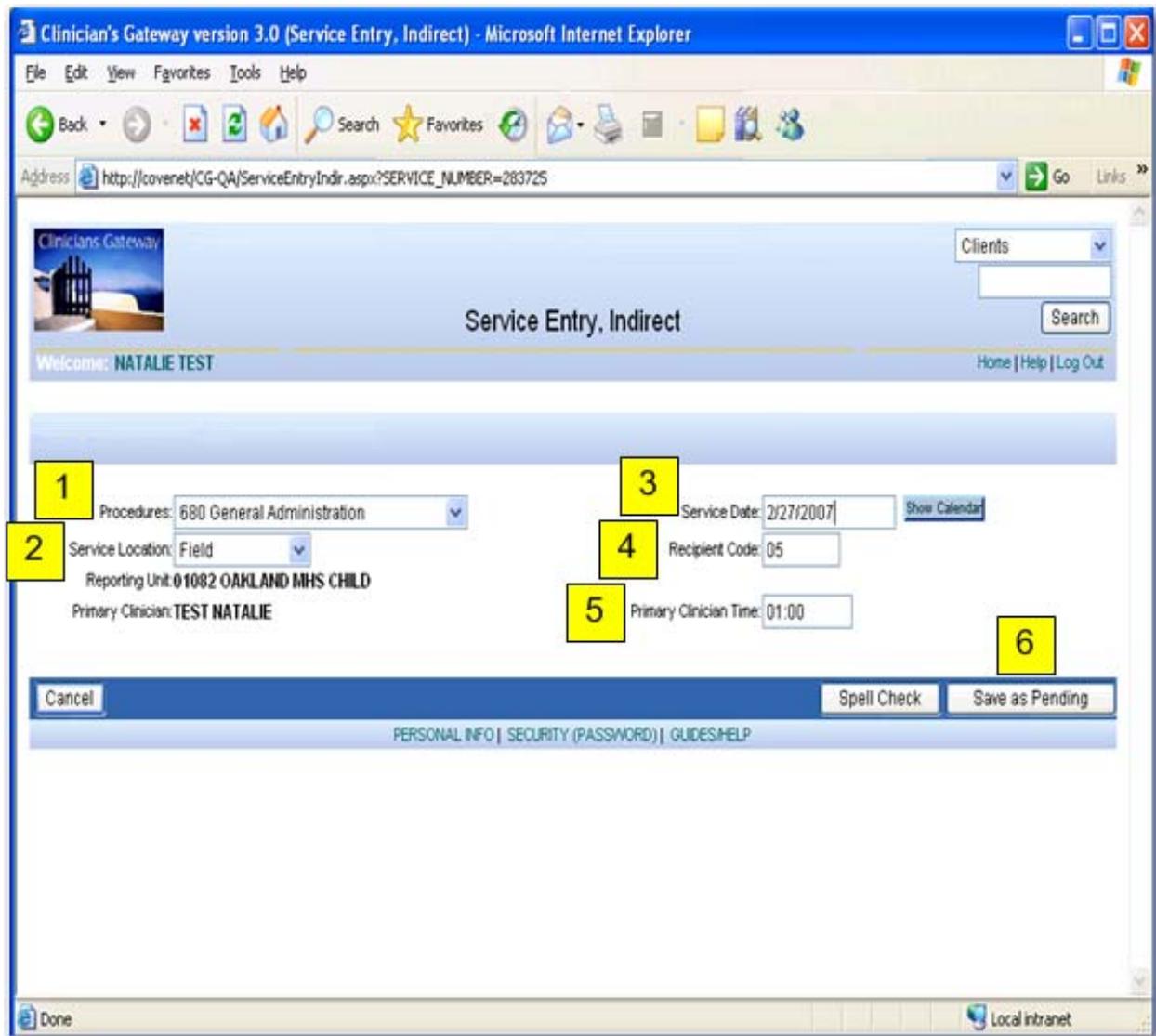
Search Services by Date Click day to see services performed on that day

February 2009							March 2009							April 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	5	6	7	1	2	3	4	5	6	7	5	6	7	8	9	10	11
8	9	10	11	12	13	14	8	9	10	11	12	13	14	12	13	14	15	16	17	18
15	16	17	18	19	20	21	15	16	17	18	19	20	21	19	20	21	22	23	24	25
22	23	24	25	26	27	28	22	23	24	25	26	27	28	26	27	28	29	30		
							29	30	31											

Clinical Administrator Access

Search Staff 01082 OAKLAND MIHS CHILD Anytime Search

- **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.”



- Select the appropriate procedure code (1), service location (2), Service date (3), Recipient code (4), and time (5).
- 6 – Click on “Save as pending.”


Clients
Search

Home

Welcome: **Natalie Courson** Home Help Log Out

Enter New Service:

Type of Service
 To start a new service note, select the type of service

Pending Services 15 Results

Srv. #	Procedure	Group Svc #	Client #	Client Name	Provider	Date	Sort	Type
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...
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...

<< First < Prev -1- -2- Next > Last >>

Advanced Search

For: Clients | Type: Any | Status: Any | Provider: Everywhere | Date: Anytime | Search

Services Search

All | Service: Anywhere | Rendered for: Client Name or ID | Search

Search Services by Date Click day to see services performed on that day

February 2009							March 2009							April 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	5	6	7	1	2	3	4	5	6	7	8	9	10	11	12	13	14	
8	9	10	11	12	13	14	8	9	10	11	12	13	14	15	16	17	18	19	20	21	
15	16	17	18	19	20	21	15	16	17	18	19	20	21	19	20	21	22	23	24	25	
22	23	24	25	26	27	28	22	23	24	25	26	27	28	26	27	28	29	30			
							29	30	31												

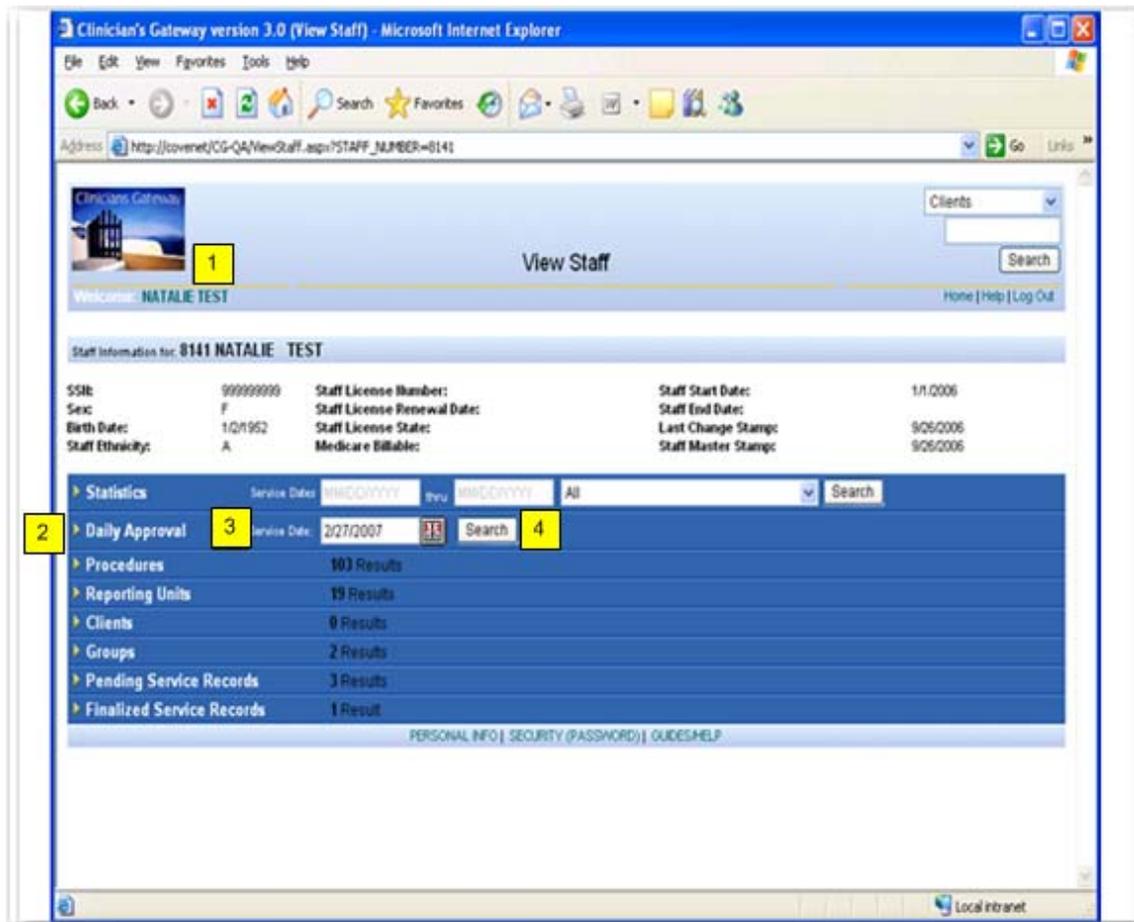
- After you click “Save as pending” you will be returned to your “Home” screen, where you will see the pending services listed (1).

blank

INDIVIDUAL STAFF LOG FORM

blank

Approval printout



- **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!

IMPORTANT!

View Staff

Welcome: **Natalie Courson**

Staff Information for: **Courson, Natalie (8141)**

SSN: 999999999 License #: Renew: Start date: 1/1/2006
 Gender: Female License State: End date:
 BirthDate: 1/2/1952 Taxonomy: Record Modify date: 12/20/2007
 Ethnicity: White National Provider Id: Record Codify date: 9/26/2006
 Medicaid PIN: UPII: DEA Number:
 Medicare PIN:
 Staff Type: Unlicensed Worker
 Languages: English

Statistics Service Dates: 3/20/2009 through 4/20/2009 All Search

▼ Daily Approval Service Date: 3/8/2007 Search

Srv. #	Date	Type	Client #	Client Name	Reporting Unit	Procedure	Status	Approve	Time	# In Group	Approve Time
284177	3/8/2007	Indirect			01082 OAKLAND MHS CHILD	401 Mental Health Promotion	FINALIZED	Pending	01:00	1	01:00
284138	3/8/2007	Indiv.	75087772	TEST CNDYTW0	99991 West County Mental Health Svs	361 Medication Support	FINALIZED	Pending	00:30	1	00:30
284120	3/8/2007	Indiv.	75087772	TEST CNDYTW0	99991 West County Mental Health Svs	361 Medication Support	FINALIZED	Pending	01:00	1	01:00
284110	3/8/2007	Indiv.	75087772	TEST CNDYTW0	99991 West County Mental Health Svs	361 Medication Support	PENDING	Pending	01:00	1	01:00
284109	3/8/2007	Indiv.	75087772	TEST CNDYTW0	99991 West County Mental Health Svs	361 Medication Support	PENDING	Pending	01:00	1	01:00
284101	3/8/2007	Indiv.	75087772	TEST CNDYTW0	99991 West County Mental Health Svs	361 Medication Support	PENDING	Pending	01:00	1	01:00

6 service records on 3/8/2007 for a total time of 05:30. Approve Time

Procedures 126 Results
 Reporting Units 31 Results
 Clients 0 Results
 Groups 7 Results
 Pending Service Records 15 Results
 Finalized Service Records 18 Results

PERSONAL INFO | SECURITY (PASSWORD) | GUIDES.HELP

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.

View Staff

Welcome: **Natalie Courson**

Staff Information for: **Courson, Natalie (8141)**

SSN: 999999999 License #: Renew: Start date: 1/1/2006
 Gender: Female License State: End date:
 BirthDate: 1/2/1952 Taxonomy: Record Modify date: 12/20/2007
 Ethnicity: White National Provider Id: Record Codify date: 9/28/2006
 Medicaid PIN: UPIIN: DEA Number:
 Medicare PIN:
 Staff Type: Unlicensed Worker
 Languages: English

Statistics Service Dates: 3/20/2009

Daily Approval Service Date: 3/8/2007

Srv. #	Date	Type	Client #	Client Name	Reporting Unit	Activity	Approve	Time	# In Group	Approve Time	
284177	3/8/2007	Indirect			01062 OAKLAND MHS CHILD	401 Mental Health Promotion	FINALIZED	Pending	01:00	1	01:00
284138	3/8/2007	Indiv.	75087772	TEST CINDYTWO	99991 West County Mental Health Svs	361 Medication Support	FINALIZED	Pending	00:30	1	00:30
284120	3/8/2007	Indiv.	75087772	TEST CINDYTWO	99991 West County Mental Health Svs	361 Medication Support	FINALIZED	Pending	01:00	1	01:00
284110	3/8/2007	Indiv.	75087772	TEST CINDYTWO	99991 West County Mental Health Svs	361 Medication Support	PENDING	Pending	01:00	1	01:00
284109	3/8/2007	Indiv.	75087772	TEST CINDYTWO	99991 West County Mental Health Svs	361 Medication Support	PENDING	Pending	01:00	1	01:00
284101	3/8/2007	Indiv.	75087772	TEST CINDYTWO	99991 West County Mental Health Svs	361 Medication Support	PENDING	Pending	01:00	1	01:00

6 service records on 3/8/2007 for a total time of 05:30.

Procedures 126 Results
 Reporting Units 31 Results
 Clients 0 Results
 Groups 7 Results
 Pending Service Records 15 Results
 Finalized Service Records 18 Results

PERSONAL INFO | SECURITY (PASSWORD) | GUIDES/HELP

Windows Internet Explorer

?

This will FINALIZE all your pending notes for 3/8/2007; Your total number of hours = 05:30.

ARE YOU SURE?

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

Print Daily Approval

Welcome: Natalie Courson

ALAMEDA COUNTY Behavioral Health Care Services

Individual Staff Log

Service Date: 3/8/2007

Service #	Type	RU	Client #	Client Name	Procedure	Time	Hrs: Min	Cap Ct	Loc	Recipient
284177	Indirect	01002 OAKLAND MHS CHILD			401 Mental Health Promotion	01:00	1	Office	DS	
284138	Indb.	99991 West County Mental Health Ser	75087772	TEST CINDYTWO	361 Medication Support	00:30	1	Office		
284120	Indb.	99991 West County Mental Health Ser	75087772	TEST CINDYTWO	361 Medication Support	01:00	1	Office		
284110	Indb.	99991 West County Mental Health Ser	75087772	TEST CINDYTWO	361 Medication Support	01:00	1	Office		
284109	Indb.	99991 West County Mental Health Ser	75087772	TEST CINDYTWO	361 Medication Support	01:00	1	Office		

5 service records on 3/8/2007 for a total time of 04:30

I hereby certify, under penalty of perjury, that the information contained in this document is accurate and free from fraudulent claiming.

Sign your name here

Staff ID: 8141 NATALIE TEST

7/8/2009 10:06:49 AM
ELECTRONIC PROTECTED HEALTH INFORMATION

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!**



ALAMEDA COUNTY Behavioral Health Care Services

[Home](#) | [Help](#) | [Log Out](#)

Indirect		Service Number:	284177		
		Service Date:	3/8/2007		
		Recipient:	05		
Provider:	01082 OAKLAND MHS CHILD	Location:	Office		
Procedure:	401 Mental Health Promotion	Number in Group:	1		
Primary Clinician:	8141 NATALIE TEST	Staff Time:	1 hr(s).	0 min(s).	

Electronic signature on file

Staff ID 8141

NATALIE TEST

Info Systems Analyst - Operations
Manager

4/20/2009 3:08:32 PM

ELECTRONIC PROTECTED HEALTH INFORMATION



ALAMEDA COUNTY Behavioral Health Care Services

[Home](#) | [Help](#) | [Log Out](#)

Clinician's Progress Note		Service Number:	284138		
		Service Date:	3/8/2007		
Provider:	99991 West County Mental Health Svcs	Location:	Office		
Procedure:	361 Medication Support	Number in Group:	1		
Client:	75087772 TEST CINDYTWO	Med Compliant?	N/A	Side Effects?	N/A
Primary Clinician:	8141 NATALIE TEST	Staff Time:	0 hr(s).	30 min(s).	

Instructions

Record Stamp: **3/8/2007 1:52:41 PM**

Respond to problems/goals/objectives of treatment plan and signs and symptoms related to diagnosis. Include treatment interventions and address changes in the client's functioning. If there is little progress, include an explanation of the limited progress.

Episode Diagnosis Information

Axis I Axis II Axis III Axis IV Axis V
296.60V71.0999 A 099

Face To Face Time 0 Hours:Minutes

Presenting Problem(s)

test

Evaluation

test

Intervention

test

Response

test

Plan

test

Electronic signature on file

Staff ID 8141

NATALIE TEST

Info Systems Analyst - Operations
Manager

TEST CINDYTWO (75087772) 4/20/2009 3:08:32 PM

ELECTRONIC PROTECTED HEALTH INFORMATION

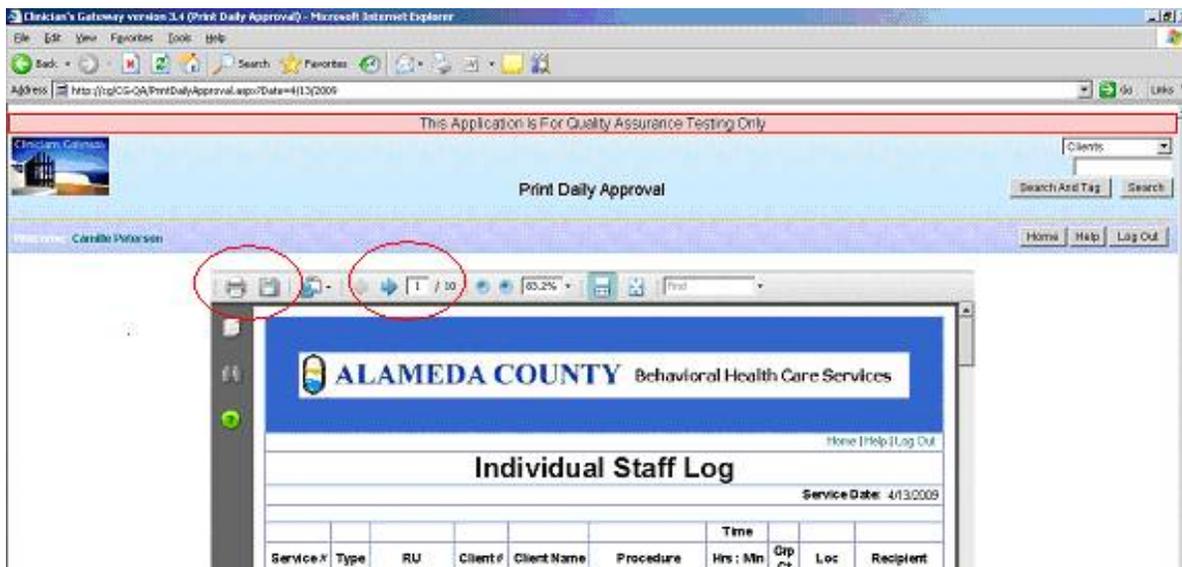
PRINTING

blank

Printing from Daily Approval

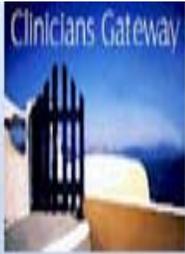
To print your Staff Log and progress notes after Daily Approval, use the printer icon and blue arrows above and adjacent to their images. (Circled below) Do not use File/Print

- 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.



- 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.



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.

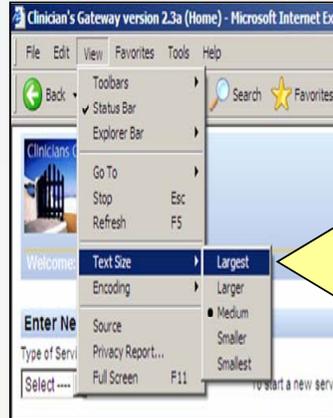
Setting Margins so all the Information is Displayed when Printing...

•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.

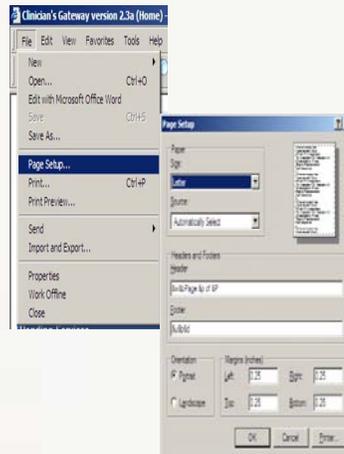
•The Header is needed to print client info on the OLPN

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.



Larger Font



Setting Margins



UR Compliance

The following issues need to be addressed before your progress note can be evaluated:

- Enter Valid Date
- Select Service Location

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

v1.0
2/13/2009

blank

DELETING NOTES

blank



CLINICIAN'S GATEWAY

- Are there any requirements for having a note deleted?
 - 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 **ONLY** 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 **NOT** 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 "Clinician's Gateway Same Day Delete" 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.

blank

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:	
<input type="checkbox"/> Same-Day Delete	<input type="checkbox"/> NON Same-Day Delete
NOTE: This deletion will affect the total hours on your Individual Staff Log (MAA form). If you have already printed the form, you need make any corrections necessary and reprint the form.	
<p><u>Use For NON Same-Day deletes only:</u></p> <p>(To be completed by staff deleting the InSyst service record.)</p> <p>InSyst Service Delete Date: _____</p> <p>Staff Name: _____</p> <p>Signature: _____</p>	

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, skip to step 8.
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: _____

blank

***CONSUMER/CLIENT LIFE PLAN
TREATMENT PLAN***

blank

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.

The screenshot shows the Clinician's Gateway version 3.4 Home page. The browser window title is "Clinician's Gateway version 3.4 (Home) - Microsoft Internet Explorer". The address bar shows "http://cg/CG-QA/Default.aspx". The page content includes a "Home" header, a search bar, and a "Welcome: Sandy TEST" message. The "Enter New Service:" section has a "Type of Service" dropdown menu set to "Client Plan". The "Primary Clinician" is "TEST SANDY" and the "Client" field contains "testy cindy". A "Start Client Plan" button is visible. Below the form is a table with 5 results. The first result is highlighted.

Group #	Svc #	Client Name	Provider	Date	Type	Sort	Reviewer
344757	75087772	TEST CINDY.DMO	9999CG - CLINICIAN GATRW&Y TEST.MHS.AD	2/3/2009	Clinician's Progress Note		Update...

This will bring up the Client Plan entry screen.

Client Plan

Welcome: Sandy TEST

Plan #: New **2**

Revision: 1 **1**

Client: TESTY, CINDY(75130257)

Provider: 99996 - Habilitative Day Treatment **5** **4**

Status: New **2**

Plan Start: 6/14/2010

Plan End: **3**

Medical Necessity Consumer/Client Life Plan

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.

Medical Necessity Consumer/Client Life Plan

DSM: Diagnosis

Diagnosis Established by:

1 Date: [] Responsible Staff: [Staff] License (professional suffix): [(Select Staff)]

If established by waived clinician, also provide licensed supervisor's name and licensure.

2 Staff member waived LPHA Licensed Staff: [None] License (professional suffix): []

Diagnosis updated since last Consumer/Client plan?

DSM: Axis I

3 Start by typing a DSM number in the input box... [] Is Primary 6

4 Current Signs & Symptoms that Support Primary Diagnosis or Per History: []

5 Add Additional Diagnosis

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 waived.
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

DSM: Axis IV

Psychosocial & Environmental Problems (check all that apply)

Severity	Problem	Additional Information
1 Mild	Problems with primary support group	2
Moderate	Problems related to the social environment	
3 Severe	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

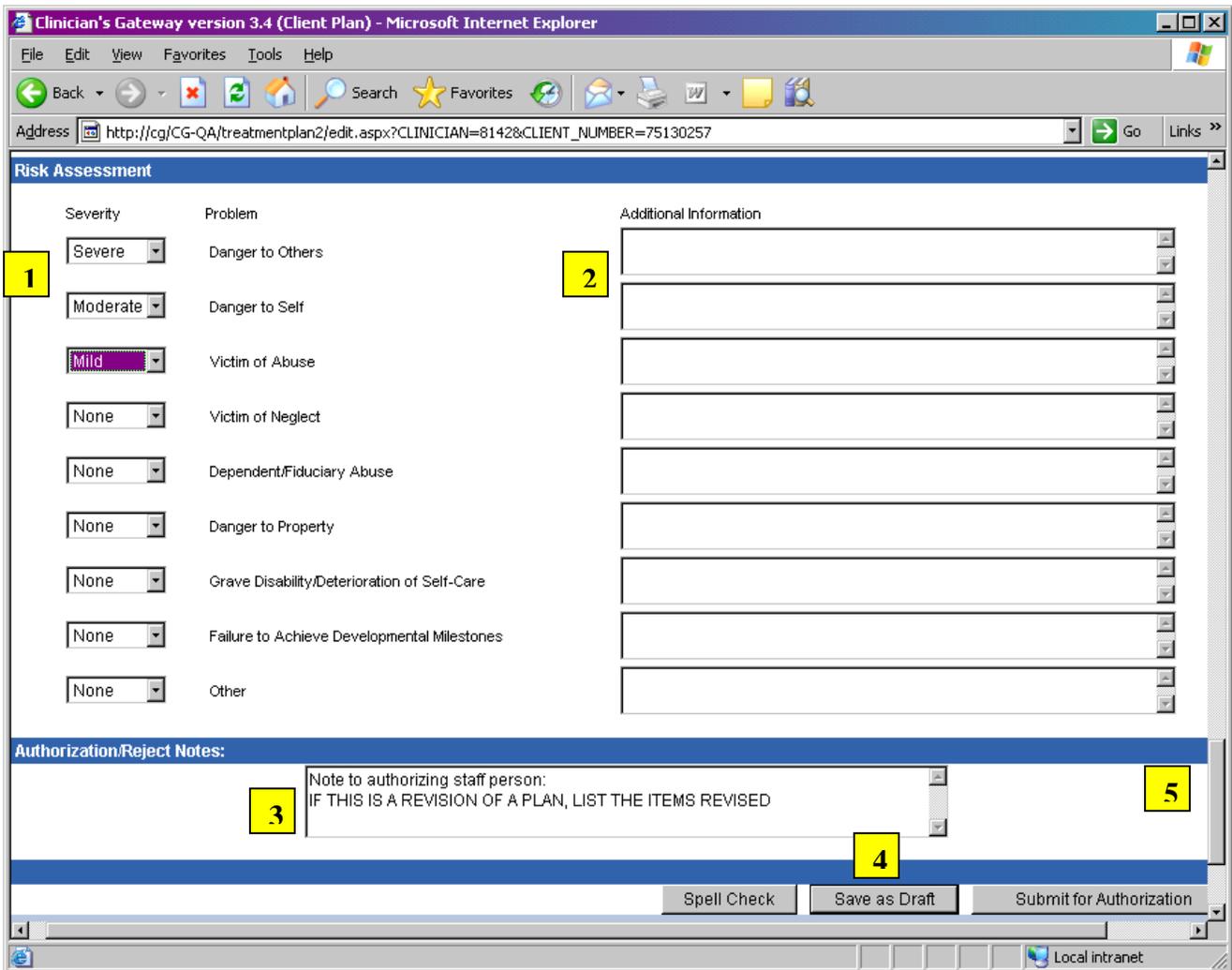
Global Assessment of Functioning Scale

4 Current Score:

Highest past year Score:

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.

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.



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

Clinician's Gateway version 3.4 (Client Plan) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Refresh Print Mail Print Print Print Print

Address http://cg/QA/treatmentplan2/edit.aspx?CLINICIAN=81428&CLIENT_NUMBER=75130257 Go Links >>

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?

1

What helps you now and in the past? Who helps you now and in the past?

2

Done Local intranet

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

Clinician's Gateway version 3.4 (Client Plan) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Refresh Print Mail Print Print Print Print

Address http://cg/QA/treatmentplan2/edit.aspx?CLINICIAN=8142&CLIENT_NUMBER=75130257 Go Links >>

Consumer/Client's Goals: Hopes For a Better Life

Goal Name
(brief identifier will appear in Objectives section)

1

What are your hopes for a better life?
Consumer/Client's Goal (whenever possible, use consumer/client's words)

2

What gets in the way of having a better life?
Mental Health Barriers in Context of Cultural Self-Identification

3

Other Barriers:

4

Add Another Goal 5

Done Local intranet

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

Objectives: Steps to Change What "Gets in the Way"

In collaboration with Consumer/Client, and in context of Consumer/Client's cultural 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:

2 Calm Peaceful Life

What are the smaller steps to change what gets in the way?
Objective Description (must be measurable 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)

5

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:

8 Educational problems

Associated Co-occurring Conditions:

Substance Abuse

Population Related Concerns:

can't walk or drive

Associated Risk Assessments:

Danger to Others

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

The screenshot shows a web browser window titled "Clinician's Gateway version 3.4 (Client Plan) - Microsoft Internet Explorer". The address bar shows the URL: <http://cg/CG-QA/treatmentplan2/Edit.aspx?PLANID=33&t=1>. The page content is titled "Interventions: What We Will Do to Help You".

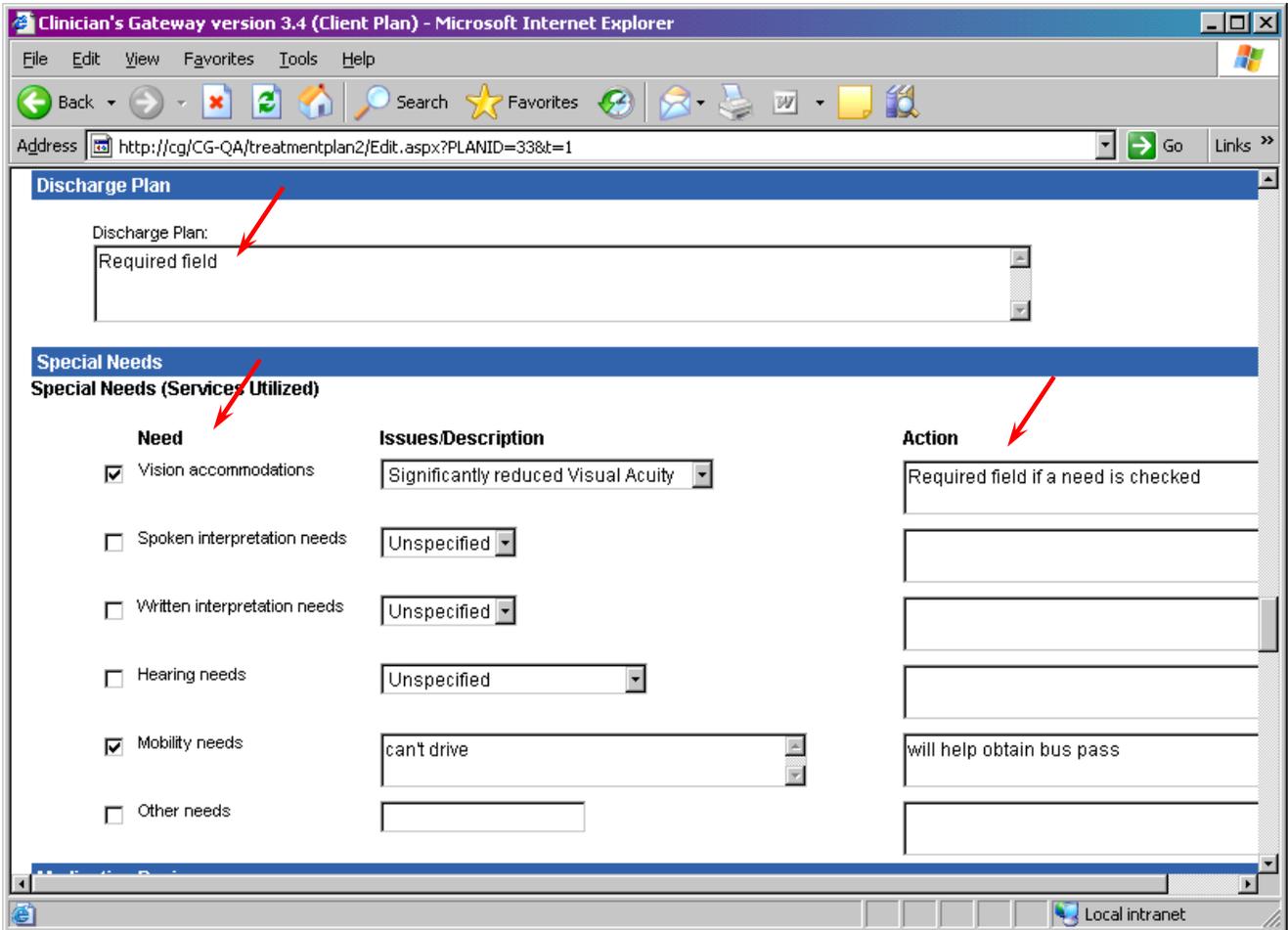
The form contains the following sections and fields:

- Service types:** A dropdown menu showing "Brokerage / Case Management" with a yellow callout '1' and an "Add Additional Service" button.
- Intervention description:** A text area with instructions: "(incorporate consumer's strengths; stage-specific if utilizing stages of change. Provider input before finalization of plan. Use addendum for post finalization of notes.)". A yellow callout '2' points to the text area.
- Provider:** A text input field with a yellow callout '3'.
- Alternate Provider:** A text input field.
- Session frequency:** Two dropdown menus showing "Every" and "Mon, Wed, Fri" with a yellow callout '4'.
- Contact:** A dropdown menu showing "Case Manager" with a yellow callout '5' and an "Add Additional Contact" button.
- Associated Objectives:** A checkbox labeled "Periods of Calm" with a yellow callout '6'.
- At the bottom, there are buttons for "Save Intervention" (yellow callout '6') and "Remove Intervention" (yellow callout '7').

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.



Fill in any **Medication information**. Any medication noted must be accompanied by the last date of contact with an outside provider.

Medication Regimen

Current Psychiatric Medication:

None
 Prescribed by Program MD -- See medication records
 Prescribed by Outside MD (If box checked, complete information below)

Prescribing MD: Dr. Serene
Phone Number: 510-777-7777
Last Collateral Contact Date: 6/9/2010 **Required**

Medication: Zoloft
Dosage: 800 mg
Frequency: daily

[Add Additional Medication](#)

Non-Psychiatric Medication:

Currently Using Non-Psychiatric Medication, Including Natural Medicines

Medication: Stinging Nettle - extract nightly

Prescribing MD: Dr. Flowers
Phone Number: 510-111-1111
Last Collateral Contact Date: 6/9/2010 **Required**

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.**

Authorization Signatures

This Consumer/Client Plan is to be forwarded to the following for authorization:

LPHA Co-Sign: 10904 - Peterson, Camille **Author or Co-signer must be licensed**
 Psychiatrist: Select Clinician
 Program Supervisor: Select Clinician
 Other: Select Clinician

Client is being treated by a non-BHCS psychiatrist.

Consumer/Client Plan also sent to: _____

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.

Clinician's Gateway version 3.4 (Client Plan) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Refresh Mail Print Wordpad Help

Address <http://cg/CG-QA/treatmentplan2/Edit.aspx?PLANID=33&t=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, Conservator, 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:

See progress note dated 6/16/2010 for discussion of plan with consumer.

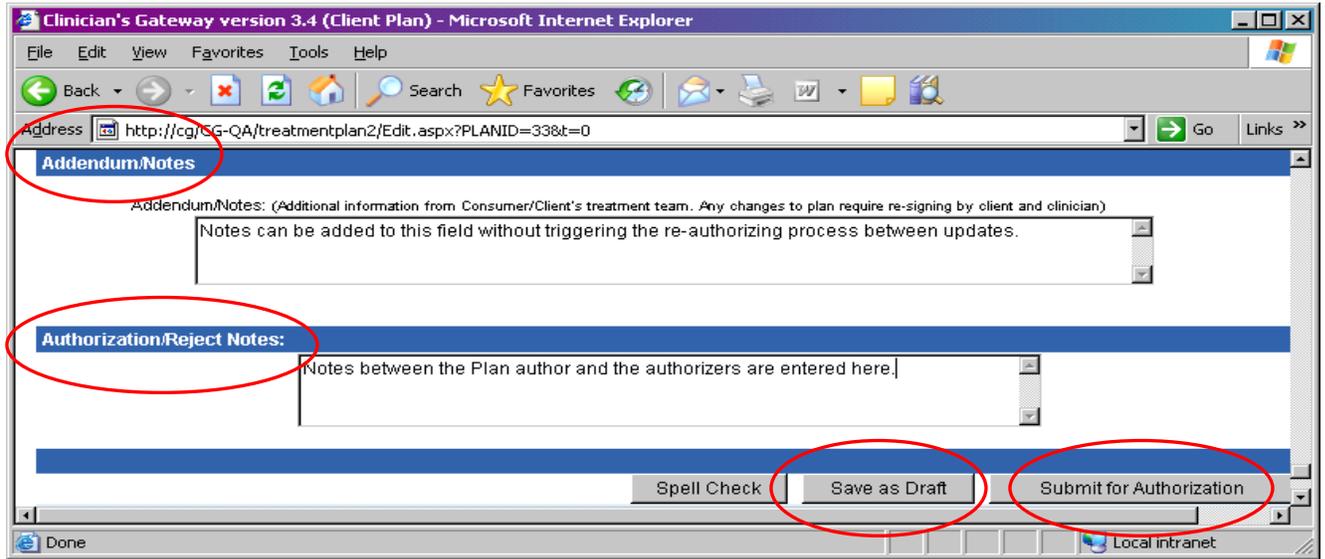
Consumer/Client comments:

Done Local intranet

NOTES: The last section is an area for notes which will not 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.



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

Welcome: Sandy TEST

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

Pending Services 3 Results									
Srv. #	Procedure	Group Svc #	Client #	Client Name	Provider	Date	Type	Sort	Reviewer
402718	311 Collateral		75087772	TEST CINDYTWO	9999CG - CLINICIAN GATEWAY TEST MHS AD	9/11/2009	Clinician's Progress Note	Wait	
482445	433 90801 Initial Psych Evaluation		75130257	TESTY CINDY	9999CG - CLINICIAN GATEWAY TEST MHS AD	10/21/2009	Physician's Progress Note	Wait	
454498	433 90801 Initial Psych Evaluation		75135386	TESTCASE DAVE	9999CG - CLINICIAN GATEWAY TEST MHS AD	1/13/2010	Physician's Assessment		

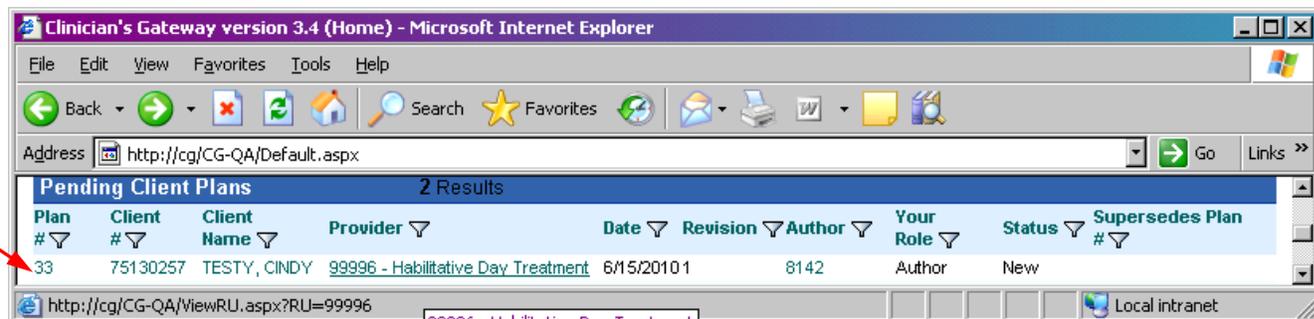
Pending Client Plans 2 Results									
Plan #	Client #	Client Name	Provider	Date	Revision	Author	Your Role	Status	Supersedes Plan
33	75130257	TESTY, CINDY	99996 - Habilitative Day Treatment	6/15/2010	1	8142	Author	Authorizing	

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)

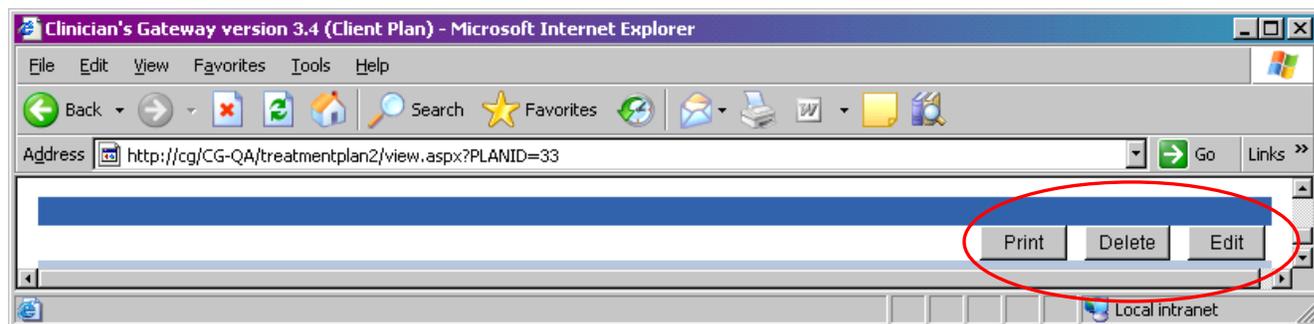
THEN VIEW IT TO INVOKE THE PRINT BUTTON.

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



The Plan appears on your screen.

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



Editing will allow you to Submit for Authorization.

Editing also requires you to resubmit the Plan for authorization.

blank

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”.



Enter New Service:

Type of Service
 Select... To start a new service rate, select the type of service

Pending Services 3 Results									
Srv. #	Procedure	Group Svc #	Client #	Client Name	Provider	Date	Type	Sort	Reviewer
432718	311 Colateral		75087772	TEST CINDY WYO	99990G - CLINICAN GATEWAY TEST VHS 4D	9/11/2009	Clinician's Progress Note		Wait
432445	433 90801 Initial Psych Evaluation		75130257	TESTY CINDY	99990G - CLINICAN GATEWAY TEST VHS 4D	10/21/2009	Physician's Progress Note		Wait
454498	433 90801 Initial Psych Evaluation		7513536E	TESTCASE DAVE	99990G - CLINICAN GATEWAY TEST VHS 4D	1/13/2010	Physician's Assessment		

Pending Client Plans 2 Results									
Plan #	Client #	Client Name	Provider	Date	Revision	Author	Your Role	Status	Supersedes Plan #
33	75130257	TESTY, CINDY	99996 - Habilitative Day Treatment	6/15/2010	1	8142	Author	Authorizing	
12	75053807	TESTCASE, CINDY	99995 - Short Term House	5/13/2010	1	10904	Author	New	

2. The Plan now appears on the Authorizer’s Pending Client Plan list. Their role is listed as LPHACosign, Supervisor, etc. as defined on the Plan.

Pending Client Plans 2 Results									
Plan #	Client #	Client Name	Provider	Date	Revision	Author	Your Role	Status	Supersedes Plan #
33	75130257	TESTY, CINDY	99996 - Habilitative Day Treatment	6/15/2010	1	8142	Lphacosign	Authorizing	
12	75053807	TESTCASE, CINDY	99995 - Short Term House	5/13/2010	1	10904	Author	New	

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	

Authorization/Reject Notes:

THE REVIEWER READS THE NOTES FROM THE AUTHOR. IF CHANGES WERE MADE TO UPDATE THE PLAN, THOSE CHANGES SHOULD BE INDICATED HERE

Print for Signature Print Delete Edit Authorize Reject

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

Pending Client Plans		2 Results							
Plan #	Client #	Client Name	Provider	Date	Revision	Author	Your Role	Status	Supersedes Plan #
33	75130257	TESTY, CINDY	99996 - Habilitative Day Treatment	6/15/2010	1	8142	Author	New	

- The Author works on the Plan after reading the Authorizer's notes and resubmits the Plan for Authorization until it has been Authorized.
- 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.

Pending Client Plans		2 Results							
Plan #	Client #	Client Name	Provider	Date	Revision	Author	Your Role	Status	Supersedes Plan #
33	75130257	TESTY, CINDY	99996 - Habilitative Day Treatment	6/15/2010	1	8142	Author	Authorizing	

- 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.
- 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	THE REVIEWER READS THE NOTES FROM 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	6/17/2010 12:23:02 AM	The Author should have written the Authorizer a note so they know what to look for.

Authorization/Reject Notes:

Print for Signature
Print
Delete
Edit
Reject
Finalize

- 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 name and click “Search”.

Home

Client Plans

Testy Cindy

Search And Tag Search

Home Help Log Out

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

Search Again

Testy Cindy Search

Client Plans

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		

3. The Plan may be Printed, Edited or Revised.

Print Edit Revise

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)
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.

Client Plans									
4 Results									
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, Camille	Finalized	16	
16	75139951	TESTING, ACCT	99991 - West County Mental Health Svs	5/25/2010	3	Peterson, Camille	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, Camille	Revised	14	

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.



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.

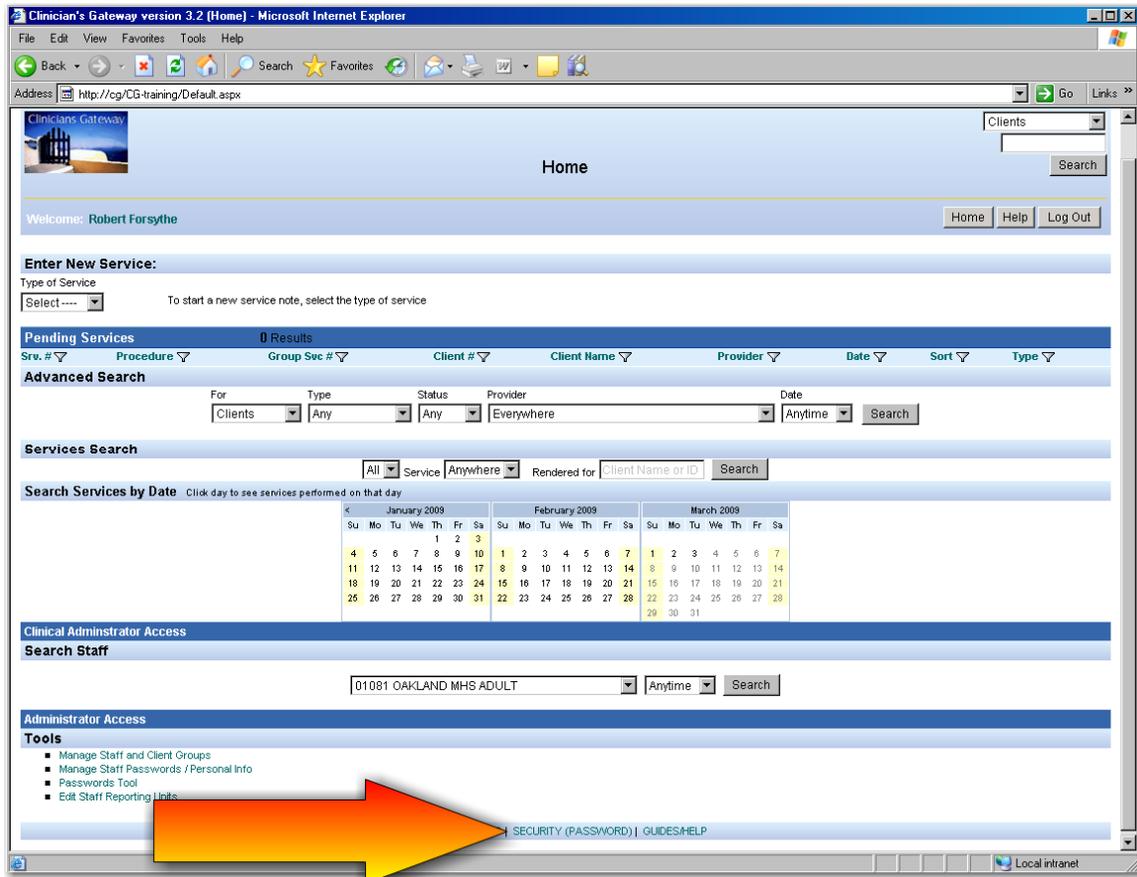
CHANGING THE AUTHOR OF THE PLAN

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.

PASSWORDS

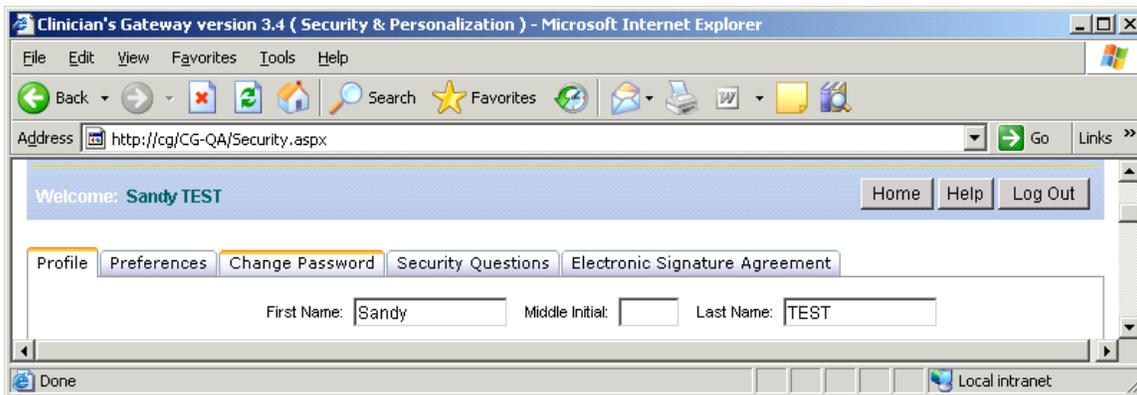
blank

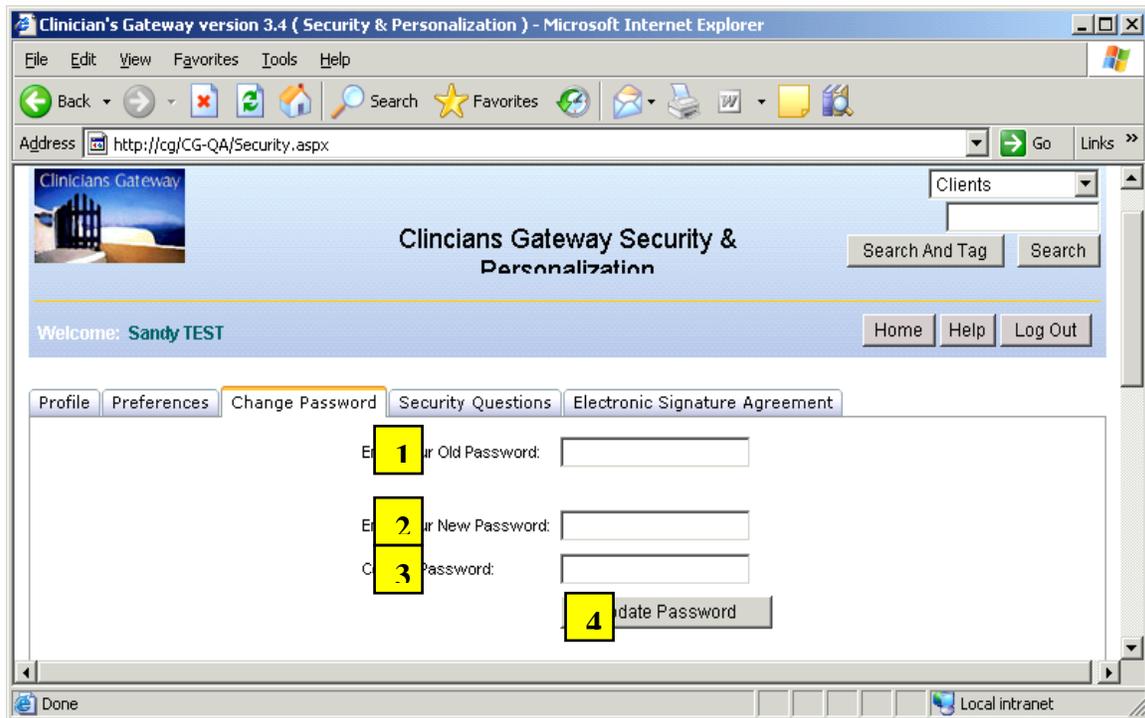
Changing your password



➤ Click on security from the bottom of the home page.

➤ Choose the “Change Password” tab





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).

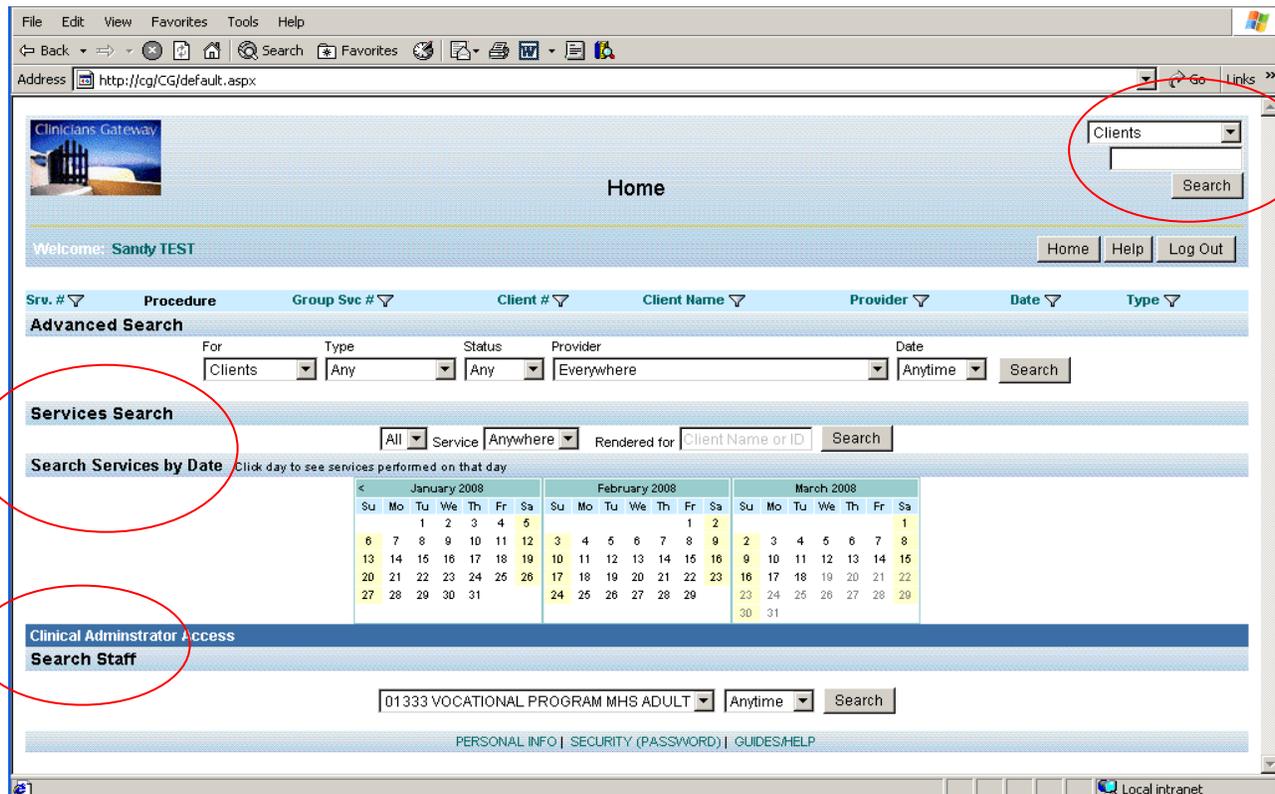
3 – Re-enter your new password in the third field to confirm the change.

4 - Click on “Update password”

ADMINISTRATION TOOLS

blank

Administration Home Page



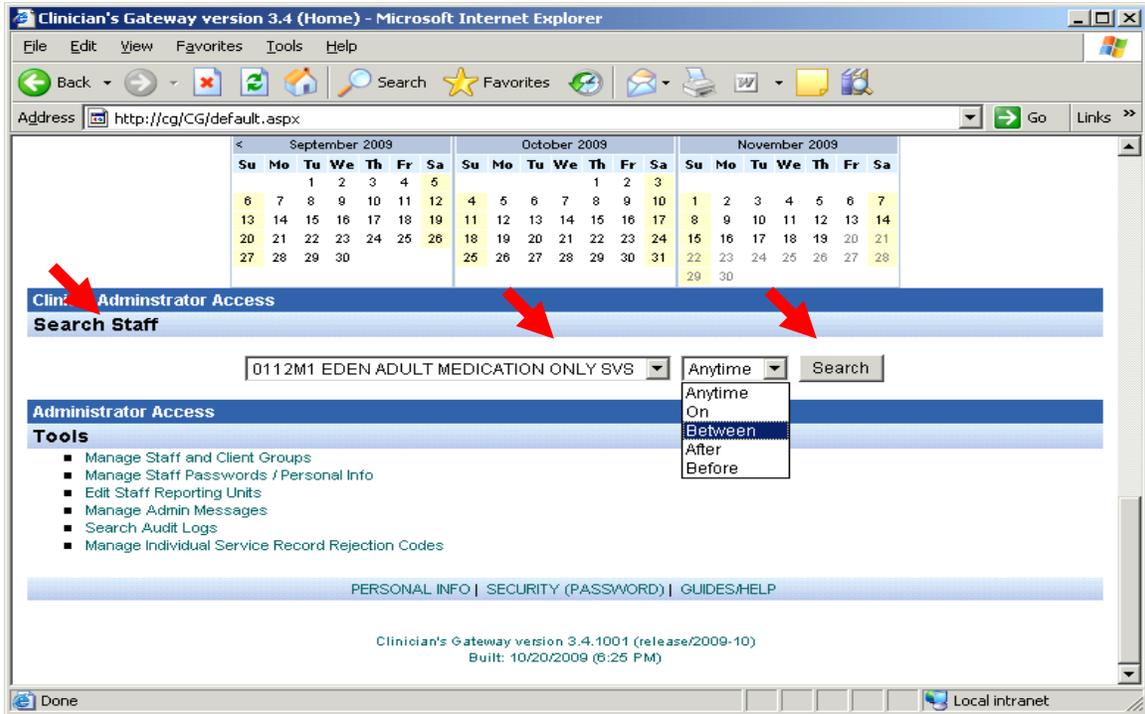
- This is your home page
- Either search for client services via the Search functions in the center of the page or through the Global Search in the upper right hand corner (choose Services and enter the client name).
- Search for an individual staff person's Staff View page through the Global Search 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

blank

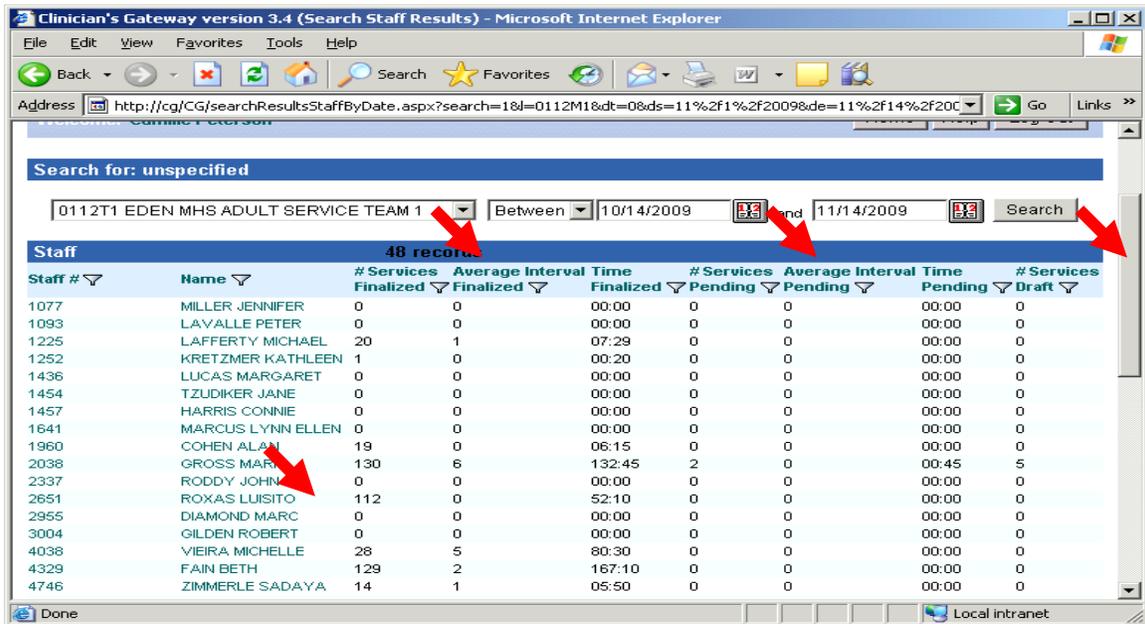
SUPERVISOR TOOLS

Staff Reviewing

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



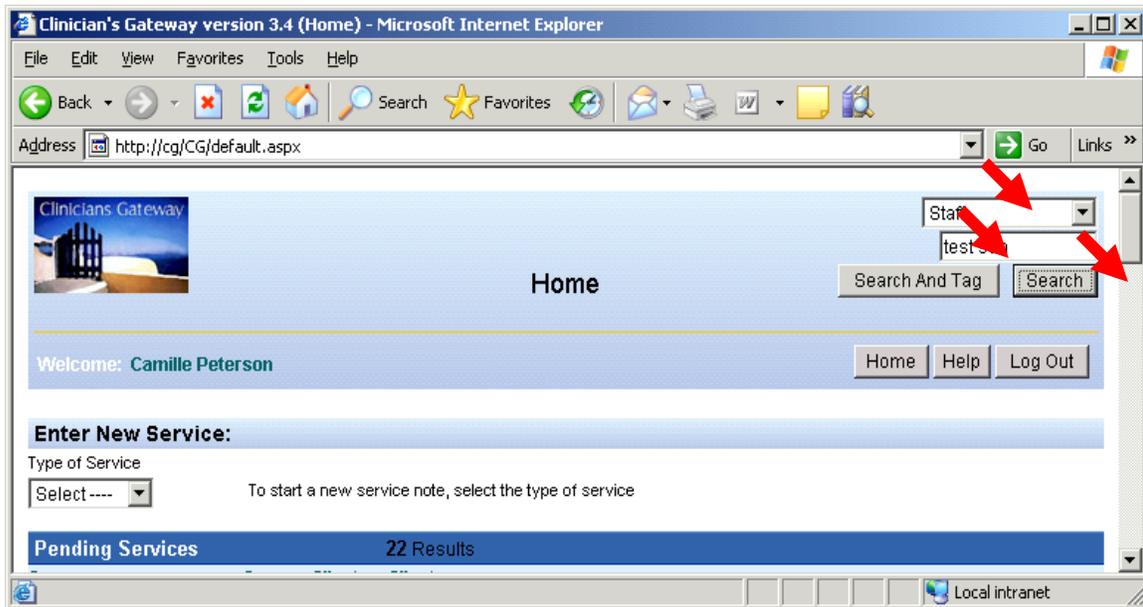
Tallies of services by staff are generated:



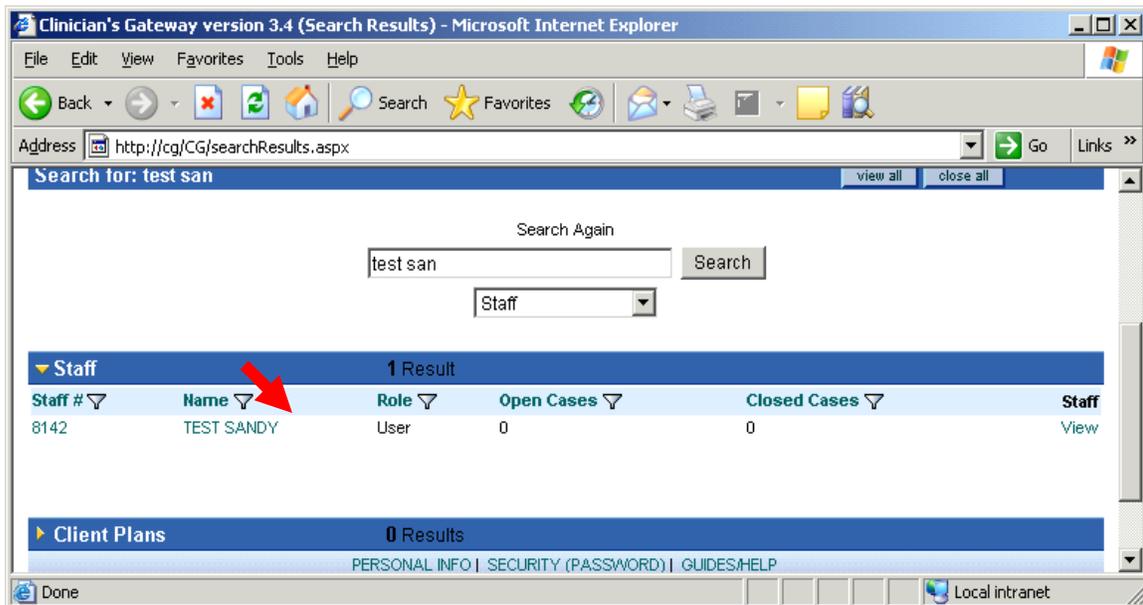
This information can be pasted into an Excel spreadsheet.

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.



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



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.

Staff Information for: **TEST, Sandy (8142)**

SSN: ***.**-**** License #: Start date: 1/1/2006
 Gender: Female License Renew: End date:
 BirthDate: **/**/**** License State: Last Changed On: 12/20/2007
 Ethnicity: White Taxonomy: Record Created On: 9/26/2006
 National Provider Id:

Medicaid PIN:
 Medicare PIN:
 DEA Number:
 UPIN:

Staff Type: Unlicensed Worker

Language: English

Statistics Service Dates: 10/19/2009 thru 11/19/2009 All Search

Type of Service	Clinician Role	Number of Services	Average Interval	Time	Time Reporting
Individual	Primary Clinician	0	0	00:00	Enter Estimated Time
	Co-Clinician	0	0	00:00	
Group	Primary Clinician	0	0	00:00	00:00 Calculate
	Co-Clinician	3	0	01:30	
Indirect	Primary Clinician	0	0	00:00	Est. %
Totals:		3	0	01:30	

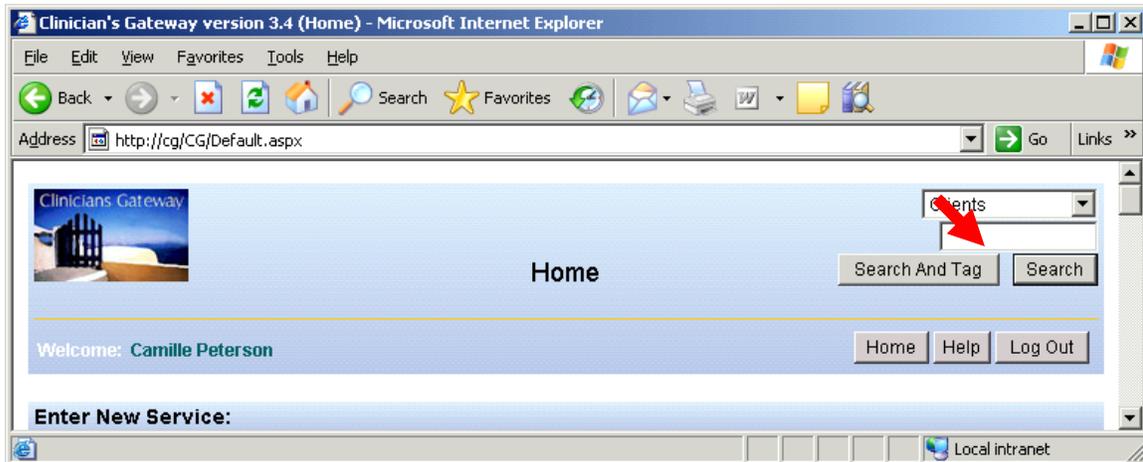
- Procedures: 84 Results
- Reporting Units: 10 Results
- Clients: 0 Results
- Groups: 3 Results
- Direct Service Records: 0 Results
- Pending Service Records: 1 Result
- Finalized Service Records: 11 Results

Srv.	Client #	Client Name	Reporting Unit	Procedure	Date	Type	Note
420337	75135386	TESTCASE DAVE	9999CG CLINICIAN GATEWAY TEST MHS AD	Group Rehabilitation	10/22/2009	Group	View
420338	75130257	TESTY CINDY	9999CG CLINICIAN GATEWAY TEST MHS AD	Group Rehabilitation	10/22/2009	Group	View
420336	75087772	TEST CINDYTWO	9999CG CLINICIAN GATEWAY TEST MHS AD	Group Rehabilitation	10/22/2009	Group	View
368080			01122 EDEN MHS CHILD	General Administration	8/3/2009	Indirect	View
332513	75087772	TEST CINDYTWO	9999CG CLINICIAN GATEWAY TEST MHS AD	Collateral	11/24/2008	Indiv.	View
332454	75087772	TEST CINDYTWO	9999CG CLINICIAN GATEWAY TEST MHS AD	Collateral	11/24/2008	Indiv.	View
331431	75087772	TEST CINDYTWO	9999CG CLINICIAN GATEWAY TEST MHS AD	Evaluation	11/17/2008	Indiv.	View
326841	75087772	TEST CINDYTWO	9999CG CLINICIAN GATEWAY TEST MHS AD	Collateral	10/16/2008	Indiv.	View
326772	75087772	TEST CINDYTWO	9999CG CLINICIAN GATEWAY TEST MHS AD	Collateral	10/14/2008	Indiv.	View
326776			9999CG CLINICIAN GATEWAY TEST MHS AD	Mental Health Promotion	10/14/2008	Indirect	View

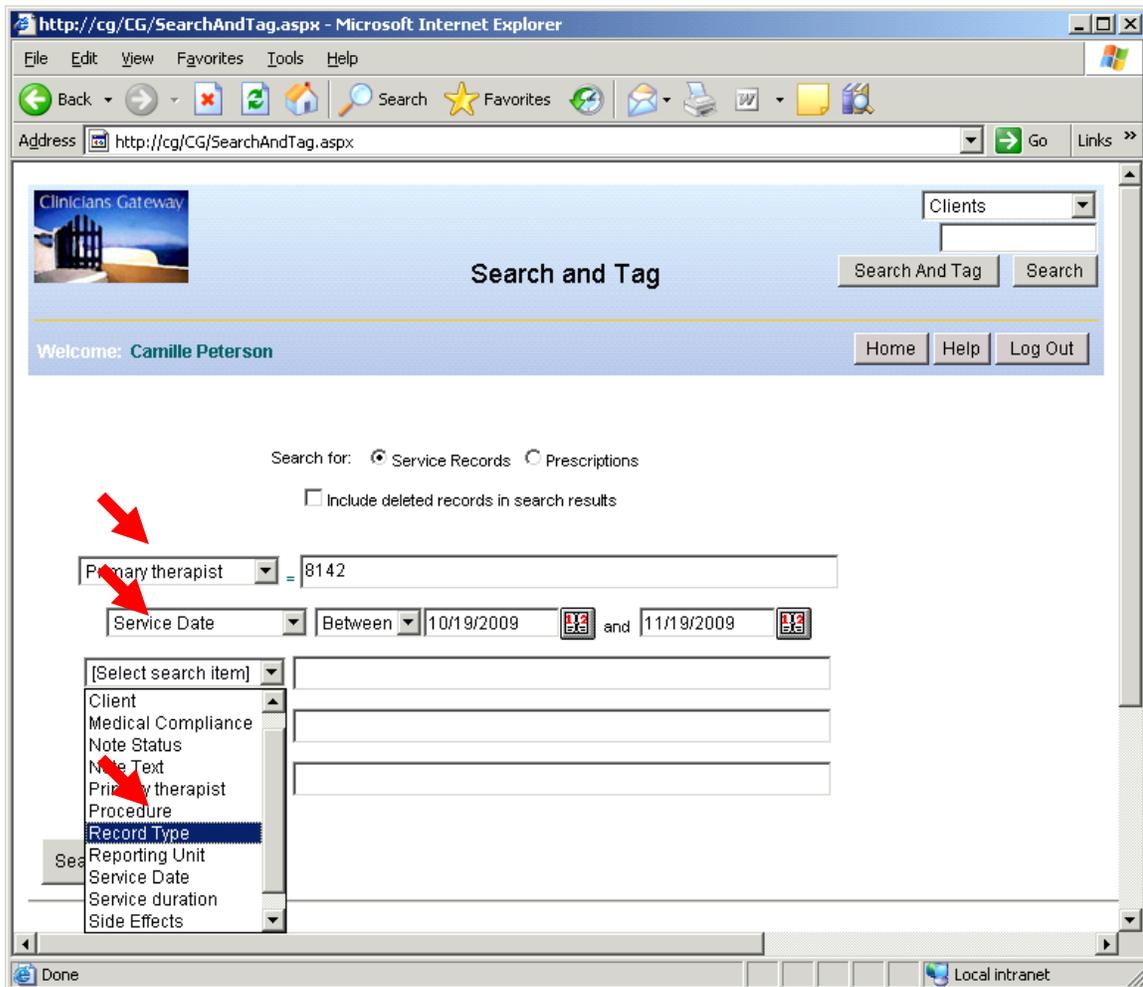
<< First < Prev -1- -2- Next > Last >>

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

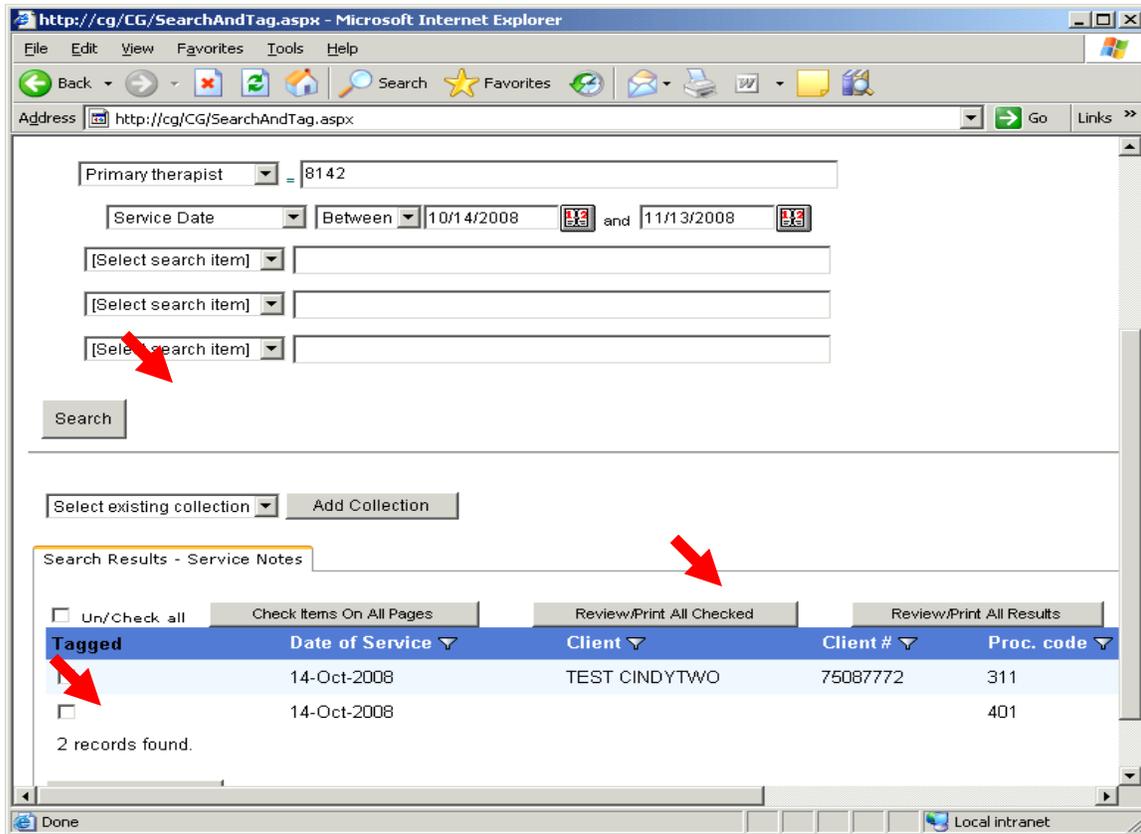
3. **Search and Tag** can be used to assemble sets of notes based on multiple parameters, including Primary Therapist, Types of Notes, Time parameters, etc.



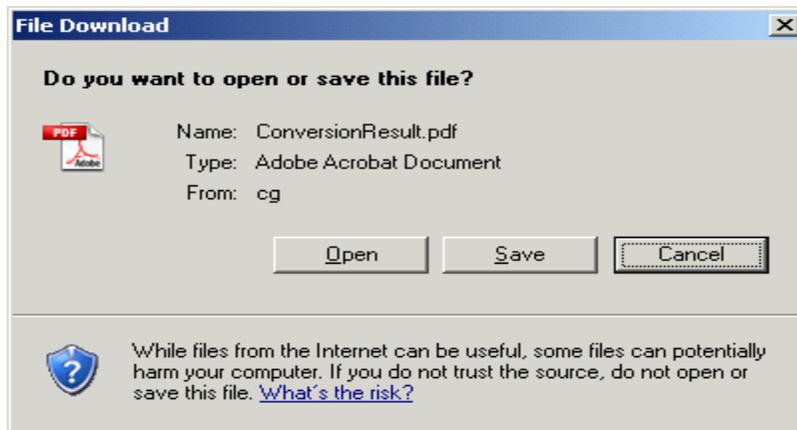
Define up to five parameters to narrow your search criteria.



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



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. http://covenet/gateway/CG_search_and_tag.pdf, (TEXT)
2. http://covenet/gateway/Search_and_tag_swf.html (VIDEO)

blank

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:

The screenshot shows a web form for creating a progress note. At the top, there is a 'Plan' section with a text area containing 'this is only a test'. Below this is the 'Assign to be reviewed by' section, which includes a 'Reviewer:' dropdown menu set to 'Select Reviewer' and a 'Notes:' text area. At the bottom of the form, there are buttons for 'Cancel', 'Spell Check', 'Submit for review', and 'Save as Pending'. The footer contains the text 'PERSONAL INFO | SECURITY (PASSWORD) | GUIDES/HELP'.

2. Select Reviewer from the drop down box:

This screenshot shows the same form as above, but with the 'Reviewer:' dropdown menu open. The menu lists several options: 'Select Reviewer', 'SMITH SHANNON (8612)', 'TEST NATALIE (8141)', 'TEST SHERYL (8144)', and 'WORDEN DAVE (8139)'. The 'Submit for review' button is now highlighted in blue. The footer text remains 'PERSONAL INFO | SECURITY (PASSWORD) | GUIDES/HELP'.

- Complete Notes and click “submit for review.” Note is sent to Supervisor for review and approval:

Assign to be reviewed by

Reviewer: SMITH SHANNON (8612)

Notes: please review and approve my notes

Cancel Spell Check Submit for review Save as Pending

PERSONAL INFO | SECURITY (PASSWORD) | GUIDES/HELP

- The Progress Note appears in “pending services” of the Supervisor’s home page and the “type” is “Approve”: waiting for approval:

Clinicians Gateway Home

Welcome: Sheryl Diedrick

Enter New Service: Type of Service Select ----

Pending Services 1 Result

Srv. #	Procedure	Group Svc #	Client #	Client Name	Provider	Date	Sort	Type
332083	311 Collateral		75087772	TEST CINDY TWO	9999CG CLINICIAN GATEWAY TEST MHS A	11/21/2008	Apprv.	Update...

Advanced Search: For Clients, Type Any, Status Any, Provider Everywhere, Date Anytime

Services Search: All Service Anywhere Rendered for Client Name or ID

Search Services by Date: Click day to see services performed on that day

September 2008							October 2008							November 2008						
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	5	6			1	2	3	4							1	
7	8	9	10	11	12	13	5	6	7	8	9	10	11	2	3	4	5	6	7	8

- 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:**

Clinicians Gateway Home

Welcome: Sheryl Diedrick

Enter New Service: Type of Service Select ----

Pending Services 1 Result

Srv. #	Procedure	Group Svc #	Client #	Client Name	Provider	Date	Sort	Type
332083	311 Collateral		75087772	TEST CINDY TWO	9999CG CLINICIAN GATEWAY TEST MHS A	11/21/2008	Accept	Indiv.

Advanced Search: For Clients, Type Any, Status Any, Provider Everywhere, Date Anytime

Services Search: All Service Anywhere Rendered for Client Name or ID

Search Services by Date: Click day to see services performed on that day

September 2008							October 2008							November 2008						
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	5	6			1	2	3	4							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	Staff	Action	Notes
11/21/2008	DIEDRICK SHERYL	Submit	Please review and approve my notes
11/21/2008	TEST SHERYL	Accept	I have reviewed and approve your note

Cancel Print Delete Service Edit Service

PERSONAL INFO | SECURITY (PASSWORD) | GUIDES/HELP

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 Clients

Home Search

Welcome: Sheryl Diedrick Home Help Log Out

Enter New Service:

Type of Service: To start a new service note, select the type of service

Pending Services 1 Result

Srv. #	Procedure	Group Svc #	Client #	Client Name	Provider	Date	Sort	Type
332099	311 Collateral		75087772	TEST CINDYTWO	9999CG CLINICIAN GATEWAY TEST MHS A	11/21/2008	Reject	Indiv.

Advanced Search

For: Type: Status: Provider: Date: Search

Services Search

Service: Rendered for: Search

Search Services by Date Click day to see services performed on that day

September 2008							October 2008							November 2008						
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	5	6		1	2	3	4										1
7	8	9	10	11	12	13	5	6	7	8	9	10	11	2	3	4	5	6	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

Previous Entries: (Select Note)

this is only a test

Assign to be reviewed by

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

Reviewer: TEST SHERYL (8144)

Notes: made necessary changes, please approve

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

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 necessary changes, please approve

Notes: I now accept this note

Print Accept Reject

Done Local intranet

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

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

Pending Services 1 Result

Srv. #	Procedure	Group Svc #	Client #	Client Name	Provider	Date	Sort	Type
332099	311 Collateral		75087772	TEST CINDYTWO	9999CG CLINICIAN GATEWAY TEST MHS A	11/21/2008	Accept	Indiv.

Advanced Search

For: Clients | Type: Any | Status: Any | Provider: Everywhere | Date: Anytime | Search

Services Search

All | Service: Anywhere | Rendered 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	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6			1	2	3	4							1	
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
21	22	23	24	25	26	27	19	20	21	22	23	24	25	16	17	18	19	20	21	22

6 Staff can click “update” to see Supervisor’s comments:

Plan

this is only a test

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 necessary changes, please approve
11/21/2008	TEST SHERYL	Accept	I now accept this note

Cancel | Print | Delete Service | Edit Service

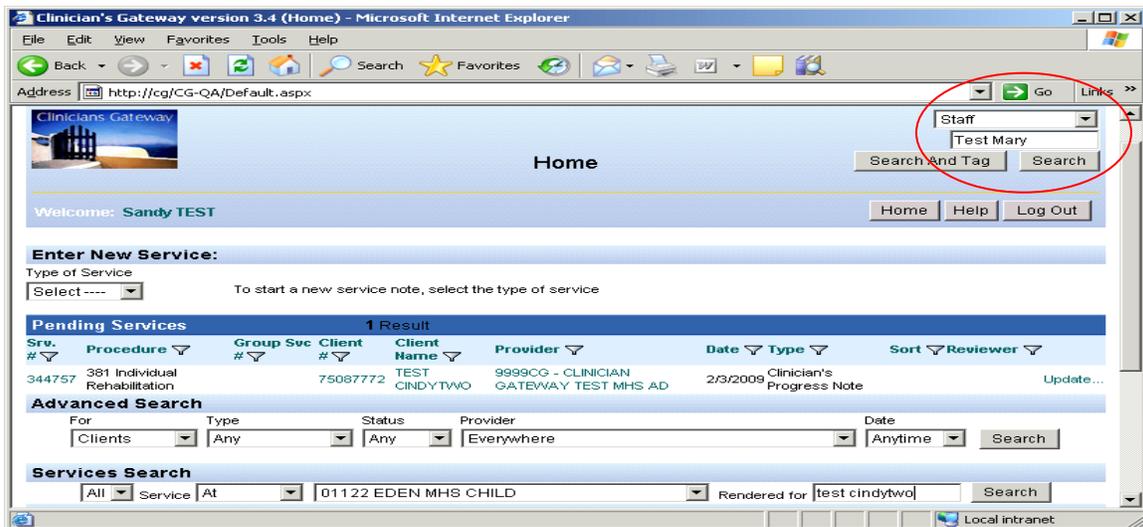
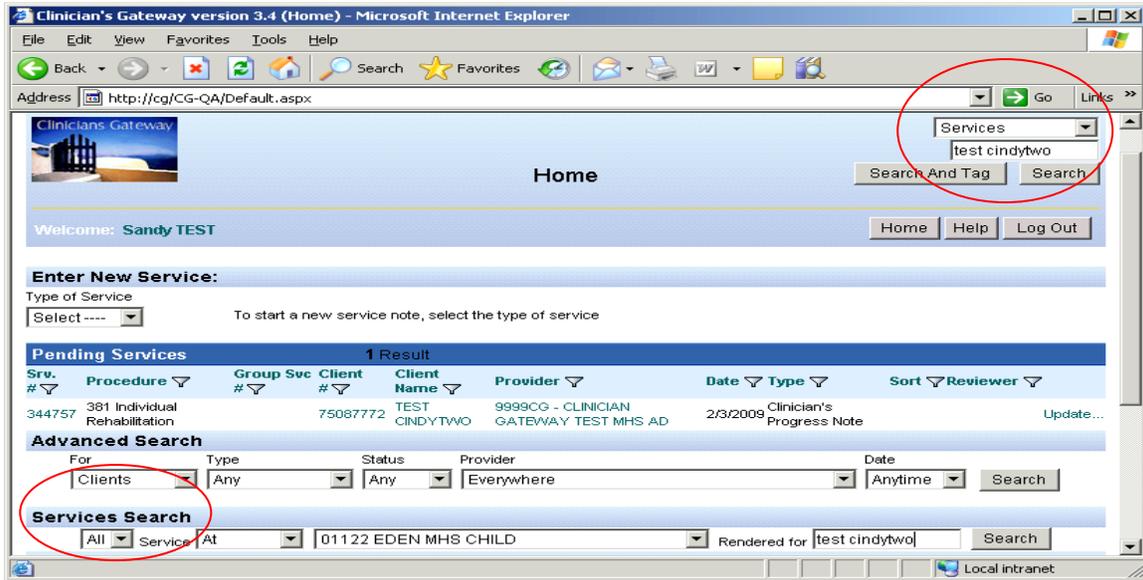
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Change Reviewer Procedure

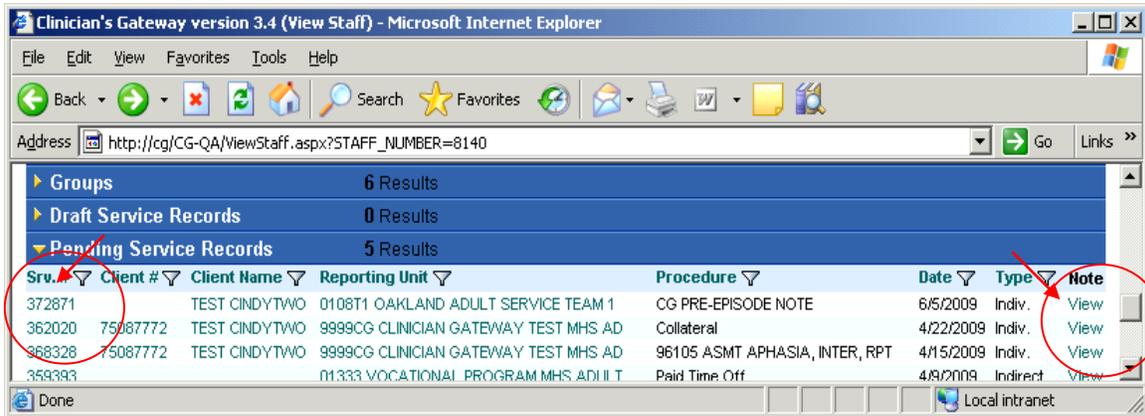
The designated reviewer on a service can be changed by a staff person who has been given the “Change Reviewer” role in Clinician’s Gateway.

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.

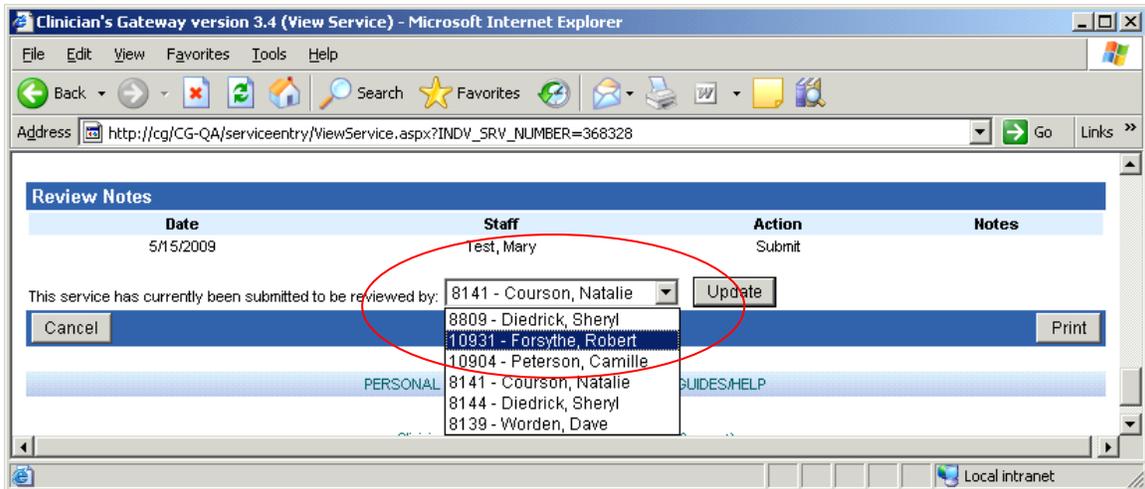
1. Locate the service. You can search for the client’s services by client name or service # (#xxxxxxx) if known, or search for the Staff person’s Pending services.



2. View the note by clicking on View or the Service number.



3. At the bottom of the Service Note, choose a new reviewer from the list. Click Update.



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

blank

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.

The screenshot displays the Clinicians Gateway Home page. The browser address bar shows <http://cg/CG/default.aspx>. The page features a navigation menu with 'Home', 'Help', and 'Log Out' buttons. A 'Welcome: Santy TEST' message is visible. The main content area includes several search sections:

- Advanced Search:** A search bar with dropdown menus for 'For' (Clients), 'Type' (Any), 'Status' (Any), 'Provider' (Everywhere), and 'Date' (Anytime), followed by a 'Search' button.
- Services Search:** A search bar with dropdown menus for 'All', 'Service', and 'Anywhere', and a 'Rendered for' dropdown (Client Name or ID), followed by a 'Search' button.
- Search Services by Date:** A section with a 'Click day to see services performed on that day' instruction and a calendar grid for January, February, and March 2008.
- Clinical Administrator Access Search Staff:** A search bar with a dropdown menu (01333 VOCATIONAL PROGRAM MHS ADULT) and a 'Search' button.

Red circles highlight the 'Clients' dropdown in the top right search bar, the 'Services Search' section, and the 'Search Staff' section.

- 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

FROM: Help Desk, BHCS, Problem Reporting
SENT: Wednesday, November 24, 2010
TO: Clinic Supervisor
CC: Help Desk, BHCS
SUBJECT: 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 Services
Service Audit Report

dd-mmm-yyyy
Page 1

REPORT MHS442

Provider: Oakland Mental Health Services (RU #####)

Input Date: dd-mmm-yyy

Service Audit Date: dd/mmm/yyyy

Primary Therapist: Clinician's Name

Staff#: #####

Case #	Client Name	Procedure	#Group	HH-MM	Location	Co-Staff
0123459	Sample, John	130	**	24:00	9	

Service Audit Date: dd/mmm/yyyy

Primary Therapist: Clinician's Name

Staff#: #####

Case #	Client Name	Procedure	#Group	HH-MM	Location	Co-Staff
0123458	Schmoo, Joe	131	**	24:00	9	

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 Services
Service Audit Report

dd-mmm-yyyy
Page 1

REPORT MHS443

Reporting Period: 16 July 2010 to 16 July 2010 23:59:00

Reporting Unit: REPORTING UNIT NAME (RU #####)

Service Audit Date: dd/mmm/yyyy

Primary Therapist: Clinician's Name

Staff#: #####

Case #	Client Name	Procedure	#Group	HH-MM	Location	Co-Staff
0123459	Sample, John	130	**	24:00	9	

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	 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