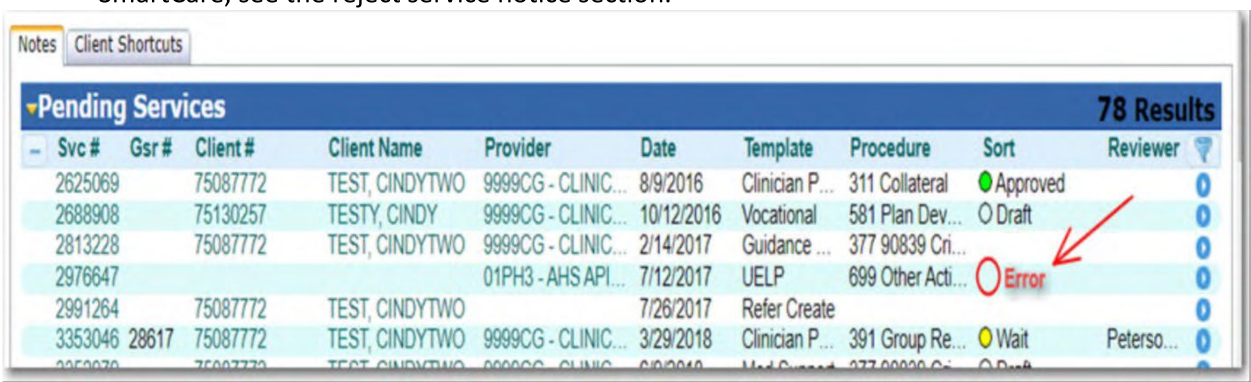
CLINICIANS GATEWAY AND SERVICE MY OFFICE LIST PAGE WORKBOOK

Service Entry via Clinicians Gateway

Clinicians Gateway Service Entry

Clinicians Gateway (CG) is Alameda County's Electronic Health Record (EHR) system. CG is utilized by Alameda County Clinics and Support Programs as well as some Community Based Organizations (CBOs) to document encounters Clients.

1. CG clinical Notes, when finalized by Clinicians, will generate the SmartCare Service records.
2. Nightly, finalized clinical Notes from CG are transferred to SmartCare to create the SmartCare service record.
3. During the Nightly process some services can be rejected and will return to Clinicians Gateway in draft status. Rejected services can be found in the Pending Services list on the homepage in CG. To revise rejected services for re-submission in to SmartCare, see the reject service notice section.

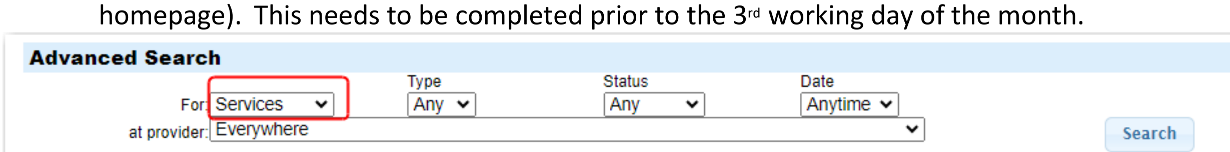


Svc #	Gsr #	Client #	Client Name	Provider	Date	Template	Procedure	Sort	Reviewer
2625069		75087772	TEST, CINDYTWO	9999CG - CLINIC...	8/9/2016	Clinician P...	311 Collateral	Approved	
2688908		75130257	TESTY, CINDY	9999CG - CLINIC...	10/12/2016	Vocational	581 Plan Dev...	Draft	
2813228		75087772	TEST, CINDYTWO	9999CG - CLINIC...	2/14/2017	Guidance ...	377 90839 Cri...		
2976647				01PH3 - AHS API...	7/12/2017	UELP	699 Other Acti...	Error	
2991264		75087772	TEST, CINDYTWO		7/26/2017	Refer Create			
3353046	28617	75087772	TEST, CINDYTWO	9999CG - CLINIC...	3/29/2018	Clinician P...	391 Group Re...	Wait	Peterso...

4. Use the Services (My Office) List Page to view services transferred from CG into SmartCare from the previous night.

Unable to load the picture

5. Clerical staff will need to monitor for potential missing services by logging into CG to review existing Clinical Notes (using the Advance Search for services on the homepage). This needs to be completed prior to the 3rd working day of the month.



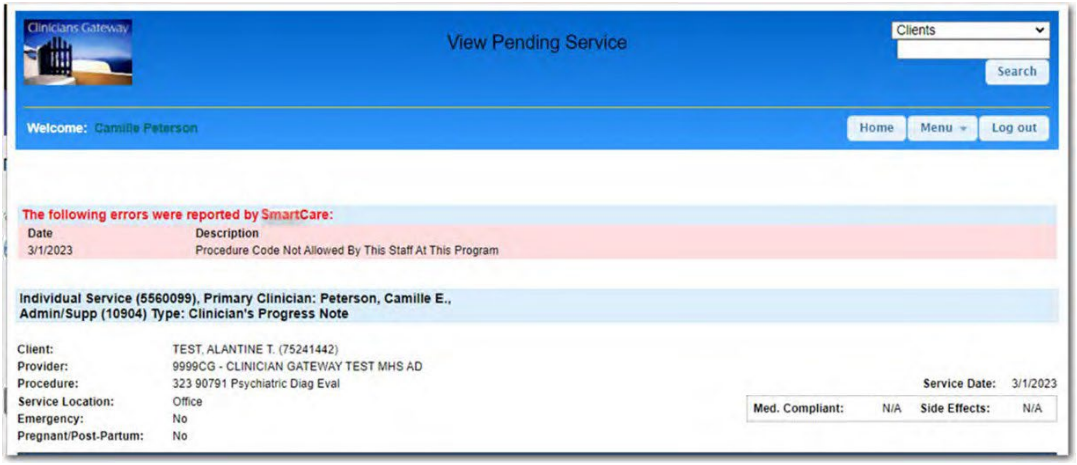
a. Pending and Draft Notes should be finalized, for successful transfer to SmartCare. Services should post before the first Medi-Cal test claim is scheduled to run.

b. Clerical Staff should also look for missing Services that were never written in CG to alert Clinicians to write their Notes.

Clinicians Gateway (CG) Reject Service Notice

- CG clinical notes finalized by the Clinicians generate the SmartCare Service records.

- Nightly, finalized clinical Notes from CG are transferred to SmartCare to create the SmartCare Service records.
- If during the nightly transfer process, the CG Service record is rejected the Service **NOTE** will be reverted to "Draft" status and returned to the clinician's Pending Services list in CG, with the rejection reason added to the Notes.



- The Clinician or Clerical staff are responsible for updating the enrollment or billing data so the **NOTE** can be finalized for transfer to SmartCare again.

- CG Service records may be rejected due to the following:
  - **SmartCare enrollment** opening date is after the CG date of Service.
  - **SmartCare enrollment** closing date is before the CG date of Service.
  - CG Service date is not a valid **SmartCare** Service day (e.g. Service provided on weekend when facility is closed).
  - Clients are not enrolled in the Program.
  - Procedure code not allowed for Clinician's staff type.
  - Procedure code not allowed for Program
  - Service duration not allowed for procedure code

Clinicians Gateway (CG) Reporting

List of services can be generated using the Advanced Search in CG or the Search and Tag feature in CG.
NOTE: There is a Clinician's Gateway (CG) Manual for reference, which contains additional details on the Providers website.

Services (My Office) List Page

The Services (My Office) List Page has several functionalities. These Functionalities Include:

1. **Generate a "New" and/or Modify a Service Record** (as previously explained in Chapter 5 of the Service Entry Manual)
    a. Edit or modify services in "Show" Status that have not been "Completed", select, and edit from the list page.
    b. View completed services.
    c. Review services uploaded from Clinician's Gateway.

2. **Reporting Tool**
    a. The Services (My Office) List page will replace INSYST MHS 442 Daily Service Audit Listing and MHS 696 Monthly Client Services Listing Reports. The filter section allows the users to search for data in real-time.
    b. Use the list page to query on certain search parameters to display service information for the users CDAG group. Information can be filtered and sorted.

3. **Troubleshoot Common Service Records Errors and Warnings**
    - Research and Review Service Errors and Warnings.

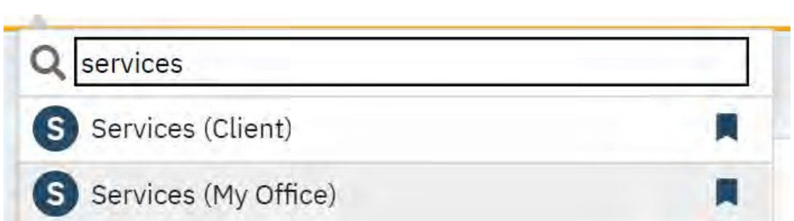
This section will discuss the Services (My Office) List Page as a reporting tool. The next chapter will discuss how to troubleshoot common service record errors and warnings using the Services (My Office) List Page.

Services (My Office) List Page Reporting Functionality

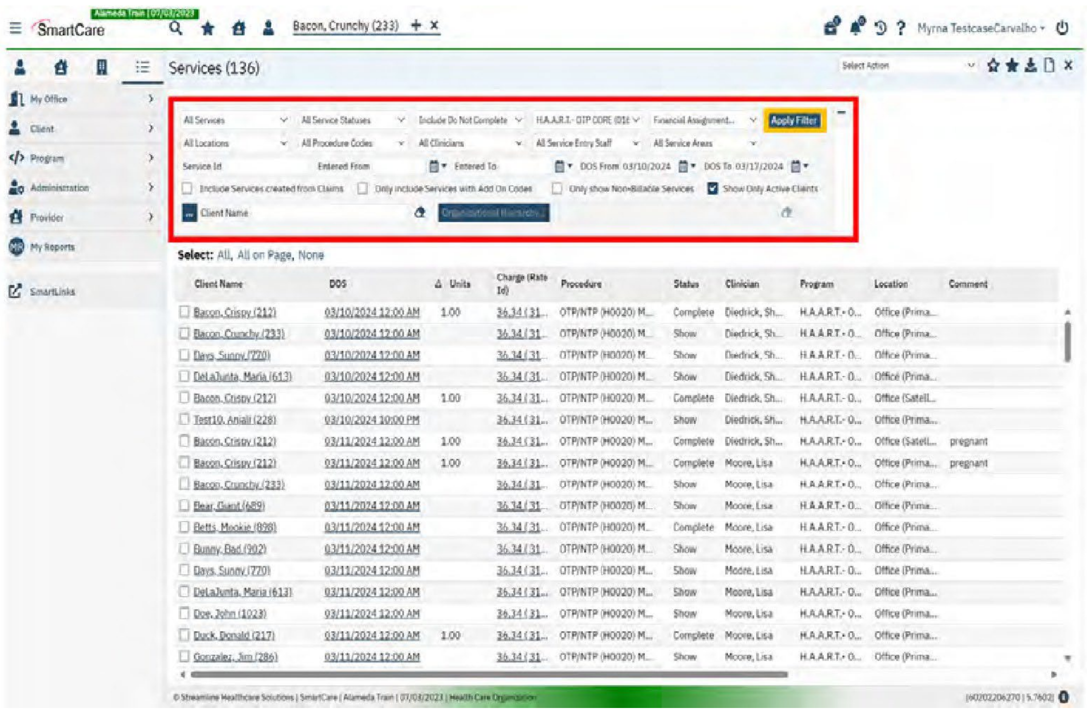
The Services (My Office) List page will replace the legacy systems MHS 442 and MHS 696 Reports. The filters allow the users to search for data in real-time. Use the list page to query on certain search parameters to display service information for the users CDAG group. Information can be sorted and exported to Excel as a CSV file.

To access service information on the Services (My Office) List Page for reporting purposes follow the below steps.

1.) Click on the magnifying glass and type and select Service (My Office)



2.) The Service (My Office) List Page will display.



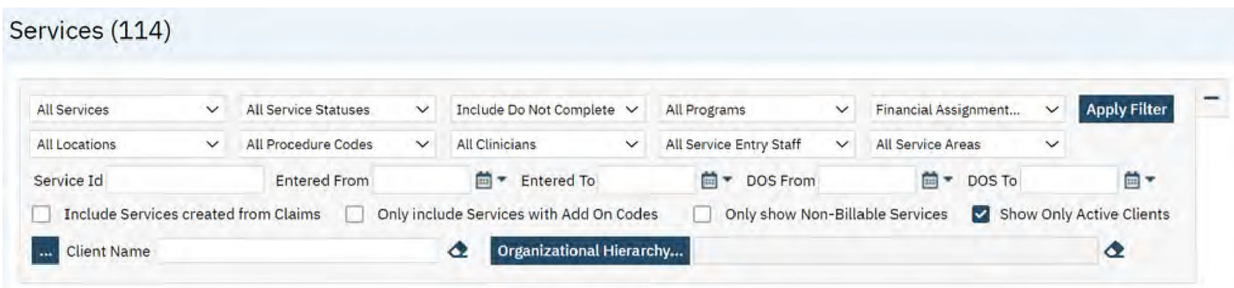
3.) Use the filter area to query and search for service records. When all applicable filters have been set. Select the **Apply Filter** button. The data in the list area will refresh to reflect within the filter criteria.

Services (My Office) List Page Filters

The below tables list the Services (My Office) List Page filters and has a brief description of their purpose.

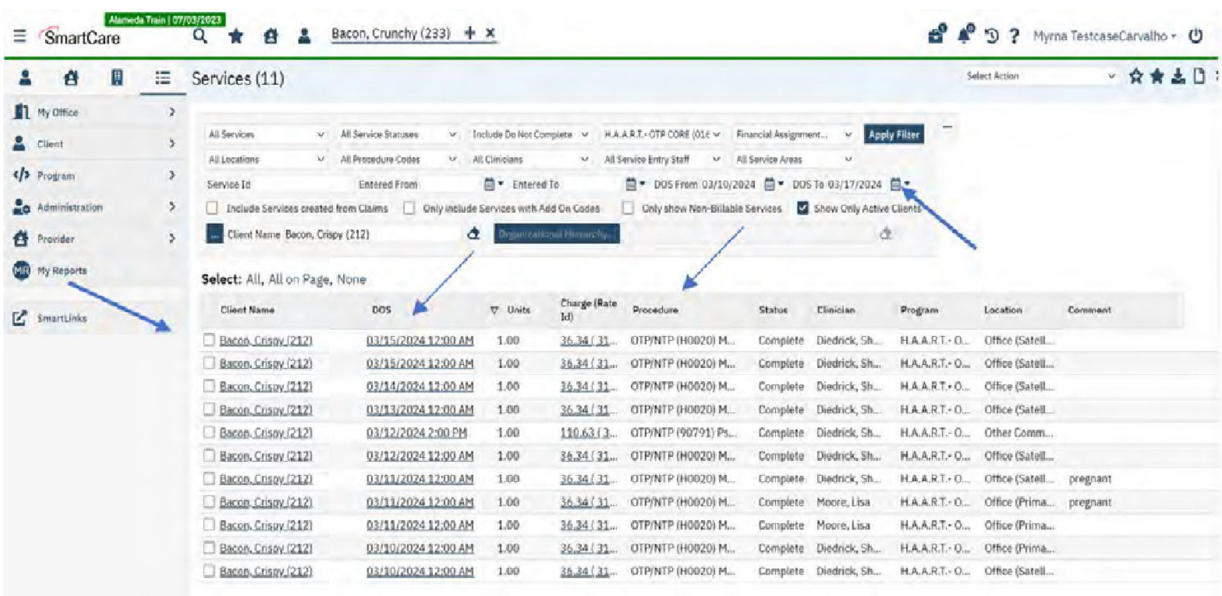
Filter	Purpose/Description
All Services	Filters the list Page by service error and warning messages
All Service Statuses	Filters the list page by service status e.g. “Show”, “Complete”, “Error” etc.
Include Do Not Complete	N/A not using this filter/functionality currently.
All Programs	Filters the list page by the Users CDAG Security Assigned Programs
Financial Assignment	Filters the list page by the Clients Coverage Plan
All Locations	Filters the list page by Service Location
All Procedure Codes	Filters the list page by Procedure code
All Clinicians	Filters the list page by Staff providing the service
All Service Entry Staff	N/A
All Service Areas	N/A
Service Id	Filters the list page by system generated unique service identifier assigned when saving a service record

Entered From/ Entered To	Filters the list page by SmartCare Service entry date stamp, using date ranges
DOS From/DOS To	Filters the list page by SmartCare Service entry Start date, using date ranges
Include Services Created for Claims	N/A
Only Service with Add-On Codes	Filters the list page by services with Add-On Codes ONLY
Only Show Non-Billable Services	Filters the list page by "Non-Billable" services
Show Only Active Clients	Filters the list page by active clients with the program enrollment status of enrolled
Client Name	Filters the list page for the clients' services ONLY



IMPORTANT NOTE: Some list pages will default filter selections. It is recommended to always check your filter area and update your selections prior to selecting the **Apply Filter** button.

The return values and data will be displayed in the List Area table (see below example).



The number in parentheses next to the title of the screen . Services (11) informs on how many service records met your filter criteria.

To collapse the filter area, select the − icon next to the Apply Filter button. To expand the filter area, select the + icon.

Use the icon to delete the field information.

The icon allows the user to export the information to Excel as a CVS file.

Use the icons to setup favorite filters or to access saved filters to used frequently.

Service (My Office) List Page Data Table Columns and Return Values

The below tables list the Services (My Office) list area data columns, with a brief description of their purpose. Once the user has selected the applicable filters, review the service record information. The data table has 15 columns of information.

Data Column	Purpose/ Description
Client Name and Status Action Check box	Display the Client name and Client ID. By Selecting the action check, the user can update a service status using the list page.
DOS (Date of Service)	Display the service record date and start time. Clicking the hyperlink in DOS column will open the service detail screen for that service.
Units	Identifies the number of units used for this Service. NOTE: This identifies the duration unit specified on the General tab in the Entered As field for this procedure code.
Procedure	Displays the procedure code and description performed during that service.
Group Note	N/A
Charge ID	N/A
Status	The status of the Service (“Show”, “Completed”, “Errored”)
Clinician/Provider	Displays the clinician/provider that provided the Service.
Program	Displays the program of service
Location	Displays the location where the Service was delivered
Comment	Displays Comments from both the Batch Service Screen and the Service Detail Screen
Failure to Complete Reason	Displays if the service record has any error messages or warnings, found during service validation checks and/or the service completion process
Add-On Code	Displays the services Add-On Code(s), when applicable
Group Name	N/A
Telehealth	N/A

NOTE: Data field columns can be sorted in ascending or descending order by double clicking in the right-hand corner of the column header field.

Use the **Select:** All, All on Page, None options to adjust how many records are viewed in the list area at a given time.

The user can filter and research service records as needed and necessary using the Services (My Office) List Page. Next learn how to identify and address service record errors and warnings.

Chapter 9: Troubleshooting Common Service Issues

Earlier in the manual we displayed the service entry workflow diagram and discussed the system requirements for ensuring successful service entry. This Chapter discusses how to identify services that have error messages and warnings upon validation checks and service completion processing.

Before services can be recorded the client must be registered and enrolled in the program providing the service on the service date and have a signed diagnosis document.

When a service is entered into the SmartCare system it will be placed into “Show” status. “Show” status indicates that the service was delivered. The SmartCare system will run a nightly service completion process. The service completion process validates the service and checks the service for any service completion errors or warnings. Services that have error messages or warnings will remain in “Show” status until all errors and warnings are addressed and corrected.

Services that meet system setup requirements and have no validation errors or warnings, will move from a “Show” status to a “Complete” status (similar to the INSYST service posting workflow) and generate a charge. When a service is in “Complete” status and a charge is generated, it can no longer be altered and/or changed.

Once the charge is generated and the service status is “Complete”, an additional nightly process runs to validate and check the charge for any claiming error messages or warnings. Charges that have error messages or warnings will remain in a “Complete” status until all claiming errors and warnings are addressed and corrected. Charges that meet system setup requirements and have no claiming validation errors or warnings, will move from “Complete” status to “Ready to Bill” status for claim submission. Charges are then claimed to the State by ACBH.

Common Service Entry Validation Errors

Here are some frequently encountered validation errors during Service Entry and Completion Processing:

Error Type ID	Service Completion Error and Warning Messages
4401	This procedure requires a clinician to be specified for the service.
4403	Unable to find a matching rate for the selected procedure.
4404	Billing diagnosis required for completing the service
4406	Authorization is required
4407	Auth requested but not approved
4410	Financial information has not been completed for this client.
4411	Duration does not match DateTime In/DateTime Out.
4412	End Date does not equal Start Date.
4413	Duration cannot be negative.
4414	Service Date/Time does not match Time In/Time Out.
11127444	Please enter valid Start Time
11127445	Please enter valid Duration
11127446	Please enter valid End Time
11134507	Pregnancy Indicator is required

11134508	Pregnancy Indicator does not match the value set on the Claim.
11136057	Pregnancy Indicator cannot be set as "No" or "N/A"

Once the user has addressed the error and/or warning message, the service will remain in "Show" status until the next scheduled nightly "Completion" processing is done. The service will go through the same validation checks and balances as previously done to ensure the error is corrected and the service can then be moved from "Show" to "Complete" status.

Service Entry Setup

The Service entry process is generally straightforward and automated. However, certain circumstances may necessitate manual intervention. Incomplete or incorrectly entered information can result in claims or charges remaining on list pages without clearance or payment.

The following is a compilation of frequently encountered issues, accompanied by troubleshooting tips for each major step.

Client Record Issues:

1. General: Client lacks Name, **HOME** Address, or SSN under Client Information
2. Gender must be entered under Demographics.

Service Entry Issues:

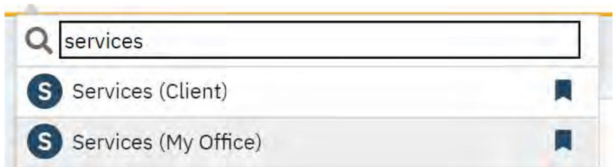
If you are experiencing issues with the Service, some of the most common issues are:

1. For a Service to complete, the service date must be today's date, or earlier and the status must be "Show". Select the location and program before entering a procedure and other service information.
2. Service Status must be "Show" to being the billing process.
3. The Service must include entries in the Staff, Procedure, Program, Location, Date and Duration fields. Mode of Delivery and Pregnancy Indicator. And Emergency Indicator as applicable.
4. If Programs do not populate, ensure the staff member is entered in the Clinician field and is assigned to Programs under Staff detail and the Client is enrolled in a corresponding program.
    a. That the Procedure Code is not listed under "These codes are not billable to this plan" rule.
    b. That the Service Area for the Plan matches the Service Area for the Program.
5. The Status remains "Show" after other troubleshooting, and you cannot progress to complete.
    a. Open the Service Detail by selecting the Date of service hyperlink from the Service list page. View the reasons that the service will not complete in the section near the bottom.

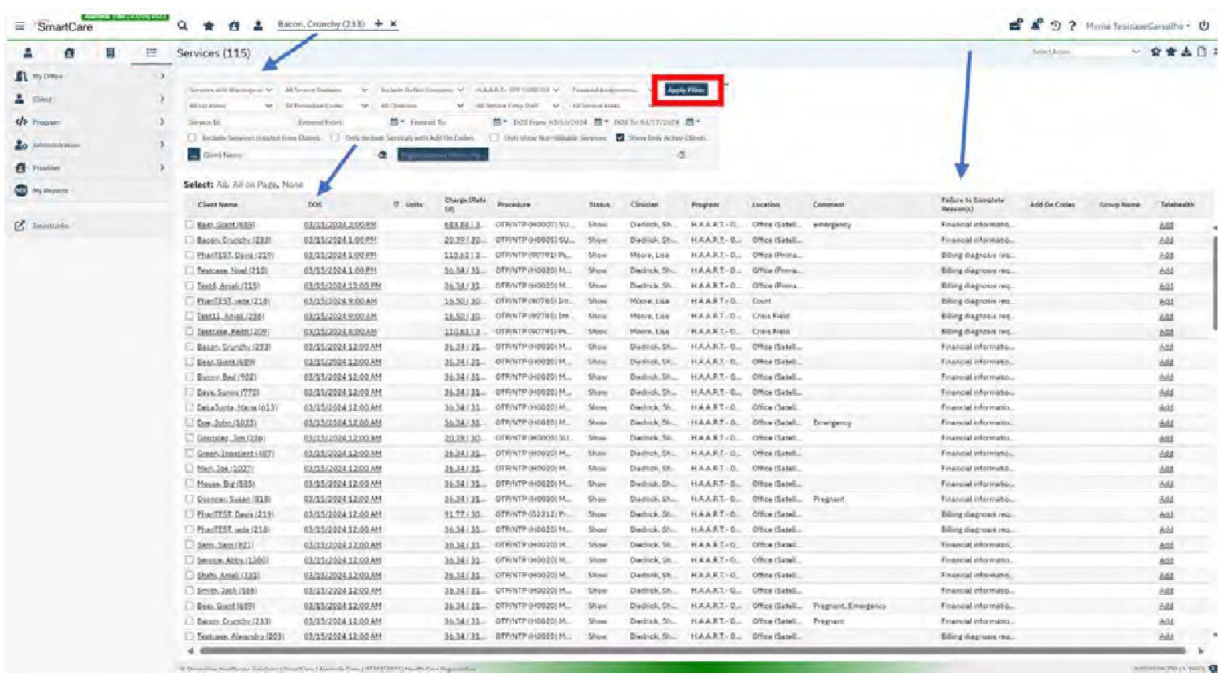
Using the Services (My Office) List Page to Research and troubleshoot Errors and Warnings

To use the Service (My Office) List Page to Research and Troubleshoot Errors and Warnings follow the below steps.

1.) Click on the magnifying glass and type Service (My Office)

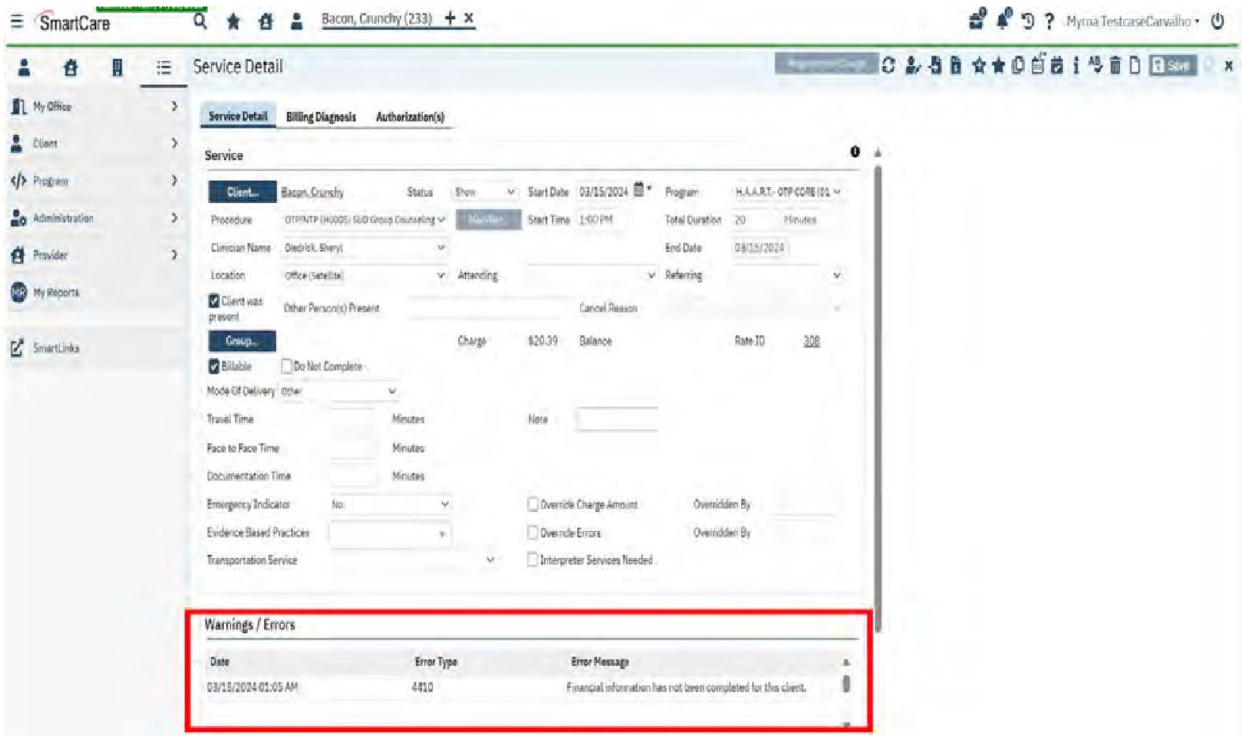


2.) Apply Applicable filters as needed. Once all filters are set, select Apply Filter button.



3.) Review the data in the list page area, research the service record by clicking on the hyperlink in the DOS data column.

4.) Once in the service record, correct and modify the service to address the error or warning message.



5.) Once the error message is corrected. Resave **Save** the service in "Show" Status, The service will be revalidated and rerun through the service completion process during the next scheduled job.