

# Clinician's Gateway

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

Revised August 12, 2021

# Contents

<b>What is Clinician’s Gateway?</b> .....	4
Features.....	6
<b>Logging into Clinician’s Gateway</b> .....	8
Login – Security .....	10
Initial Login .....	11
<b>Client Information</b> .....	16
Client Search.....	18
Client Face Sheet .....	19
Client Services Search.....	22
Medication Log.....	24
Vital Signs .....	26
Search and Tag .....	28
Client Shortcuts .....	32
Filtering and Sorting .....	33
<b>Individual Notes</b> .....	34
Individual Notes Using Client Name or Number .....	36
CRISIS AND CPT Codes 2014: Add-on Codes and Time.....	41
Pending versus Draft, Archive, and Finalize .....	49
Archiving Draft Notes .....	50
Informational Notes .....	51
Co-staffed Individual Notes.....	54
<b>Group Notes</b> .....	58
Creating Groups .....	60
Writing the Group Note .....	62
Additional Participants Feature.....	66
Groups with Mixed Procedure Codes.....	68
<b>Indirect Notes</b> .....	72
<b>Documents</b> .....	76
Starting a document.....	78
Completing the Document .....	80
<b>SUD Specifics Notes, Forms, and Authentication</b> .....	82
Notes .....	84
Time Entry .....	84
Forms.....	86

Authentication.....	88
<b>Finalizing Notes</b> .....	90
Without Review Required .....	92
With Review Required .....	92
<b>Individual Staff Log (Daily Approval)</b> .....	98
Approval printout and Finalizing Notes.....	100
Co-staff Individual Logs .....	104
<b>Printing</b> .....	106
<b>Deleting a Note</b> .....	112
<b>Consumer/Client Life Plan – Treatment Plan</b> .....	116
Starting the Client Plan.....	118
Discharge Plan, Authorizing, and Client Participation .....	125
Print for Client Signature.....	129
Viewing, Editing, and Revising a Finalized Plan .....	131
Renewing Client Plan.....	134
Concurrent Treatment Plans .....	135
Troubleshooting .....	137
<b>Changing your Password</b> .....	140
<b>Administration Tools</b> .....	144
Administration Home Page .....	146
Supervisor Tools .....	148
Staff Reports.....	148
<b>Managing Reports</b> .....	154
Reviewing Services .....	155
Individual Staff Log .....	158
Daily Service Audit Reports (MHS) .....	159
Report MHS 442 .....	159
Report MHS 443 .....	161
Daily Service Audit Report (SUD).....	163
Report DAS707 .....	163



## Clinician's Gateway

### What is Clinician's Gateway?

- ❖ Clinician's Gateway is an Integrated 'Online Progress Note 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 in a series of add-on packages that can be used instead of 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 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.





# 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 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.





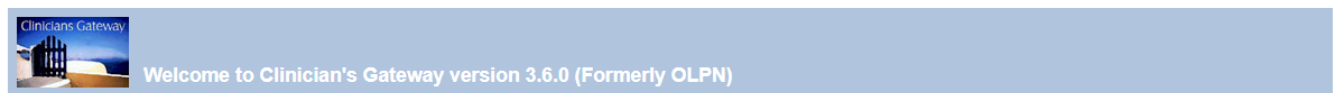
# Logging into Clinician's Gateway



## Login – Security

FOR BHCS STAFF: Find the link to this page at <http://achcsa.org/behavioral-health> , click on Clinician’s Gateway in the left hand column.

FOR CBO STAFF: Find the link via the web portal at <https://go.bhcsportal.org> .



Staff ID #:   
Password:

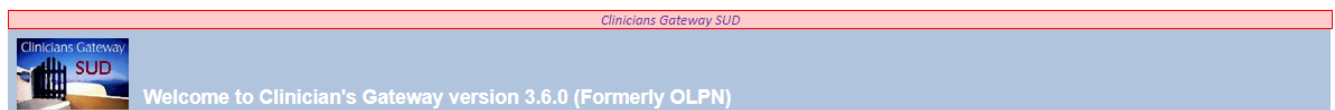
**You have been authorized to access patient data only to perform your job as it is defined by Alameda County.**

**Please ensure you have taken appropriate precautions to guard against inappropriate sharing of Protected Health Information (PHI) pursuant to HIPAA and California Welfare and Institutions Code Section 5328 regarding “Confidential Patient Information”.**

**Do not share your password with anyone.**

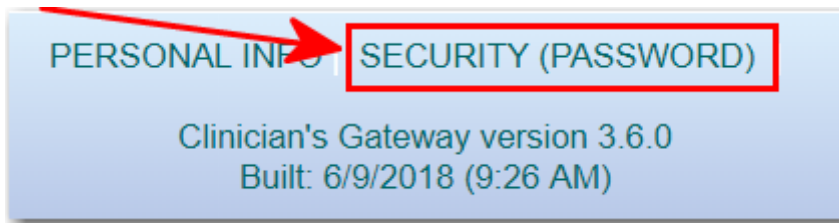
Clinician's Gateway version 3.6.0  
Built: 4/7/2017 (8:01 AM)

- **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 eight 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.**
- **If you are accessing SUD environment you will see this banner at the top of each page**

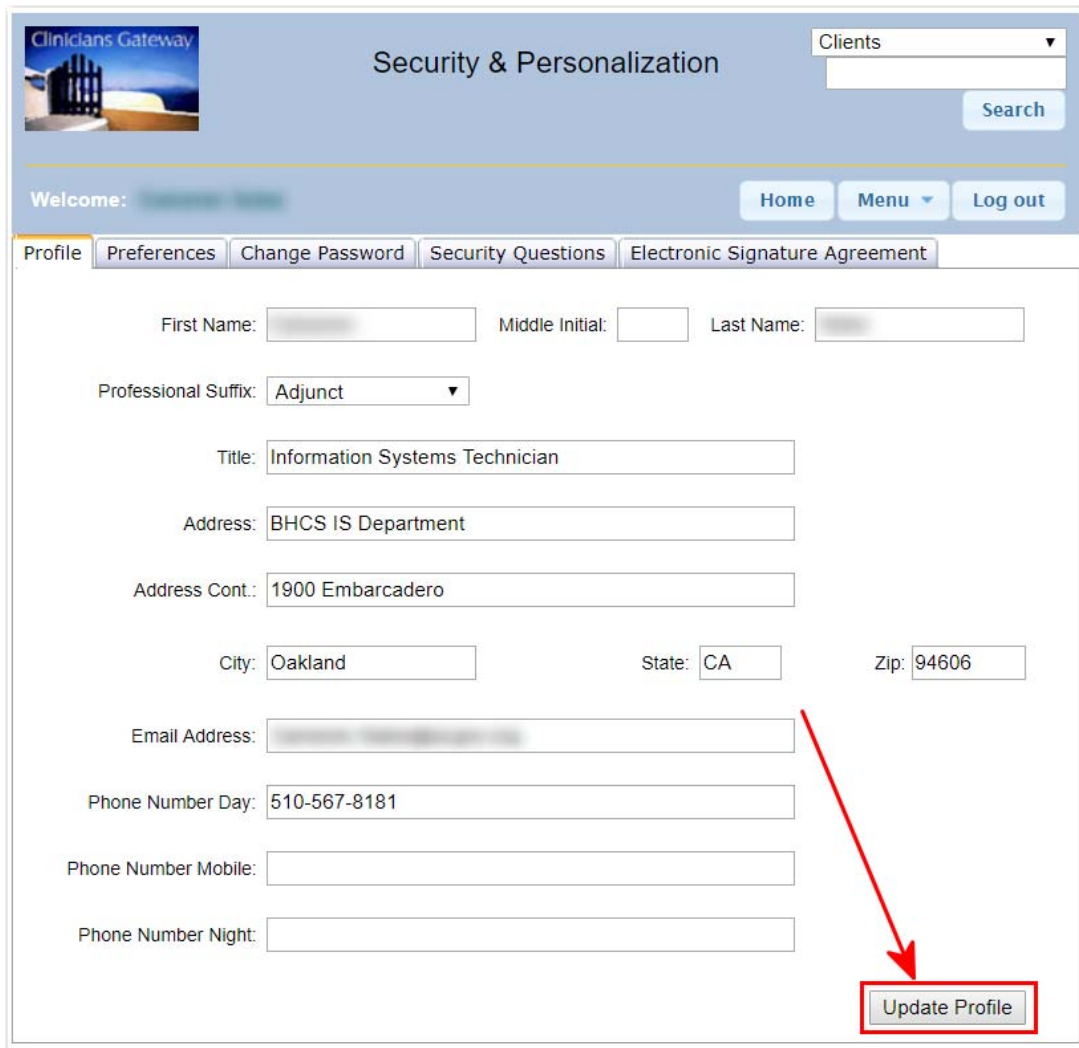


## Initial Login

1. **Sign into CG** using your InSyst staff number and default password (currently Gateway2018). The first time you login, you will need to **update your password**. (8 characters or more, including at least 1 uppercase, 1 lowercase, and 1 number)
2. **Check personal information** via “Security/Password” at bottom of Home page



3. Make changes, if needed, and click “**update profile**” to retain changes. HINT: Use the “Tab” key to enter the Phone Number fields from the e-mail field to land in the correct spot.



Clinicians Gateway

Security & Personalization

Welcome: [Redacted]

Home Menu Log out

Profile Preferences Change Password Security Questions Electronic Signature Agreement

First Name: [Redacted] Middle Initial: [Redacted] Last Name: [Redacted]

Professional Suffix: Adjunct

Title: Information Systems Technician

Address: BHCS IS Department

Address Cont.: 1900 Embarcadero

City: Oakland State: CA Zip: 94606

Email Address: [Redacted]

Phone Number Day: 510-567-8181

Phone Number Mobile: [Redacted]

Phone Number Night: [Redacted]

Update Profile

#### 4. The preferences tab is used to set the following:

- **Print On Finalize – Defaulted (Yes)**
  - Yes - Print Service page will display after Finalizing, and with Daily Approval, all services will print under your Staff Log.
  - No - return to the Home Page after finalizing and with Daily Approval, only the summary on the Staff Log printout.
- **Print On Save – Defaulted (No)**
  - Yes - Print Service page will display after saving.
  - No - return to the Home Page after saving
- **Print on Approve – Defaulted (Yes)**
  - Yes - Print Service page will display after approving.
  - No - return to the Home Page after approving.
- **Default Service Date – Defaulted (Yes)**
  - Yes to default today's date on a note.
  - No to start without a date selected.
- **Service Note Popup – Defaulted (Yes)**
  - Service Note Popup launches an Enlarged popup textbox when double-clicking a textbox. Select no to disable.
- **Import RXNT Manually - Defaulted (Yes)**
  - Import RXNT Manually means the prescriber pulls the day's prescription manually onto a note. If unchecked, then a draft note is created in CG with each prescription in RXNT

The screenshot shows the 'Preferences' tab in a software interface. The 'Print On Finalize' dropdown is set to 'Default (Yes)'. The 'Print On Save' dropdown is set to 'Default (No)'. The 'Print On Approve' dropdown is set to 'Default (Yes)'. The 'Default Service Date' dropdown is set to 'Default (Yes)'. The 'Service Note Popup' dropdown is set to 'Default (Yes)'. The 'Import RXNT Manually' checkbox is checked. A red box at the bottom contains the text 'Click update to Save Changes' with an arrow pointing to the 'Update Preferences' button.

Profile | Preferences | Change Password | Security Questions | Electronic Signature Agreement

Yes - Print Service page will display after Finalizing, and with Daily Approval, all Services will print under your Staff Log. No - return to the Home Page when a service is finalized and with Daily Approval, only the summary on the Staff Log printout.

Print On Finalize: Default (Yes) ▼

Print On Save: Default (No) ▼

Print On Approve: Default (Yes) ▼

Default Service Date: Default (Yes) ▼

Service Note Popup launches an Enlarged popup textbox when double-clicking a textbox. Select No to disable.

Service Note Popup: Default (Yes) ▼

Import RXNT Manually:

Yes - Print Service page will display after saving/approving No - return to the Home Page after saving/approving.

Default Service Date Yes for today's date, No for no date when writing notes.

Import RXNT Manually means the prescriber pulls the day's prescription manually onto a note. If unchecked, then a draft note is created in CG with each prescription in RXNT

Click update to Save Changes

Update Preferences

5. **Note the tabs for changing your password, adding security questions, and seeing the expiration date for your electronic signature agreement.**

The screenshot shows a user profile settings page with four tabs: Profile, Preferences, Change Password, Security Questions, and Electronic Signature Agreement. The 'Change Password' tab is highlighted with a red box. Below the tabs, there is a red-bordered box containing the text: "Changing your password restarts the 90 day period before the next required password change". To the right of this box is a red arrow pointing to the 'Enter your New Password' input field. The form includes three input fields: "Enter your Old Password:", "Enter your New Password:", and "Confirm Password:". Below these fields is an "Update Password" button. At the bottom of the form, there is a link that says "click here if you forgot your password".

6. **Check your staff information.** Click on your name on the Home page to bring up your staff view page.

The screenshot shows the 'Home' page of the 'Clinicians Gateway' system. In the top left corner, there is a logo for 'Clinicians Gateway' with a small image of a building. In the top right corner, the word 'Home' is displayed. Below a horizontal line, the text 'Welcome:' is followed by a red-bordered box containing a user's name. A red arrow points from the right side of the page towards this name box.

Welcome: [User Name] Home Menu Log out

---

**Staff Information for:** [Staff ID]

SSN: ***-**-****	License #: [License #]	Start date: 2/17/2016
Gender: Male	License Renew: [License Renew]	End date: [End date]
BirthDate: **/**/****	License State: [License State]	Last Changed On: 6/18/2018
Ethnicity: White	Taxonomy: [Taxonomy]	Record Created On: 2/16/2016
Medicaid PIN: [Medicaid PIN]	National Provider Id: [National Provider Id]	
Medicare PIN: [Medicare PIN]		
DEA Number: [DEA Number]		
UPIN: [UPIN]		
CG Code: [No code yet]		
Staff Type: Unlicensed Worker		
Languages: English		

---

**Statistics** Service Dates: [Start] thru [End] All Search

**Daily Approval** Service Date: [Date] Search

**Procedures** 38 Results

**Providers** 5 Results

Id #	Name	Address	City, State, Zip	Phone
99991	West County Mental Health Svcs	116 NEW MONTGOMERY ST #800	SAN FRANCISCO, CA 94105-0	(415) 495-6969
99995	Short Term House	116 NEW MONTGOMERY ST	SAN FRANCISCO, CA 94105-3607	(415) 495-6969
99998	VOCATIONAL PROGRAM	0	94606-0	
99999	HOSPITAL 24HR SERVICES	116 NEW MONTGOMERY ST	SAN FRANCISCO, CA 94105-0	(415) 495-6969
9999CG	CLINICIAN GATEWAY TEST MHS AD	2000 EMBARCADERO CV #400	OAKLAND, CA 94606-5300	(510) 567-8100

View: 50 << First < Prev 1 Next > Last >>

- Verify basic staff information:** Basic staff information, displayed in the upper half of the page, will need to be updated via an InSyst Staff Number Request Update form.
- Verify your Reporting Units:** To view your reporting units, click on the “Providers” bar. The designated RU’s allow you to write a progress note into an RU. To update them, a supervisor submits a CG Authorization Update Request e-form.





# Client Information



# Client Search

1

2

3

Clinicians Gateway

Home

Welcome: [Name]

Home Menu Log out

**Enter New Service:**

Type of Service

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

Notes Client Shortcuts Lab Results (0)

**▼ Pending Services** **4 Results**

Svc #	Gsr #	Client #	Client Name	Provider	Date	Template	Procedure	Sort	Reviewer
1410800		75087772	TEST, CINDYTWO	9999CG - CLINIC...	2/22/2018	Interim Ass...	323 90791 Ps...		
1410801		75087772	TEST, CINDYTWO	9999CG - CLINIC...	2/27/2018	Interim Ass...	323 90791 Ps...		
1410793		75087772	TEST, CINDYTWO	9999CG - CLINIC...	2/6/2017	Clinician P...	581 Plan Dev...		
1410792		75087772	TEST, CINDYTWO	9999CG - CLINIC...	2/8/2018	FSP PAF - ...	197 CG INFO...	○ Draft	

View: 10 << First < Prev 1 Next > Last >>

1. You can use the global search tool located at the top right of all Clinician's Gateway Pages. Select "Clients" from the drop list. (Clients is also the default for this tool)
2. Type the client's last name first, then first name. (with a space in between...no need to use a comma)
  - a. Alternately, you could type in the client's InSyst ID number.
  - b. Alternately, you could type in the client's Social Security Number preceded by the # sign (for example, #123-33-3333. You may use dashes or not.)
  - c. If you are unsure on exact spelling you may use a percent (%) symbol as the wild card. For example, a client name Client Testerson can be found by searching 'Test% Client'
3. Click on Search

Search: view all close all

Search Again

**1**

**3** Clients **3 Results**

Client #	Client Name	Status	Gender	Birth Date	Age	Serviceable	Services
<b>3</b> 75087772	<b>4</b> TEST, CINCIN (TEST, CINDYTWO T)	Active	Female	02/02/1960	58	<input checked="" type="checkbox"/>	3
75226968	TEST, CINDY	Active	Female	12/12/1900	117	<input checked="" type="checkbox"/>	0
75087772	TEST, CINDYTWO T	Active	Female	02/02/1960	58	<input checked="" type="checkbox"/>	3

View: 50 << First < Prev **1** Next > Last >>

PERSONAL INFO SECURITY (PASSWORD) GUIDES/HELP

Clinician's Gateway version 3.6.0  
Built: 4/7/2017 (8:01 AM)

**5**

Start Individual Service

**2** Facesheet

Client Medication

Start Client Plan

Start Document

Account

Services Search

Vital Signs Log

- The search results screen will show the list of clients.
  - The list of "All" clients are all clients in Alameda County.
  - The list of "Serviceable" clients are those clients for whom you can write a note.
  - Notice that these two clients are the same person, because they have the same client number. The one with the icon is an alias name.

## *Client Face Sheet*

- To get the Face Sheet, either
  - Click on the client's name or
  - Click on the blue button at the far right of the row, to bring up the menu and then click on "Facesheet" for that client.

Action ▾

Generate Patient Code



### CONSUMER INFORMATION

Aliases: TEST, CINCIN

TESTING, CINDYCIN T.

TESTING, CINDYONETWO

<b>Name:</b> TEST	<b>Number:</b> 75087772	<b>Birth Date:</b> 2/2/1960
CINDYTWO T.	<b>Issued On:</b> 10/8/2001	<b>Age:</b> 58
<b>Address:</b> 9999 STREET	<b>SSN:</b> 123-33-3333	<b>Gender:</b> Female
FREMONT, CA 94538-0	<b>Account:</b> 851701	<b>Language:</b> Chinese Dialect
	TEST, CINDYTWO	<b>Education:</b> Grade 11
<b>Phone:</b> (510) 999-9999 Ext.0	<b>Marital:</b> Never Married	<b>Ethnicity:</b> Black
<b>Staff:</b> Staff, General	<b>Disability:</b> Physical Impairment	<b>Ethnic Origin:</b>
<b>RP Owes:</b> \$0.00	<b>Problem:</b> None	

### Consumer Detail Alert

KTA Eligible From Jul 1 2013

### Medicaid Coverage

Covered	Medical Number	Insured Name	Eligibility Date	Eligible County	Special Reason
---------	----------------	--------------	------------------	-----------------	----------------

### Insurance

#	Company	Policy #	Insured	Effective	Expires
2485	HEALTH PAC MCE	123333333		6/1/2012	8/31/2012

### CONSUMER MESSAGES

Effective	Expiration	Type	Author	Username	Status
<b>Dangerous Client Alert</b>					
6/19/2009	12/18/2020	Incident	PETERSON C	PETERSONC	Active
Known to throw marshmallows unpredictably.					
<b>THIS IS ONLY A TEST</b>					
8/28/2007	10/27/2007	Other	SHERYL DIEDRICK	DIEDRICK	Expired
THIS IS ONLY A TEST					

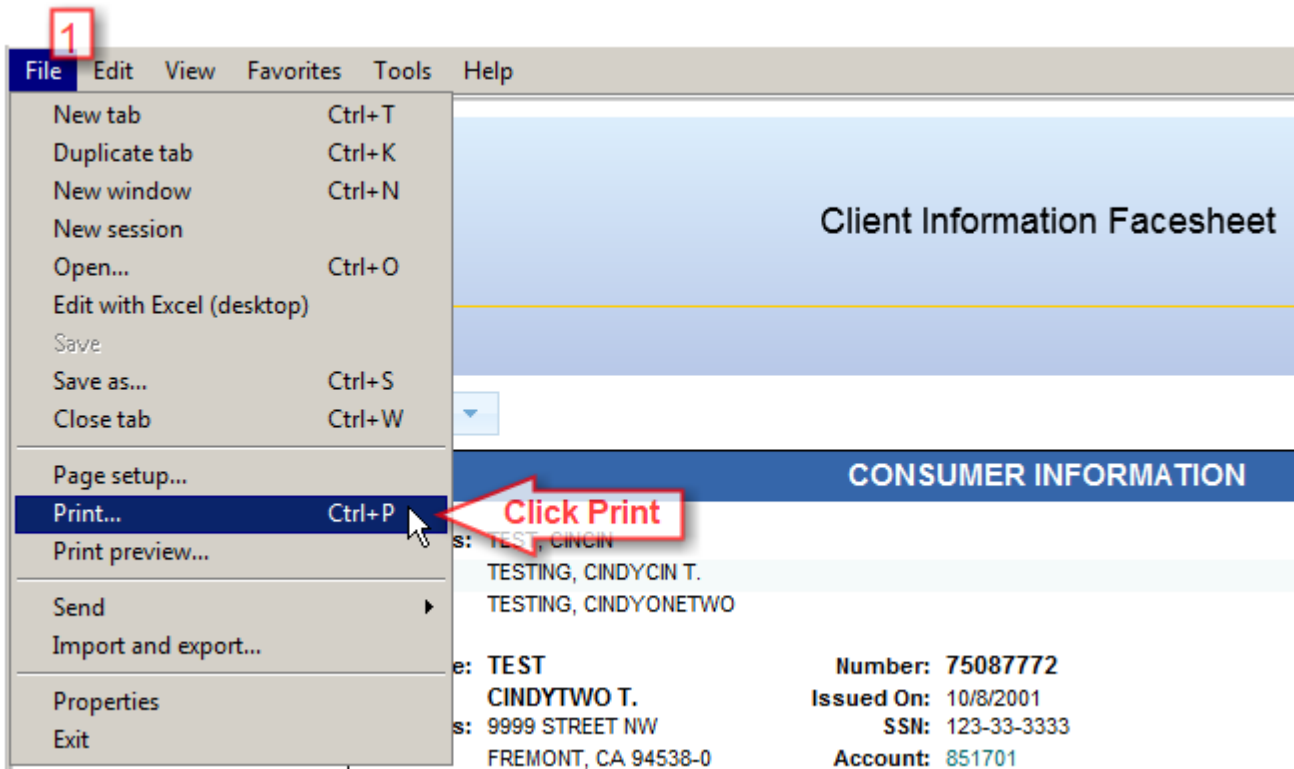
### SIGNIFICANT OTHER

Name	Relation	Full Address	Effective	Expires	Phone
TEST, MAMA	MOTHER	999 TESTER ST, OAKLAND, CA 94606-0	4/1/2013		(510) 999-9999 Ext:0

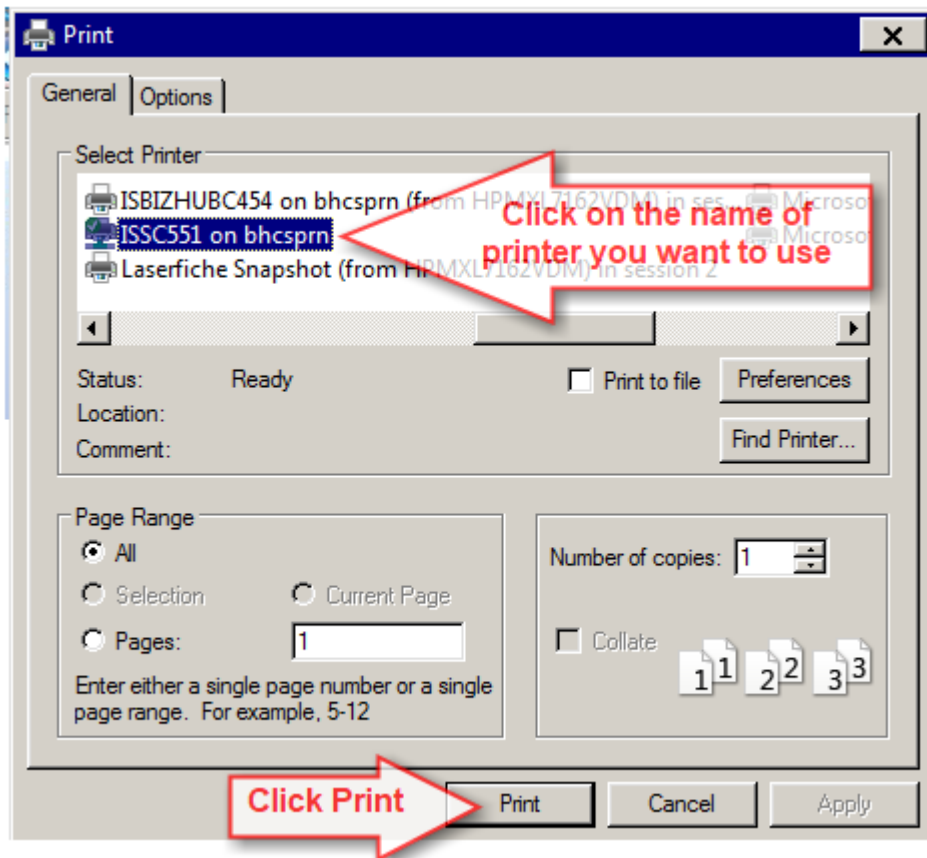
### CLINICAL HISTORY

Results:11

—	Status	Provider	Clinician	Opened	Closed	Diag
	Open	99991 - West County Mental Health Svs Physician: 0 - Staff, General Svc Coordinator: Legal Status: Voluntary	13155 - BALA-IS, PRIYA Last Service: Consent: Not Applicable	7/20/2017 Units: 0		F20.81
	Open	9999CG - CLINICIAN GATEWAY TEST M... Physician: 0 - Staff, General Svc Coordinator: Legal Status: Voluntary	6224 - HINES, TRACI Last Service: 5/23/2017 Consent: Unknown	3/7/2007 Units: 3		F31.2



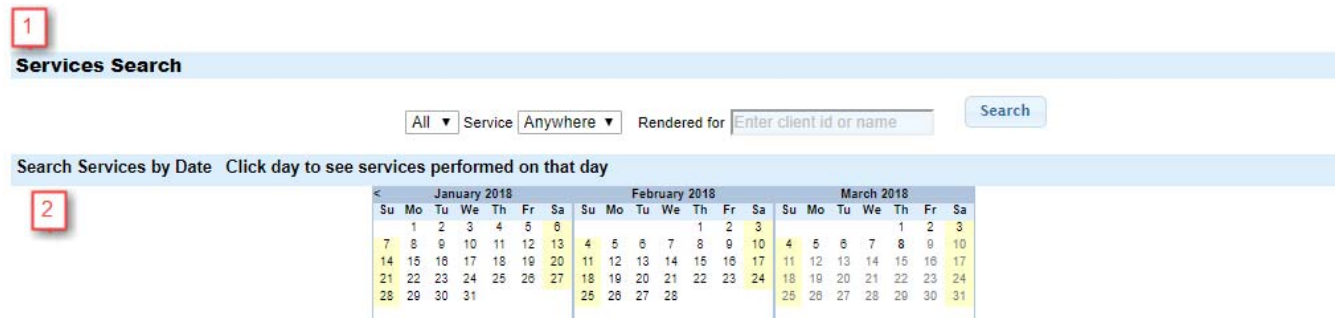
- To print the Face Sheet, click on file (1),
- Click on Print
- Then select the printer you want to send the form to, and click on “Print.”



# Client Services Search



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) or the client’s InSys ID #.
3. Click on Search.



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

Search Results:

To read the notes, click on the Service # or click on the blue button.

Search:  view all close all

Search Area:  Search

Services

Service #	Client #	Client Name	Provider	Date	Status	Template	Procedure	Type
1410803	75087772	TEST, CINDYTWO	9999CG - CLINICIAN GAT...	2/28/2018	Finalized	Assessment ...	323 90791 Psychiatric D...	Individual
1410799	75087772	TEST, CINDYTWO	0108T1 - OAKLAND ADUL...	2/15/2018	Finalized	Assessment ...	197 CG INFORMATION...	Individual
1410795	75087772	TEST, CINDYTWO	9999CG - CLINICIAN GAT...	2/13/2018	Finalized	Clinician Pro...	391 Group Rehabilitation	Group
1410783	75087772	TEST, CINDYTWO	9999CG - CLINICIAN GAT...	12/11/2017	Finalized	Assessment...	323-90791-Psychiatric-D...	Individual
1410768	75087772	TEST, CINDYTWO	9999CG - CLINICIAN GAT...	11/27/2017	Finalized	AIMS	197 CG INFORMATION...	Individual
1410761	75087772	TEST, CINDYTWO	9999CG - CLINICIAN GAT...	11/9/2017	Finalized	Adult Assess...	197 CG INFORMATION...	Individual
1410753	75087772	TEST, CINDYTWO	9999CG - CLINICIAN GAT...	4/8/2017	Finalized	Guidance Crisis	377 90839 Crisis Thpy 6...	Individual
1410752	75087772	TEST, CINDYTWO	9999CG - CLINICIAN GAT...	4/7/2017	Finalized	Guidance Crisis	197 CG INFORMATION...	Individual

390 Results

### Searching for a Single Service by Service number

To look up a service by its service number, in the Global Search area, simply precede the service number by the # sign. Click Search.

Change Search parameter to Services. Use the # sign before the Service number. Click search

Services

#1410803

Search

Home Menu Log out

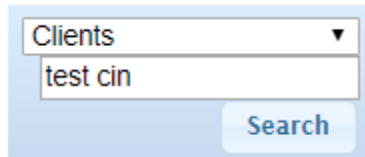


# Medication Log

The Medication Log can be called up by two methods: either by using the Client Search/Action Button or by using the Client Medication Search.

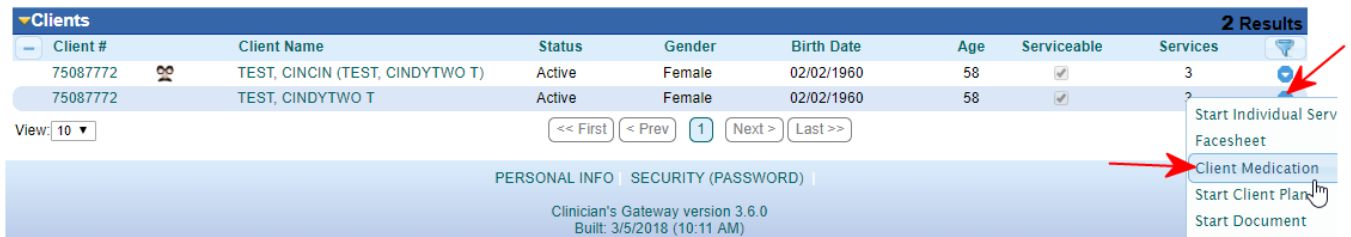
## Method # 1: “CLIENT SEARCH/ACTION BAR” SEARCH PROCEDURE:

1. In the Global Search field, leave Clients in the drop down, and enter the **client’s name**, click **Search**.



A search interface with a dropdown menu set to 'Clients', a text input field containing 'test cin', and a blue 'Search' button.

2. Click the “**Action Button** ”, then click Client Medication.



A screenshot of a web application showing search results for 'Clients'. The table has columns: Client #, Client Name, Status, Gender, Birth Date, Age, Serviceable, and Services. Two results are shown for client 75087772. A context menu is open over the second row, with 'Client Medication' highlighted. Red arrows point to the 'Action Button' icon and the 'Client Medication' menu item.

Client #	Client Name	Status	Gender	Birth Date	Age	Serviceable	Services
75087772	TEST, CINCIN (TEST, CINDYTWO T)	Active	Female	02/02/1960	58	<input checked="" type="checkbox"/>	3
75087772	TEST, CINDYTWO T	Active	Female	02/02/1960	58	<input checked="" type="checkbox"/>	?

View: 10

PERSONAL INFO SECURITY (PASSWORD)

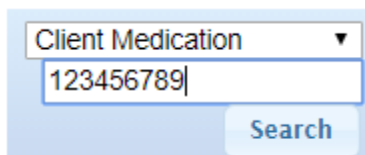
Client Medication

Start Individual Serv  
Facesheet  
Start Client Plan  
Start Document

Clincian's Gateway version 3.6.0  
Built: 3/5/2018 (10:11 AM)

## Method # 2: “CLIENT MEDICATION” SEARCH PROCEDURE:

1. In the Global Search area, choose **Client Medication**, and enter the **client’s number** (their name is not specific enough), click Search. This will bring you directly to the Medication Log



A search interface with a dropdown menu set to 'Client Medication', a text input field containing '123456789', and a blue 'Search' button.

## MEDICATION LOG:

The Medication Log displays all of the client’s medications from E-Prescribing and from the Physician’s Progress Notes.

The top section of the Log will import all the medications that were e-prescribed in RxNT, an e-prescribing application that our physicians and nurses have begun using.

The bottom section imports the entries from the “Plan” section of the Physicians Progress Note. History from all Physician’s Progress Notes will be displayed no matter how old.

### Sample of a Client’s Medication Log:

Connect to

▼RXNT Medications						35 Results
Details	Entry Date	Drug Name	Dosage	Prescribing Doctor	Refills	Svc. Number
	24-May-2012	Zyprexa 10 mg Tab	1 po q am	Luisito Roxas	3	1038364
	12-Apr-2012	benztropine 1 mg Tab	take 1 tablet by mouth at bedtime	Luisito Roxas	3	1002637
	12-Apr-2012	levothyroxine 50 mcg Tab	take 1 tablet (50 mcg) by oral route once daily	Luisito Roxas	3	1002637
	12-Apr-2012	Zyprexa 20 mg Tab	1 q hs	Luisito Roxas	3	1002637

▼Local Medications					73 Results
Svc. Number	Svc Date	Primary Clinician	Status	Note	
1057040	6/14/2012	ROXAS LUISITO	FINALIZED	Will continue present medications since they do appear to be effective as long as she is taking them. Will adjust the dose as indicated. Noted no hand tremors while off Depakote. She might need a other mood stabilizer to help control her mood and outburst or increase the dose of her Zyprexa to target the mood. Also discussed the possibility of trying depot medications again specifically Risperdal Consta to maximize the compliance. Compliance with medications was emphasized. dISCUSSED WITH cm. Medications: Zyprexa 10 mg q am and 20 mg q hs; Synthroid 50 mcg po q day. Cogentin 1 mg q hs RTC: 7/5@10:00	
1044057	5/31/2012	ROXAS LUISITO	FINALIZED	Will continue present medications since they do appear to be effective as long as she is taking them. Will adjust the dose as indicated. Noted no hand tremors while off Depakote. She might need a other mood stabilizer to help control her mood and outburst or increase the dose of her Zyprexa to target the mood. It will be easier for her to manage if she is less agitated. Compliance with medications was emphasized. Discussed with CM. Medications: Zyprexa 10 mg q am and 20 mg q hs; Synthroid 50 mcg po q day. Cogentin 1 mg q hs RTC: 6/14@11:00	
1038364	5/24/2012	ROXAS LUISITO	FINALIZED	Will continue present medications since they do appear to be effective as long as she is taking them. Will adjust the dose as indicated. Noted no hand tremors while off Depakote. She might need a other mood stabilizer to help control her mood and outburst or increase the dose of her Zyprexa to target the mood. It will be easier for her to manage if she is less agitated. Compliance with medications was emphasized. The patient was given Zyprexa 10 mg to calm her down and to help with the voices. Discussed need to go back to the board and care. Noted need to be stable for the next 2 weeks so she can celebrate the birthdays of her children in the hotel. She agreed then to go back to the board and care via a taxi. Discussed with CM. Medications: Zyprexa 10 mg q am and 20 mg q hs; Synthroid 50 mcg po q day. Cogentin 1 mg q hs RTC: 6/14@11:00 REFILL: PAYLESS PHARAMCY: ZYPREXA 10 MG TAB 1 Q AM #30 + 3 REFILLS	

The bottom section, from the physician’s note, should contain the complete medication regimen for the client, if the physician has manually entered it.

Clicking on the Service Number will bring up the entire note.

# Vital Signs

**Find Vital Signs log using the Action Bar:** Search for the client first, then request the Vital Signs Log or the Growth Chart from the Action Bar.

Client # 2 | Client Name | Status | Gender | Birth Date | Age | Serviceable | Services

75087772	TEST, CINDYTWO T	Active	Female	02/02/1960	56	<input checked="" type="checkbox"/>	1
75226968	TEST, CINDY	None	Female	12/12/1900	115	<input type="checkbox"/>	0

View: 20 | << First | < Prev | 1 | Next > | Last >>

PERSONAL INFO | SECURITY (PASSWORD) | GUIDES/HELP

Clinician's Gateway version 3.8.0  
Built: 1/14/2016 (10:47 PM)

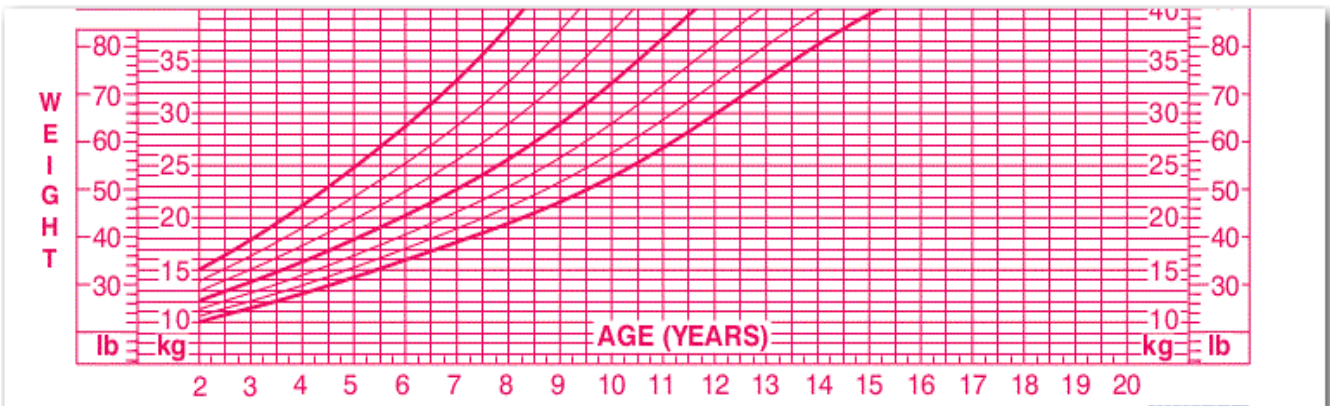
- Start Individual Service
- Facesheet
- Client Medication
- Start Client Plan
- Start Document
- Account
- Vital Signs Log
- Vital Signs - growth
- Clinical Summary

**Vital Signs Log:** displays Vital Signs over the entire history of client. (data from medical staff Vital Signs chart on notes)

Vital Signs Log for TEST, CINDYTWO T (75087772)

Service #	Date	Height	Weight	BMI	BP	Pulse
1410651	05/20/2014					
1182151	10/27/2012					
1182146	10/25/2012	69.0	150.0	22	125/92	78
1182141	10/24/2012					
1182140	10/23/2012	70.0	160.0	22	150/75	70
1182113	10/22/2012					
864829	10/14/2011	10	100	703	100/100	10
863396	10/13/2011	70	150	21	110	65
863407	10/13/2011	70	150	21	110	76
805825	07/25/2011	70	170	24	110/60	70
805828	07/25/2011	70	170	24	115/90	82
805591	07/24/2011	70	180	25	120/80	60
805592	07/24/2011	70	190	27	145/90	62

**Vital Signs Growth Chart:** Plots Height and Weight against average percentiles for ages 2 – 20.





# 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)

The screenshot shows the 'Search and Tag' page in the Clinicians Gateway. At the top left is the 'Clinicians Gateway' logo. The page title is 'Search and Tag'. On the top right, there is a 'Clients' dropdown menu and a 'Search' button. Below the title bar, there is a 'Welcome:' message and navigation buttons for 'Home', 'Menu', and 'Log out'. The main search area includes a 'Search for:' section with radio buttons for 'Service Records' (selected) and 'Prescriptions', and a checkbox for 'Include deleted records in search results'. There are five search criteria fields, each with a '[Select search item]' dropdown and a text input box. A 'Search' button is located below these fields. At the bottom, there is a 'Select existing collection' dropdown.

## DEFINE YOUR SEARCH CRITERIA

1. The Search and Tag button is found in the Menu listing on the Home Page.

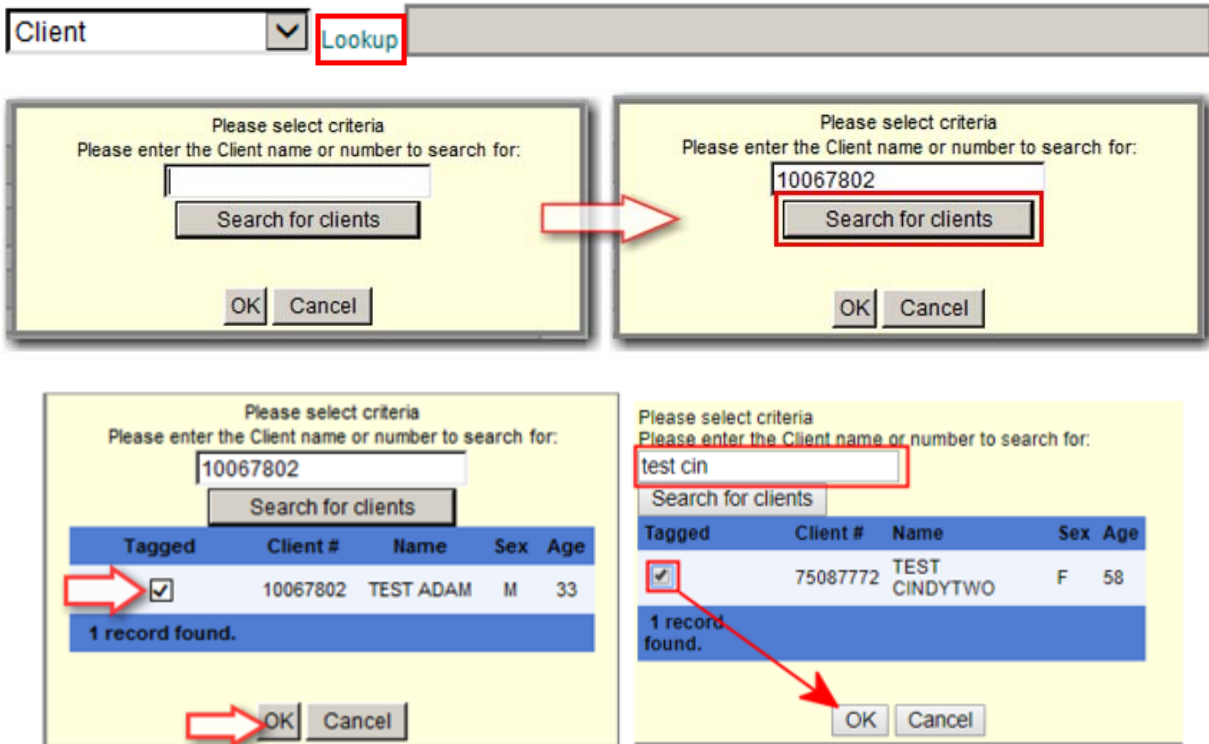
The screenshot shows the 'Home' page in the Clinicians Gateway. The page title is 'Home'. On the top right, there is a 'Clients' dropdown menu and a 'Search' button. Below the title bar, there is a 'Welcome: Cameren Sales' message and navigation buttons for 'Home', 'Menu', and 'Log out'. The 'Menu' button is highlighted with a red box and a red arrow labeled '1'. A dropdown menu is open from the 'Menu' button, showing options: 'Help', 'Appointments', 'Medication Lists', 'Med Allergy List', 'Search and Tag', and 'Patient Lists'. The 'Search and Tag' option is highlighted with a red box. Below the navigation bar, there is an 'Enter New Service:' section with a 'Type of Service' dropdown and a text input box. There are also tabs for 'Notes', 'Client Shortcuts', and 'Lab Results (0)'.

2. The Services radio button should be checked.

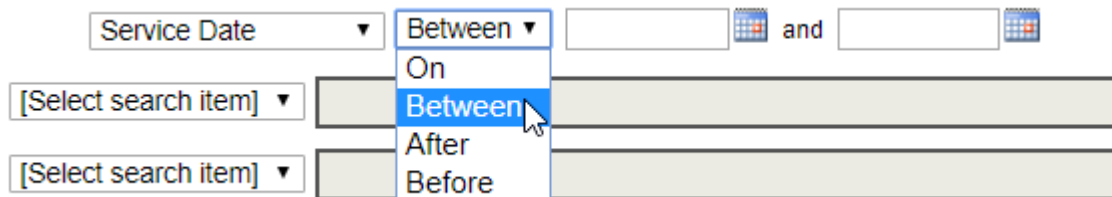
Search for:  Service Records  Prescriptions

Include deleted records in search results

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. For Client; Search by Client Number or 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 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 possible.
7. Click the Search button to assemble your results.

Search for:  Service Records  Prescriptions

Include deleted records in search results

Client

Service Date  02/01/2018 and 02/28/2018

[Select search item]

[Select search item]

[Select search item]

Search



## Results:

Select existing collection

Search Results - Service Notes

Un/Check all  Check Items On All Pages

Tagged	Date of Service	Client	Client #	Proc. code	Procedure
<input checked="" type="checkbox"/>	15-Feb-2018	TEST CINDYTWO	75087772	197	CG INFORMATIONAL NOTE
<input checked="" type="checkbox"/>	08-Feb-2018	TEST CINDYTWO	75087772	197	CG INFORMATIONAL NOTE
<input checked="" type="checkbox"/>	13-Feb-2018	TEST CINDYTWO	75087772	391	Group Rehabilitation
<input checked="" type="checkbox"/>	22-Feb-2018	TEST CINDYTWO	75087772	323	90791 Psychiatric Diag Eval
<input checked="" type="checkbox"/>	27-Feb-2018	TEST CINDYTWO	75087772	323	90791 Psychiatric Diag Eval
<input checked="" type="checkbox"/>	27-Feb-2018	TEST CINDYTWO	75087772	197	CG INFORMATIONAL NOTE
<input checked="" type="checkbox"/>	28-Feb-2018	TEST CINDYTWO	75087772	323	90791 Psychiatric Diag Eval

7 records found.

## 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

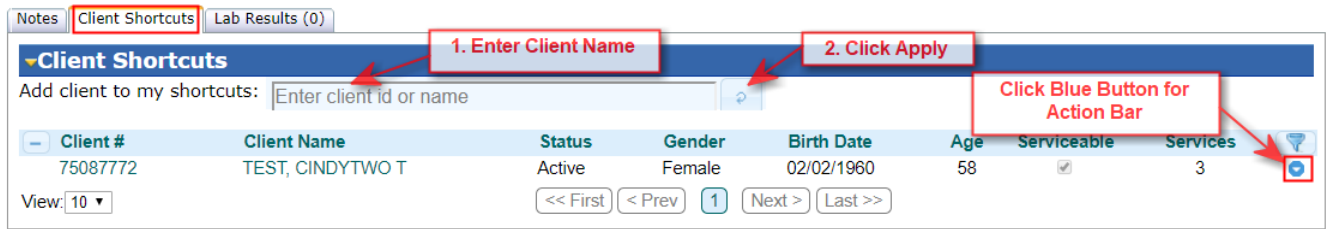
1. Click on the words *"select an existing collection name"*
2. The Drop Down menu indicator appears. Click on the down arrow.
3. Click on the collection that you would like to view.





# Client Shortcuts

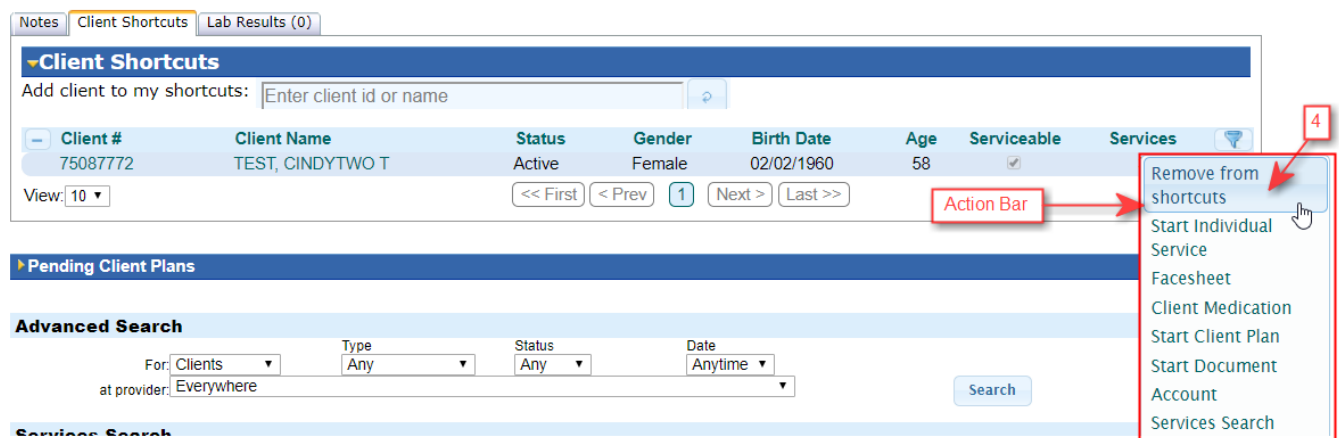
Build your custom client shortcut list on the Home Page (Does not alter InSyst caseload records)



Above is the Client Shortcut tab on your home page. To add a client to you shortcuts; (1) enter client name to add to shortcuts, (2) click the apply button. Once added you can quickly access the Client Action Bar by clicking the Blue Button (3)

The Action Bar gives access to quick client information and common actions: view Facesheet, start a service or client plan, view medication log, etc...

When a client is added to the shortcuts, a new item is added to the top of the action bar. This action will remove this client from your shortcuts list (4)

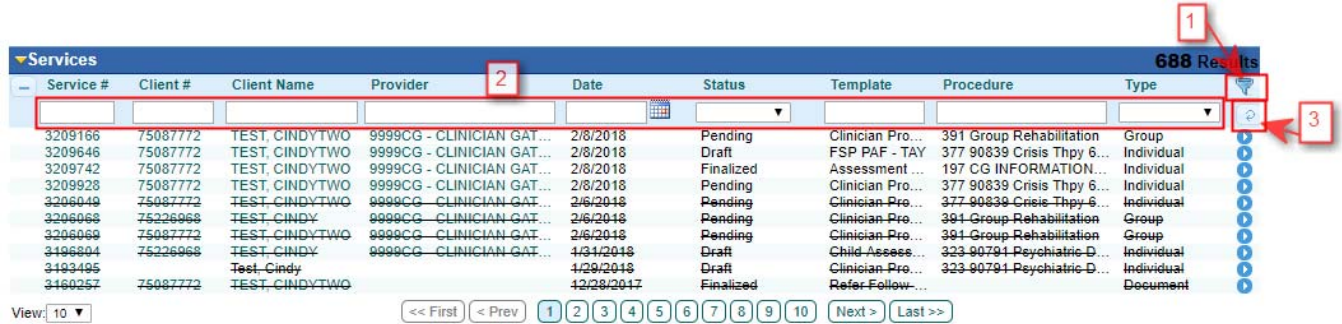


# Filtering and Sorting

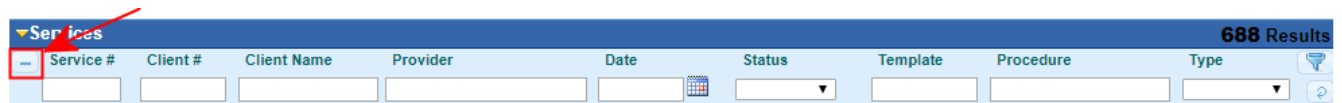
At any point when you have a large list of clients, services, etc. you may want to find specific information. This can be attained with the assistance of the various Filters and sorts.

**Enhanced Filtering** can be done over multiple parameters at the same time.

1. Click the funnel (filter icon) to open the fields.
2. Then enter the texts you want to filter for.
3. Click the Arrow to activate the filter.



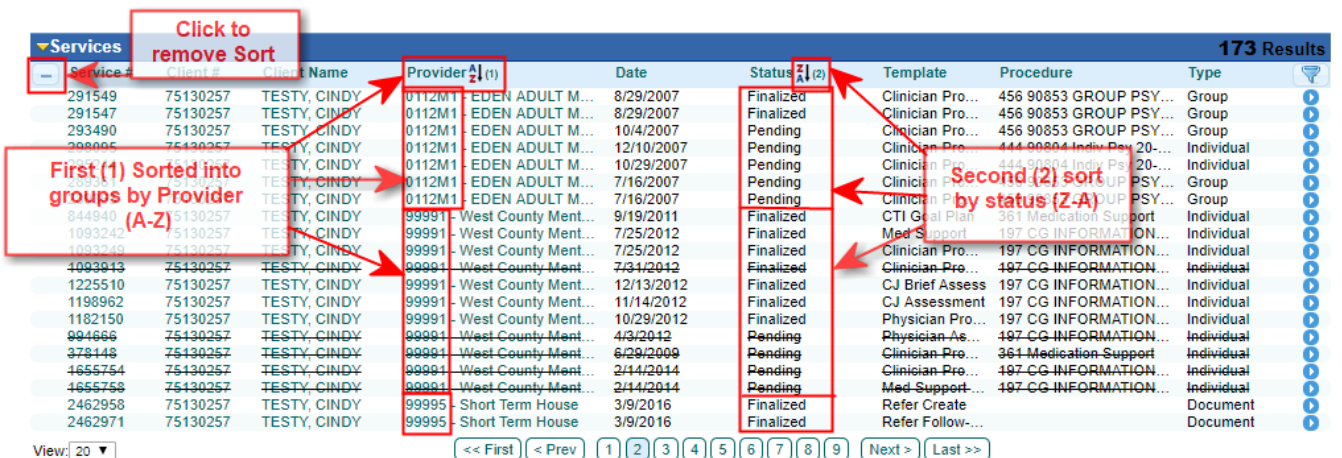
Remove Filters by clicking on the button.



**Enhanced Sorting** can be done over multiple columns, in ascending or descending order.

Sort Order will be retained for the next time you search!

- First click = ascending. A second click = descending. Third click = remove the sort.
- Click(s) on the column you want to be the first sort.
- Click(s) on the next column you want to be the second sort, etc.
- Your custom **sort order is retained** and applied to future searches of the same type.
- Minus button clears the sort order and restores date order as default.
- Remove Sort Order by clicking on the button.



# Individual Notes



# Individual Notes Using Client Name or Number

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

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 #	Client Name	Status	Gender	Age	Services	Select Provider	Note Template	Select
7508772	TEST, CINDYTWO	Active	Female	58	3	9999CG - CLINICIAN GATEWAY TEST MHS AD	Clinician's Progress Note	Select
75135386	TESTCASE, DAVE	Active	Male	68	1	9999CG - CLINICIAN GATEWAY TEST MHS AD	Clinician's Progress Note	Select

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”

The Note Entry page looks like this:

**Clinicians Gateway** Service Entry, Individual

Welcome: [User Name]

Service #: New Title: Clinician's Progress Note

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

Service date: [Calendar Icon]

Client opened: 3/7/2007

Util. review date:

Client Plan Due Date: 2/28/2019

Last assessment: 1/1/2014

Procedures: Select Procedure

Service Location: Select Location

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

Emergency  Pregnant?  Veteran?

**Staff Time**

Primary Clinician: [Dropdown] Primary Total Time: 00:00

Provider: 9999CG - CLINICIAN GATEWAY TEST MHS AD

Add Additional Clinicians

E/M Plus Psychotherapy or Additional Crisis: None 2nd FF Time: [Input] 2nd Tot Time: [Input]

Interactive Complexity: Not Present

**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.

Episode Diagnosis Information

	Primary	Secondary	Tertiary	SU	GMC
ICD-10:	F31.2	R69			10,11,12

DSM 5: Probable major vascular neurocognitive disorder. Without

Primary ICD-10 and DSM 5 do not match - you must update In Syst or CG

Primary FF Time: [Input] Hours:Minutes

Services were provided in: English

by  interpreter [Input] or  clinician

**Allergies**

**Alert for Last Assessment Date** displays the last Child, Adult or Physician Assessment.

The date links to the assessment, opened on a new tab, for easy access.

(\*\*\*\* Remember to close the tab after viewing the assessment. An unused tab can time out - logging out your Clinician's Gateway session. You could lose your unsaved work. \*\*\*\*)

Service #: New Title: Clinician's Progress Note

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

Service date: [Calendar Icon]

Client opened: 3/7/2007

Util. review date:

Client Plan Due Date: 2/28/2019

Last assessment: 1/1/2014

Procedures: Select Procedure

Service Location: Select Location

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

Emergency  Pregnant?  Veteran?

Last Assessment Date links to the assessment. Click to view in separate tab.

**Alert for Katie A eligibility** on note entry screen.

Service #: New Title: Clinician's Progress Note

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

Opened: 2/1/2007 Closed: 8/30/2014

Procedures: Select Procedure

KTA ELIGIBLE (Jul 1 2013)

Service Date: [Calendar Icon]

Utilization review date:

Client Plan due date: 11/26/2011 Client Plan has expired!

## Starting the Note:

- When writing a progress note in Clinician's Gateway, first choose the Primary code matching the Face to Face time and complexity of the service. Enter the time spent on that code's activity, including documentation and travel, in the 'Primary Total Time' field. Codes have minimum time requirements. *For Crisis: record ALL Documentation and Travel time in the Primary Clinician time field.*
- Enter the Face to Face time in the 'Primary FF Time' field below the 'Instructions' line.
- Choose the Secondary add-on code for Psychotherapy or Additional Crisis/Pharmacist. Enter the times spent on that activity into both the '2<sup>nd</sup> Face to Face' and '2<sup>nd</sup> Total Time' fields. *For Crisis/Pharmacist: 2<sup>nd</sup> FF time = 2<sup>nd</sup> Total time (NO documentation/ travel time)*  
 'Primary Clinician Time' + '2<sup>nd</sup> Total Time' = Total time for entire service.  
 'Primary FF Time' + '2<sup>nd</sup> FF Time' = Total Face to Face time for entire service.
- Some Procedures allow coding to indicate Interactive Complexity (no time recorded).

Client: Number 75087772, Last Name TEST, First Name CINDYTWO, Service date: [calendar icon]  
 Client opened: 3/7/2007  
 Util. review date:  
 Plan due date: 2/28/2019  
 Last assessment: 1/1/2014

Procedures: 377 90839 Crisis Thpy 60 min  
 Service Location: Office  
 Med. Compliant: N/A, Side Effects: N/A  
 Emergency  Pregnant?  Veteran?

**1. Choose Primary Code. Enter Primary Code Face to Face time + Documentation and Travel time**

Staff Time  
 Primary Clinician: 19072 - Sales, Cameren  
 Provider: 9999CG - CLINICIAN GATEWAY TEST MHS AD  
 Primary Total Time: 01:45

[Add Additional Clinicians](#)

E/M Plus Psychotherapy or Additional Crisis: 378 90840 Crisis Therapy Additional minutes  
 2nd FF Time: 02:00  
 2nd Tot Time: 02:00  
 Interactive Complexity: Not Present

**3. Choose Secondary add-on Code if needed. Enter time spent in secondary activity in 2nd ff and 2nd Total Time fields. (For additional Crisis/Pharmacist codes, do not add Documentation or travel time here)**

**4. Add Interactive Complexity if appropriate (no time)**

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

Primary FF Time: 01:00  
 Services were provided in: English  
 ICD-10: F31.2 R69  
 DSM 5: Probable major vascular neurocognitive disorder. Without  
**Primary ICD-10 and DSM 5 do not match - you must update Insyst or CG**

**2. Primary Face to Face time**

**Secondary Codes**

**2nd Total Time**

**For Psychotherapy, choose the add-on code that most closely matches the Face to Face time for that activity. For Crisis/Pharmacist, add-on code is used for additional Face to Face time.**

**Enter Face to Face time and Total time in secondary activity. (for Crisis/Pharmacist codes both time are equal to the Face to Face time.)**

E/M Plus Psychotherapy or Additional Crisis: 465 90833 Psychotherapy 30 minutes with patient/family member when performed with E/M service  
 2nd FF Time: 00:18  
 2nd Tot Time: 00:25  
 Interactive Complexity: Not Present

Instructions: 465 90833 Psychotherapy 30 minutes with patient/family member when performed with E/M service  
 467 90836 Psychotherapy 45 minutes with patient/family member when performed with E/M service  
 468 90838 Psychotherapy 60 minutes with patient/family member when performed with E/M service  
 378 90840 Crisis Therapy Additional minutes

- Both total Primary Clinician Time and total Secondary Add-On code time and will be transferred to InSyst for billing.

**Staff Time**

Primary Clinician: 19072 - Sales, Cameren  
 Provider: 9999CG - CLINICIAN GATEWAY TEST MHS AD

Primary Total Time: 01:00

E/M Plus Psychotherapy or Additional Crisis: 465 90833 Psychotherapy 30 minutes with patient/family member when performed with E/M service  
 2nd FF Time: 00:18 2nd Tot

Time: 00:25  
 Interactive Complexity: Not Present

Primary Total Time will be transferred to the Staff Log and InSyst

Secondary Total Time will be transferred to InSyst but NOT onto the Staff Log at this time. Write Secondary Time on a separate separate paper Staff Log stapled to the Daily Staff log. Add the times together before writing final indirect admin time notes.

- Only Primary Clinician Time is reported on the Daily Approval and Daily Staff Log at this time. In the future, secondary time will be included. Report secondary time on an old-style paper staff log form (MAA form) stapled to staff log.

**▼Daily Approval** Service Date: 03/07/2018 Search

Srv. #	Date	Type	Client #	Client Name	Reporting Unit	Procedure	Status	Approve	Time #	In Group	Approve Time
1410812	3/7/2018	Indiv.	75087772	TEST CINDYTWO	9999CG CLINICIAN GATEWAY TEST MHS AD	381 Individual Rehabilitation	PENDING	Pending	01:00	1	01:00

Only Primary Code Time included.

1 service record on 3/7/2018 for a total time of 01:00

Approve Time

**ALAMEDA COUNTY Behavioral Health Care Services**

Home | Help | Log Out

## Individual Staff Log

Service Date: 3/7/2018

Svc #	Type	RU	Client #	Client Name	Procedure	Time		Loc	Rec.	Flags
						H:M	Grp Ct			
1410812	Indiv.	9999CG CLINICIAN GATEWAY TEST MHS AD	75087772	TEST CINDYTWO	381 Individual Rehabilitation	01:00	1	Office		
1410801	Indiv.	9999CG CLINICIAN GATEWAY TEST MHS AD	75087772	TEST CINDYTWO	323 90791 Psychiatric Diag Eval	01:30	1	Office		
1410793	Indiv.	9999CG CLINICIAN GATEWAY TEST MHS AD	75087772	TEST CINDYTWO	581 Plan Development	03:00	1	Office		
<b>3 service records on 3/7/2018 for a total time of</b>						<b>05:30</b>				

Currently, Primary Code time is listed but Secondary Code Time is not. In the Future, Secondary Time will be added

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



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

Use the "Previous Entries" Dropdown to view the last five notes entered for

- 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 'Note is Complete' if available and 'Save as pending' at the bottom of the page. **\*Note is Complete is only visible if you have 'Daily Approval'**

Note is complete.

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

Home

Clients ▾  
  
 Search

---

Welcome: Cameren Sales Home Menu ▾ Log out

1 Service record 1410813 was successfully saved.

**Enter New Service:**

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

Select ---- ▾

Notes | Client Shortcuts | Lab Results (0)

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.
2. You can click Service Number to return to Note.

# CRISIS AND CPT Codes 2014: Add-on Codes and Time

Procedure codes now exist that are designed to be used in sets. Total Time (including documentation and travel) and Face-to-Face<sup>1</sup> times are now recorded for each code. Please refer to QA training resources on the ACBHCS Providers website for coding guidelines.

<sup>1</sup>Note Face-to-Face time becomes “contact time” when the work is done on the phone. Follow the same procedures below but be sure to select “telephone” in the “location” field.

1. When writing a progress note in Clinician's Gateway for a **Crisis service**, **first choose the 377 Primary code**. Documentation and Travel will be added to Primary Code time.

## SITUATION ONE: CRISIS TIME = 75 MINUTES or less of FACE TO FACE TIME

2. Enter the total time spent, including all charting and travel, in the “Primary Clinician Time” field.
3. Enter the Face-to-Face time for the Primary Code 377 in the “Primary FF Time” field (below the “Instructions” line). The Primary FF Time field accepts 30 – 75 minutes of time)

**Example:** 75 minutes (1:15) face to face time and 30 minutes documentation = 1:45 Total time

The screenshot displays the 'Clinician's Progress Note' form in the Clinician's Gateway system. The form includes fields for Client information (Number: 75135386, Last Name: TESTCASE, First Name: DAVE), Service date (07/21/2021), Client opened date (6/26/2009), Client Plan due date (5/31/2021), and Last assessment (7/27/2017). The Procedures dropdown is set to '377 90839 Crisis Thpy 60 min'. The Service Location is 'Office'. The Billing time section shows the Primary Clinician as '10904 - Peterson, Camille E' and the Primary Total Time as '01:45'. The Primary FF/Contact/E-M Time is set to '01:15'. The Instructions and Pre-Existing Diagnoses section contains the text: '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.' The Episode Diagnosis Information table shows Primary code F31.2, Secondary code Z03.89, and GMC code 34. The DSM 5 code is 'Acute stress disorder'. Annotations with red boxes and arrows provide instructions: 'Use Primary Code 377 when FF/Contact time is 75 minutes or less.' points to the Procedures dropdown; 'Enter Primary Code total time equal to Primary Code 377 time + all documentation and travel time.' points to the Primary Total Time field; 'Enter up to 75 minutes of Primary code 377 Crisis FF/Contact time' points to the Primary FF/Contact/E-M Time field.

Episode Diagnosis Information				
Primary	Secondary	Tertiary	SU	GMC
F31.2	Z03.89			34

DSM 5: Acute stress disorder

(Note: Codes have minimum and maximum time requirements. If Crisis time is more than 75 minutes for Face to Face time, you will be adding a secondary code to the note. We will address that situation next)

**SITUATION TWO: CRISIS TIME GREATER THAN 75 MINUTES FACE TO FACE TIME.**

**Example: 3:00 hours face to face time plus 2:30 documentation/travel time = 5:30 Total**

4. If Crisis time is more than 75 minutes for Face to Face time, the time attributed to Primary Code 377 will be stepped down to 60 minutes.
  - Choose Primary code 377 for the first 60 minutes (1 hour) of face to face time
  - Enter 1:00 hour to the Primary FF/Contact/E-M Time field
  - Add ALL Documentation and Travel time to the 1 hour of 377 Primary Time (2:30 + 1:00 =3:30). Enter into the Primary Clinician Time field.

The screenshot shows a form for a 'Clinician's Progress Note' with the following details:

- Service #:** New **Title:** Clinician's Progress Note
- Service date:** 07/21/2021
- Client:** 75135386 TESTCASE DAVE
- Client opened:** 6/26/2009
- Client Plan due date:** 5/31/2021 (C/P has expired)
- Procedures:** 377 90839 Crisis Thpy 60 min
- Service Location:** Field
- Med. Compliant:** N/A
- Side Effects:** N/A
- Emergency:**
- Primary Clinician:** 10904 - Peterson, Camille E
- Provider:** 9999CG - CLINICIAN GATEWAY TEST MHS AD
- Primary Total Time:** 03:30
- Additional E/M, Psychotherapy or Crisis Minutes:** None
- Interactive Complexity:** Not Present
- Primary FF/Contact/E-M Time:** 01:00
- Services were provided in:** English
- ICD-10:** F31.2 Z03.89
- DSM 5:** Acute stress disorder

Red callout boxes provide instructions:

- Choose Primary Code 377 for the first 60 minutes** (points to the procedure dropdown)
- Enter the first hour of Primary Code 377 time plus all travel and documentation time. (1 + 2:30 = 3:30)** (points to the Primary Total Time field)
- Enter the FF/Contact time that corresponds to the Primary Code 377** (points to the Primary FF/Contact/E-M Time field)

**Episode Diagnosis Information**

	Primary	Secondary	Tertiary	SU	GMC
ICD-10:	F31.2	Z03.89			34
DSM 5:	Acute stress disorder				

5. Choose the Secondary add-on code 378 for Additional Crisis time.

There are 2 hours of Crisis face to face time remaining. Use Secondary add-on code 378 to document it.

Additional E/M, Psychotherapy or Crisis Minutes: **378 90840 Crisis Therapy Additional minutes** 2nd FF/Contact/E-M Time: **02:00**

Interactive Complexity: **Not Present**

When Primary code 377 Crisis service time exceeds 75 minutes, set the Primary code 377 Crisis service time to 60 minutes. Enter the remaining Crisis service time for the 2nd code 378 Additional Crisis. Add all documentation and travel time to the Primary code time.

6. Check your Math:

- Primary Clinician Time = 1 hour Face to Face time plus documentation and travel time.
- 2<sup>nd</sup> Add-on Code 378 = all face to face time exceeding 1 hour (No doc/travel).
- The **two added together** (Primary Clinician Time and 2<sup>nd</sup> Total Time) will equal the grand total for the entire service.

Service #: New Title: Clinician's Progress Note

Service date: 07/21/2021

Client: 75135386 TESTCASE DAVE

Client opened: 6/26/2009

Client Plan due date: 5/31/2021 C/P has expired!

Procedures: 377 90839 Crisis Thpy 60 min

Last assessment: 7/27/2017

Service Location: Field

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

Emergency

**Billing time**

Primary Clinician: 10904 - Peterson, Camille E

Provider: 9999CG - CLINICIAN GATEWAY TEST MHS AD

Primary Total Time: **03:30**

Additional E/M, Psychotherapy or Crisis Minutes: 378 90840 Crisis Therapy Additional minutes

2nd FF/Contact/E-M Time: **02:00**

When Primary code 377 Crisis service time exceeds 75 minutes, set the Primary code 377 Crisis service time to 60 minutes. Enter the remaining Crisis service time for the 2nd code 378 Additional Crisis. Add all documentation and travel time to the Primary code time.

**Instructions and Pre-Existing Diagnoses**

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

Primary FF/Contact/E-M Time: **01:00**

Services were provided in: English

ICD-10: F31.2 Z03.89 SU 34

DSM 5: Acute stress disorder

Episode Diagnosis Information

- The two Face-to-Face times added together = Total Face-to-Face time for entire service. (“Primary FF Time” + “2<sup>nd</sup> FF Time”)
- “2<sup>nd</sup> FF/Contact Time” will never have documentation or travel time included.

7. Both Primary Code and Secondary Code Times will be transferred to InSyst for billing.

**Billing time**

Primary Clinician: 10904 - Peterson, Camille E

Provider: 9999CG - CLINICIAN GATEWAY TEST MHS AD

Primary Total Time: 03:30

Add Additional Clinicians

Additional E/M, Psychotherapy or Crisis Minutes: 378 90840 Crisis Therapy Additional minutes

Interactive Complexity: Not Present

2nd FF/Contact/E-M Time: 02:00

8. **ALERT: Only Primary Clinician Time is reported on the Daily Approval and Daily Staff Log at this time.** In the future, secondary time will be included.

▼ Daily Approval      Service Date: 2/7/2013      Search

Srv. #	Date	Type	Client #	Client Name	Reporting Unit	Procedure	Status	Approve	Time	# In Group	Approve Time
1277585	2/7/2013	Indiv.	75135386	TESTCASE DAVE	9999CG CLINICIAN GATEWAY TEST MHS AD	442 90834 Psychotherapy 45 min	PENDING	Pending	00:50	1	00:50
1276867	2/7/2013	Indiv.	75087772	TEST CINDYTWO	9999CG CLINICIAN GATEWAY TEST MHS AD	377 90839 Crisis Thpy 60 min	PENDING	Pending	01:00	1	01:00

Primary Code Time only included 2 service records on 2/7/2013 for a total time of 01:50.      Approve Time



# Individual Staff Log

Service Date: 10/26/2012

Svc #	Type	RU	Client #	Client Name	Procedure	Time		Loc	Rec.	Flags
						H:M	Grp Ct			
1182862	Indirect	01028 BACS MHS ADULT SERVICE TEAM			519 Inform At-Risk About MH Svs	03:00	1	School	05	
1182149	Indiv.	9999CG CLINICIAN GATEWAY TEST MHS AD	75087772	TEST CINDYTWO	331 Assessment	00:30	1	Currently, Primary Code time is listed but Secondary Code time is not. In the future, Secondary Code time will be added		76
1182148	Indiv.	9999CG CLINICIAN GATEWAY TEST MHS AD	75087772	TEST CINDYTWO	331 Assessment	00:30	1			
3 service records on 10/26/2012 for a total time of						04:00				

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

## 9. To account for your time currently:

- Record the time spent doing the secondary activity on a separate old-style manual paper staff log.
- Add the times from the 2 logs together to check your daily total time.
- Add indirect/MAA services as appropriate in Clinician's Gateway.
- Staple the manual paper staff log to the Clinician's Gateway generated staff log.

In the future, Clinician's Gateway will transfer both Primary and Secondary code times to the Daily Approval and Daily Staff Log, calculating the totals again for you. Thank you for your patience as we work through all of the programming changes required due to the new CPT coding structure.

Image of ACBHCS Staff Log form:

**ALAMEDA COUNTY BEHAVIORAL HEALTH CARE - MENTAL HEALTH**  
INDIVIDUAL STAFF LOG

REPORTING UNIT #:       CONFIDENTIAL INFORMATION      STAFF NAME:   
 DATE OF SERVICE:       California W&I Code Section 5328      STAFF #:

RU	Client Number	Client Name (Last, First)	Proc. Code	TIME			CO-STAFF			Recipient	Next Appt
				HRS:MIN	Grp Ct	Loc*	Co-Staff Number	HRS:MIN			
<b>SUBTOTAL</b>											
Enter other staff time already entered in PSP from Staff Appointment Roster				→							
Enter other staff time already entered in PSP from Group Attendance Roster or Day Svcs Log				→							
Enter your Co-Staff time already entered in PSP from Primary Staff Log				→							
<b>TOTAL PAID TIME</b>											

\*1=Office, 2=Field, 3=Phone, 4=Home, 5=School Satellite, 6=Satellite

Signature: \_\_\_\_\_ Date: \_\_\_\_\_ Data Entry Init.

10.Co-staff may be included on the note. Follow the same rules for co-staff time and codes.

### SITUATION THREE: CRISIS EVALUATION TEMPLATE

The Crisis Evaluation template has some different fields from the regular Progress Note but will follow the same rules. Co-staff may also be included also. The Primary Code is the code at the top and the time associated with it is the Primary Total Time. When you exceed the limit of FF/Contact time for the Primary Code then the Secondary Code (the add-on code) is used.

**Example:** 2:10 face to face plus 0:20 travel plus 0:30 documentation = 3:00 total for Author of note and 2:30 for second co-staff.

1. Use the two rows under “Add Co-Staff Time” to calculate the values for the Primary Code time. Add those figures to Primary Total Time and Service Time. The rule still applies to drop the Primary Code 377 Time to 60 minutes if FF time exceeds 75 minutes.
2. All Travel and Documentation Time is still added to the Primary Code Total Time.



Service date: 07/21/2021  
 Client opened: 8/28/2009  
 Client Plan due date: 5/31/2021 C/P has expired!  
 Last assessment: 7/27/2017

Client: Number 75135388 Last Name TESTCASE First Name DAVE

Procedures: 377 90839 Crisis Thpy 60 min

Service Location: Field  
 Med. Compliant: N/A Side Effects: N/A  
 Emergency

**Billing time**

Primary Clinician: 10904 - Peterson, Camille E  
 Provider: 9999CG - CLINICIAN GATEWAY TEST MHS AD  
 Co-Clinician: 8140 - Test, Mary Annie  
 Provider: CLINICIAN GATEWAY TEST MHS AD

Total Staff Time: 03:10  
[Add Additional Clinicians](#)

Was a 2nd staff needed for safety reasons?  Yes  No  
 If yes, describe why?

Additional E/M, Psychotherapy or Crisis Minutes: 378 90840 Crisis Therapy Additional minutes 2nd FF/Contact/E-M Time: 01:10  
 Interactive Complexity: Not Present

When Primary code 377 Crisis service time exceeds 75 minutes, set the Primary code 377 Crisis service time to 80 minutes. Enter the remaining Crisis service time for the 2nd code 378 Additional Crisis. Add all documentation and travel time to the Primary code time.

**Instructions and Pre-Existing Diagnosis**  
 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.

Services were provided in: English  
 by  interpreter or  clinician

Episode Diagnosis Information

	Primary	Secondary	Tertiary
ICD-10:	F31.2	Z03.89	
DSM 5:	Acute stress disorder		

Primary ICD-10 and DSM 5 do not match - you must update ICD-10 or DSM 5

**For Primary Code 377**

Add Co-Staff Time

Primary FF/Contact Time: 01:00 HH:MM Travel Time: 00:20 HH:MM Documentation Time: 00:30 HH:MM  
 Co-Staff FF/Contact Time: 01:00 HH:MM Travel Time: 00:20 HH:MM Documentation Time: 00:00 HH:MM

**For Primary Code**  
 Primary Total Time: 01:50  
 Service Time: 01:20

**Primary Code FF + Secondary Code FF = Total FF Time**  
 (1:00 + 1:10 = 2:10)  
 Secondary Code time transfers to InSyst for both staff

**Use the calculation below to figure times for Primary Code above**

Primary Total Time: 01:50  
 Co-Staff Total Time: 01:20

3. Check your math: Does the Primary FF + Secondary FF = Total FF time?  
 Does the Primary Total Time + Secondary FF time = Total Time including documentation and travel?

## *Pending versus Draft, 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.

**Finalize:** 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.

**Save and Continue:** Quick save while continuing to work on Note that may take a few hours to complete. You may want to save frequently if you have lost notes in the past. This saves a draft note, unless already in pending status, with all the current information on note and stays on the edit page so you may continue working. **\*\*Please be aware if you leave date blank and use save and continue it will enter today's date\*\***

# 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.

# 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.**

Leave Name/ID field blank when writing a note for an unregistered client and click Start

**Enter New Service:**

Type of Service	Primary Clinician	Client	Note Template	
Individual	<input type="text"/>	Enter Client Name or ID or leave blank	Clinician's Progress Note	<input type="button" value="Start Indiv Service"/>
	<small>Edit Primary Clinician List</small>			

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.

Service #: New Title: Clinician's Progress Note Enter Name

Client: Number: [Unknown] Last Name: [Unregistered] First Name: [Client] ... Service date: [ ] Util. review date: [ ] Client Plan Due Date: [ ]

Procedures: [197 CG INFORMATIONAL NOTE] Select Code 197

Service Location: [Office] Med. Compliant: [N/A] Side Effects: [N/A] Emergency:  Pregnant?:  Veteran?:

---

Staff Time Enter 00:00 minutes

Primary Clinician: [19072 - Sales, Cameren] Select Reporting Unit Primary Total Time: [00:00]

Provider: [9999CG - CLINICIAN GATEWAY TEST MHS AD]

[Add Additional Clinicians](#)

- 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.

Clinicians Gateway Home Services  
[unregl]  
Search

Welcome: Cameren Sales Home Menu Log out

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

Notes: Client Shortcuts Lab Results (0)

Pending Services									4 Results
Svc #	Gsr #	Client #	Client Name	Provider	Date	Template	Procedure	Sort	Reviewer
1410813	75087772	TEST_CINDYTWO	TEST_CINDYTWO	9999CG - CLINIC...	3/7/2018	Clinician P...	197 CG INFO...		
1410800	75087772	TEST_CINDYTWO	TEST_CINDYTWO	9999CG - CLINIC...	2/22/2018	Interim Ass...	323 90791 Ps...		
1410792	75087772	TEST_CINDYTWO	TEST_CINDYTWO	9999CG - CLINIC...	2/8/2018	FSP PAF...	197 CG INFO...	<input type="radio"/> Draft	
1410814		Unregistered, Client	Unregistered, Client	9999CG - CLINIC...	3/7/2018	Clinician P...	197 CG INFO...	<input type="radio"/> Draft	

View: [10] << First < Prev 1 Next > Last >>


**Pending Client Plans** 1 Result

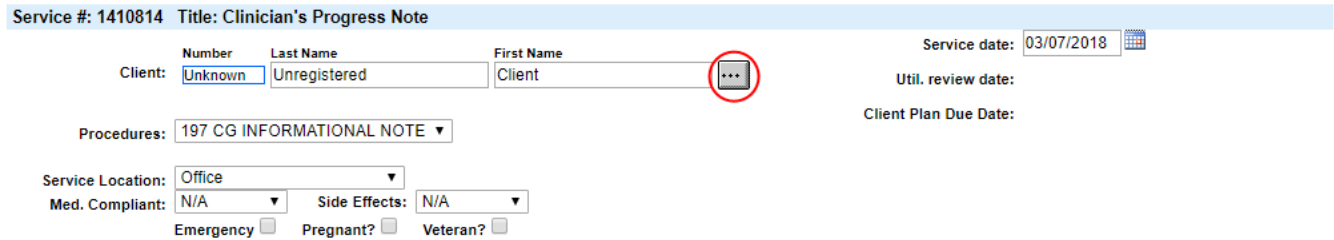
**Advanced Search**  
For: [Clients] Type: [Any] Status: [Any] Date: [Anytime]  
at provider: [Everywhere] Search

**Services Search** Services Search


All Service [Anywhere] Rendered for: [Enter client id or name] Search


## To update the Draft Note

**Update the client's name and 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.



Service #: 1410814 Title: Clinician's Progress Note

Client:    

Service date:  

Util. review date:

Client Plan Due Date:

Procedures:

Service Location:

Med. Compliant:  Side Effects:

Emergency  Pregnant?  Veteran?

**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)**

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

**\*Note is complete is only visible if you have 'Daily Approval'**

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.



Note is complete.

# Co-staffed Individual Notes

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

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.”

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 Staff Time Section.

Service #: 1410813 Title: Clinician's Progress Note

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

Service date: 03/07/2018

Client opened: 3/7/2007

Util. review date:

Client Plan Due Date: 2/28/2019

Last assessment: 1/1/2014

Procedures: 197 CG INFORMATIONAL NOTE

Service Location: Office

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

Emergency  Pregnant?  Veteran?

**Staff Time**

Primary Clinician: [dropdown] Primary Total Time: 00:00

Provider: 9999CG - CLINICIAN GATEWAY TEST MHS AD

1 Add Additional Clinicians

- Click on "Add Additional Clinician's."
- Choose the Co-staff from the drop down menu.
- Enter time for both clinicians

**Staff Time**

Primary Clinician: [dropdown] Primary Total Time: 00:00

Provider: 9999CG - CLINICIAN GATEWAY TEST MHS AD

Co-Staff Clinician: [dropdown] 2 Time: 00:00

Provider: Select Clinician

Total Staff Time: 00:00

Add Additional Clinicians

- Complete all of the progress note entries. Check "Note is Complete."  
**\*Note is complete is only visible if you have 'Daily Approval'**
- Click on "Save as pending."

Note is complete.

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



- 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.
- Best Practice is that co-staff review and approve their addendum to the notes before the Primary Clinician finalizes this service.

▪ **Primary Staff:**

Pending Services										4 Results
Svc #	Gsr #	Client #	Client Name	Provider	Date	Template	Procedure	Sort	Reviewer	
1410813		75087772	TEST, CINDYTWO	9999CG - CLINIC...	3/7/2018	Clinician P...	197 CG INFO...	Wait		
1410800		75087772	TEST, CINDYTWO	9999CG - CLINIC...	2/22/2018	Interim Ass...	323 90791 Ps...			
1410792		75087772	TEST, CINDYTWO	9999CG - CLINIC...	2/8/2018	FSP PAF - ...	197 CG INFO...	Draft		
1410814			Unregistered, Client	9999CG - CLINIC...	3/7/2018	Clinician P...	197 CG INFO...	Draft		

▪ **Co-Staff:**

Pending Services										1 Result
Svc #	Gsr #	Client #	Client Name	Provider	Date	Template	Procedure	Sort	Reviewer	
1410813		75087772	TEST, CINDYTWO	9999CG - CLINIC...	3/7/2018	Clinician Pr...	197 CG INFOR...	Wait		

- The co-staff have the opportunity to edit their time and add an optional addendum to the note before the Primary finalizes.
- To edit, click the service #
- Co-staff may edit their time before the Primary finalizes.

Role	Staff #	Staff Name	Time		Approved
Primary Clinician			00:30	Edit	<input checked="" type="checkbox"/>
Co-Clinician			00:10	Edit	<input type="checkbox"/>
<b>Total Staff Time</b>			<b>00:40</b>		

**Correct time and click Update**

00:30 Edit

00:20 Update Cancel

00:30

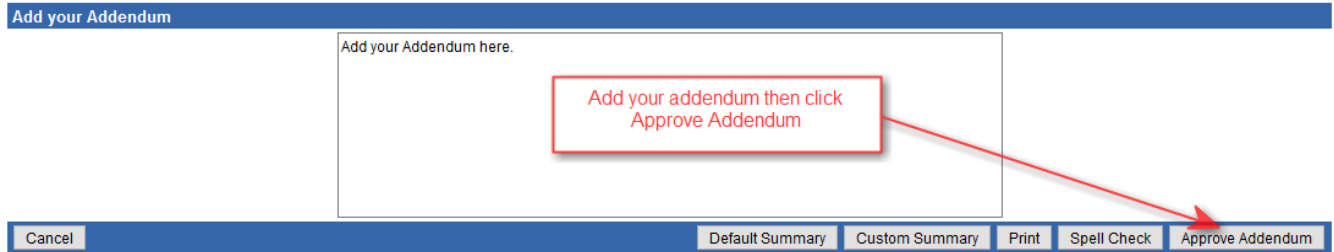
**Time**

00:30 Edit

00:20 Edit

00:50

- Add the addendum at the bottom of the note and click "Approve Addendum"
- Best Practice is that co-staff review and approve their addendum to the notes before the Primary Clinician finalizes this service.



- When the co-staff approve their addendum
  1. A checkmark is placed in the “Approved” checkbox at the top of the note  
**\*Note: Co-staff approval is optional.**

Role	Staff #	Staff Name	Time		Approved
Primary Clinician			00:30	Edit	<input checked="" type="checkbox"/>
Co-Clinician			00:20	Edit	<input checked="" type="checkbox"/>
<b>Total Staff Time</b>			<b>00:50</b>		

2. The note will disappear from the Co-Staff’s Home Page Pending service list. It is no longer available for editing.



3. The dot on the Primary’s Home Page Pending list then turns green.

Pending Services										4 Results
Svc #	Gsr #	Client #	Client Name	Provider	Date	Template	Procedure	Sort	Reviewer	
1410813	75087772	TEST, CINDYTWO	9999CG - CLINIC...	3/7/2018	Clinician P...	197 CG INFO...	● Approved			
1410800	75087772	TEST, CINDYTWO	9999CG - CLINIC...	3/7/2018	Interim Ass...	323 90791 Ps...	● Approved			
1410792	75087772	TEST, CINDYTWO	9999CG - CLINIC...	2/8/2018	FSP PAF - ...	197 CG INFO...	○ Draft			
1410814		Unregistered, Client	9999CG - CLINIC...	3/7/2018	Clinician P...	197 CG INFO...	○ Draft			

4. The Primary Clinician then finalizes the note and the services drop into InSyst for both primary and co-staff.

# Group Notes



# Creating Groups

**Enter New Service:**

Type of Service: **1** Group

Primary Clinician: [Dropdown]

Group: **2** Click 'Edit Groups' to add Groups

Note Template: Progress Report

Start Group Service

Notes | Client Shortcuts | Lab Results (0)

Edit Your Groups: **3**

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

Select Group: 4429 New Untitled Group

Rename | Delete Group

**New Group**

Please search for and add clients to this group before proceeding

Default Provider: (No Provider) Save Provider

Add Clients: test Search 0 Results

- Click on the “New group” button.
- Type in the client’s 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.

Select Group: 4429 New Untitled Group

Rename | Delete Group

**New Group**

Client #	Client Name	Last Service Date	
75241442	TEST ALANTINE		Remove
75087772	TEST CINDYTWO	3/21/2018	Remove

Default Provider: (No Provider) Save Provider

Add Clients: test Search 28 Results

Client #	Client Name	Gender	Birth Date	Age	Services	Add
75241442	TEST, ALANTINE	F	1/23/2013	5	0	<b>Add</b>
75134621	TEST, BABY	F	1/1/1950	68	0	Add
75135515	TEST, BOB H	M	7/1/1990	27	0	Add
75087772	TEST, CINCIN	F	2/2/1960	58	4	Add
75226968	TEST, CINDY	F	12/12/1900	117	0	Add
75087772	TEST, CINDYTWO T	F	2/2/1960	58	4	<b>Add</b>
75061469	TEST, MEMBER	M	11/11/1911	106	0	Add

<< First < Prev -1- -2- -3- -4- Next > Last >>

- When the client information appears, click on the “Add” button.
- The client will move above to the group section
- Follow the same steps to add all of the other members to the group listing.

**2**

Client #	Client Name	Last Service Date	
75241442	TEST ALANTINE		Remove
75134621	TEST BABY	3/24/2014	Remove
75135515	TEST BOB		Remove
75226968	TEST CINDY	7/12/2017	Remove
75087772	TEST CINDYTWO	3/21/2018	Remove
75061469	TEST MEMBER	3/21/2016	Remove

Default Provider: 9999CG CLINICIAN GATEWAY TEST MHS AD **1** Save Provider

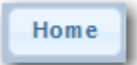
1. Select a default provider from the drop list and click on Save Provider
2. Click on Rename to enter the name of the group you have created. When naming the group, you can use names that remind you of the days the group meets, and the type of group they are...e.g. "Wednesday Rehab" or "Tue&Thu Skill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

From cgate

Enter new name

Wednesday Rehab

OK Cancel

- 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.

# Writing the Group Note

**Enter New Service:**

Type of Service **1** Primary Clinician Group **2** Note Template **3** **4**

Group [v] [v] 4429 Wednesday Rehad [v] Clinician's Progress Note [v] Start Group Service

[Edit Primary Clinician List](#) [Edit Your Groups](#)

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

Group: Wednesday Rehad (4429) Title: Clinician's Progress Note

**Group Members** 6 Members Show client RUs for: [v]

Client #	Name	Gender	Age	Present	Med Compliant	Side Effects	Provider
75241442	TEST ALANTINE	F	5	<input type="checkbox"/>	N/A [v]	N/A [v]	99999 HOSPITAL 24HR SERVICES [v]
75134621	TEST BABY	F	68	<input type="checkbox"/>	N/A [v]	N/A [v]	99991 West County Mental Health Svs [v]
75135515	TEST BOB	M	27	<input type="checkbox"/>	N/A [v]	N/A [v]	99999 HOSPITAL 24HR SERVICES [v]
75226968	TEST CINDY	F	117	<input checked="" type="checkbox"/>	N/A [v]	N/A [v]	9999CG CLINICIAN GATEWAY TEST MHS AD [v]
75087772	TEST CINDYTWO	F	58	<input checked="" type="checkbox"/>	N/A [v]	N/A [v]	9999CG CLINICIAN GATEWAY TEST MHS AD [v]
75061469	TEST MEMBER	M	106	<input type="checkbox"/>	N/A [v]	N/A [v]	99995 Short Term House [v]

Additional participants in group: [0]

Procedures: [Select Procedure] Service Date: [ ] [ ] [ ] [ ]

Service Location: [Select Location] Primary Clinician: [ ] Primary Clinician Time: [hh:mm]

[Add additional clinicians](#)

**Record Attendance here**

**Be sure to verify RUs for present clients**

- 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)

Presenting Problem(s) Previous Entries: (Select Note) [v]

Evaluation Previous Entries: (Select Note) [v]

**You can use the drop arrow to select from the list of available entries**

- Complete each text box as appropriate.
- View previous notes if desired.

- 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).

Pending Services										3 Results
Svc #	Gr #	Client #	Client Name	Provider	Date	Template	Procedure	Sort	Reviewer	
3259487		75087772	TEST, CINDYTWO	9999CG - CLINICIAN GA...	3/7/2018	Clinician Pro...	377 90839 Crisis Thpy...	Wait		
3259524	27926	75226968	TEST, CINDY	9999CG - CLINICIAN GA...	3/7/2018	Clinician Pro...	391 Group Rehabilitation			
3259525	27926	75087772	TEST, CINDYTWO	9999CG - CLINICIAN GA...	3/7/2018	Clinician Pro...	391 Group Rehabilitation			

View: 10 << First < Prev 1 Next > Last >>

- You will see your group service listed in your ‘Pending Services’ split into individual notes for each client present.
- Click on the Service Number (1) or the blue action button (2) to view/edit the individual notes for each of the clients in the group.

**Presenting Problem(s)**  
N/A

**Evaluation**  
N/A

**Intervention**  
N/A

**Response**  
N/A

**Plan**  
N/A

Click here to edit Service

Cancel Default Summary Custom Summary Print Delete Service Edit Service

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



**Group Members** 6 Members Show client RUs for: SALES CAMEREN (19072)

Client #	Name	Gender	Age	Present	Med Compliant	Side Effects	Provider
75241442	TEST ALANTINE	F	5	<input type="checkbox"/>	N/A	N/A	99999 HOSPITAL 24HR SERVICES
75134621	TEST BABY	F	68	<input type="checkbox"/>	N/A	N/A	99991 West County Mental Health Svs
75135515	TEST BOB	M	27	<input type="checkbox"/>	N/A	N/A	99999 HOSPITAL 24HR SERVICES
75226968	TEST CINDY	F	117	<input checked="" type="checkbox"/>	N/A	N/A	9999CG CLINICIAN GATEWAY TEST MHS AD
75087772	TEST CINDYTWO	F	58	<input checked="" type="checkbox"/>	N/A	N/A	9999CG CLINICIAN GATEWAY TEST MHS AD
75061469	TEST MEMBER	M	106	<input type="checkbox"/>	N/A	N/A	99995 Short Term House

Additional participants in group: 0

Procedures: 391 Group Rehabilitation Service Date: 03/07/2018  
 Service Location: Office Emergency?  Pregnant?  Util. review date: 6/4/2017  
 Primary Clinician: SALES CAMEREN Primary Clinician Time: 01:00

E/M Plus Psychotherapy or Additional Crisis: None 2nd FF Time: 2nd Tot  
 Time: Interactive Complexity: Not Present

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

Primary FF Time: Hours:Minutes Services were provided in: English ICD-10: F39  
 by  interpreter or  clinician DSM 5:  
 Episode Diagnosis Information Primary Secondary Tertiary SU GMC  
**Primary ICD-10 and DSM 5 do not match - you must update Insyst or CG**

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

Client Specific Note

Evaluation Previous Entries: (Select Note)

N/A

Intervention Previous Entries: (Select Note)

Client Specific Intervention

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.

Cancel Spell Check Save as Pending

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.

Daily Approval										Service Date:	03/07/2018	Search
Srv. #	Date	Type	Client #	Client Name	Reporting Unit	Procedure	Status	Approve	Time #	In Group	Approve Time	
3259525	3/7/2018	Group	75087772	TEST CINDYTWO	9999CG CLINICIAN GATEWAY TEST MHS AD	391 Group Rehabilitation	PENDING	Pending	01:00	2	00:30	
3259524	3/7/2018	Group	75226968	TEST CINDY	9999CG CLINICIAN GATEWAY TEST MHS AD	391 Group Rehabilitation	PENDING	Pending	01:00	2	00:30	
3259487	3/7/2018	Indiv.	75087772	TEST CINDYTWO	9999CG CLINICIAN GATEWAY TEST MHS AD	377 90839 Crisis Thpy 60 min	PENDING	Pending	01:30	1	01:30	

3 service records on 3/7/2018 for a total time of 02:30.

## 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 Members
5 Members
Show client RUs for: ▼

Client #	Name	Gender	Age	Present	Med Compliant	Side Effects	Provider
75241442	TEST ALANTINE	F	5	<input type="checkbox"/>	N/A ▼	N/A ▼	99999 HOSPITAL 24HR SERVICES ▼
75134621	TEST BABY	F	68	<input type="checkbox"/>	N/A ▼	N/A ▼	99991 West County Mental Health Svs ▼
75135515	TEST BOB	M	27	<input type="checkbox"/>	N/A ▼	N/A ▼	99999 HOSPITAL 24HR SERVICES ▼
75226968	TEST CINDY	F	117	<input checked="" type="checkbox"/>	N/A ▼	N/A ▼	9999CG CLINICIAN GATEWAY TEST MHS AD ▼
75087772	TEST CINDYTWO	F	58	<input checked="" type="checkbox"/>	N/A ▼	N/A ▼	9999CG CLINICIAN GATEWAY TEST MHS AD ▼

Additional participants in group:

1

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)

▼Daily Approval
Service Date: 03/07/2018
Search

Srv. #	Date	Type	Client #	Client Name	Reporting Unit	Procedure	Status	Approve	Time #	In Group	Approve Time
3259546	3/7/2018	Group	75087772	TEST CINDYTWO	9999CG CLINICIAN GATEWAY TEST MHS AD	391 Group Rehabilitation	PENDING	Pending	01:00	3	00:20
3259545	3/7/2018	Group	75226968	TEST CINDY	9999CG CLINICIAN GATEWAY TEST MHS AD	391 Group Rehabilitation	PENDING	Pending	01:00	3	00:20
3259525	3/7/2018	Group	75087772	TEST CINDYTWO	9999CG CLINICIAN GATEWAY TEST MHS AD	391 Group Rehabilitation	PENDING	Pending	01:00	2	00:30
3259524	3/7/2018	Group	75226968	TEST CINDY	9999CG CLINICIAN GATEWAY TEST MHS AD	391 Group Rehabilitation	PENDING	Pending	01:00	2	00:30
3259487	3/7/2018	Indiv.	75087772	TEST CINDYTWO	9999CG CLINICIAN GATEWAY TEST MHS AD	377 90839 Crisis Thpy 60 min	PENDING	Pending	01:30	1	01:30

- If you gave services to clients who did not have an open episode, their time will not be added to your staff log. Notice two services were given 20 minutes for the 01:00 spent. Time given to each note equals the total time divided by the number in group.  $01:00/3 = 00:20$ .
- **Note: 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. (see next page)**

- 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

Daily Approval										Service Date: 03/07/2018		Search	
Srv. #	Date	Type	Client #	Client Name	Reporting Unit	Procedure	Status	Approve	Time #	In Group	Approve Time		
3259557	3/7/2018	Indirect			9999CG CLINICIAN GATEWAY TEST MHS AD	401 Mental Health Promotion	PENDING	Pending	00:20	1	00:20		
3259546	3/7/2018	Group	75087772	TEST CINDYTWO	9999CG CLINICIAN GATEWAY TEST MHS AD	391 Group Rehabilitation	PENDING	Pending	01:00	3	00:20		
3259545	3/7/2018	Group	75226968	TEST CINDY	9999CG CLINICIAN GATEWAY TEST MHS AD	391 Group Rehabilitation	PENDING	Pending	01:00	3	00:20		
3259525	3/7/2018	Group	75087772	TEST CINDYTWO	9999CG CLINICIAN GATEWAY TEST MHS AD	391 Group Rehabilitation	PENDING	Pending	01:00	2	00:30		
3259524	3/7/2018	Group	75226968	TEST CINDY	9999CG CLINICIAN GATEWAY TEST MHS AD	391 Group Rehabilitation	PENDING	Pending	01:00	2	00:30		
3259487	3/7/2018	Indiv.	75087772	TEST CINDYTWO	9999CG CLINICIAN GATEWAY TEST MHS AD	377 90839 Crisis Thpy 60 min	PENDING	Pending	01:30	1	01:30		

6 service records on 3/7/2018 for a total time of 03:30. Approve Time

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)

## 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 1	Check 2	Dropdown
75071955	TESTY MICHELLE	F	23	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	01032R ASIAN MHS CHILD REFERRAL
75139951	TESTING ACCT	M	58	<input type="checkbox"/>	<input type="checkbox"/>	No matching providers
75138646	TESTING TEN	M	13	<input type="checkbox"/>	<input type="checkbox"/>	99994 Works Hard Crisis Unit
75130257	TESTY CINDY	F	43	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	9999CG CLINICIAN GATEWAY TEST MHS AD

Additional participants in group:

Procedures:  Service Date:

Service Location:  Primary Clinician:  Primary Clinician Time:

Presenting Problem(s):

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

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

The screenshot displays the 'Clinician's Gateway version 3.4 (Service Entry, Group)' web application. The browser address bar shows the URL: `http://cg/CG-QA/ServiceEntryGroup.aspx?GROUP_NUMBER=245&CLINICIAN=10904&TITLE=1`. The main content area features a table of participants:

75138646	TESTING TEN	M	13	<input checked="" type="checkbox"/>	N/A	N/A	99994 Works Hard Crisis Unit
75130257	TESTY CINDY	F	43	<input type="checkbox"/>	N/A	N/A	9999CG CLINICIAN GATEWAY TEST MHS AD

Below the table, there is a field for 'Additional participants in group' with the value '2'. The form includes several dropdown menus and text boxes:

- Procedures: 392 Group Rehab-AB3632
- Service Date: 9/8/2009
- Service Location: Office
- Primary Clinician: PETERSON CAMILLE
- Primary Clinician Time: 2:15

At the bottom, there is a 'Presenting Problem(s)' section with a text area containing the instruction 'Type in one Note, then copy and paste into the other note' and a 'Previous Entries' dropdown menu set to '(Select Note)'.

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







# Indirect Notes



## Indirect Notes

- From the “Enter new service” (1) section, click the “Type of service” (2) drop arrow and select “Indirect”; click the “Reporting unit” (3) drop arrow and select the appropriate RU.
- Click on “Start indirect service.”(4)

1

**Enter New Service:**

Type of Service 2 Primary Clinician Reporting Unit 3 Note Template 4

Indirect TESTCARE TESTCARE 9999CG CLINICIAN GATEWAY TEST MHS AD Indirect Note Start Indirect Service

Edit Primary Clinician List

- Select the appropriate procedure code (1), service location (2), Service date (3), Recipient code (4), time (5), and any notes (6) \*optional.
- Click on “Save as pending.” (7)

Procedures: 680 General Administration 1 Service Date: 03/07/2018 3

Service Location: Office 2 Recipient Code: 05 4

Reporting Unit: 9999CG CLINICIAN GATEWAY TEST MHS A Primary Clinician Time: 02:00 5

Note Previous Entries: (Select Note)

6 \*optional: Notes

7

Cancel Spell Check Save as Pending

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

Notes Client Shortcuts Lab Results (0)

**▼ Pending Services** 1 Result

Svc #	Gsr #	Client #	Client Name	Provider	Date	Template	Procedure	Sort	Reviewer
1410790				9999CG - CLINIC...	3/7/2018	Indirect	680 General A...		

View: 10

<< First < Prev 1 Next > Last >>



# Documents



# What is a Document?

A Document is a note for a client that will not be tracking time or entered under a procedure code. Depending on the agency, Environment (MHS or SUD), and Staff configuration you will only see a select set of templates under Documents.

## Starting a document

- From the 'Enter new service' section (1); click the 'Type of service' (2) drop arrow and select 'Document'; enter the clients name or number (3); Select the correct 'Note Template'.
- Click on 'Start Document.'(5)

The screenshot shows the 'Enter New Service' form. Callout 1 points to the 'Enter New Service:' section header. Callout 2 points to the 'Type of Service' dropdown menu. Callout 3 points to the 'Client' text input field. Callout 4 points to the 'Note Template' dropdown menu. Callout 5 points to the 'Start Document' button.

- If there are multiple results find the correct client and click select

Clients Matching, "test c"

Search For Different Client  
test c


Client #	Client Name	Status	Gender	Age	Services	Note Template	
75071453	TEST CASE, JOE	None	Male	30	0	Document	Select
75087772	TEST, CINDYTWO T	Active	Female	58	3	Document	Select
75087772	TEST, CINDYTWO T	Active	Female	58	3	Document	Select
75053807	TESTCASE, CINDY V	Closed	Female	57	0	Document	Select
75144431	TESTCASE, CINDYLOUIE W	Active	Female	69	0	Document	Select








# Completing the Document

- The Document Must have a Client
- Fill in the Document Date
- Complete all Notes Fields that may be required based on the document Template
- Follow the same procedures to finalize a document as you would a Note.

Service #: New Title: Document 

Client: Number: 75087772 Last Name: TEST First Name: CINDYTWO   Document date: 03/07/2018 

Comment Previous Entries: (Select Note) ▼

Note is complete.

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

---



# **SUD Specifics Notes, Forms, and Authentication**



# Notes

In the SUD Environment, there are much stricter rules, and you will notice there are minor changes in the input of services than described in the previous pages.

## Time Entry

Depending on the Services provided, you may see the following Time Entry Fields.

- Standard Billing Time Entry (On Progress/Service Note Daily) will Display fields for start and end time for Service Time, Travel to, and Travel From, as well as an overall Documentation Time.

Billing time	
Primary Clinician <input type="text"/>	Service Start: <input type="text" value="hh:mm"/>
Provider: <input type="text" value="999CGS - CLINICIAN GATEWAY TEST SUD AD"/>	End: <input type="text" value="hh:mm"/>
	Time: 00:00
Travel To Start: <input type="text" value="hh:mm"/>	Travel From Start: <input type="text" value="hh:mm"/>
End: <input type="text" value="hh:mm"/>	End: <input type="text" value="hh:mm"/>
Time: 00:00	Time: 00:00
	Documentation Time: <input type="text" value="00:00"/>
Total Staff Time: 00:00	

- When zero minute codes are used (tracking codes, info only 197, or no show), no Billing Time will be required, zero minutes will be defaulted.

Billing time	
Primary Clinician <input type="text"/>	Service Time: 00:00
Provider: <input type="text" value="999CGS - CLINICIAN GATEWAY TEST SUD AD"/>	

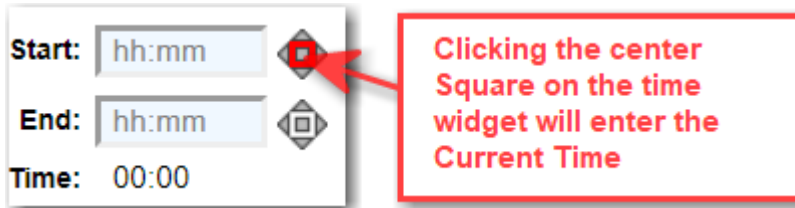
- When 24 hr Residential Day codes are used, no additional Billing Time will be entered, 24 hours will be defaulted.

Billing time	
Primary Clinician <input type="text"/>	Service Time: 24:00
Provider: <input type="text" value="999CGR - CLINICIAN GATEWAY TEST SUD RES"/>	

## Using the Time Entry Widget

The format for all time entry fields are HH:MM AM/PM.

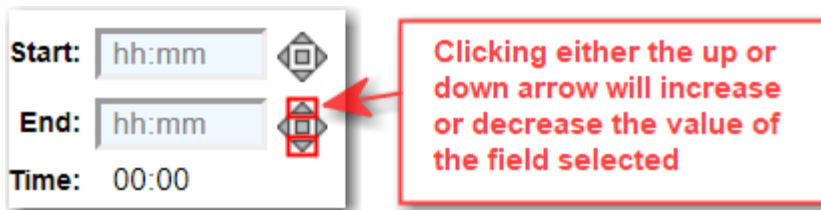
1. When typing directly into the fields use a zero when necessary, (e.g typing 0806pm will display as 08:06 PM)
2. The widget to the left of the text box can default and adjust time
  - Clicking the center square will enter the Current Time



- Clicking on the left and right arrows move between the hour, minute, and am/pm fields



- Clicking either the up or down arrow will increase or decrease the value of the field selected



## Documentation Time:

When writing specific notes there may also be a Documentation Time Log:

- Date, Time Start, and End are required.
- Format HH:MM AM/PM **\*Note the Space in the format**
- You **MUST** enter a space between the minute and AM/PM
- If you are writing a Service Note Daily covering multiple services, denote time spent on each type of Form documented

Documentation Time Log					Type/Notes				
Date:	<input type="text"/>		Time Start:	<input type="text"/>	End:	<input type="text"/>	Duration:	<input type="text"/>	<input type="text"/>

# Forms

Some Service Note Types will be referred to as Forms. These Notes will all have Zero time and time spent will be entered on your Progress/Service Daily Note.

Forms will still be entered under Individual Services with the following Templates:

- Intake and Assessment
- Initial Medical Necessity
- ALOC Assessments
- Discharge Plan
- Discharge Summary

**Enter New Service:**  
Type of Service: Individual  
Primary Clinician: [dropdown]  
Client: Enter Client Name or ID or leave blank  
Note Template: Intake & Assessment  
Start Indiv Service

When entering one of these forms you will be required to select a tracking code, this will ensure the service will transfer to Insyst in a meaningful way without double billing any time on separate service, e.g. daily residential.

The Tracking codes included are:

- 880 – SUD TRACKING-ASSESSMENT
- 881 – SUD TRACKING MED NECESS/JUSTIF
- 882 – SUD TRACKING ALOC

**Service #: New Title: Intake & Assessment**  
Client: Unknown  
Service date: 07/23/2018  
Procedures: 880 SUD TRACKING-ASSESSMENT  
Service Location: Office  
Med. Compliant: N/A  
Side Effects: N/A  
Emergency:  Pregnant?:   
Billing time  
Primary Clinician: [dropdown]  
Provider: 999CGR - CLINICIAN GATEWAY TEST SUD RES  
Service Time: 00:00  
Add Additional Clinicians

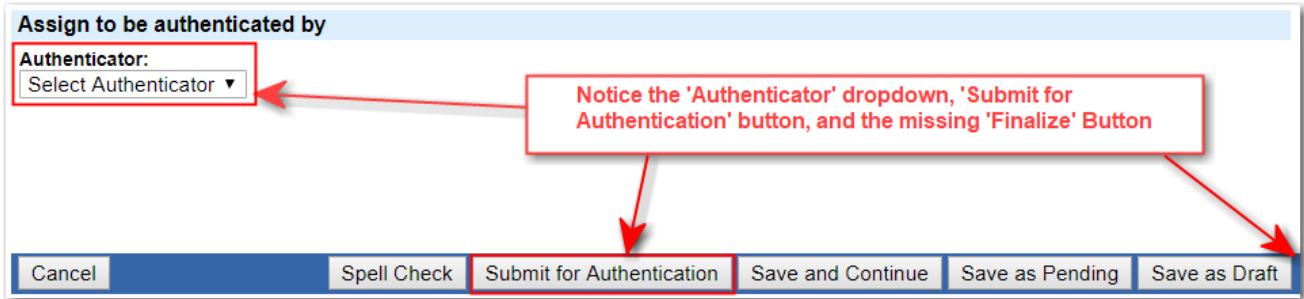
When a form is completed, it may be require to be submitted for Authentication in order to be finalized. (e.g. Intake and Assessment, and the Initial Medical Necessity)





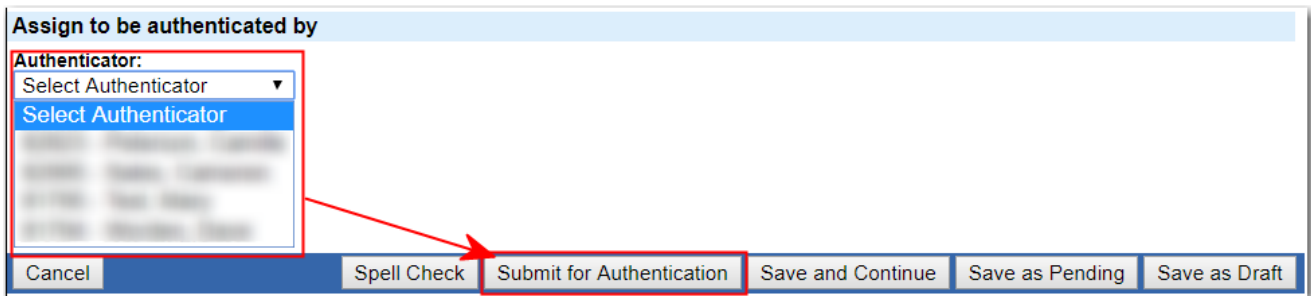
# Authentication

At the bottom of specific Forms you will notice you are unable to finalize. You will need to use the 'Submit for Authentication' button.

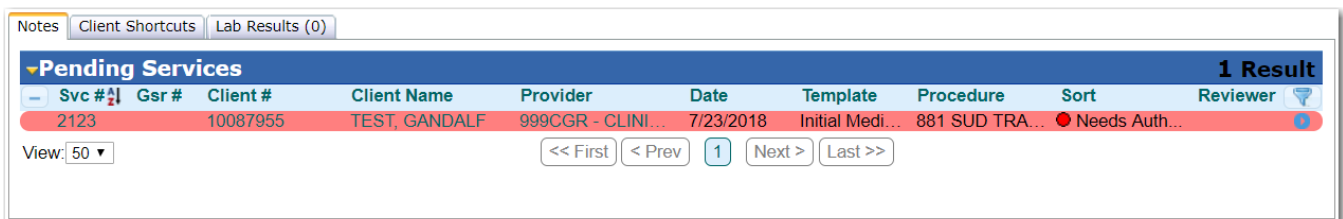


The Steps for Authentication are similar to notes that require review:

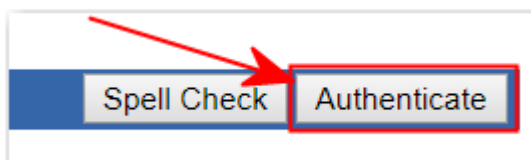
1. Complete the form
2. Select Authenticator from the drop down and click 'Submit for Authentication'
  - Note the dropdown will have specific staff based on the Note Template, RU, and Staff Mask in Insyst
  - If you are included in the dropdown you may submit to yourself



3. There will be a 'Pending Authentication' service on your home page and the home page of the Authenticator.



4. The Authenticator will then open the service and select 'Edit Service'.
5. After reviewing and making any necessary edits the Authenticator can then click 'Authenticate'.  
**\*Authenticate will Finalize the Note.**





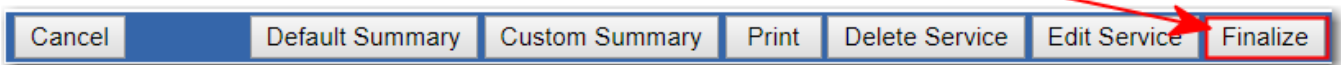
# Finalizing Notes



## Without Review Required

When you are not required to submit your notes for review, you will Finalize your Note one of two ways:

1. At the bottom of each service, select the 'Finalize' button.



2. Or if your profile is setup with Daily Approval Follow the steps in the section [Individual Staff Log \(Daily Approval\)](#)

**Note in SUD 'Authenticate' will also Finalize a Note**

## With Review Required

### CG account Setup for Review Required

For Staff who need their notes approved by Supervisor:

Add 'Review Required' to their CG account

For Supervisor who will review the notes for Staff:

Add 'Can Review' to their CG account

RU# required to be added to Staff and Supervisor CG accounts

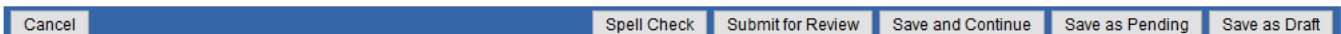
### Procedure: Staff creates Progress note and Supervisor "Accepts" the notes

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

Assign to be reviewed by

Reviewer:  Notes:

Note is complete.



2. Select Reviewer from the drop down box:

Assign to be reviewed by

Reviewer:  Notes:

Note is complete.

Spell Check Submit for Review Save and Continue Save as Pending Save as Draft

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

Assign to be reviewed by

Reviewer:

Notes:

Please Review and Approve this Note!?

Note is complete.

Cancel Spell Check Submit for Review Save and Continue Save as Pending Save as Draft

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

Notes Client Shortcuts Lab Results (0)

**Pending Services** 1 Result

Svc #	Gsr #	Client #	Client Name	Provider	Date	Template	Procedure	Sort	Reviewer
1410819		75087772	TEST, CINDYTWO	9999CG - CLINIC...	3/7/2018	Clinician P...	381 Individual ...	Review	

View: 10 << First < Prev 1 Next > Last >>

Waiting for reviewer to accept or reject this service.

- The Supervisor will need to review the note. First click the service # or the Blue Button

Notes Client Shortcuts Lab Results (0)

**Pending Services** 1 Result

Svc #	Gsr #	Client #	Client Name	Provider	Date	Template	Procedure	Sort	Reviewer
1410819		75087772	TEST, CINDYTWO	9999CG - CLINIC...	3/7/2018	Clinician P...	381 Individual ...	Review	

View: 10 << First < Prev 1 Next > Last >>

Click Service Number or blue 'Action Button' to view Note

- At the bottom of the note complete ‘Review Notes’ section with comments, then click ‘Accept’. The note will be removed from the Supervisor’s ‘Pending Services’ section of their home page and updates the note on the Staff’s ‘Pending Services’

**Review Notes**

Date	Staff	Action	Notes
3/28/2018		Submit	Please Review and Approve this Note!?

This service has currently been submitted to be reviewed by:  Update

Notes:

Accepted!

Cancel Default Summary Custom Summary Print Spell Check Accept Reject

7. Note is now ready to be “Finalized” via [Individual Staff Log \(Daily Approval\)](#) or opening the note and selecting ‘Finalize’: **\*Do not click ‘Edit Service’ if you have review required and it’s been approved, or you will be required to resubmit for approval.**

Notes Client Shortcuts Lab Results (0)

Pending Services										1 Result
Svc #	Gsr #	Client #	Client Name	Provider	Date	Template	Procedure	Sort	Reviewer	
1410819		75087772	TEST, CINDYTWO	9999CG - CLINICI...	3/7/2018	Clinician Pr...	381 Individual ...	Accepted		

View: 10 << First < Prev 1 Next > Last >>

Cancel Default Summary Custom Summary Print Delete Service Edit Service **Finalize**

**Procedure: Staff creates Progress note and Supervisor “Rejects” the notes before “Accepting” the note**

- Follow steps 1 through 5 above
- At the bottom of the note complete ‘Review Notes’ section with comments, then click ‘Reject’. The note will be removed from the Supervisor’s ‘Pending Services’ section of their home page and updates the note on the Staff’s ‘Pending Services’

**Review Notes**

Date: 3/28/2018 Staff: [Redacted] Action: Submit Notes: Please Review and Approve this Note!

This service has currently been submitted to be reviewed by: [Redacted] Update

Notes:  
Rejected - Notes on what the Clinician may need to correct.

Cancel Default Summary Custom Summary Print Spell Check **Accept** **Reject**

**Supervisor ‘Rejected’ the note:**

Notes Client Shortcuts Lab Results (0)

Pending Services										1 Result
Svc #	Gsr #	Client #	Client Name	Provider	Date	Template	Procedure	Sort	Reviewer	
1410819		75087772	TEST, CINDYTWO	9999CG - CLINICI...	3/7/2018	Clinician Pr...	381 Individual ...	Rejected	Sales, ...	

View: 10 << First < Prev 1 Next > Last >>





- Staff will open note to view. 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:

Assign to be reviewed by

Reviewer: 19072 - Sales, Cameren

Notes: Corrected Note!

Note is complete.

Cancel Spell Check **Submit for Review** Save and Continue Save as Pending Save as Draft

- Supervisor will open the note. At the bottom of note complete 'Review Notes' section with comments, then click 'Accept'. The note will be removed from the Supervisor's 'Pending Services' section of their home page and updates the note on the Staff's 'Pending Services'

Review Notes

Date	Staff	Action	Notes
3/28/2018		Submit	Please Review and Approve this Note!?
3/28/2018		Reject	Rejected - Notes on what the Clinician may need to correct.
3/28/2018		Submit	Corrected Note!

This service has currently been submitted to be reviewed by: [dropdown] Update

Notes: Accepted!

Cancel Default Summary Custom Summary Print Spell Check **Accept** Reject

Supervisor 'Approved' the note: **\*In SUD Approving will Finalize this Note**

Notes Client Shortcuts Lab Results (0)

▼ Pending Services 1 Result

Svc #	Gsr #	Client #	Client Name	Provider	Date	Template	Procedure	Sort	Reviewer
1410819		7508772	TEST, CINDYTWO	9999CG - CLINICI...	3/7/2018	Clinician Pr...	381 Individual ...	● Accepted	

View: 10 << First < Prev 1 Next > Last >>

- Note is now ready to be 'Finalized' and the Staff can view the note to see Supervisor's comments:

Review Notes

Date	Staff	Action	Notes
3/28/2018		Submit	Please Review and Approve this Note!?
3/28/2018		Reject	Rejected - Notes on what the Clinician may need to correct.
3/28/2018		Submit	Corrected Note!
3/28/2018		Accept	Accepted!

Cancel Default Summary Custom Summary Print **Delete Service**



# **Individual Staff Log (Daily Approval)**



## Approval printout and Finalizing Notes

1. From your home screen, click on your name to get the “View staff screen.
2. In the daily approval section of the screen,
3. Enter the service date for the Staff Log (MAA) you wish to create.
4. Click on “Search.”

The screenshot displays the 'View Staff' interface in the Clinicians Gateway. At the top left is the 'Clinicians Gateway' logo. The main title is 'View Staff'. A search bar is located at the top right with a 'Clients' dropdown and a 'Search' button. Below the title bar is a 'Welcome:' message and navigation buttons for 'Home', 'Menu', and 'Log out'. The 'Staff Information for:' section lists various fields: SSN, Gender, BirthDate, Ethnicity, Medicaid PIN, Medicare PIN, DEA Number, UPIN, Staff Type (Unlicensed Worker), Languages (English), License #, License Renew, License State, Taxonomy, National Provider Id, Start date, End date, Last Changed On, and Record Created On. At the bottom, there are three tabs: 'Statistics' (with a date range of 02/23/2018 thru 03/07/2018 and an 'All' dropdown), 'Daily Approval' (with a 'Service Date' of 03/07/2018 and a 'Search' button), and 'Procedures' (showing '95 Results').

# 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!

# IMPORTANT!

## Please be sure to

**REVIEW THE DAILY LOG BEFORE YOU CLICK ON “APPROVE TIME”**

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

Daily Approval											Service Date: 03/07/2018	Search
Srv. #	Date	Type	Client #	Client Name	Reporting Unit	Procedure	Status	Approve	Time #	In Group	Approve Time	
3259557	3/7/2018	Indirect			9999CG CLINICIAN GATEWAY TEST MHS AD	401 Mental Health Promotion	PENDING	Pending	00:20	1	00:20	
3259546	3/7/2018	Group	75087772	TEST CINDYTWO	9999CG CLINICIAN GATEWAY TEST MHS AD	391 Group Rehabilitation	PENDING	Pending	01:00	3	00:20	
3259545	3/7/2018	Group	75226968	TEST CINDY	9999CG CLINICIAN GATEWAY TEST MHS AD	391 Group Rehabilitation	PENDING	Pending	01:00	3	00:20	
3259525	3/7/2018	Group	75087772	TEST CINDYTWO	9999CG CLINICIAN GATEWAY TEST MHS AD	391 Group Rehabilitation	PENDING	Pending	01:00	2	00:30	
3259524	3/7/2018	Group	75226968	TEST CINDY	9999CG CLINICIAN GATEWAY TEST MHS AD	391 Group Rehabilitation	PENDING	Pending	01:00	2	00:30	
3259487	3/7/2018	Indiv.	75087772	TEST CINDYTWO	9999CG CLINICIAN GATEWAY TEST MHS AD	377 90839 Crisis Thpy 60 min	PENDING	Pending	01:30	1	01:30	

6 service records on 3/7/2018 for a total time of 03:30.

- 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.

# IMPORTANT!

# IMPORTANT!

**REVIEW THE DAILY LOG BEFORE YOU CLICK ON “APPROVE TIME”**

This will FINALIZE all your pending notes for 3/7/2018; Your total number of hours = 03:30.

ARE YOU SURE?

OK Cancel

Service Date: 03/07/2018 Search

Srv. #	Date	Type	Client #	Client Name	Reporting	Status	Approve	Time	# In Group	Approve Time
3259557	3/7/2018	Indirect			9999CG C	PENDING	Pending	00:20	1	00:20
3259546	3/7/2018	Group	75087772	TEST CINDYTWO	9999CG C	PENDING	Pending	01:00	3	00:20
3259545	3/7/2018	Group	75226968	TEST CINDY	9999CG C	PENDING	Pending	01:00	3	00:20
3259525	3/7/2018	Group	75087772	TEST CINDYTWO	9999CG C	PENDING	Pending	01:00	2	00:30
3259524	3/7/2018	Group	75226968	TEST CINDY	9999CG C	PENDING	Pending	01:00	2	00:30
3259487	3/7/2018	Indiv.	75087772	TEST CINDYTWO	9999CG CLINICIAN GATEWAY TEST MHS AD	PENDING	Pending	01:30	1	01:30

6 service records on 3/7/2018 for a total time of 03:30. Approve Time

**Once you click on “Approve Time,” the service notes are finalized.**

**Service Notes are sealed with the clinician’s Electronic Signature**

Use the print icon on the Individual Staff Log

Print Daily Approval

1

2

ALAMEDA COUNTY Behavioral Health Care Services

Home | Help | Log Out

Individual Staff Log

Service Date: 3/7/2018

Svc #	Type	RU	Client #	Client Name	Procedure	Time		Loc	Rec.	Flags
						H:M	Grp Ct			
		9999CG								

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. You may specify which pages to print, eliminating unneeded pages.

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



## Co-staff Individual Logs

**PRIMARY CLINICIANS MUST FINALIZE THE NOTE FIRST. CO-STAFF WILL BE UNABLE TO GET TIME ON THEIR STAFF LOG UNTIL THE PRIMARY FINALIZES.** (Time will ONLY be transferred into Insyst on the day the Primary finalizes.)

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

Daily Approval										Service Date: 03/07/2018	Search
Srv. #	Date	Type	Client #	Client Name	Reporting Unit	Procedure	Status	Approve	Time #	In Group	Approve Time
3259487	3/7/2018	Indiv.	75087772	TEST CINDYTWO	9999CG CLINICIAN GATEWAY TEST MHS AD	377 90839 Crisis Thpy 60 min	PENDING	Waiting on Finalization	01:00	1	01:00
3259682	3/7/2018	Indiv.	75087772	TEST CINDYTWO	9999CG CLINICIAN GATEWAY TEST MHS AD	377 90839 Crisis Thpy 60 min	PENDING	Pending	01:00	1	01:00

2 service records on 3/7/2018 for a total time of 02:00.

Approve Time

- If you attempt to Approve Time before the primary you will notice the service will not be displayed on your Staff Log’s print out

<h2>Individual Staff Log</h2>										
										<b>Service Date:</b> 3/7/2018
Svc #	Type	RU	Client #	Client Name	Procedure	Time H:M	Grp Ct	Loc	Rec.	Flags
3259682	Indiv.	9999CG CLINICIAN GATEWAY TEST MHS AD	75087772	TEST CINDYTWO	377 90839 Crisis Thpy 60 min	01:00	1	Office		
1 service record on 3/7/2018 for a total time of						01:00				
I hereby certify, under penalty of perjury, that the information contained in this document is accurate and free from fraudulent										

- Inform the Primary clinician they will need to finalize their service
- Once the service is Finalized (1) return to Daily Approval and View Report (2)

Daily Approval										Service Date: 03/07/2018	Search
Srv. #	Date	Type	Client #	Client Name	Reporting Unit	Procedure	Status	Approve	Time #	In Group	Approve Time
3259682	3/7/2018	Indiv.	75087772	TEST CINDYTWO	9999CG CLINICIAN GATEWAY TEST MHS AD	377 90839 Crisis Thpy 60 min	FINALIZED	Approved	01:00	1	01:00
3259487	3/7/2018	Indiv.	75087772	TEST CINDYTWO	9999CG CLINICIAN GATEWAY TEST MHS AD	377 90839 Crisis Thpy 60 min	FINALIZED	Approved	01:00	1	01:00

2 service records on 3/7/2018 for a total time of 02:00. [View Report](#)

Individual Staff Log										
Service Date: 3/7/2018										
Svc #	Type	RU	Client #	Client Name	Procedure	Time H:M	Grp Ct	Loc	Rec.	Flags
3259682	Indiv.	9999CG CLINICIAN GATEWAY TEST MHS AD	75087772	TEST CINDYTWO	377 90839 Crisis Thpy 60 min	01:00	1	Office		
3259487	Indiv.	9999CG CLINICIAN GATEWAY TEST MHS AD	75087772	TEST CINDYTWO	377 90839 Crisis Thpy 60 min	01:00	1	Office		
<b>2 service records on 3/7/2018 for a total time of</b>						<b>02:00</b>				

**\*\*Note:**

Both primary and co-staff times are transferred to InSyst, the evening that the note is finalized by the primary clinician.

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

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

# Printing



## Printing from Daily Approval

To print your Staff Log and progress notes after Daily Approval, use the printer icon adjacent to the image. Do not use File/Print

1. First, decide which pages to print. You can scroll through document using the inner
2. Then use the printer icon to bring up the printing menu.

Use the print icon on the Individual Staff Log

Print Daily Approval

Welcome: [Name]

Home Menu Log out

ALAMEDA COUNTY Behavioral Health Care Services

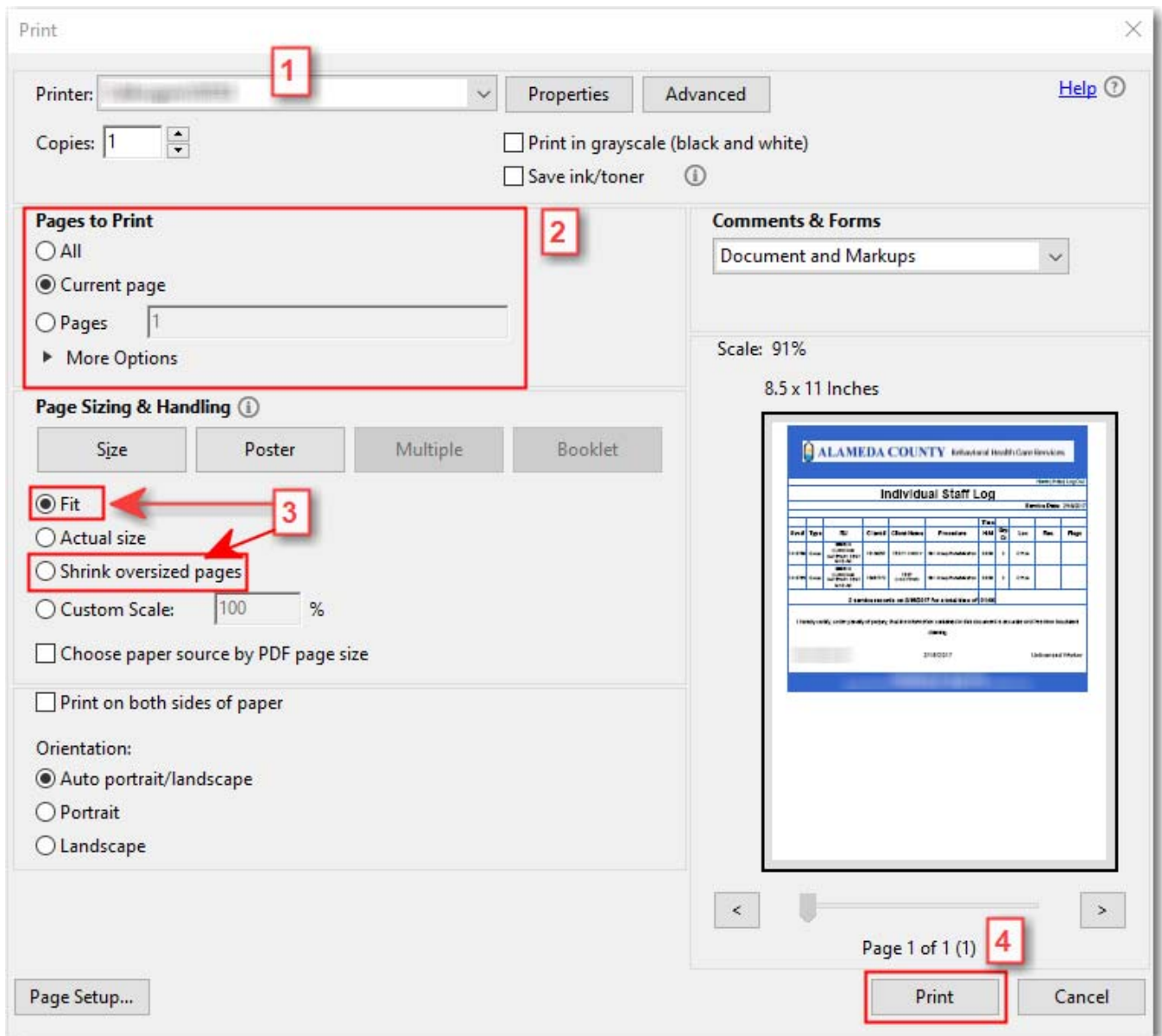
Home | Help | Log Out

Individual Staff Log

Service Date: 3/7/2018

Svc #	Type	RU	Client #	Client Name	Procedure	Time H:M	Grp Ct	Loc	Rec.	Flags
		000000								

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.



1. Select your Printer
2. Chose which pages to print (I selected current page to print only page 1)
3. Set Page Scaling to either 'Fit' or 'Shrink oversized pages'
4. Click 'Print'



# 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.

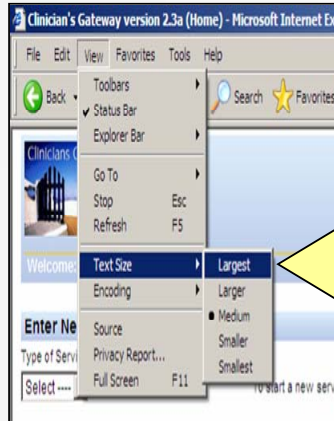
## Setting Margins so all the Information is Displayed when Printing...

•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.

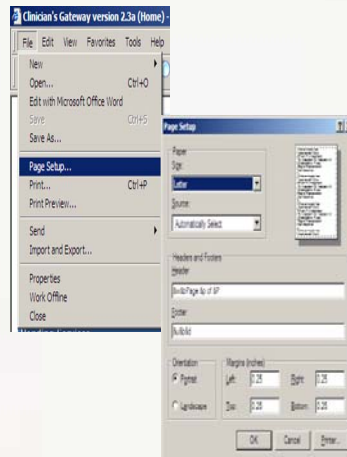
•The Header is needed to print client info on the OLPN

## UTILIZATION REVIEW..

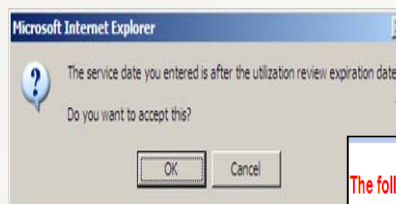
•It is very important that you keep all Client Record in Compliance. When ever you see the Utilization Review up-to-date. Make sure your Client Assessments and Service/Treatment Plans are completed in a timely manner.



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





# Deleting a Note

### **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 Insyst and redone by the clinician/physician in Clinician's Gateway. We cannot 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 4:00pm on the day that the note has been finalized:
  - Submit a '**Clinician's Gateway Staff Note Delete Request**' and make sure to mark it as a 'Same-Day Delete'
  - Complete the form and click submit
  - You will receive a Pending request in your email
  - Contact the Help Desk via phone at (510) 567-8181 (tie line 38181) to inform them that a "Clinician's Gateway Same Day Delete has been Submitted
- If it is after 4:00pm of the day that the note has been Finalized:
  - Submit a '**Clinician's Gateway Staff Note Delete Request**' and make sure to mark it as a 'Not Same-Day Delete'
  - Complete the form and click submit
  - You will receive a Pending request in your email
  - Ensure your Insyst support staff received a copy in order to delete the service from Insyst

The contact on the e-form will be notified when the note has been marked as deleted.

**Be sure to submit delete requests as soon as an error is discovered. If note deletes are submitted after the service has been claimed, the note cannot be deleted.**

**Note Delete Requests are found in BHCS E-Forms in the Clinicians Gateway section.**










Contact Information


### Clinician's Gateway Staff Note Delete Request

Please complete this form and allow 3 business days for processing. This Delete Note Request form is to be used for requesting Clinicians Gateway Notes to be Deleted from the BHCS IS Support Group.


**Use the TAB key to navigate through each field.** Click on the GREEN circles for help on each field. When you have completed the form, click on the "Submit CG Note Deletion Request" button. The completed form will be emailed to the IS Support Help Desk ([HIS@acgov.org](mailto:HIS@acgov.org)) and you will receive a copy for your records. Note: To process another request, simply press the Refresh icon or the F5 key to reload the form.



Today's Date :	03/07/2018	 
Clinician's First Name :	<input type="text"/>	
Clinician's Last Name :	<input type="text"/>	
Clinician's Phone / Ext :	<input type="text"/>	
Clinician's Email :	<input type="text"/>	
Enter Name of Organization (BHCS or CBO name):	<input type="text"/>	


Indicate if this deletion is for the Same-Day or Not Same-Day :


Same-Day Delete or Rejected Delete  
 Not Same-Day Delete   
 Already Claimed Delete

CG Service Number :  
(Please confirm the service number, once submitted this number cannot be changed)

Client Number :  

Service Date :   

Service RU :  



Clinician's Staff Number :  

Reason for Note Deletion (Please specify) :

Supporting Documentation

You can either scan a copy of the note and attach it to this form as an electronic document OR copy the web address of the note from Clinician's Gateway and paste it into the available web address field below.

Web Address (URL) of CG Note :

File Attachment :   upload (8 MB max) 



# **Consumer/Client Life Plan – Treatment Plan**



## Starting the Client Plan

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

The Consumer/Client Life Plan consists of two plan types: the Medication Plan and the Universal Client Plan. Throughout these Plans, 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 episode cycle. Include Client Participation information before submitting for approval.)
2. Submit for approvals by licensed, supervisor and medical staff as needed.
3. **Obtain approvals** in Clinician's Gateway.
4. Print for Client Signature. (After submitting for approval the Plan doesn't say "Pending")
5. Add the client signature date in CG.
6. Finalize the Plan.
7. Submit all the required Annual Documents with the Approved Treatment Plan signed by the client to supervisorial staff.
8. Support staff enters Plan approval into InSyst and scans the entire plan.
9. "Edit" the Plan when objectives are achieved. Minor edits are allowed without re-approval.
10. **Revise:** modify current plan and obtain new signatures/approvals as needed during the plan year.
11. **Renew:** Renew the Plan, before the end date of the current plan, for the next year as needed.

### A special note from the BHCS QA Department:

*Once a Licensed, Waivered or Registered LPHA (including doc's) sign the Plan and then have the Client sign the Plan it is compliant for documentation requirements (if done by due date).*

*This can be accomplished by printing, have the client sign and routing to be scanned for data entry.*

*We have Clinic supervisors who are doing a great job of reviewing Plans by requiring the Plans to be forwarded to them for review. However, this does not need to hold up the finalization process for Licensed, Waivered and Registered LPHA's. Please note, if a revision is requested by the Supervisor—then the clinician will need to do so, re-sign with the new date, and again obtain the client signature. This too will be scanned into the client record (an auditor will see both Plans, but audit the most recent).*

*Please remember--It is crucial that anytime a printed CG document is modified by hand (such as a client signature) that it be scanned into the client record as this becomes part of the Medical Record. It MUST be uploaded—or we are not maintaining an accurate Medical Record. Regardless of the reason (such as the document says "pending", "draft", etc.) a document routed for uploading into Laserfiche by a clinicians—MUST always be uploaded.*

To **start writing a Plan**, Choose “Client Plan” from the Enter New Service menu on your Home page, enter the client # or name. Choose plan type and click “Start”.

**Enter New Service:**

Type of Service: Primary Clinician

Client Plan (dropdown)

Client: test cindy

Plan Type (dropdown): Universal, Universal, Medication

Start Client Plan

Select the line with the correct client, you may get multiple clients. **\*Ignore the RU listed as the Lead Provider.**

**Start Client Plan for:**

Primary Clinician: [dropdown] Client: test cindy Search

**▼ Servicable Clients Matching "test cindy" 2 Results**

Clinician	Client #	Client Name	Status	Gender	Age	Services	Plan Type	Lead provider	
[blurred]	75226968	TEST, CINDY	Active	Female	117	0	Universal	9999CG - CLINICIAN GATEWAY TEST MHS AD	Select Client
[blurred]	75087772	TEST, CINDYTWO T	Active	Female	58	4	Universal	99995 - Short Term House	Select Client

The View Client Plans window will display Plans that already exist: Note the Plan # (1), the reporting unit (2), the start and end dates (3), and the status(4) of the plan (New, Authorizing, or Finalized)

**The following Client Plans already exist for this client. If possible RENEW or REVISE these plans before creating a new plan.**

**▼ The following Client Plans exist for TEST, CINDYTWO T (75087772) 7 Results**

1 Plan #	Plan Type	2 Provider	Start Date	End Date	3 Author	Rev	Status	4
4687	ALE_Client_Plan_MHS	9999CG - CLINICIAN GATEWAY T...	4/5/2018	2/28/2019	[blurred]	1	Finalized	
4685	ALE_Meds_Svcs_Plan	99995 - Short Term House	2/1/2018	2/28/2018	[blurred]	1	Finalized	
4652	Standard	99995 - Short Term House	2/5/2016	2/4/2017	[blurred]	1	Finalized	
4651	Standard	9999CG - CLINICIAN GATEWAY T...	12/29/2015	11/30/2016	[blurred]	1	Finalized	
4642	Standard	99991 - West County Mental Health...	1/8/2015	1/7/2016	[blurred]	1	Authorizing	
4641	Standard	9999CG - CLINICIAN GATEWAY T...	10/3/2014	10/31/2014	[blurred]	1	Finalized	
4630	Standard	99991 - West County Mental Health...	7/1/2014	12/31/2014	[blurred]	1	Finalized	

**Only create new plans for a new Reporting Unit or if an existing plan CANNOT be RENEWED or REVISED.**

**Create A New Plan** (Note: only one plan may be active per provider for a given date range)

Clinician: [blurred] Client: TEST, CINDYTWO T (75087772) Plan Type: Universal Start New Plan



**First, Try to Renew or Revise.**

Revise a plan in the same reporting unit that is still in effect.

Renew a plan in the same reporting unit that has ended within the last six months or will be ending soon.

This Plan can be RENEWED because its End Date is recent;

The following Client Plans already exist for this client. If possible RENEW or REVISE these plans before creating a new plan.

▼ The following Client Plans exist for TEST, CINDYTWO T (75087772) 7 Results

Plan #	Plan Type	Provider	Start Date	End Date	Author	Rev	Status
4687	ALE_Client_Plan_MHS	9999CG - CLINICIAN GATEWAY T...	4/5/2018	2/28/2019		1	Finalized
4685	ALE_Meds_Svcs_Plan	99995 - Short Term House	2/1/2018	2/28/2018		1	Finalized
4652	Standard	99995 - Short Term House	2/5/2016	2/4/2017		1	Finalized
4651	Standard	9999CG - CLINICIAN GATEWAY T...	12/29/2015	11/30/2016		1	Finalized
4642	Standard	99991 - West County Mental Health...	1/8/2015	1/7/2016		1	Authorizing
4641	Standard	9999CG - CLINICIAN GATEWAY T...	10/3/2014	10/31/2014		1	Finalized
4630	Standard	99991 - West County Mental Health...	7/1/2014	12/31/2014		1	Finalized

View: 10 | << First | < Prev | 1 | Next > | Last >>

View | Edit | **Renew** | Print

This Plan can be REVISED because it is still in effect:

The following Client Plans already exist for this client. If possible RENEW or REVISE these plans before creating a new plan.

▼ The following Client Plans exist for TEST, CINDYTWO T (75087772) 7 Results

Plan #	Plan Type	Provider	Start Date	End Date	Author	Rev	Status
4687	ALE_Client_Plan_MHS	9999CG - CLINICIAN GATEWAY T...	4/5/2018	2/28/2019		1	Finalized
4685	ALE_Meds_Svcs_Plan	99995 - Short Term House	2/1/2018	2/28/2018		1	Finalized
4652	Standard	99995 - Short Term House	2/5/2016	2/4/2017		1	Finalized
4651	Standard	9999CG - CLINICIAN GATEWAY T...	12/29/2015	11/30/2016		1	Finalized
4642	Standard	99991 - West County Mental Health...	1/8/2015	1/7/2016		1	Authorizing
4641	Standard	9999CG - CLINICIAN GATEWAY T...	10/3/2014	10/31/2014		1	Finalized
4630	Standard	99991 - West County Mental Health...	7/1/2014	12/31/2014		1	Finalized

View: 10 | << First | < Prev | 1 | Next > | Last >>

View | Edit | **Revise** | Print

**\*SUD Will only use New and Revise**

**Only Use Start New Plan for a new reporting unit or if a previous plan can't be Revised or Renewed!**

**Only create new plans for a new Reporting Unit or if an existing plan CANNOT be RENEWED or REVISED.**

Create A New Plan (Note: only one plan may be active per provider for a given date range)

Clinician	Client	Plan Type	Action
	TEST, CINDYTWO T (75087772)	Universal	<b>Start New Plan</b>

This will bring up the Client Plan entry screen.

The screenshot shows the 'Client Plan MHS' entry form. It includes fields for Plan # (New), Status (New), Revision (1), Episode Opening Date (3/7/2007), Client (TEST, CINDYTWO T (75087772)), Effective Start (03/01/2018), Client DOB (2/2/1960), Effective End (02/28/2019), Provider (9999CG - CLINICIAN GAT), Plan type (Initial/Update), and a checkbox for 'Consumer/Client is a long term ACBHCS beneficiary (> 3 months)'. Red boxes with numbers 1-7 highlight these specific fields.

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.
2. The “Revision” number will tell you if it is revision #1, 2, 3, etc.
3. The Status will be “New” before submitting for authorization, “Authorizing” if submitted, or “Finalized” after approved by approvers and finalized by the clinician.
4. The Effective Start and Effective End automatically default to cover the one year starting with the first day of the episode opening month. End dates can be changed if your program uses shorter time frames. **\*Verify the dates are correct (SUD will be 90 day plans)**
5. **Choose the Correct Reporting Unit** for the client.
6. Mark Initial if it is the first plan for the client in this Reporting Unit. Mark Update if it is an annual update or a revision of the current plan during the effective period.
7. If the Client is not a long term beneficiary of Alameda County BHCS (receiving services less than 3 months), then uncheck the box.

**Fill in Goals, Strengths, Challenges\*, Objectives, Modalities, and Specific Services.**

The screenshot shows two sections: 'MY GOALS FOR THE FUTURE' with a text box for 'INDIVIDUAL/FAMILY DESIRED RESULTS FROM MH INTERVENTIONS (Client quote if possible)', and 'MY STRENGTHS' with a text box for 'INDIVIDUAL/FAMILY STRENGTHS TOWARD OVERCOMING BARRIERS AND ACHIEVING DESIRED MH RELATED RESULTS'.

**\*Challenges section is specific to Universal Plan**

**CHALLENGES**

**Area of Challenges:** Community Life, Family Life, Safety School/Education, Vocational, Independent Living, ADLs, Health, Housing, Legal, SUD, Food/Clothing/Shelter, etc.

(Select) [ ] (Select) [ ]

**Level of Challenges:** Moderate, Severe

**Specific Challenges or Functional Impairments related to MH Diagnosis's Signs & Symptoms:** [For Case Mgt, must indicate need for C/M service, i.e. ct. is homeless. Also, must indicate (1) which severe Symptoms/Impairments/Barriers resulting from MH Diagnosis that prevents client from accessing/maintaining needed services, or (2) for child that the lack of such services (caretaker not providing) exacerbates child's MH symptoms/impairments.]

[ ]

[Add Another Challenge](#)

**Use 'Add Another Challenge' button to add more challenges as needed.**

**OBJECTIVES**

**Obj#** Short-Term Mental Health Objectives: Specific, quantifiable or observable outcomes of target symptoms, behaviors, or impairments in functioning. (Note: these are ALWAYS MENTAL HEALTH Objectives - even when providing Case Management Services.)

1 [ ]

**Target Date:** (12 months unless specified) 12 Months [ ]

**At Reassessment: (Optional)** When appropriate indicate level of improvement, date and initial.

Not Improved  
 Somewhat Improved  
 Very Much Improved

Date: [ ] Initials: [ ]

Met [ ]

[Add Another Objective](#)

**Use 'Add Another Objective' button to add more objectives as needed.**

The Objectives will be displayed on the progress notes for reference.

Revisions can be made during the Effective Period to add or change Objectives, or mark the level of improvement, or accomplishment of the Objective.

## Service Modality and Specific Services for each modality

1. Select the correct Service Modalities as needed.
2. For each Modality selected, there will be a section to annotate the specific services for that modality

## The Modality and Services sections vary based on Plan type

Modality and Services sections specific to the Medication Plan:

SERVICE MODALITIES		
<b>MODALITY</b>	<b>FREQUENCY</b>	<b>DURATION</b>
<input checked="" type="checkbox"/> Medication Mgmt	Every ▾ Month and As Needed ▾	12 Months ▾
<input checked="" type="checkbox"/> Other Testing	Every ▾ Week and As Needed ▾	12 Months ▾
<input type="checkbox"/> Other	Every ▾ Week and As Needed ▾	12 Months ▾

SPECIFIC SERVICES FOR EACH MODALITY	
<b>MODALITY</b>	<b>Detailed Intervention(s)</b>
Medication Mgmt	Detailed Interventions provided to client and/or significant support may include but are not limited to: <ul style="list-style-type: none"><li><input checked="" type="checkbox"/> Evaluation of clinical effects of medication.</li><li><input checked="" type="checkbox"/> Medication regimen adjustment.</li><li><input checked="" type="checkbox"/> Obtaining informed consent for medication (inform of risks and benefits, discuss alternative treatments and obtain signed informed consent).</li><li><input checked="" type="checkbox"/> Medication education (re proper use, benefits, risks and side effect management of medications).</li><li><input checked="" type="checkbox"/> Medication prescribing, administration or dispensing.</li><li><input checked="" type="checkbox"/> Medication related consultation with providers.</li><li><input checked="" type="checkbox"/> Phone calls to client and/or significant support persons about medications.</li><li><input checked="" type="checkbox"/> Phone calls to pharmacy and transmitting medication orders (re communicate with pharmacy, prepare prescription orders for transmission, authorize prescription refills, and resolve issues related to client's prescriptions).</li><li><input checked="" type="checkbox"/> Counseling (Supportive Psychotherapy) and Coordination of Care (Referrals).</li></ul>
	Additional Comments: <input type="text"/>
Testing	<input type="text"/>

Modality and Services sections specific to the Universal Plan:

SERVICE MODALITIES		
MODALITY	FREQUENCY	DURATION
<input checked="" type="checkbox"/> Collateral	Every Week and As Needed	12 Months
<input checked="" type="checkbox"/> Case Mgmt	Every Week and As Needed	3 - 12 Months
<input type="checkbox"/> Indiv Rehab	Every Week and As Needed	12 Months
<input type="checkbox"/> Group Rehab	Every Week and As Needed	12 Months
<input type="checkbox"/> Indiv Therapy	Every Week and As Needed	12 Months
<input checked="" type="checkbox"/> Group Therapy	Every Week and As Needed	12 Months
<input type="checkbox"/> Family Therapy	Every Week and As Needed	12 Months
<input type="checkbox"/> Multi Family Grp Therapy	Every Week and As Needed	12 Months
<input type="checkbox"/> Medication Mgmt	Every Month and As Needed	12 Months
<input type="checkbox"/> Collateral Family Grp	Every Week and As Needed	12 Months
<input type="checkbox"/> TBS	Every Week and As Needed	3 - 12 Months
<input type="checkbox"/> Katie A. (ICC)	Every Week and As Needed	3 - 12 Months
<input type="checkbox"/> Katie A. (IHBS)	Every Week and As Needed	3 - 12 Months
<input type="checkbox"/> Day Rehab	Every Day and As Needed	6 - 12 Months
<input type="checkbox"/> Crisis Residential	Every Week and As Needed	3 - 12 Months
<input type="checkbox"/> Adult Residential	Every Week and As Needed	6 - 12 Months
<input type="checkbox"/> Crisis Stabilization	Every Week and As Needed	3 - 12 Months
<input checked="" type="checkbox"/> Other Testing	Every Week and As Needed	12 Months
<input type="checkbox"/> Other	Every Week and As Needed	12 Months

SPECIFIC SERVICES FOR EACH MODALITY	
MODALITY	Detailed Intervention(s)(For Case Management indicate as relevant: linkage to and monitoring of community support services for _____ (i.e. homeless, joblessness, medical illness, or substance abuse) will result in client achieving their Mental Health Objectives # and # listed above)
Collateral	
Group Therapy	
Case Mgmt	
Testing	

# Discharge Plan, Authorizing, and Client Participation

Finish by entering the Discharge Plan, Additional Comments, Authorizations, and Participation sections.

**DISCHARGE PLAN**

DISCHARGE PLAN (Readiness/Time Frame/Expected Referrals, Etc.)

Additional Comments (Client, Provider, Family, etc.)

If authorization is needed before printing for client signature, add authorizers here. Plan will be sent to them to authorize

**AUTHORIZATION SIGNATURES**

This plan is to be forwarded to the following for authorization:

- Psychiatric NP/PA
- Psychiatrist
- Program Supervisor
- Other

Select Clinician

Select Clinician

Select Clinician

Select Clinician

Client is being treated by a non-BHCS psychiatrist.

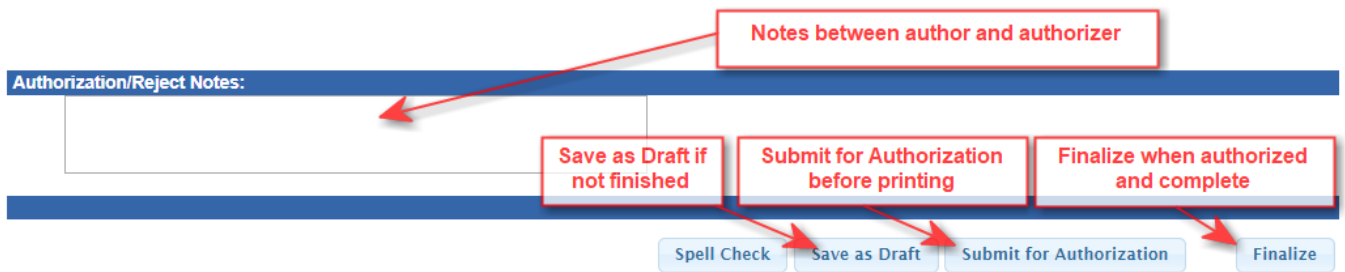
This plan also sent to:

**INDIVIDUAL/FAMILY PARTICIPATION**

- Plan was discussed in primary language
- Individual/Family was offered a copy of this Plan in English
- Individual/Family participated in the development of, and agreed to, this Plan.
- Provider attests that Individual signed plan.
- Provider attests that legal representative (Parent, Legal Guardian, Conservator, etc.) signed or verbally accepted this Plan on this date due to Individual inability to sign.
- Individual/Family verbally accepts this plan but not able to sign on this date (explain below).
- Individual/Family declines to sign (explain below).
- See progress note dated [ ] for discussion of plan with Individual/Family.

Check the box for the correct type of participation. Type and date of Participation and progress note date are required before Finalizing.

After completing the plan, “Submit for Authorization”. (At this point you could bring up the plan and “Print for Signature”. This procedure is described later after authorizations are described.)



When the Plan is “Saved” or “Submitted”, it will appear on the Home page of the author and the authorizers. Notice the yellow dot near Authorizing, this means it has been submitted but not authorized by one the selected Authorizers.

Pending Client Plans											1 Result
Plan #	Type	Client #	Client name	Provider	Date	Rev	Author	Status	Role	Supercedes #	
4690	ALE_Client_Plan_MHS	75087772	TEST, CINDYTWO T	9999CG - CLINICIAN GA...	3/1/2018	1		Authorizing	Author		

View: 10

<< First < Prev 1 Next > Last >>

The role column displays if you are the author or one of the authorizers.

Pending Client Plans											1 Result
Plan #	Type	Client #	Client name	Provider	Date	Rev	Author	Status	Role	Supercedes #	
4690	ALE_Client_Plan_MHS	75087772	TEST, CINDYTWO T	9999CG - CLINICIAN GA...	3/1/2018	1		Authorizing	Iphacosign		

View: 10

<< First < Prev 1 Next > Last >>

Obtain Authorizations. After “Submit for Authorization”, the plan appears on the Pending Client Plans list on the authorizer’s Home page. The authorizer should click the plan ID # or its blue button to open the plan for approval.

\*\*\*If the author of the plan doesn’t need any approvers, they may Finalize the plan after the client or representative signature date has been added to the Participation section.

Pending Client Plans											1 Result
Plan #	Type	Client #	Client name	Provider	Date	Rev	Author	Status	Role	Supercedes #	
4690	ALE_Client_Plan_MHS	75087772	TEST, CINDYTWO T	9999CG - CLINICIAN GA...	3/1/2018	1		Authorizing	Iphacosign		

View: 10

<< First < Prev 1 Next > Last >>

Click the Plan # to view the plan for authorization

The authorizer brings up the plan to review it. Using the Action Button they either Authorize, Reject, or possibly Finalize the Plan. (Only Finalize if all authorizers have approved the plan, and you are the last one.)

After reading the plan the authorizer can leave a note and either Authorize or Reject the plan

The Green dot tells me my plan was authorized. All it needs is the individual or family signature.

Plan #	Type	Client #	Client name	Provider	Date	Rev	Author	Status	Role	Supercedes #
4690	ALE_Client_Plan_MHS	75087772	TEST, CINDYTWO T	9999CG - CLINICIAN GA...	3/1/2018	1		Authorizing	Author	

\*\*\*If the author of the plan doesn't need any approvers, they may Finalize the plan after the client or representative signature date has been added to the Participation section.

Authorizers and their signature dates are shown in the Authorization Signature section near the end of the plan. After Authorization then bring up the plan and "Print for Signature" of the client or representative. (After "Submit", the "Pending" banner disappears and you can print it for the signature without "Pending" splashed across it.)

**AUTHORIZATION SIGNATURES**

This plan is to be forwarded to the following for authorization:

N/A

Licensed LPHA Co-Sign:	3/27/2018
------------------------	-----------

**INDIVIDUAL/FAMILY PARTICIPATION**

By signing, I agree that I have: 1) participated in the development of, and agreed to, this Plan; and 2) have been offered a copy of this Plan.

\_\_\_\_\_ Individual \_\_\_\_\_ Date

\_\_\_\_\_ and/or Family/Representative \_\_\_\_\_ Date

**Actions:**

Action	User Name	Date	Note
Submit		3/27/2018 1:48:41 PM	
Authorize		3/27/2018 2:16:15 PM	

**Authorization/Reject Notes:**

\_\_\_\_\_

Print for Signature

Edit

Print

Reject

Finalize

Delete

Action



After the Client/Family Signs, bring up the plan and enter the client participation. From the Action bar choose “Edit”. This is a “Mini-Edit” which will not require you to submit for authorization again.

**INDIVIDUAL/FAMILY PARTICIPATION**

Plan was discussed in primary language  
 Individual/Family was offered a copy of this Plan  
 Individual/Family participated in the development of, and agreed to, this Plan.

English ▾  
English ▾

Provider attests that Individual signed plan.  
 Provider attests that legal representative (Parent, Legal Guardian, Conservator, etc.) signed or verbally accepted this Plan on this date due to Individual inability to sign.  
 Individual/Family verbally accepts this plan but not able to sign on this date (explain below).  
 Individual/Family declines to sign (explain below).

See progress note dated 03/27/2018 for discussion of plan with Individual/Family.

03/27/2018

Once the plan is Authorized and signed by the Client and/or Family you may Finalize this plan

**Actions:**

Action	User Name	Date	Note
Submit	Sales, Cameren	3/27/2018 1:48:41 PM	
Authorize	Chavez, Aaron J	3/27/2018 2:16:15 PM	

Save Finalize

After the plan is authorized and signed by the individual and/or family, you can click ‘Finalize’.

**\*\*\*\*\* FINALIZE IT. \*\*\*\*\***

CONGRATULATIONS!

# Print for Client Signature

**BEFORE PRINTING, SUBMIT THE PLAN AND GET APPROVALS.** (When the Plan has not yet been submitted for approval the Plan will have “Pending” splashed across it)

**AFTER APPROVED, VIEW IT TO ACCESS THE “PRINT FOR SIGNATURE” BUTTON.** To view the Plan, click on its Plan Number or the blue button.

Status is green, meaning the plan has been authorized. Click either the Plan # or the blue button to view plan

Pending Client Plans										1 Result
Plan #	Type	Client #	Client name	Provider	Date	Rev	Author	Status	Role	Supercedes #
4690	ALE_Client_Plan_MHS	75087772	TEST, CINDYTWO T	9999CG - CLINICIAN GA...	3/1/2018	1		Authorizing	Author	

View: 10 | << First | < Prev | 1 | Next > | Last >>

The Plan appears on your screen. From the Action Bar, Click “PRINT FOR SIGNATURE”.

### AUTHORIZATION SIGNATURES

This plan is to be forwarded to the following for authorization:

N/A

Licensed LPHA Co-Sign:	3/27/2018
------------------------	-----------

Electronic Signature Date of Co-signer/Authorizer

---

### INDIVIDUAL/FAMILY PARTICIPATION

By signing, I agree that I have: 1) participated in the development of, and agreed to, this Plan; and 2) have been offered a copy of this Plan.

\_\_\_\_\_ Individual \_\_\_\_\_ Date

\_\_\_\_\_ and/or Family/Representative \_\_\_\_\_ Date

---

### Actions:

Action	User Name	Date	Note
Submit		3/27/2018 1:48:41 PM	
Authorize		3/27/2018 2:16:15 PM	

---

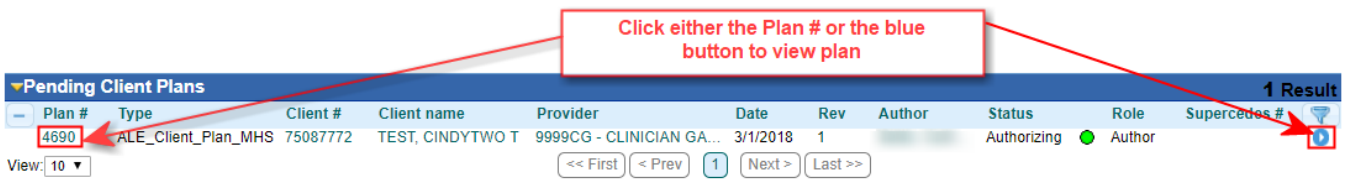
### Authorization/Reject Notes:

Print for Signature  
 Edit  
 Print  
 Reject  
 Finalize  
 Delete  
 Action ▾

(You can Print, Edit, Reject, Finalize or Delete from this screen via the Action bar. “Edit” will allow you to Submit for Authorization. Editing also requires you to resubmit the Plan for authorization.)

**RETURN TO THE PLAN TO ADD THE CLIENT SIGNATURE DATE AFTER IT IS OBTAINED.**

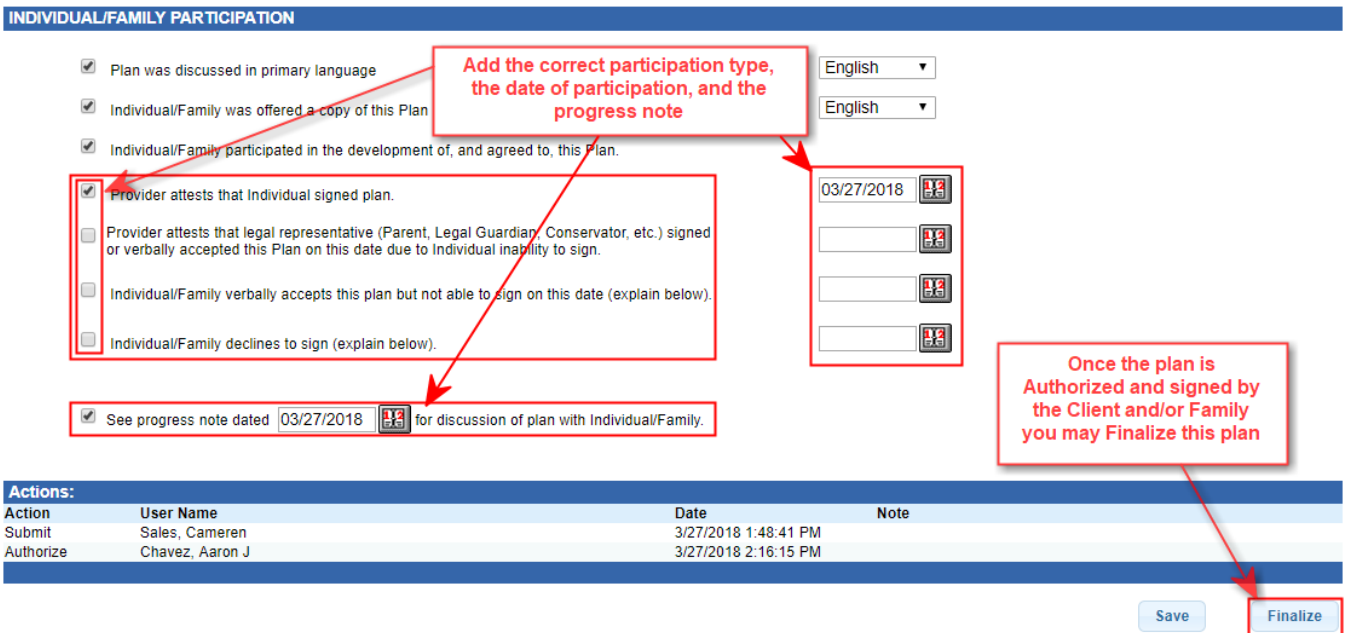
This edit will not trigger another round of authorizing. First, View the Plan by clicking on the Plan Number.



Click "Edit" on the Action bar.



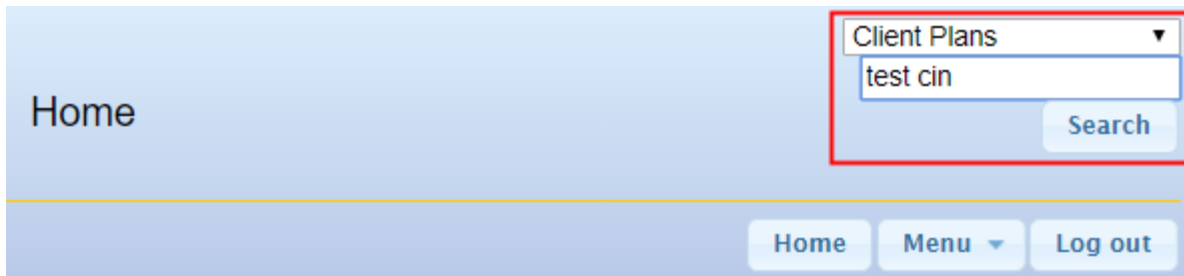
Add Individual/Family Participation and date the signatures. Then you can click 'Finalize'.



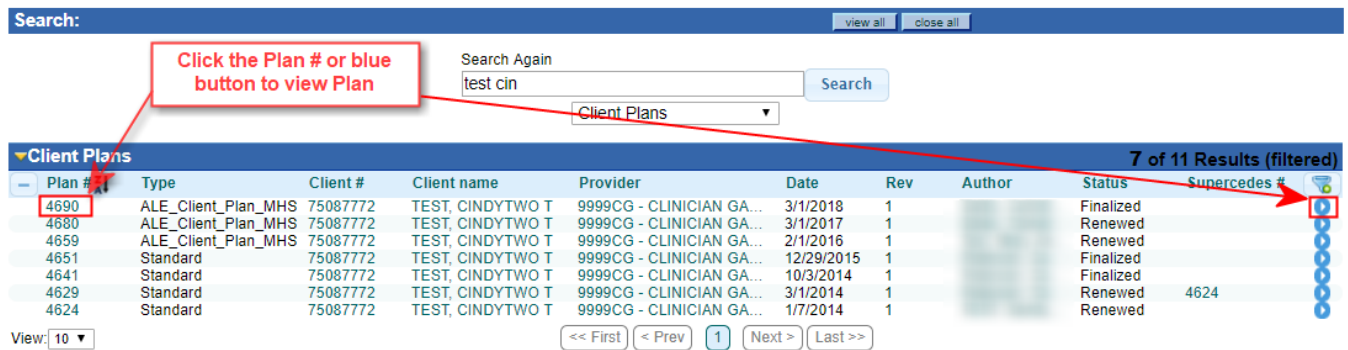
The Plan is removed from the Pending Client Plan list on the Home page after it is finalized.

## Viewing, Editing, and Revising a Finalized Plan

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”.



Search Results are displayed. Click on the Plan number or its blue button to view it. Note that this Plan’s Status is now “Finalized”.



If the plan is in the middle of the Effective Period, then the Finalized Plan may be Printed, Edited or Revised. (can’t renew it yet)



**Edit:** A Finalized Plan 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.
- Client signatures may be added.

**OBJECTIVES**

Obj# Short-Term Mental Health Objectives: Specific, quantifiable or observable outcomes of target symptoms, behaviors, or impairments in functioning. (Note: these are ALWAYS MENTAL HEALTH Objectives.)

Target Date: (12 months unless specified)

At Reassessment: (Optional) When appropriate indicate level of improvement, date and initial.

1	<input type="text" value="we can enter objective #1"/>	12 Months	<input type="radio"/> Not Improved
	<input type="text" value="Remove Objective"/>		<input type="radio"/> Somewhat Improved
			<input type="radio"/> Very Much Improved
			<input type="radio"/> Date:      Initials:
			<input type="radio"/> Met
2	<input type="text" value="And then there is objective # 2"/>	12 Months	<input type="radio"/> Not Improved
	<input type="text" value="Remove Objective"/>		<input type="radio"/> Somewhat Improved
			<input type="radio"/> Very Much Improved
			<input type="radio"/> Date:      Initials:
			<input type="radio"/> Met

**Unable to edit text but can update improvements**

**INDIVIDUAL/FAMILY PARTICIPATION**

Plan was discussed in primary language English

Individual/Family was offered a copy of this Plan in English

Individual/Family participated in the development of, and agreed to, this Plan.

Provider attests that Individual signed plan. 02/14/2018

Provider attests that legal representative (Parent, Legal Guardian, Conservator, etc.) signed or verbally accepted this Plan on this date due to Individual inability to sign.

Individual/Family verbally accepts this plan but not able to sign on this date (explain below).

Individual/Family declines to sign (explain below).

See progress note dated  for discussion of plan with Individual/Family.

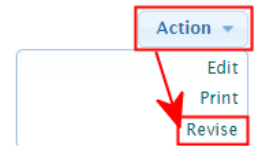
**Revise: Any substantial change is a Revision** and

- Revisions must be re-authorized and re-signed by the client.
- Revisions are given a new Plan #.
- New Revisions of Plans supersede earlier versions.

From the Action Bar, click on Revise.

**PLAN**

Plan #: 4690	Status: Finalized
Revision: 1	Episode Opening Date: 3/7/2007
Client: TEST, CINDYTWO T (75087772)	Effective Start: 3/1/2018
Client DOB: 2/2/1960	Effective End: 2/28/2019
Provider: 9999CG - CLINICIAN GATEWAY TEST MHS AD	



- Change **any** of the fields in the plan.
- Send for Authorization
- Obtain authorizer's signatures.
- Print for Signature.
- Add Client signature information to Plan.
- Finalize Plan.

# Renewing Client Plan

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

- From the Action Bar, click the Renew button.

The screenshot displays a 'PLAN' interface with the following details:

- Plan #:** 4685
- Revision:** 1
- Client:** TEST, CINDYTWO T (75087772)
- Client DOB:** 2/2/1960
- Provider:** 99995 - Short Term House
- Status:** Finalized
- Episode Opening Date:** 2/1/2007
- Effective Start:** 2/1/2018
- Effective End:** 2/28/2018
- Plan Instructions:** (with a PDF icon)

On the right side, there is an 'Action' dropdown menu with a red box around it. A red arrow points from the 'Action' menu to a 'Renew' button, which is also highlighted with a red box. Other options in the menu include 'Edit' and 'Print'.

- All of the entries from the previous plan will be brought forward into the new plan.
- 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.

# Concurrent Treatment Plans

Plans may now be active in more than one reporting unit concurrently.

## Start writing the plan as usual

**Enter New Service:**

Type of Service: Client Plan Primary Clinician: [Dropdown] Client: test cindy Plan Type: Universal Start Client Plan

## A grid of existing plans will be presented from which to choose.

- **First try to renew or revise an existing plan in your reporting unit.**

The following Client Plans already exist for this client. If possible RENEW or REVISE these plans before creating a new plan.

▼ The following Client Plans exist for TEST, CINDYTWO T (75087772) 7 Results

Plan #	Plan Type	Provider	Start Date	End Date	Author	Rev	Status
4690	ALE_Client_Plan_MHS	9999CG - CLINICIAN GATEWAY T...	3/1/2018	2/28/2019	Sales, C...	1	Finalized
4685	ALE_Meds_Svcs_Plan	99995 - Short Term House	2/1/2018	2/28/2018	Peterson...	1	Finalized
4652	Standard	99995 - Short Term House			Chavez, ...	1	Finalized
4651	Standard	9999CG - CLINICIAN GATEWAY T...			Peterson...	1	Finalized
4642	Standard	99991 - West County Mental H...			Plattonix...	1	Authorizing
4641	Standard	9999CG - CLINICIAN GATEWAY T...	10/3/2014	10/31/2014	Peterson...	1	Finalized
4630	Standard	99991 - West County Mental Health...	7/1/2014	12/31/2014	Plattonix...	1	Finalized

View: 10 << First < Prev 1 Next > Last >>

Only create new plans for a new Reporting Unit or if an existing plan CANNOT be RENEWED or REVISED.

Create A New Plan (Note: only one plan may be active per provider for a given date range)

Clinician: 19072 - Sales, Cameren, MD Client: TEST, CINDYTWO T (75087772) Plan Type: Universal Start New Plan

- **The Action Menu will tell you if you can Renew or Revise the plan**

The following Client Plans already exist for this client. If possible RENEW or REVISE these plans before creating a new plan.

▼ The following Client Plans exist for TEST, CINDYTWO T (75087772) 7 Results

Plan #	Plan Type	Provider	Start Date	End Date	Author	Rev	Status
4690	ALE_Client_Plan_MHS	9999CG - CLINICIAN GATEWAY T...	3/1/2018	2/28/2019	Sales, C...	1	Finalized
4685	ALE_Meds_Svcs_Plan	99995 - Short Term House	2/1/2018	2/28/2018	Peterson...	1	Finalized
4652	Standard	99995 - Short Term House	2/5/2016	2/4/2017	Chavez, ...	1	Finalized
4651	Standard	9999CG - CLINICIAN GATEWAY T...	12/29/2015	11/30/2016	Peterson...	1	Finalized
4642	Standard	99991 - West County Mental Health...	1/8/2015	1/7/2016	Plattonix...	1	Authorizing
4641	Standard	9999CG - CLINICIAN GATEWAY T...	10/3/2014	10/31/2014	Peterson...	1	Finalized
4630	Standard	99991 - West County Mental Health...	7/1/2014	12/31/2014	Plattonix...	1	Finalized

View: 10 << First < Prev 1 Next > Last >>

Action Menu: View, Edit, Revise, Print

(Continued on next page)



**Use “Start New Plan” only if you need a new RU or the existing plan is too old.**

Only create new plans for a new Reporting Unit or if an existing plan CANNOT be RENEWED or REVISED.

Create A New Plan (Note: only one plan may be active per provider for a given date range)

Clinician	Client	Plan Type	
	TEST, CINDYTWO T (75087772)	Universal	<a href="#">Start New Plan</a>

You will be warned if the “New Plan” cannot be finalized due to a pre-existing plan

Cannot save form until the following issues are resolved:

\* Warning! Another plan (# 4690) can be renewed or revised. This plan will not be able to be finalized.

▼ The following Client Plans exist for TEST, CINDYTWO T (75087772) 8 Results

Plan #	Plan Type	Provider	Start Date	End Date	Author	Rev	Status
4691	ALE_Client_Plan_MHS	9999CG - CLINICIAN GATEWAY T...	5/1/2018	2/28/2019		1	Authorizing
4690	ALE_Client_Plan_MHS	9999CG - CLINICIAN GATEWAY T...	3/1/2018	2/28/2019		1	Finalized

**If you work on a plan that cannot be finalized, you will not be able to finalize it.**

**Your work will be lost!**

# Troubleshooting

## **Client Plan End Dates:**

Normally clinician's will have to set the end date to the end month 12 months from the Start Date, but sometimes this data is entered incorrectly.

If the plan has been finalized, the user must send a Treatment Plan Change Request to the BHCS Help Desk at 567-8161 or [his@acbhcs.org](mailto:his@acbhcs.org) .

## **Client Plan Start Dates:**

These can usually be changed by doing a Revision or Renewal. Revision allows a new start date to be entered during the plan year. A Renewal starts after the end of the existing plan. Start Dates cannot be back dated.

If the Start Date needs to be earlier, then we must have a Change Request along with a signed paper Plan faxed or emailed to the Helpdesk indicating an earlier client signature. We can then do a QA override to attest to the Start Date change.

## **Incorrect Reporting Unit:**

If the Plan has not been finalized, reject the Plan, Edit it, and change the RU. If the Plan has been finalized, either do a new revision to change the RU, or submit a Treatment Plan Change Request form to the Help Desk.

**Revision being used when a Renewal was intended:** (Revisions keep the same end date while Renewals start after the current plan's end date)

Delete the Revision, go to the previous plan and click Renew.

If the dates don't match up we can adjust the end Date of the previous plan to cover the period for auditing purposes only.

**Plan Submitted for Authorization not appearing on Supervisor's Home page:**

Verify the Reporting Unit is set correctly. If not Staff must Reject the plan and update to the correct Reporting Unit and Submit for Authorization again.

Verify that the Checkboxes are checked next to the authorizer's names in the "Authorization Signatures" section. Click "Submit for Authorization" button.

**Client Signature details are incorrect:**

Edit the plan. Go to the Consumer/Client Life Plan

Go down to Consumer/Client Participation and fill out the appropriate responses.

**Authorizer Signatures not showing:**

Verify that the Checkboxes are checked next to the authorizer's names in the "Authorization Signatures" section. Then click "Submit for Authorization".



# Changing your Password



## Changing your password

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

PERSONAL INFO SECURITY (PASSWORD) GUIDES/HELP

- Choose the “Change Password” tab

Clinicians Gateway Security & Personalization

Welcome

Home Menu Log out

Profile Preferences **Change Password** Security Questions Electronic Signature Agreement

Profile Preferences **Change Password** Security Questions Electronic Signature Agreement

1 Enter your Old Password:

2 Enter your New Password:

3 Confirm Password:

4 Update Password

[click here if you forgot your password](#)

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 eight characters in length).
3. Re-enter your new password in the third field to confirm the change.
4. Click on “Update password”





# Administration Tools



# Administration Home Page

The screenshot displays the Administration Home Page with the following elements:

- Header:** "Clinicians Gateway" logo, "Home" text, and a "Clients" dropdown menu with a search button.
- Welcome:** A personalized welcome message and navigation buttons for "Home", "Menu", and "Log out".
- Enter New Service:** A section for starting a new service note, including a "Type of Service" dropdown and a "Select ----" dropdown.
- Client Shortcuts:** A section with tabs for "Notes", "Client Shortcuts", and "Lab Results (0)".
- Advanced Search:** A search section with filters for "For:" (Clients), "Type" (Any), "Status" (Any), and "Date" (Anytime), along with a "Search" button.
- Services Search:** A search section with filters for "All", "Service" (Anywhere), and "Rendered for" (Enter client id or name), along with a "Search" button.
- Search Services by Date:** A section with a calendar view for January, February, and March 2018, with a "Click day to see services performed on that day" instruction.
- Clinical Administrator Access:** A section with a "Search Staff" button and a search input field containing "81163 MOBILE CRISIS RESP PGM MHS AD" and "Anytime", along with a "Search" button.

- 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 a report on Clinical Staff by Reporting Unit through Search Staff notes (Finalized, Pending and Draft) at the bottom of the page
- 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)

This screenshot shows a close-up of the Global Search function in the upper right corner of the page. It features a "Staff" dropdown menu, a search input field, and a "Search" button. Below the search area are navigation buttons for "Home", "Menu", and "Log out".

blank

# Supervisor Tools

## Staff Reports

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

Clinical Administrator Access  
Search Staff

Enter Reporting Unit and Time parameter then click Search

9999CG CLINICIAN GATEWAY TEST MHS AD Between 02/01/2018 and 02/28/2018 Search

Administrator Access  
Tools

Tallies of services by staff are generated:

Staff #	Name	# Services Finalized	Average Interval Finalized	Time Finalized	# Services Pending	Average Interval Pending	Time Pending	# Services Draft
109		0		155:35	0	0	00:00	0
108		7		264:05	0	0	00:00	0
107		1		129:45	0	0	00:00	0
84		0		52:40	0	0	00:00	0
78		0		149:25	0	0	00:00	0
76		1		86:20	0	0	00:00	0
42		0		27:49	0	0	00:00	0
37		3		155:00	0	0	00:00	0
31		1		153:30	0	0	00:00	0

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)

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

Home

Staff

Search

Home Menu Log out

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

Search: view all close all

Search Again

Staff

**Staff** 10 Results

Staff #	Staff Name	Role	Open Cases	Closed Cases
		User	339	1649
		User	0	0
		User	0	0
		User	9	100
		User	0	74
		User	0	0
		User	0	0
		User	0	0
		User	0	0
		User	0	0
		User	0	0

View: 10

Click the correct Staff Name to view their Staff Page

## Staff View:

**Staff Information for:** [Name]

SSN:		License #:		Start date:	
Gender:		License Renew:		End date:	
BirthDate:		License State:		Last Changed On:	
Ethnicity:		Taxonomy:		Record Created On:	
Medicaid PIN:		National Provider Id:			
Medicare PIN:					
DEA Number:					
UPIN:					
CG Code:					
Staff Type:	Unlicensed Worker				
Languages:	English				

---

**Statistics** Service Dates: 02/28/2018 thru 03/28/2018 All

**Daily Approval** Service Date: 03/28/2018

**Procedures** 39 Results

**Providers** 3 Results

**Clients** 0 Result

**Groups** 1 Result

**Draft Service Records** 2 Results

**Pending Service Records** 0 Result

**Finalized Service Records** 12 Results

Service #	Client #	Client Name	Provider	Date	Status	Template	Procedure	Type
1410793	75087772	TEST, CINDYTWO	9999CG - CLINICIAN GAT...	3/7/2018	Finalized	Clinician Pro...	581 Plan Development	Individual
1410801	75087772	TEST, CINDYTWO	9999CG - CLINICIAN GAT...	3/7/2018	Finalized	Interim Asses...	323 90791 Psychiatric D...	Individual
1410812	75087772	TEST, CINDYTWO	9999CG - CLINICIAN GAT...	3/7/2018	Finalized	Clinician Pro...	381 Individual Rehabilita...	Individual
1410765			9999CG - CLINICIAN GAT...	11/27/2017	Finalized	Indirect	680 General Administrati...	Indirect
1410768	75087772	TEST, CINDYTWO	9999CG - CLINICIAN GAT...	11/27/2017	Finalized	AIMS	197 CG INFORMATION...	Individual
1410761	75087772	TEST, CINDYTWO	9999CG - CLINICIAN GAT...	11/9/2017	Finalized	Adult Assess...	197 CG INFORMATION...	Individual
1410786	75087772	TEST, CINDYTWO	9999CG - CLINICIAN GAT...	2/6/2017	Finalized	Clinician Pro...	391 Group Rehabilitation	Group
1410787	75135386	TESTCASE, DAVE	9999CG - CLINICIAN GAT...	2/6/2017	Finalized	Clinician Pro...	391 Group Rehabilitation	Group
1410788	75087772	TEST, CINDYTWO	9999CG - CLINICIAN GAT...	2/6/2017	Finalized	Adult Assess...	323 90791 Psychiatric D...	Individual
1410789	75087772	TEST, CINDYTWO	9999CG - CLINICIAN GAT...	2/6/2017	Finalized	Clinician Pro...	324 96151 Behavioral Eval	Individual

View: 10

Click on the Service # to examine any individual note.

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.

▼ Statistics						Service Dates: 03/01/2018 thru 03/07/2018 All Search
Type of Service	Clinician Role	Number of Services	Average Interval	Time	Time Reporting	Enter Estimated Time
Individual	Primary Clinician	3	-10	05:30	00:00	Est. %
	Co-Clinician	0	0	00:00		
Group	Primary Clinician	0	0	00:00		
	Co-Clinician	0	0	00:00		
Indirect	Primary Clinician	0	0	00:00		
	<b>Totals:</b>	<b>3</b>	<b>-10</b>	<b>05:30</b>		

**Search and Tag** can be used to assemble sets of notes based on multiple parameters, including Primary Therapist, Types of Notes, Time parameters, etc. Please review [Search and Tag Section](#) on page 28.

Define up to five parameters to narrow your search criteria.

Search for:  Service Records  Prescriptions

Include deleted records in search results

[Select search item] ▼	
[Select search item]	
Client	
Medical Compliance	
Note Status	
Note Text	
Primary therapist	
Procedure	
Record Type	
Reporting Unit	
Service Date	
Service duration	
Side Effects	
Treatment Location	



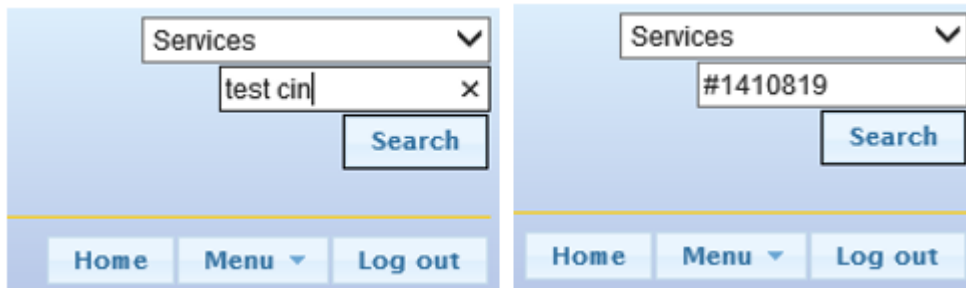


# Change Reviewer Procedure

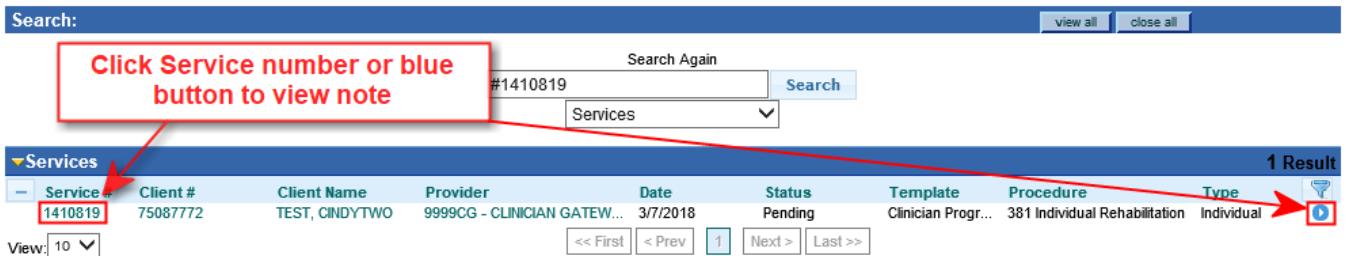
The designated reviewer on a service can be changed by a staff person who has been given the 'Can Review' role in Clinician's Gateway.

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.

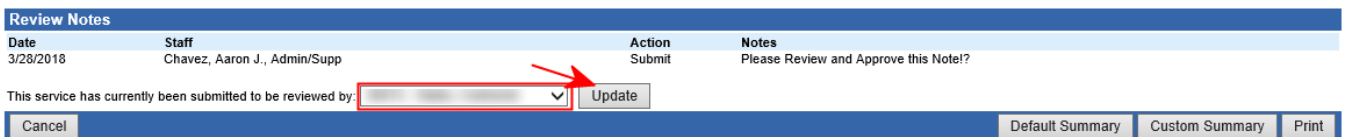
1. Locate the service. You can search for the client's services by client name or service # (#xxxxxxx) if known, or search for the Staff person's Pending services.



2. View the note by clicking the Service number or the blue 'Action button'.



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



The service will be transferred from the original reviewer's Home Page Pending to the replacement reviewer's Home Page Pending list.



# Managing Reports

# Reviewing Services: Rejected Service Notice and Daily Report Review

1. Duplicate or Rejected Service notices may be sent for research. Use the search functions from the Home page to find services.
2. Clerical Staff must justify the Daily InSyst Service Audit Reports against Clinician's Gateway services. Examples of the reports follow. Compare the daily Individual Staff Log from the clinicians to the Daily Audit Report for accuracy.

The screenshot shows the 'Clinicians Gateway' Home page. At the top right, there is a search box with a dropdown menu set to 'Clients' and a 'Search' button. Below the header, there are navigation buttons for 'Home', 'Menu', and 'Log out'. The main content area includes an 'Enter New Service' section with a 'Type of Service' dropdown and a 'Client Shortcuts' section. Below these are two search sections: 'Advanced Search' and 'Services Search'. The 'Advanced Search' section has dropdowns for 'For: Clients', 'Type: Any', 'Status: Any', and 'Date: Anytime', along with a 'Search' button. The 'Services Search' section has dropdowns for 'All' and 'Service: Anywhere', a text input for 'Rendered for: Enter client id or name', and a 'Search' button. At the bottom, there is a 'Clinical Administrator Access' section with a 'Search Staff' button. A calendar for January, February, and March 2018 is visible, showing dates from 1 to 31. At the very bottom, there is another search box with a dropdown set to '81163 MOBILE CRISIS RESP PGM MHS AD' and a 'Search' button.

- 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.

- Clinicians Gateway clinical notes finalized by the Clinicians generate the InSyst service records.
  - Nightly, after 5 p.m., finalized clinical notes from CG are downloaded to InSyst to create the InSyst service records. If the nightly download process fails or the CG service record is rejected **the Provider is responsible to manually enter the failed or rejected service record.**
  
- CG Service records are rejected due to the following:
  - InSyst Episode opening date is after the CG date of service
  - InSyst Episode closing date is before the CG date of service
  - CG service date is not a valid InSyst service day (example service provided on weekend when facility is closed)
  
- Below is examples of emails that will be sent from IS Help Desk when a CG service record is rejected and a manual InSyst service record is required:

## EXAMPLE ONLY

**Subject:** REJECTED SERVICE NOTICE - Clinician's Gateway RU# XXXXXX

Hello Clinicians,

The Clinician's Gateway service listed below for client number(s) XXXXXXXX, XXXXXXXX was rejected during the transfer from CG to InSyst. The reason for the rejection is that Reporting Unit: XXXXXX is not opened on Saturdays/Sundays.

Client Number	Reporting Unit	Service Date	Proc Code	Staff ID	Time	Co-Staff id	Time	Tx Loc	Num Grp	Dup Rea	E	P	Ref Num
XXXXXXXX	XXXXXX	13-Jan-18	323	XXXXXX	03:00	0	00:00	5	1	0	N	N	XXXXXX
<b>Reason: RU XXXXXX is not open on a SATURDAY.</b>													

Client Number	Reporting Unit	Service Date	Proc Code	Staff ID	Time	Co-Staff id	Time	Tx Loc	Num Grp	Dup Rea	E	P	Ref Num
XXXXXXXX	XXXXXX	14-Jan-18	323	XXXXXX	03:00	0	00:00	5	1	0	N	N	XXXXXX
<b>Reason: RU XXXXXX is not open on a SUNDAY.</b>													

If the CG services are valid and you work on Saturday/Sunday, you will need to **contact Provider Relations at (800) 878-1313 to increase your days of operation, then enter the Service manually in InSyst (so that it matches the service in CG). CG will not attempt to transfer these services again.**

If the CG service is not valid, please fill out the e-form: Request to Delete Clinician Gateway Note, and send them to the Help Desk. Re-enter any corrected services as needed.

Thank you for your attention to this matter.

Alameda County Behavioral Health Care Services  
 Information Systems Support  
 510-567-8181 (x38181)  
 QIC 28004

# EXAMPLE ONLY

**Subject:** REJECTED SERVICE NOTICE - Clinician's Gateway RU# XXXXX Ticket#XXXXXX

Hello Clinicians,

The Clinician's Gateway service listed below for client number(s) **XXXXXXXX** was rejected during the transfer from CG to InSyst. The reason for the rejection is that Reporting Unit: **XXXXXX** does not have an episode open during the date of **05-Mar-18**. InSyst was therefore unable to accept the service entered at this date. It might be easier to check CG for pending and finalized services or wait for the CG services to show up on the MHS442 report before closing the episodes to which they belong.

Client Number	Reporting Unit	Service Date	Proc Code	Staff ID	Time	Co-Staff id	Time	Tx Loc	Num Grp	Dup Rea	E	P	Ref Num
XXXXXXXX	XXXXXX	5-Mar-18	565	XXXXXX	03:00	0	00:00	8	1	0	N	N	XXXXXX
<b>Reason: Can't find an episode for client.</b>													

If the CG services are valid, you will need to re-open the episode in InSyst, enter the services manually in InSyst (so that they match the services in CG), and then close the episode again with a date after the final service. ***CG will not attempt to transfer these services again.***

If the CG service is not valid, please fill out the e-form: ***Request to Delete Clinician Gateway Note***, and send the form to the Help Desk. Re-enter any corrected services as needed.

Thank you for your attention to this matter.

Alameda County Behavioral Health Care Services  
Information Systems Support  
510-567-8181 (x38181)  
QIC 28004

# Individual Staff Log

## Report Description


This shows all services entered into Clinician's Gateway for the clinician, for the day that is requested.

## How to Get the Report

Each Clinician using Clinician's Gateway will generate their own report as they Finalize Services

## How to Use the Report

Review and compare this log to Audit reports for accuracy.

										
<a href="#">Home</a>   <a href="#">Help</a>   <a href="#">Log Out</a>										
<h2>Individual Staff Log</h2>										
<b>Service Date:</b> 3/7/2018										
Svc #	Type	RU	Client #	Client Name	Procedure	Time		Loc	Rec.	Flags
						H:M	Grp Ct			
3265360	Group	9999CG CLINICIAN GATEWAY TEST MHS AD	75087772	TEST CINDYTWO	391 Group Rehabilitation	00:38	2	Office		
3265359	Group	9999CG CLINICIAN GATEWAY TEST MHS AD	75226968	TEST CINDY	391 Group Rehabilitation	00:38	2	Office		
3265354	Indiv.	9999CG CLINICIAN GATEWAY TEST MHS AD	75087772	TEST CINDYTWO	323 90791 Psychiatric Diag Eval	03:00	1	Office		
3265349	Indiv.	9999CG CLINICIAN GATEWAY TEST MHS AD	75087772	TEST CINDYTWO	324 96151 Behavioral Eval	00:45	1	Office		
3265343	Indirect	9999CG CLINICIAN GATEWAY TEST MHS AD			680 General Administration	02:15	1	Office	05	
<b>5 service records on 3/7/2018 for a total time of</b>						<b>07:15</b>				
I hereby certify, under penalty of perjury, that the information contained in this document is accurate and free from fraudulent claiming.										
_____ 3/7/2018										

# *Daily Service Audit Reports (MHS)*

## 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: REPORTING UNIT NAME (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

dd-mmm-yyyy

Service Audit Report

Page 1

REPORT MHS443

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

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

# *Daily Service Audit Report (SUD)*

## Report DAS707

### **Service Audit Report**

#### **Report Description**

This shows all services entered into the system for each clinician for the day of the report run. Information includes service date, clinician, client served, and procedure, number in group, service duration, service location, and co-staff. “# in Group” and Co-staff” contain an asterisk for non-group procedures.

#### **How to Get the Report**

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

#### **How to Use the Report**

Review for accuracy. The report is intended as a data entry management tool to assist a manager in making sure all the 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.

Compare this DAS707 report to the daily Individual Staff Logs from Clinicians Gateway. All client services on the daily Individual Staff Log should appear on the DAS707.

# REPORT EXAMPLE

ALCOHOL AND OTHER DRUGS  
Service Audit Report

28-Mar-2018

Page 1

Report DAS707

XXXXXX - Residential County (#####)

Input Date: 27-Mar-2018

Primary Therapist: XXXXXX XXXXXXXXX

Staff #: #####

Service Audit Date: 18-Mar-2018

Client #	Client Name	Procedure	Grp#	Loc	Time	Co-Staff	Name	Co-Time	G/ER/DUP
#####	XXXXXXXXXXXXXXXXXX	703 RESIDENT	0	9	24:00	****	*****	00:00	N/N/
#####	XXXXXXXXXXXXXXXXXX	703 RESIDENT	0	9	24:00	****	*****	00:00	N/N/
#####	XXXXXXXXXXXXXXXXXX	703 RESIDENT	0	9	24:00	****	*****	00:00	N/N/
#####	XXXXXXXXXXXXXXXXXX	703 RESIDENT	0	9	24:00	****	*****	00:00	N/N/
#####	XXXXXXXXXXXXXXXXXX	703 RESIDENT	0	9	24:00	****	*****	00:00	N/N/
#####	XXXXXXXXXXXXXXXXXX	703 RESIDENT	0	9	24:00	****	*****	00:00	N/N/
#####	XXXXXXXXXXXXXXXXXX	703 RESIDENT	0	9	24:00	****	*****	00:00	N/N/
#####	XXXXXXXXXXXXXXXXXX	703 RESIDENT	0	9	24:00	****	*****	00:00	N/N/

Primary Therapist: XXXXXX XXXXXXXXX

Staff #: #####

Service Audit Date: 19-Mar-2018

Client #	Client Name	Procedure	Grp#	Loc	Time	Co-Staff	Name	Co-Time	G/ER/DUP
#####	XXXXXXXXXXXXXXXXXX	703 RESIDENT	0	9	24:00	****	*****	00:00	N/N/
#####	XXXXXXXXXXXXXXXXXX	703 RESIDENT	0	9	24:00	****	*****	00:00	N/N/
#####	XXXXXXXXXXXXXXXXXX	703 RESIDENT	0	9	24:00	****	*****	00:00	N/N/

If you have any questions or problems operating the Clinician's Gateway program, please do not hesitate to call our Help Desk, which is available from 8:30 AM until 5:00 PM Monday through Friday.

<b>Help Desk Telephone:</b>	<b>(510) 567-8181</b>
<b>County Tie Line:</b>	<b>38181</b>
<b>E-mail: (7:30AM-4PM)</b>	<b>his@acgov.org</b>
<b>Fax Number:</b>	<b>(510) 567-8161</b>
<b>County Tie Line Fax:</b>	<b>38161</b>