

Residential Specific Mini-Manual

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Ver. 12/05/2018

Service Note Daily RES

Starting the Note

Start Individual service from your Home Page:

The screenshot shows the 'Enter New Service' form with the following fields and callouts:

- 1) Select Individual:** Points to the 'Type of Service' dropdown menu.
- 2) Enter the Name or Number for your client, or leave blank:** Points to the 'Client' text input field.
- 3) Select 'Service Note Daily RES':** Points to the 'Note Template' dropdown menu.
- 4) Click Start Service:** Points to the 'Start Indiv Service' button.
- *Note: your name should be the Primary Clinician:** Points to the 'Primary Clinician' dropdown menu.

1. Select 'Individual' under Type of Service
 - a. Note: your name will be selected as the primary clinician
2. Enter the Name or Number of you client or leave Blank
3. Select the Note Template 'Service Note Daily RES'
4. Click 'Start Indiv Service'

After clicking start, the Service Entry Page opens:

The screenshot shows the 'Service Entry Page' with the following fields and callouts:

- 2:** Points to the 'Service date' field (11/30/2018).
- 3:** Points to the 'Procedures' dropdown menu (101 3.1 RES Residential Day).
- 4:** Points to the 'Service Location' dropdown menu (Residential Treatment).
- 1:** Points to the 'Provider' dropdown menu (999CGR - CLINICIAN GATEWAY TEST SUD RES).
- !! Always set a Provider/RU First before saving !!**: A red callout box pointing to the provider dropdown.

1. **Always select a provider before anything else. Due to strict SUD rules, if you do not set the provider to one you are assigned, you will not be able to re-open the note.**
2. Select the date of services being documented
3. Depending on Level of Care Select the correlation Residential Day
4. Select 'Residential Treatment' for service location

The screenshot shows the 'Secondary Procedure (Child's Bed Day)' field with a dropdown menu set to '303 Child's Bed Day' and the 'Number Of Children' field set to '1'.

If applicable, there is an option to add a Child's Bed Day code on this service. After selecting a Secondary procedure 303, enter the number of children staying at the facility.

Instructions & Pre-Existing Diagnoses

When writing progress notes, 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. Reminder: Providers are required to establish and maintain a sign-in sheet for every group counseling session, independent from CG. Sign-in sheet shall contain: 1) legibly printed Counselor/LPHA name & signature who conducts the session; 2) start & end time of group session; 3) date of group session 4) topic of session; and, 5) client legibly printed name and signature.

Episode Diagnosis Information

Primary Secondary Tertiary SU GMC

Primary FF Time: Hours:Minutes Services were provided in: ICD-10: F11.23

by interpreter or clinician DSM 5:

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

Under the instructions and pre-existing Diagnosis, you will be entering a total service time for the client on that day (Primary FF Time), the language used for services, and can view the clients diagnosis.

1. Skip FF Time for now and we will be coming back later to enter a duration in this field.
2. If the Services were given in English, no change necessary. If the services given were in another language, select the language and check whether an interpreter was present or if the clinician provided the service in that language.
3. Under Episode Diagnosis Information there are two rows, ICD-10 and DSM 5.
 - a. ICD-10 is pulled from Insyst Opening. To update this would require an Insyst staff person to update the Episode in episode Maintenance.
 - b. DSM 5 is pulled from the latest Medical Necessity or Justification for Continued Services. To update this field, your LPHA must finalize a service type of 'Initial Medical Necessity' or 'Justification for Continued Services'
 - c. As you can see in the screenshot above I have a warning about a mismatch on ICD-10 and DSM 5. The mismatch is because this client has yet to receive an Initial Medical Necessity and is a reminder to complete that service, but this will not block this service from being entered

Treatment Plan Objectives (most recent plan)

1: Substance Use Disorder; Find AA Meetings to attend, Attend 3 recovery meetings per week while in the residential program, Learn coping strategies for when the urges are overwhelming.

2: Mental Health; Attend individual counseling sessions to learn strategies for improving self awareness and encouragement, Meet with medical staff to explore possibility of

If you have entered a treatment plan for your client the goals and associated objectives will appear here. This text box is read-only, cannot be changed on this note, and will not appear on the Note printouts.

- Each Goal is numbered and has the selected description printed ending with a semicolon (;)
- Each Objective is listed under the associated goal and separated by a comma.
- In the example above, we have two goals, 'Substance use Disorder' and 'Mental Health'. Under the first goal we have Three objectives and under the second goal we have two objectives

Summary of Daily Services

Summary of Daily Services

Instructions: It is highly recommended that this note be completed by an SUD Counselor/LPHA who provided a reimbursable service on the day this note is documenting. Additional SUD Counselors/LPHAs may add addendums as needed.

1 See Weekly Summary for additional information (Required if no Optional Daily Narrative below)

2 Daily Service 1

Counseling Session Type

Select Session Type ▼

Select Indiv/Group ▼

Primary staff:

Select One ▼

Co-staff:

Select One ▼

Location:

Select One ▼

Was this service provided in the field/community? Yes No Add Travel Time

If Yes, describe how confidentiality in the community was ensured:

Comments (Optional):

Next is the Summary of Daily Services; this is where you will log all services provided to the client for this date by any Clinician/Counselor at this site.

1. If you are going to write a weekly summary instead of a Daily Narrative Check this box
2. This is the Service entry box, you can enter up to ten services on one note

For Each service you will need to Log the required fields

Counseling Session Type	Session Topic
Select Session Type ▼	Select Session Topic
Select Session Type	Select Session Topic
Intake/Assessment	Anger Management
Individual	Art Therapy
Group Counseling	Assessment - gather information with client
Patient Education	ASAM Assessment/Re-Assessment
Family Therapy	Cognitive Behavioral Therapy (CBT)
Medication Services - MAT	Co-Dependency
Collateral Services	Co-Occurring
Crisis Intervention Services	Criminal/Addictive Thinking
Transportation Services	Domestic Violence
Treatment Planning	Healthy Habits (physical & mental health care)
Discharge Planning	Life Skills
	Medication Management
	Men's Support
	Motivational Interviewing (MI)
	Parenting
	Psycho-Social
	Recovery Support
	Relapse Prevention (Motivational Enhancement Therapy)
	Seeking Safety (Trauma-Informed Care)

1. First select a 'Counseling Session Type'
2. Select a 'Session Topic' if you need to write in a Topic select 'Other' and use the provided text box

Session Topic

Other ▼ Write in Topic

3. Select if this an 'Individual' or 'Group' Service
4. Enter the Start Time and End Time.
 - a. Very important to note the Time Format. Must be 12 hr clock. Enter the Hour followed by a Colon (:) then minutes, use two digits, followed by a **Space**, then am/pm. (ex. '8:00 am' or '08:00 am' or '12:05 pm')
 - b. Duration will be calculated for you

Select Individ/Group ▾
 Select Individ/Group
 Individual
 Group

Start Time: End Time: Duration: **4 hr 5 min**

5. Select the Primary Staff, if there was a Co-Staff (optional), and the location of the Service

Primary staff: Co-staff: Location:

6. Answer yes or no, if this Service was provided in the field.
 - a. If yes, Describe how Confidentiality was ensured.

6 Was this service provided in the field/community? Yes No **7** Add Travel Time
 If Yes, describe how confidentiality in the community was ensured:
6a

7. If you need to add Travel time to this service check the box Labeled 'Add Travel Time'
8. Enter the start and end time for both 'Travel to' and 'Travel From' using the same 12 hour clock format as the service time. ***Travel time without Client Present**

Travel to: Start Time: End Time: **0 hr 20 min**
 Travel From: Start Time: End Time: **0 hr 25 min**
 Total Travel Time: **0 hr 45 min**

9. The last box is used for any comments you want to add on this specific service, and is optional

Comments (Optional):

10. Repeat steps 1-9 for any service provided today (up to 10)

Example Completed Service:

Daily Service 1					
Counseling Session Type		Session Topic			
Intake/Assessment ▾		Assessment - gather information with client ▾			
Individual ▾	Start Time: 8:00 am	End Time: 9:30 am	Duration: 1 hr 30 min		
Primary staff: [REDACTED]	Co-staff: Select One ▾	Location: Residential ▾			
Was this service provided in the field/community? <input type="radio"/> Yes <input checked="" type="radio"/> No <input type="checkbox"/> Add Travel Time					
If Yes, describe how confidentiality in the community was insured:					
[REDACTED]					
Comments (Optional):					
Do you want to add a comment or description of the service?					

Once you have entered all services provided on a given day you can see the 'Total Duration' under the tenth service box.

TOTAL DURATION:	3 hr 45 min
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We will now update the FF Time with this duration, formatted Hours Colon (:) Minutes, HH:MM

Instructions & Pre-Existing Diagnoses					
When writing progress notes, 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. Reminder: Providers are required to establish and maintain a sign-in sheet for every group counseling session, independent from CG. Sign-in sheet shall contain: 1) legibly printed Counselor/LPHA name & signature who conducts the session; 2) start & end time of group session; 3) date of group session 4) topic of session; and, 5) client legibly printed name and signature.					
<u>Episode Diagnosis Information</u>					
Primary FF Time: 3:45 Hours:Minutes		Services were provided in: English ▾	ICD-10: F11.23	Primary	Secondary Tertiary SU GMC
		by <input type="checkbox"/> interpreter [REDACTED] or <input type="checkbox"/> clinician	DSM 5:		

Daily Narrative

The Daily Narrative is optional unless you will **not** be entering a weekly summary.

Optional Daily Narrative (Required if Weekly Summary will not be completed)	
Instructions: Based on the identified ASAM dimensions, describe the client's progress on the treatment plan, problems, goals, action steps, and/or referrals (required). Additionally, as relevant incorporate the following: client's attitude towards change; new issues or problems that affect the client's treatment or recover plan; types of support or interventions provided by the program or other appropriate health care providers; and/or the plan for upcoming session.	
Previous Entries: (Select Note) ▾	
[REDACTED]	

Documentation Time Log

For any time spent documenting the service, you will want to add to the log at the bottom of the note.

Documentation Time Log				Type/Notes				
Date:	<input type="text" value="11/05/2018"/>	Time Start:	<input type="text" value="4:30 pm"/>	End:	<input type="text" value="4:45 pm"/>	Duration:	<input type="text" value="0 hr 15 min"/>	<input type="text" value="This Note"/>
Date:	<input type="text" value="11/06/2018"/>	Time Start:	<input type="text" value="4:30 pm"/>	End:	<input type="text" value="4:45 pm"/>	Duration:	<input type="text" value="0 hr 15 min"/>	<input type="text" value="This Note"/>
Date:	<input type="text"/>	Time Start:	<input type="text"/>	End:	<input type="text"/>	Duration:	<input type="text"/>	<input type="text"/>
Date:	<input type="text"/>	Time Start:	<input type="text"/>	End:	<input type="text"/>	Duration:	<input type="text"/>	<input type="text"/>
Date:	<input type="text"/>	Time Start:	<input type="text"/>	End:	<input type="text"/>	Duration:	<input type="text"/>	<input type="text"/>
Total Documentation Time:								<input type="text" value="0 hr 30 min"/>

Please note the dates do not have to match the service date or each other. This is just documenting when and how long you spend writing the notes for the services.

1. Select the Date of Documentation Time
2. Enter a Start and End Time using the 12 hour format (Hour colon (:) Minute (SPACE) am/pm)
 - a. HH:MM AM/PM
3. Enter what you were documenting in the Type/Notes Field

Documentation Time Log				Type/Notes				
Date:	<input type="text" value="11/05/2018"/>	Time Start:	<input type="text" value="4:30 pm"/>	End:	<input type="text" value="4:45 pm"/>	Duration:	<input type="text" value="0 hr 15 min"/>	<input type="text" value="This Note"/>

Saving/Finalize

At the bottom of the service, you will have the following buttons
(see pg. 41 of the CG Manual for more Information on each button)

Cancel	Spell Check	Save and Continue	Save as Pending	Save as Draft	Finalize
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When you are ready to **submit billing** and **all** documentation is complete select 'Finalize'

Weekly Service Summary

Starting the document

The screenshot shows the 'Enter New Service' form with the following fields and callouts:

- 1) Select Document:** Points to the 'Type of Service' dropdown menu, which is set to 'Document'.
- 2) Enter the Name or Number for your client, or leave blank:** Points to the 'Client' text input field.
- 3) Select 'Weekly Summary Residential':** Points to the 'Note Template' dropdown menu, which is set to 'Weekly Summary Residential'.
- 4) Click Start Document:** Points to the 'Start Document' button.
- *Note: your name should be the Primary Clinician:** Points to the 'Primary Clinician' dropdown menu.

1. Select 'Document' under Type of Service
 - a. Note: your name will be selected as the primary clinician
2. Enter the Name or Number of your client or leave Blank
3. Select the Note Template 'Weekly Summary Residential'
4. Click 'Start Document'

After clicking start, the Document Entry Page opens:

The screenshot shows the Document Entry Page with the following fields and callouts:

- 2** Document date: 11/10/2018
- 1** !! Always set a Provider/RU First before saving !!
- Document Date should be either the Last day of the week in summary or the Last Date of Service
- Provider: 999CGR - CLINICIAN GATEWAY TEST SUD RES
- Primary Clinician: [Redacted]
- Client: [Redacted]
- Service #: New Title: Weekly Summary Residential
- Billing time
- Add Additional Clinicians

- 1. As always, select a provider before anything else.**
2. The Document Date should be the Last day of the week in summary or the Last Date of Service

Instructions & Pre-Existing Diagnoses

Episode Opening Date: 1 Services were provided in: 2

by interpreter or clinician

3 **Episode Diagnosis Information**
 Primary Secondary Tertiary SU GMC
 ICD-10: F11.23
 DSM 5:

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

Instructions: Required if the optional Daily Narrative is not completed for every day of service 4

It is required that this note be completed by an SUD Counselor/LPHA who provided a reimbursable service during the week that this note is documenting. The service date should be the last day the weekly period covers. At a minimum the Weekly Summary must be completed within the following calendar week.

Based on the identified ASAM dimensions, describe the client's progress on the treatment plan, problems, goals, action steps, and/or referrals (required). Additionally, as relevant, incorporate the following: client's attitude towards change; new issues or problems that affect the client's treatment or recover plan; details of support or interventions provided by the program or other appropriate health care providers; and/or the plan for upcoming week.

5 **Treatment Plan Objectives (most recent plan)**

1: Substance Use Disorder; Find AA Meetings to attend., Attend 3 recovery meetings per week while in the residential program, Learn coping strategies for when the urges are overwhelming.

2: Mental Health; Attend individual counseling sessions to learn strategies for improving self awareness and encouragement, Meet with medical staff to explore possibility of

1. The Episode Date will default based on the client and Provider selected
2. If the Services were given in English, no change necessary. If the services given were in another language, select the language and check whether an interpreter was present or if the clinician provided the service in that language.
3. Episode Diagnosis Information, containing the ICD-10 (from Insyst) and DSM 5 (from CG).
4. These are the instructions for the 'Weekly Summary Residential':
5. If there was a treatment plan submitted for this client, in this RU, the goals and objectives will be displayed in this box.

Completing the Summary

Summary Previous Entries: (Select Note) ▾

Write the Weeks summary here and keep the following instructions in mind:

Required if the optional Daily Narrative is not completed for every day of service

It is required that this note be completed by an SUD Counselor/LPHA who provided a reimbursable service during the week that this note is documenting. The service date should be the last day the weekly period covers. At a minimum, the Weekly Summary must be completed within the following calendar week.

Based on the identified ASAM dimensions, describe the client's progress on the treatment plan, problems, goals, action steps, and/or referrals (required). Additionally, as relevant, incorporate the following: client's attitude towards change; new issues or problems that affect the client's treatment or recover plan; details of support or interventions provided by the program or other appropriate health care providers; and/or the plan for upcoming week.

Documentation Time Log

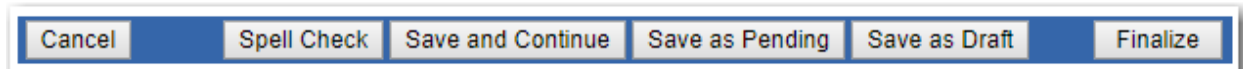
Documentation Time Log					Type/Notes
Date: 11/04/2018	Time Start: 11:30 am	End: 11:50 am	Duration: 0 hr 20 min	Weekly Summary	
Date: <input type="text"/>	Time Start: <input type="text"/>	End: <input type="text"/>	Duration: <input type="text"/>	<input type="text"/>	
Date: <input type="text"/>	Time Start: <input type="text"/>	End: <input type="text"/>	Duration: <input type="text"/>	<input type="text"/>	
Date: <input type="text"/>	Time Start: <input type="text"/>	End: <input type="text"/>	Duration: <input type="text"/>	<input type="text"/>	
Date: <input type="text"/>	Time Start: <input type="text"/>	End: <input type="text"/>	Duration: <input type="text"/>	<input type="text"/>	
Total Documentation Time: 0 hr 20 min					

The Documentation Log here is identical to the Service Note. Please note the dates do not have to match the service date or each other. This is just documenting when and how long you spend writing the notes for the services.

1. Select the Date of Documentation Time
2. Enter a Start and End Time using the 12 hour format (Hour colon (:) Minute (SPACE) am/pm)
 - a. HH:MM AM/PM
3. Enter what you were documenting in the Type/Notes Field

Saving/Finalizing Document

At the bottom of the service, you will have the following buttons
(see pg. 41 of the CG Manual for more Information on each button)

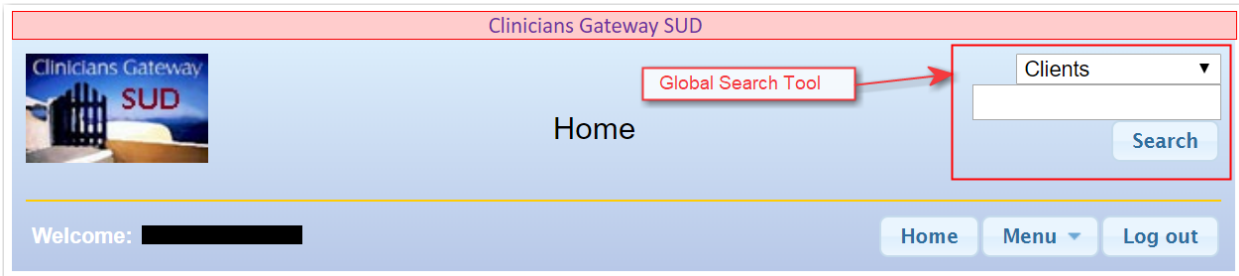


When **all** documentation is complete, select 'Finalize'

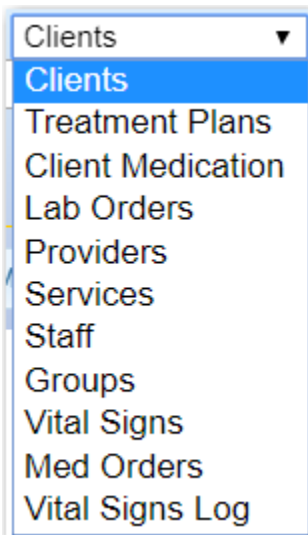
Services Search

*Note – all client information on the following pages are test clients with test data; no real clients will be used.

Services search by client



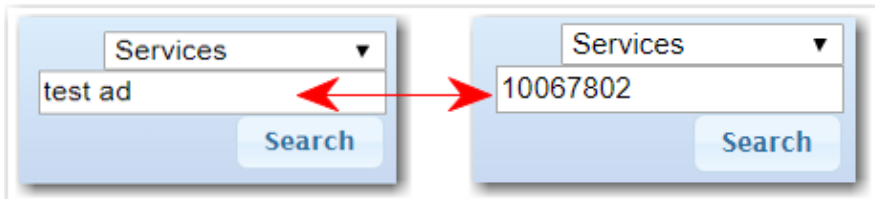
At the top right of Clinician’s Gateway is what we refer to as the ‘Global Search Tool’. This is where you can search for various information based on a specific Client Name or Number.



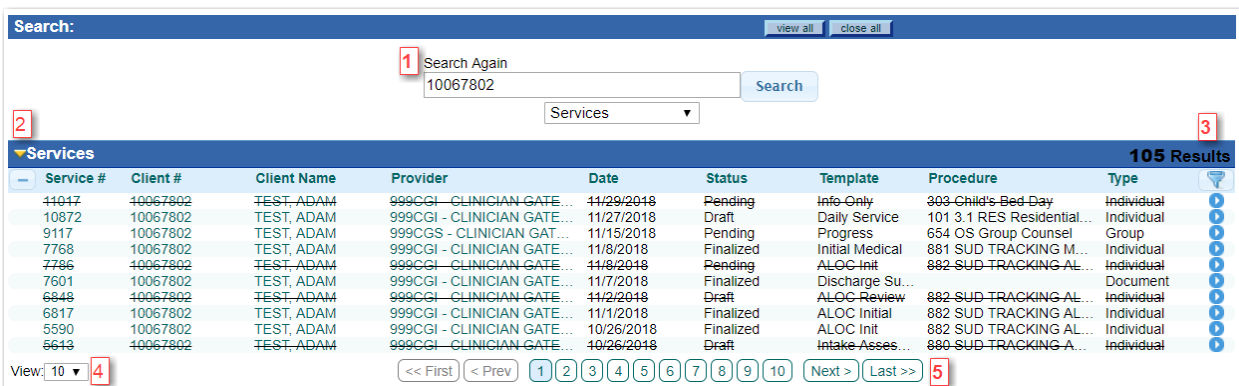
Here are the various options you can search. The most common selections are Clients, Treatment Plans, Services, and occasionally Staff or Providers.

For this guide we will select Services. In the text box below you will enter the Name (Lastname Firstname) or the Client/Insyst Number. When you have your Client entered click ‘Search’.

In this example, I will look for my client Adam Test’s services. **Please note if you want only an exact match please use the Client/Insyst number.*



After clicking search, you will be taken to the results Page:



1. Search again: this can be used to change the client you are searching for or if you search by name and decide to switch to using a specific number (in cases where two clients have identical names)

2. This is the Search Results list. You will be given every service this client has received, written by staff in your agency.
 - a. The columns give you a description of the service including, Service date, Provider/RU, Status, Template, Procedure, etc.
 - b. *Note the Services with a strike throughout were deleted services and are only visible by IS Staff
3. This is the count of services returned, looks like Adam Test has 105 Notes entered in Clinician's Gateway
4. The view is the limit of how many results are displayed on each page. This is defaulted to ten but can be adjusted to up to fifty results per page.
5. At the bottom of the results pane is the page count. You can click next, previous, or jump to a specific page.

To view a Service Click either the Service # or the Blue 'Action'

Services									106 Results
Service #	Client #	Client Name	Provider	Date	Status	Template	Procedure	Type	
12900	10067802	TEST, ADAM	999CGS - CLINICIAN GAT...	12/5/2018	Pending	Progress	654 OS Group Counsel	Group	
44047	10067802	TEST, ADAM	999CGI - CLINICIAN GATE...	44/29/2018	Pending	Info Only	393 Child's Bed Day	Individual	
10872	10067802	TEST, ADAM	999CGI - CLINICIAN GATE...	11/27/2018	Draft	Daily Service	101 3.1 RES Residential...	Individual	
9117	10067802	TEST, ADAM	999CGS - CLINICIAN GAT...	11/15/2018	Pending	Progress	654 OS Group Counsel	Group	

To view a Service Click either the Service # or the Blue 'Action Button'

By Reporting Unit

On your home page scroll down to the section labeled 'Advanced search'

Advanced Search

For: Type: Status: Date:

at provider:

For:

ider:

rch

You can search 'For:' the following:

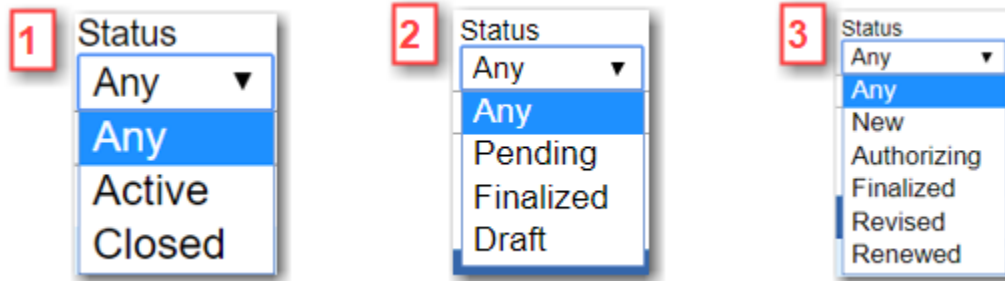
- Clients
- Services or
- Treatment Plans

Type

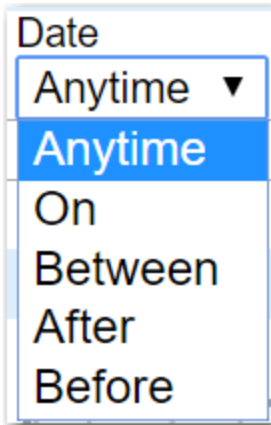
The Options for 'Type' include Any, Mine, and My Serviceable:

- Any – All clients, services, or plans at the selected RU
- Mine – the Services or plans you are the Author, or the clients assigned to you from Insyst on the episode
- My Serviceable – Only an option when searching for clients, this will list all clients you can write notes for

Status will change depending on what you are searching for:



1. Searching for Clients will have the options Any, Active/Open, and Closed.
2. Searching for Services will have the options Any, Pending, Finalized, and Draft
3. Searching for Treatment Plans will have the options Any, New, Authorizing, Finalized, Revised, and Renewed



The following Date Selection are available:

- Anytime – All Clients, Services, or Plans in the selected RU
- On – All clients, Services, or Plans on a specific date. Selecting this option will add a Date Field
- Between – All clients, Services, or Plans between, and including, two specified dates. Selecting this option will add two Date Fields
- After - All clients, Services, or Plans on and after the specified date. Selecting this option will add a Date Field
- Before - All clients, Services, or Plans on and before the specified date. Selecting this option will add a Date Field

As an Example, I will search for **all Services** in a **Test RU 999CGS** for the **first week of November**

Advanced Search

For: Type: Status: Date: and
 at provider:

To do this I select Services, leave Type and Status as Any, select Date Between* 11/04/2018 and 11/10/2018, and select my Provider-RU 999CGR. Now Click Search to return your results.

*note the results **will** include 11/04 and 11/10 services

Search for:

1 For: Services Type: Any Status: Any Date: Between 11/04/2018 and 11/10/2018
 at provider: 999CGR CLINICIAN GATEWAY TEST SUD RES Search

2

3

Service Records 13 Results

Service #	Client #	Client Name	Provider	Date	Status	Template	Procedure	Type
13030	10087955	TEST, GANDALF	999CGR - CLINICIAN GAT...	11/10/2018	Draft	Daily Service	101 3.1 RES Residential...	Individual
11917	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/10/2018	Finalized	Daily Service	101 3.1 RES Residential...	Individual
11926	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/10/2018	Finalized	Weekly Sum...		Document
13029	10087955	TEST, GANDALF	999CGR - CLINICIAN GAT...	11/9/2018	Draft	Daily Service	101 3.1 RES Residential...	Individual
13028	10087955	TEST, GANDALF	999CGR - CLINICIAN GAT...	11/8/2018	Draft	Daily Service	101 3.1 RES Residential...	Individual
11916	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/8/2018	Finalized	Daily Service	101 3.1 RES Residential...	Individual
11914	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/7/2018	Finalized	Daily Service	101 3.1 RES Residential...	Individual
11913	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/6/2018	Finalized	Daily Service	101 3.1 RES Residential...	Individual
13027	10087955	TEST, GANDALF	999CGR - CLINICIAN GAT...	11/6/2018	Draft	Daily Service	101 3.1 RES Residential...	Individual
13021	10087955	TEST, GANDALF	999CGR - CLINICIAN GAT...	11/5/2018	Finalized	Daily Service	101 3.1 RES Residential...	Individual
11912	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/5/2018	Finalized	Daily Service	101 3.1 RES Residential...	Individual
11885	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/4/2018	Finalized	Daily Service	101 3.1 RES Residential...	Individual
13020	10087955	TEST, GANDALF	999CGR - CLINICIAN GAT...	11/4/2018	Finalized	Daily Service	101 3.1 RES Residential...	Individual

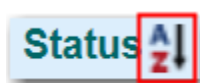
View: 20 4 << First < Prev 1 Next > Last >> 5

1. Search for: this can be used to change the criteria you are searching, if you change your criteria make sure to click search again to get your new results
2. This is the Search Results list. You will be given all items meeting your criteria
 - a. The columns give you a description of the service, client, or plans including, Service/Plan/Client #, Provider/RU, Status, etc.
3. This is the count of records returned; looks like this RU has 13 Services the first week of November
4. The view is the limit of how many results are displayed on each page. This is defaulted to ten but can be adjusted to up to fifty results per page.
5. At the bottom of the results pane is the page count. You can click next, previous, or jump to a specific page.

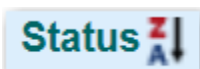
Sorting

When you have large amounts of data to go through the sorting and filter tools will be very helpful.

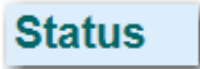
In order to start a sort simply click on the column name to start sorting.



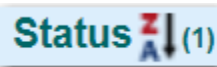
The first time you click a column it will sort A to Z alphabetically, or special sorts based on column (e.g. dates oldest to newest, or Status sorted Draft, Pending, Finalized)



The Second time you click a column it will sort Z to A alphabetically, or special sorts based on column (e.g. dates newest to oldest or Status sorted Finalized, Pending, Draft)





The Third click will remove the sort



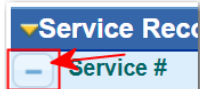
Next, you may want to sort multiple columns, grouping all the services of this type, by this author, etc. If you click multiple columns, you will see an index number appear next to the sort icon.

Example: Sort Status Z to A, making finalized services at top, then sort by client name grouping the finalized service by client

Service #	Client #	Client Name  (2)	Provider	Date	Status  (1)
13021	10087955	TEST, GANDALF	999CGR - CLINICIAN GAT...	11/5/2018	Finalized
13020	10087955	TEST, GANDALF	999CGR - CLINICIAN GAT...	11/4/2018	Finalized
11914	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/7/2018	Finalized
11913	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/6/2018	Finalized
11885	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/4/2018	Finalized
11912	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/5/2018	Finalized
11917	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/10/2018	Finalized
11926	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/10/2018	Finalized
11916	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/8/2018	Finalized
13030	10087955	TEST, GANDALF	999CGR - CLINICIAN GAT...	11/10/2018	Draft
13028	10087955	TEST, GANDALF	999CGR - CLINICIAN GAT...	11/8/2018	Draft
13027	10087955	TEST, GANDALF	999CGR - CLINICIAN GAT...	11/6/2018	Draft
13029	10087955	TEST, GANDALF	999CGR - CLINICIAN GAT...	11/9/2018	Draft

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As you can see above the first sort is on Status Z to A (1) this orders the services Finalized on top. The next sort is Client Name A to Z (2) now this takes the subset, sorted by finalized services, and groups Services together by client name alphabetically. ***Note Gandalf has two groups because Finalized and Draft services are sorted separately**



When you are ready to remove sorts and return to the default results order click this icon [-] on the far left of the results window.

Service #	Client #	Client Name	Provider	Date	Status	Template
13030	10087955	TEST, GANDALF	999CGR - CLINICIAN GAT...	11/10/2018	Draft	Daily Service
11917	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/10/2018	Finalized	Daily Service
11926	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/10/2018	Finalized	Weekly Sum...
13029	10087955	TEST, GANDALF	999CGR - CLINICIAN GAT...	11/9/2018	Draft	Daily Service
13028	10087955	TEST, GANDALF	999CGR - CLINICIAN GAT...	11/8/2018	Draft	Daily Service
11916	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/8/2018	Finalized	Daily Service
11914	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/7/2018	Finalized	Daily Service
11913	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/6/2018	Finalized	Daily Service
13027	10087955	TEST, GANDALF	999CGR - CLINICIAN GAT...	11/6/2018	Draft	Daily Service
13021	10087955	TEST, GANDALF	999CGR - CLINICIAN GAT...	11/5/2018	Finalized	Daily Service
11912	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/5/2018	Finalized	Daily Service
11885	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/4/2018	Finalized	Daily Service
13020	10087955	TEST, GANDALF	999CGR - CLINICIAN GAT...	11/4/2018	Finalized	Daily Service


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Filtering

Another handy tool is the filter; this is the icon, on the far right, that looks similar to a funnel. Clicking this will expand the columns to enter keywords used to filter results.



Service #	Client #	Client Name	Provider	Date	Status	Template	Procedure	Type
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

13 Results 



Once you have the expanded columns you can enter text to filter on, select a date, or select an option from a dropdown list. Once you have criteria to filter click this icon under the funnel, to apply filter.

In this example, I will filter my results to display Finalized, Daily Services (This is the short name for Service Note Daily RES)

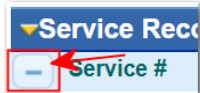
Service Records 8 of 13 Results (filtered)

Service #	Client #	Client Name	Provider	Date	Status	Template	Procedure	Type
					Finalized	Daily		
11917	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/10/2018	Finalized	Daily Service	101 3.1 RES Residential...	Individual
11916	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/8/2018	Finalized	Daily Service	101 3.1 RES Residential...	Individual
11914	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/7/2018	Finalized	Daily Service	101 3.1 RES Residential...	Individual
11913	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/6/2018	Finalized	Daily Service	101 3.1 RES Residential...	Individual
13021	10087955	TEST, GANDALF	999CGR - CLINICIAN GAT...	11/5/2018	Finalized	Daily Service	101 3.1 RES Residential...	Individual
11912	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/5/2018	Finalized	Daily Service	101 3.1 RES Residential...	Individual
11885	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/4/2018	Finalized	Daily Service	101 3.1 RES Residential...	Individual
13020	10087955	TEST, GANDALF	999CGR - CLINICIAN GAT...	11/4/2018	Finalized	Daily Service	101 3.1 RES Residential...	Individual

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I selected Finalized from the dropdown under the Status column and entered the text 'Daily' under Template. Now we can see there are 8 of 13 results; meaning 5 services in my original search do not meet the criteria. You can use these functions to verify services have been entered in Clinician's Gateway.



Again, when you are ready to remove Filters and return to the default results click this icon [-] on the far left of the results window.

Service Records 13 Results

Service #	Client #	Client Name	Provider	Date	Status	Template	Procedure	Type
13030	10087955	TEST, GANDALF	999CGR - CLINICIAN GAT...	11/10/2018	Draft	Daily Service	101 3.1 RES Residential...	Individual
11917	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/10/2018	Finalized	Daily Service	101 3.1 RES Residential...	Individual
11926	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/10/2018	Finalized	Weekly Sum...		Document
13029	10087955	TEST, GANDALF	999CGR - CLINICIAN GAT...	11/9/2018	Draft	Daily Service	101 3.1 RES Residential...	Individual
13028	10087955	TEST, GANDALF	999CGR - CLINICIAN GAT...	11/8/2018	Draft	Daily Service	101 3.1 RES Residential...	Individual
11916	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/8/2018	Finalized	Daily Service	101 3.1 RES Residential...	Individual
11914	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/7/2018	Finalized	Daily Service	101 3.1 RES Residential...	Individual
11913	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/6/2018	Finalized	Daily Service	101 3.1 RES Residential...	Individual
13027	10087955	TEST, GANDALF	999CGR - CLINICIAN GAT...	11/6/2018	Draft	Daily Service	101 3.1 RES Residential...	Individual
13021	10087955	TEST, GANDALF	999CGR - CLINICIAN GAT...	11/5/2018	Finalized	Daily Service	101 3.1 RES Residential...	Individual
11912	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/5/2018	Finalized	Daily Service	101 3.1 RES Residential...	Individual
11885	10090949	TESTERSON, T...	999CGR - CLINICIAN GAT...	11/4/2018	Finalized	Daily Service	101 3.1 RES Residential...	Individual
13020	10087955	TEST, GANDALF	999CGR - CLINICIAN GAT...	11/4/2018	Finalized	Daily Service	101 3.1 RES Residential...	Individual

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Empty Note Screenshots

Here are empty examples of the Notes outlined in this Manual...

Service Note Daily RES

Service #: New Title: Service Note Daily RES (N)		Service date: <input type="text"/>
Client: Number: <input type="text"/> Last Name: <input type="text"/> First Name: <input type="text"/>		Util. review date:
Procedures: <input type="text"/>		Plan due date:
Service Location: <input type="text"/>		
Med. Compliant: <input type="text"/> Side Effects: <input type="text"/>		
Emergency: <input type="checkbox"/> Pregnant?: <input type="checkbox"/>		
Billing time		
Primary Clinician: <input type="text"/>		
Provider: <input type="text"/>		
Secondary Procedure (Child's Bed Day): <input type="text"/>		
Instructions & Pre-Existing Diagnoses		
<p>When writing progress notes, 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. Reminder: Providers are required to establish and maintain a sign-in sheet for every group counseling session, independent from CG. Sign-in sheet shall contain: 1) legibly printed Counselor/LPHA name & signature who conducts the session; 2) start & end time of group session; 3) date of group session 4) topic of session; and, 5) client legibly printed name and signature.</p>		
Primary FF Time: <input type="text"/> Hours:Minutes	Services were provided in: <input type="text"/>	Episode Diagnosis Information
by <input type="checkbox"/> interpreter <input type="text"/> or <input type="checkbox"/> clinician	ICD-10: <input type="text"/>	Primary Secondary Tertiary SU GMC
	DSM 5: <input type="text"/>	
Treatment Plan Objectives (most recent plan)		
<input type="text"/>		

Summary of Daily Services

Instructions: It is highly recommended that this note be completed by an SUD Counselor/LPHA who provided a reimbursable service on the day this note is documenting. Additional SUD Counselors/LPHAs may add addendums as needed.

See Weekly Summary for additional information (Required if no Optional Daily Narrative below)

Daily Service 1

Counseling Session Type

Select Session Type ▼

Select Indiv/Group ▼

Primary staff:

Select One ▼

Co-staff:

Select One ▼

Location:

Select One ▼

Was this service provided in the field/community? Yes No

Add Travel Time

If Yes, describe how confidentiality in the community was ensured:

Comments (Optional):

Daily Service 2

Daily Service 10

Counseling Session Type

Select Session Type ▼

Select Indiv/Group ▼

Primary staff:

Select One ▼

Co-staff:

Select One ▼

Location:

Select One ▼

Was this service provided in the field/community? Yes No

Add Travel Time

If Yes, describe how confidentiality in the community was ensured:

Comments (Optional):

TOTAL DURATION:

Optional Daily Narrative (Required if Weekly Summary will not be completed)






Instructions: Based on the identified ASAM dimensions, describe the client's progress on the treatment plan, problems, goals, action steps, and/or referrals (required).

Additionally, as relevant incorporate the following: client's attitude towards change; new issues or problems that affect the client's treatment or recover plan; types of support or interventions provided by the program or other appropriate health care providers; and/or the plan for upcoming session.

Previous Entries: (Select Note) ▼

Documentation Time Log

Type/Notes

Date:	<input type="text"/>		Time Start:	<input type="text"/>	End:	<input type="text"/>	Duration:	<input type="text"/>
Date:	<input type="text"/>		Time Start:	<input type="text"/>	End:	<input type="text"/>	Duration:	<input type="text"/>
Date:	<input type="text"/>		Time Start:	<input type="text"/>	End:	<input type="text"/>	Duration:	<input type="text"/>
Date:	<input type="text"/>		Time Start:	<input type="text"/>	End:	<input type="text"/>	Duration:	<input type="text"/>
Date:	<input type="text"/>		Time Start:	<input type="text"/>	End:	<input type="text"/>	Duration:	<input type="text"/>

Total Documentation Time:

Cancel	Spell Check	Save and Continue	Save as Pending	Save as Draft	Finalize
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Weekly Summary Residential

Service #: New Title: Weekly Summary Residential		Document date: <input type="text"/>
Client: <input type="text" value="Unknown"/> <input type="text"/> <input type="text"/> <input type="button" value="..."/>		
Billing time		
Primary Clinician: <input type="text"/>		
Provider: <input type="text" value="Select a Provider"/>		
Instructions & Pre-Existing Diagnoses		
Episode Opening Date: <input type="text"/> Services were provided in: <input type="text" value="English"/>		<u>Episode Diagnosis Information</u> Primary Secondary Tertiary SU GMC
by <input type="checkbox"/> interpreter <input type="text"/> or <input type="checkbox"/> clinician		ICD-10: DSM 5:
<p>Instructions: Required if the optional Daily Narrative is not completed for every day of service</p> <p>It is required that this note be completed by an SUD Counselor/LPHA who provided a reimbursable service during the week that this note is documenting. The service date should be the last day the weekly period covers. At a minimum the Weekly Summary must be completed within the following calendar week.</p> <p>Based on the identified ASAM dimensions, describe the client's progress on the treatment plan, problems, goals, action steps, and/or referrals (required). Additionally, as relevant, incorporate the following: client's attitude towards change; new issues or problems that affect the client's treatment or recover plan; details of support or interventions provided by the program or other appropriate health care providers; and/or the plan for upcoming week.</p>		
<div style="border: 2px solid black; padding: 5px; width: fit-content; margin: 0 auto;"> Treatment Plan Objectives (most recent plan) </div> <div style="border: 1px solid black; height: 60px; width: 100%; margin-top: 5px;"></div>		
Summary		Previous Entries: <input type="text" value="(Select Note)"/>
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"/>
Date: <input type="text"/>	Time Start: <input type="text"/> End: <input type="text"/> Duration: <input type="text"/>	<input type="text"/>
Date: <input type="text"/>	Time Start: <input type="text"/> End: <input type="text"/> Duration: <input type="text"/>	<input type="text"/>
Date: <input type="text"/>	Time Start: <input type="text"/> End: <input type="text"/> Duration: <input type="text"/>	<input type="text"/>
Date: <input type="text"/>	Time Start: <input type="text"/> End: <input type="text"/> Duration: <input type="text"/>	<input type="text"/>
Total Documentation Time: <input type="text"/>		