Batch Service Entry User Guide

Table of Contents

Batch Service Entry1
Define a Procedure Group to Use in Batch Service Entry1
Field Definitions
Batch Service Entry Page Field Definitions5
Define View Window Field Definitions7
Group Services List Page Field Definitions
Search10
Search for a Client
Searching Best Practices
To Search for a Client
Client Search Window Field Definition11
Miscellaneous
Check for Spelling Errors in a Free-form Comment Field
Filter a List Page14
Why Can't I Access a Screen?
Role Definitions Page Field Definitions16

Batch Service Entry

Define a Procedure Group to Use in Batch Service Entry

When there are procedure codes that are generally performed as a group service, you can create groups to make assigning the service to a client more efficient.

1. Follow this path: My Office tab > Billing banner > Batch Service Entry sub-tab.

The Batch Service Entry page is displayed. View field definitions (See page 5).

10/09/2015 📑 🖌 🗛 Client Preference 🖸 M ast Name Begins With	duit Inp U Last N	atient W TH Iame Begins With	F	Staff Name Also Include Complet T	te/Sł	All Provides for the day	ocedure Grou	ps y Show Clien	▼ ts Seen	Apply Filter In Last 90 Days		
fault Values												
<u>Staff</u> Staff Name	•	Procedure Code Procedure Code		Time In	Tim	e Out Dur. Locati	20 on	•				
Client Name		Staff		Procedure Code		Date	Time In	Time Out	Dur.	Location	Comments	
		Admin, System	٠	ACT P&P F2F	۲	10/09/2015	10:00 AM	11:00 AM	60	Afterschool Dauphin 🔻		
	$ \mathcal{C} $	Admin, System	•	ACT P&P F2F	۲	10/09/2015	10:00 AM	11:00 AM	60	Inpatient Unit		
	X	Admin, System	۲	Tibc (Includes Iron)	۲	10/09/2015	10:00 AM	10:00 AM	15	Afterschool Dauphin 🔻		
Adam Test	×	Admin, System	۲	Tibc (Includes Iron)	۲	10/09/2015	10:00 AM	10:00 AM	15	Afterschool Dauphin 🔻		
	4	Admin, System	۲	Tibc (Includes Iron)	۲	10/09/2015	10:00 AM	10:00 AM	15	Afterschool Dauphin 🔻		
	4	Admin, System	۲	Tibc (Includes Iron)	۲	10/09/2015	10:00 AM	10:00 AM	15	Afterschool Dauphin 🔻		
	2	Admin, System	۲	ABILIFY 10MG	۲	10/09/2015	10:00 AM	10:00 AM	20	Afterschool Dauphin V		
Banner Bruce			¥		Ŧ	10/09/2015				•		
Barbera Anthony			۲		۲	10/09/2015				•		
		-			-	Lowes.	-			10		

- 2. Click the drop down arrow in the All Procedure Groups list field.
- 3. Select the **<Define Group>** option in the drop down list.

The Define View window is displayed. View field definitions (See page 7).

ure Codes	Selected Procedure Codes	1000
D	A	10.000
1D		
	>>	
UD	All>>	
727	<<	
UD	All<<	
		w.
me 🛆	ProcedureCode	
S	Some	*
	Some	
	up up me Δ s	UD Ali>> UD Ali<< Mic< me Some Some

>>

- 4. Type a **name for the group** in the *Procedure Group* field. You can enter up to 60 characters in the field. All items listed in the *Select Procedure Codes* panel are added to the group.
- 5. Click on the **procedure code** you want to add to the group and click the **right pointing arrow**

^b button to add the code(s) to the *Selected Procedure Codes* panel to the right.

- To select more than one procedure code out of sequence, hold down the **Ctrl** key and click **each procedure code** you want.
- To select a number of procedure codes in sequence, hold down the **Shift** key and select the **first code** and then **the last code** you want. All codes in between are selected.
- To add all codes to the group, click the **All right pointing arrow** All>> button. You do not need to select any codes first.
- 6. To remove codes from the *Select Procedure Codes* panel, highlight the **code you want to remove** and click the **left pointing arrow select** button.
 - To select more than one procedure code out of sequence, hold down the **Ctrl** key and click **each procedure code** you want to remove.
 - To select a number of procedure codes in sequence, hold down the **Shift** key and select the **first code** and then **the last code** you want to remove. All codes in between are selected.
 - To remove all codes from the group, click the **All left pointing arrow** All<< button. You do not need to select any codes first.
- 7. When you have all the codes you want in the group, click the **Insert** button.

The group record is added to the *Procedure View* section of the window.

- 8. To create another group, repeat **steps 4 through 7**.
- 9. Click the **Save** button.
- 10. Click the Close button to exit from the window and re-display the Batch Service Entry page.

Why can't I access these screens? (See page 15)

Field Definitions

Batch Service Entry Page Field Definitions

10/09/2015 A	dult Inpatient	▼ Staff Name	 All Pre 	ocedure Groups	Apply Filter	
Client Preference 🔛 M ast Name Begins With	Last Name Begins With	F S Also Include Complete/S	how Services for the day	y 📃 Only Show Clien	its Seen In Last 90 Days	
efault Values						
Staff Staff Name	Procedure Code Procedure Code	<u>Time In</u> <u>Tir</u>	ne Out Dur. Locatio	ion T		
Client Name	Staff	Procedure Code	Date	Time In Time Out	Dur. Location	Comments
	Admin, System	▼ ACT P&P F2F ▼	10/09/2015	10:00 AM 11:00 AM	60 Afterschool Dauphin 🔻	
	Admin, System	▼ ACT P&P F2F ▼	10/09/2015	10:00 AM 11:00 AM	60 Inpatient Unit 💌	1
	Admin, System	▼ Tibc (Includes Iron) ▼	10/09/2015	10:00 AM 10:00 AM	15 Afterschool Dauphin 🔻	
+ Adam Test	Admin, System	Tibc (Includes Iron)	10/09/2015	10:00 AM 10:00 AM	15 Afterschool Dauphin *	
	Admin, System	▼ Tibc (Includes Iron) ▼	10/09/2015	10:00 AM 10:00 AM	15 Afterschool Dauphin 🔻	
	Admin, System	Tibc (Includes Iron)	10/09/2015	10:00 AM 10:00 AM	15 Afterschool Dauphin 🔻	
	🔀 🛛 Admin, System	ABILIFY 10MG	10/09/2015	10:00 AM 10:00 AM	20 Afterschool Dauphin •	
+ Banner Bruce		•][10/09/2015		•	
+ Barbera Anthony		•	10/09/2015		•	
	m l		Langement III	1 11 1	-11	

An asterisk (*) following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Description
Filter	
Date	Use the calendar icon to select the date of service you are entering services for.
All Programs	 Select from the drop-down list to filter data to display the list below. Options are: All Programs Choose from a list of all programs in the system
Staff Name	 Select from the drop-down list to filter data to display the list below. Options are: All staff names Choose from a list of all staff members listed in the system
All Procedure Groups	 Select from the drop-down list to filter data to display below. Options are: All Procedure Groups Choose from a list of procedure groups in the system Use the <define group=""> option in the <i>All Procedure Groups</i> drop down list to create a group of procedures to display below. <u>Tell me how</u> (See page 1)</define>
Client Preference	Select one or more days of the week to indicate the clients' preferences for days to attend services.
Also Include Complete/Show Services	Select the check box to include other services that have already been entered in the system for the date of service you are working on. Only services with a status of <i>Complete or Show are included</i>
Only Show Clients Seen In Last 90 Days	Select the check box to list only those clients who have received a service in the last 90 days.

Field	Description
	To display all clients who meet the criteria, leave the drop down selection to Last Name
Last Name Begins With	Begins With. To limit the clients listed, select a letter to display only those clients whose
	last names begin with the letter you choose.
Default Values	
Set the default values to the	he information that you want to replicate in all the clients listed below.
Staff	Select the staff member who provided the service you are entering for each client.
Procedure Code	Select the procedure code that describes the service that was provided that you are entering.
Time In*	Type the Time when the service started.
Time Out*	Type the Time when the service ended.
Dur*	Duration. Identifies the duration of the service as calculated from the <i>Time In</i> and <i>Time Out</i> values that you enter.
Location	Select the location for the service from the drop down list.
List	
Client Name	Identifies the name of the client(s) who match the filter values you entered in the Filter
Stoff	Section.
Dragodyna Coda	Identifies the massedure and which describes the service provided
Procedure Code	Identifies the late of course. This value course from the date was entered in the Eilter
Date	section.
Time In	Identifies the <i>Time In</i> you entered in the <i>Default Values</i> for this service.
Time Out	Identifies the <i>Time Out</i> you entered in the <i>Default Values</i> for this service.
Dur	Duration. Identifies the duration of the service as calculated from the <i>Time In</i> and <i>Time Out</i> entries
Location	Identifies the location selected in the <i>Default Values</i> section for this service.
Comments	Identifies comments entered for all or specific clients???
	Identifies the specific location for the service. Entered for all clients??? Can it be
Specific Location	duplicated? Or must it be entered for each client?
Prev	Use the Prev button to display the first page to the left of the one you are working on.
1, 2, 3, 4, 5	Up to five buttons appear for the current page and four more pages to the right. Click on a button to display that page
Next	Use the Next button to display the next page to the right.

Define View Window Field Definitions

		Procedure Group	
vaila BIL BIL BIL BIL BIL	ble Procedure Codes FY 10MG FY 10MGUD FY 15MG FY 15MG/UD FY 20MG FY 20MG UD FY 20MG UD FY 20MG FY 20MG	Selected Procedure Codes	at Cicar
-			
roc	edure View View Name	△ ProcedureCode	
×	View Name Crisis Inj	ProcedureCode Some Some	*

An asterisk (*) following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Description
Define View	
Procedure Group	Identifies the name of the procedure group you are creating. You can enter up to 60 characters.
Available Procedure	Identifies the procedure codes that are available to add to the procedure group you are
Codes	creating.
Selected Procedure Codes	Identifies the procedure codes you are adding to the procedure group.
Procedure View	
Lists the procedure gro	oups that have been created.
Delete Record icon	Use the delete icon to delete a procedure group from the system.
Radio Button icon	Use the radio button icon to select a procedure group to edit.
View Name	Identifies the name assigned to the procedure group when it was created.
Procedure Code	Identifies the procedure code(s) assigned to the procedure group. <i>Some</i> indicates that one or more procedure codes were added to the group. <i>All</i> indicates that all available procedure codes was added to the group.

Group Ser	vices (78)								😒 🛪 🖻
All GroupType		All Groups	s ▼ All S	taff	▼ All Status	es •	All Programs	 Apply Fill 	ter	
Custom		▼ From 12/0	1/2015 📑 To 05,	/10/2016	Other					
Group	Clients	Status	Date	Program	Staff 1	Staff 2	Staff 3	Staff 4		
1-Soc Develo	7	Show	12/18/2015 03:00 PM	Older Adul	Avila, Stace			- V.	*	
2-Test Devel	1	Scheduled	04/15/2016 03:00 PM	South Subu	Stone, Susan					
A&D Behavior	2	Show	12/03/2015 01:00 PM	South Apar	Freiley, Sus					
A&D Behavior	4	Show	03/18/2016 01:00 PM	South Apar	Freiley, Sus	Freiley, CSu				
ACT vGroup	5	Show	01/12/2016 09:00 AM	Adult Inpa	Avila, Stace	Avila, Syste	Freiley, Sus	Mauritz, Kat		
ACT vGroup	5	Show	01/10/2016 09:00 AM	Adult Inpa	Avila, Stace	Avila, Syste	Freiley, Sus	Stone, Susan		
ACT vGroup	5	Scheduled	03/29/2016 09:00 AM	Adult Inpa	Freiley, Sus	Stone, Susan				
AP-Group	2	Show	01/11/2016 08:00 AM	Brookhaven	Freiley, Sus	Stone, Susan				
AP-Group	2	Show	01/11/2016 08:00 AM	Brookhaven	Freiley, Sus	Stone, Susan				
AP-Group	2	Scheduled	01/12/2016 08:00 AM	Brookhaven	Freiley, Sus	Stone, Susan				
AP-Group	2	Show	01/26/2016 08:00 AM	Brookhaven	Freiley, Sus	Stone, Susan				
AP-Group	3	Show	03/15/2016 08:00 AM	Brookhaven	Freiley, Sus	Mauritz, Kat				
Brown, Garre	5	Show	02/16/2016 06:00 AM	MAU Shelte	De La Fuente	Ynclan, Beck				
Clubhouse	11	Show	12/07/2015 09:00 AM	South Subu	Garcia, Kyla	Freiley, Sus				
Clubhouse	11	Show	01/04/2016 02:00 PM	South Subu	Andes, Cynth					
Clubhouse	5	Show	01/26/2016 04:00 PM	South Subu	Freiley, Sus					
Clubhouse	3	Show	01/26/2016 04:00 PM	South Subu	Freiley, Sus				1	
Coping Skill	5	Scheduled	03/30/2016 12:30 PM	Adult Ment	Basevitz, Tr	Spencer, Kim				
Day Services	3	Scheduled	12/04/2015 02:00 PM	TRI Servic	Avila, Stace					
Day Services	3	Scheduled	12/11/2015 02:00 PM	TRI Servic	Avila, Stace					

Group Services List Page Field Definitions

Field	Description
	Select from the drop-down list to filter data to display below. Options are:
Type	All Group Types
Type	• Choose from a list of all group types in the system
	Select from the drop-down list to filter data to display below. Options are:
All Groups	All Groups
	• Choose from a list of all groups in the system
	Select from the drop-down list to filter data to display below. Options are:
All Staff	All Staff
	• Choose from a list of all staff members in the system
	Select from the drop-down list to filter data to display below. Options are:
	All Statuses
All Statuses	• Scheduled
	Scheduled and Show
	Complete
A 11	Select from the drop-down list to filter data to display below. Options are:
All Programs	All Programs
riograms	Choose from a list of all programs in the system

Field	Description
Custom	 Select from the drop-down list to filter data by date to display below. Options are: Today This Week Next Week Last Week This Month Next Month Last Month Custom - select this option to set a range of dates in the <i>From</i> and <i>To</i> fields.
From	If you chose <i>Custom</i> in the previous drop down list, use the calendar icon to choose a beginning of group services to display.
То	If you chose <i>Custom</i> in the previous drop down list, use the calendar icon to choose an end for group services to display.
Other	 Select from the drop-down list to filter the data to display below. Options are: Other The list is custom to your organization
Group	Identifies the name of the group, Click the hyperlinked group name to modify the group information.
Clients	Identifies how many clients are scheduled to attend the group service.
Status	Identifies the status of the group service. Statuses are: Scheduled Show Complete Cancelled
Date	Identifies the scheduled date of service.
Program	Identifies the program that the clients are enrolled in.
Staff 1	Identifies the first staff member who may lead the meeting.
Staff 2	Identifies the first staff member who may lead the meeting.
Staff 3	Identifies the first staff member who may lead the meeting.
Staff 4	Identifies the first staff member who may lead the meeting.

Search

Search for a Client

When you click on the drop-down arrow next to *Open* in the *Bed Census List Page*, the *Search for Client* window is displayed. In this window, you search for the client you want to admit. If the client has already been registered in the system, use that client record to complete the admission. If the client is not found, then follow your office's policy for registering the client.

Searching Best Practices

- To avoid duplicate records, use due diligence to ensure the client is not already entered in the system.
- Use the defined search strategy as explained in the procedure below.
- Use more specific searches found in the *Other Search Strategies* section, as needed.
- If no matches are found, assume the client is new and has not been registered in the system. Follow your office policy for registering the client.

To Search for a Client

- 1. When the *Client Search* window is displayed, complete the **Name Search**, **SSN Search** and **DOB Search** fields. View <u>field definitions</u> (See page 10).
- 2. Click the **Broad Search** button.
- 3. If no client is found, click the **Narrow Search** button.
- 4. If no client is found, click the SSN Search button.
- 5. If no client is found, click the **DOB Search** button.
- 6. When using *Other Search Strategies*, enter the information you want to search on and click the blue button to the left of the field to start the search.
- 7. If a matching record is found, the information is displayed in the *Records Found* tab.
 - **a.** Verify that the information that is listed matches the client you are working with.

b. If more than one client is listed, select the open circle to the left of the client line to select the client in the *Records Found* section.

c. Click the Select button.

-or-

If no match is found, the client is not registered in the system.

Why can't I access these screens? (See page 15)

Broad	rch Inc	lude Client Contac	ts 📄 Only Inc	lude Active	Clients (Che	ecking wil	l not allow option to c	reate new Client)
Last Nan	ne		First Name		uun 🍚 org	Pro	ogram	۲
ther Sea	rch Strategies							
SSN	Search			P	hone # Sea	rch		
DOB	Search		•	Ma	ster Client	ID Search		
Primary	Clinician Searc	•	•		lient ID Sea	arch		
Autho	prization ID / #			In	sured ID Se	arch	1	
ecords F	ound							
ID	Master ID	Client Name	∆ <u>SSN/EIN</u>	DOB	<u>Status</u>	<u>City</u>	Primary Clinician	Provider

Client Search Window Field Definition

Field	Description	
Clear button	Use to clear any information filled in the field before you conduct a new search.	
Include Client Contacts	Select the include contacts of the client in the search. What is this???	
Only Include Active Clients	The search only searches through clients marked as Active. If you select this checkbox, you will not be able to create a new client.	
Name Search tab		
Last Name	Enter the client's last name that you are looking for. Type up to 30 characters.	
First Name	Insert the client's first name that you are looking for. Type up to 20 characters.	
Program	Select the Program that the client is registered in.	
Other Search Strategies		
SSN Search	Enter the client's social security number in the fields provided.	
DOB Search	Enter the client's date of birth in mm/add/yyyy format or select from the calendar icon.	
Primary Clinician Search	To search by primary clinician, select the clinician using the drop-down list.	
Phone # Search	To search by the client's phone number, type the phone number with no hyphens.	
Master Client ID Search	To search by Master Client ID, type the ID number in the field.	
Client ID Search	To search by the client's ID, type the ID number in the field.	
Insured ID Search	To search by the insured ID, type the ID number in the field. This is the ID that is assigned to the person who carries the insurance for the client.	

Field	Description	
Records Found		
ID	Identifies the Client's ID assigned in SmartCare.	
Master ID	Identifies the Client's Master ID if one is assigned in SmartCare.	
First Name	Identifies the client's first name.	
Last Name	Identifies the client's last name.	
SSN	Identifies the client's social security number.	
DOB	Identifies the client's date of birth.	
Status	Identifies the client's current status in SmartCare.	
City	Identifies the client's city of residence.	
Primary Clinician	Identifies the primary clinician assigned to the client.	
Provider	Identifies the provider assigned to the client.	

Miscellaneous

Check for Spelling Errors in a Free-form Comment Field

When you have entered text in free-form comment fields on a page or window, if the spell check icon is present in the task bar, you can check for spelling errors in the comment fields.

- 1. Complete all comment fields on a page or window.
- 2. Click the **spell check** icon in the task bar.

Spell Check searches all comment fields.

If a misspelled word is found, the *Spell Check* window is displayed.

3. Notice that the misspelled word is bolded and underlined with a red dotted line in the *Not in Dictionary* pan. Suggestions for correct spellings are listed in the *Suggestions* panel. View field definitions.

to alleviate anxiety, and to teach skills for dealing with chaning maladaptive behavior. We spent time hearing successes and	
encouraging	Ignore
	Ignore All
Suggestions:	Add Custom
chining *	Change
shining	Change All

-or-

If the Spell check is complete window is displayed, the spell check is complete.

Spell Ch	ieck	X
1	ne spelling check is complete.	

4. Click the **Yes** button in the *Spell check is complete* window.

The page you started the *Spell Check* from is displayed.

Why can't I access these screens? (See page 15)

Filter a List Page

A list page displays a list of all the content categories on the page. Using the filters you can narrow the list of information that you view. The filters vary depending on the content of the list.

1. Follow a path from a banner selection to display a list page.

The list page is displayed

- 2. In the drop-down lists in the *Filter* box, select the items in each drop-down list to limit what is displayed on the page.
- 3. Click the **Apply Filter** button.

Note: The filter that you apply to that page remains until you change the filters and click the *Apply Filter* button again.

4. When the list is displayed, click on a **hyperlinked item** to view the detail page for that item.

Why Can't I Access a Screen?

You can only access screens that your user sign on has been granted access to. This property is referred to as *Permissions*. Use the table below to find the screen you need access to and determine the Permissions that are needed. To solve this, you need to discuss this issue with your system administrator to have the Permissions changed.

To access Permissions:

1. Follow this path: Administration tab > User/Role Setup banner > Role Definition subbanner.

The Role Definition page is displayed. View field definitions (See page 16).

From the *Permissions* page, you can:

Determine Which Permissions Are Needed for the Batch Services Entry Pages

You Need Permission Type	Parent	Permission Item
Banner	Administration	Batch Service Entry
Screens	My Office	Batch Service Entry Popup

Role Definitions Page Field Definitions

oles	Add Role	Permission Utilities
3rd Party Billing COM Clinician Employee Account Owner Environment Verification Role Finance Health Maintenance Alert Intake		Select a role to use the utilities below Copy permissions from one role to selected role Remove permissions from selected role Grant complete access to selected role
efault Permissions for Selected Role		
Select Permission Type	Select Parent	T All T Analy Eiller

An asterisk (*) following the field name indicates a Required field in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Description
Roles	All roles defined in the system. A role defines a collection of permissions to make it easier to assign permission to each staff member who will use the system. Permissions are assigned to staff to give them permission to access list pages, screens and windows in SmartCare.
Add Role	Click the Add Role button to add a new role to the system and assign permissions to that role.
Default Permissions for S	elected Role
Select Permission Type	Use this drop down list to display one permission type for the selected role.
Select Parent	Use this drop down list to select a specific parent type to view.
All	Use this drop down list to select to view all permissions, Granted permissions or Denied permissions for the selected role.
Permission Utilities	
Selected Role	This field appears if you have selected a role in the <i>Roles</i> section.
Copy permissions from one role to selected role	Click the hyperlink to copy permissions set up for one role to the Selected Role. When you click the Save button, all permission are copied from the role you select in the <i>Copy Permission from</i> drop down list. However, If there are permission already set up on the <i>Selected Role</i> , these permission are not overridden.
Remove permissions from selected role	Use this option to remove all permissions from the selected role.
Grant complete access to the selected role	Use this option to grant all permissions in the system to the selected role.