Batch Service Entry User Guide

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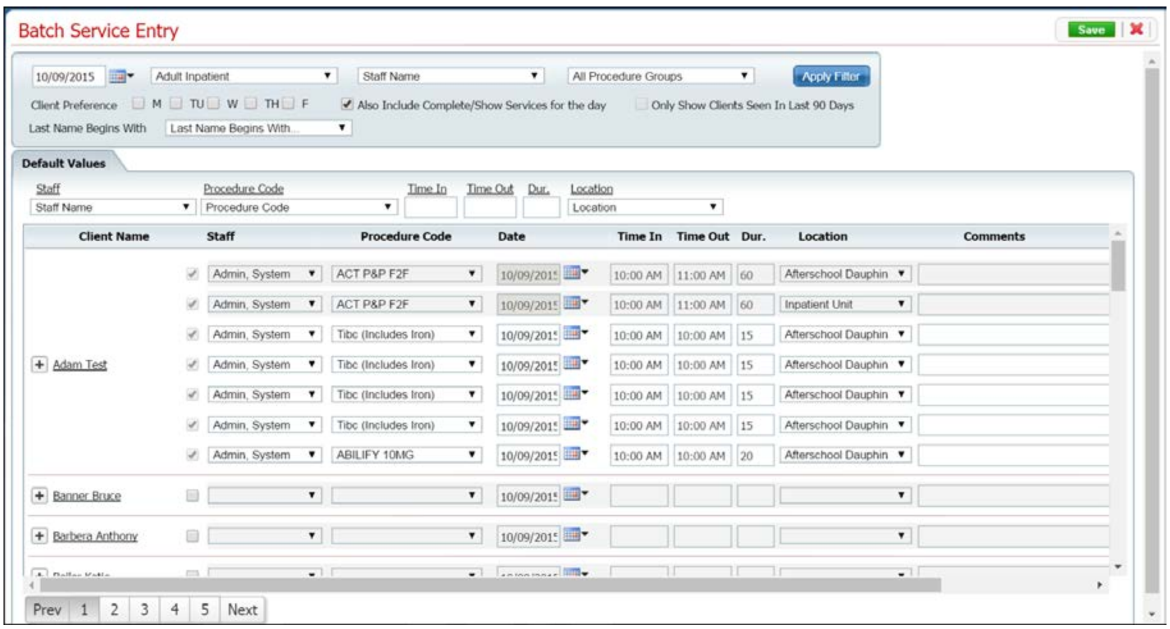
Batch Service Entry

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.**

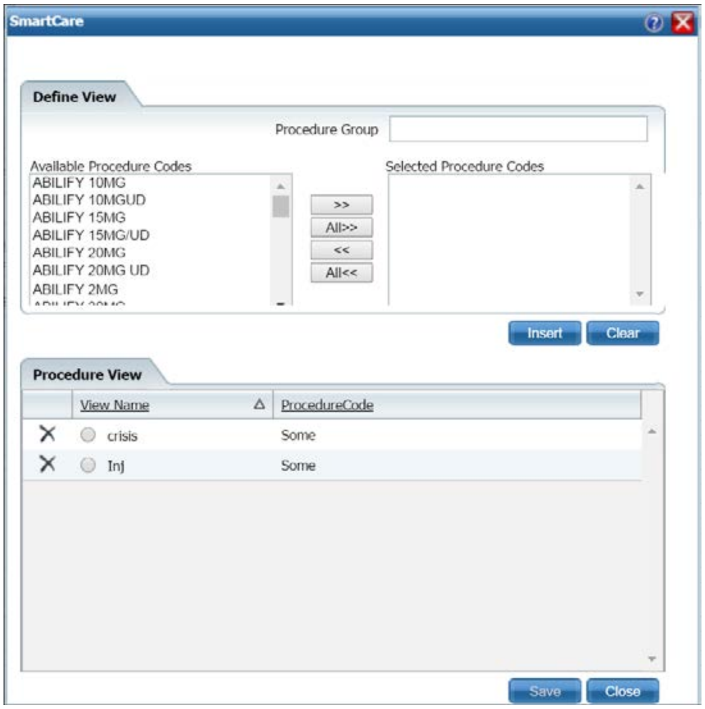
   The *Batch Service Entry* page is displayed. View field definitions (See page 5).



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).



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** >> 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** << 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** 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**.

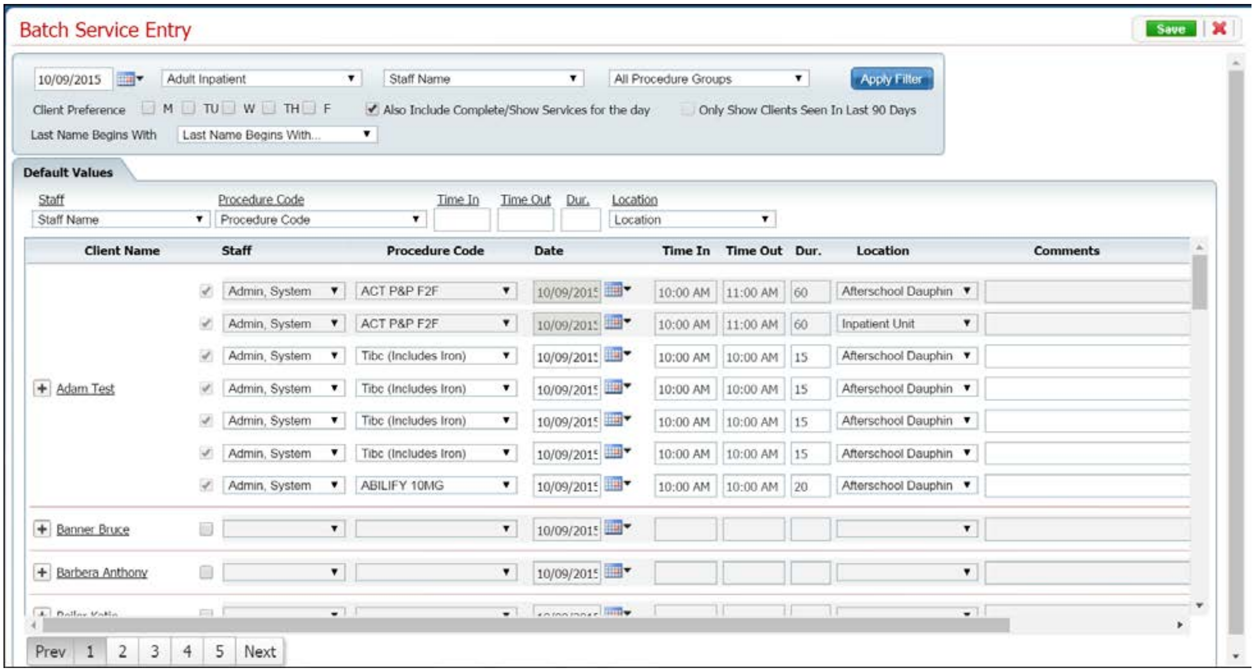
9. Click the **Save** button.

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

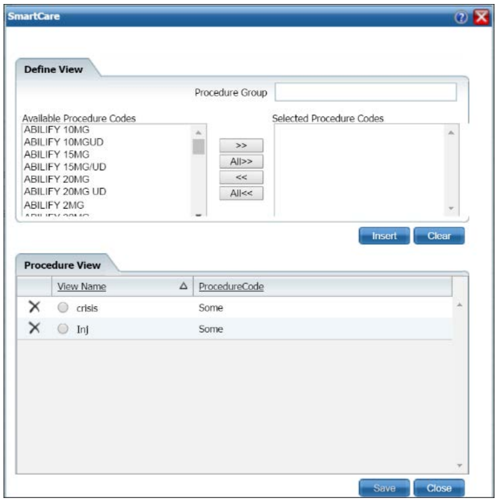


An asterisk (*) following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

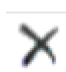
Field	Description
Filter	
Date	Use the calendar icon to select the date of service you are entering services for.
All Programs	Select from the drop-down list to filter data to display the list below. Options are: • All Programs • Choose from a list of all programs in the system
Staff Name	Select from 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 *All Procedure Groups* drop down list to create a group of procedures to display below. Tell me how... (See page 1)
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 for the day	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 *Complete* or *Show* are included.
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
Last Name Begins With	To display all clients who meet the criteria, leave the drop down selection to *Last Name 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 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 *Time In* and *Time Out* 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 section.
Staff	Identifies the name of the staff member who provided the service.
Procedure Code	Identifies the procedure code which describes the service provided.
Date	Identifies the date of service. This value comes from the date you entered in the Filter section.
Time In	Identifies the *Time In* you entered in the *Default Values* for this service.
Time Out	Identifies the *Time Out* you entered in the *Default Values* for this service.
Dur	Duration. Identifies the duration of the service as calculated from the *Time In* and *Time Out* entries.
Location	Identifies the location selected in the *Default Values* section for this service.
Comments	Identifies comments entered for all or specific clients???
Specific Location	Identifies the specific location for the service. Entered for all clients??? Can it be 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.

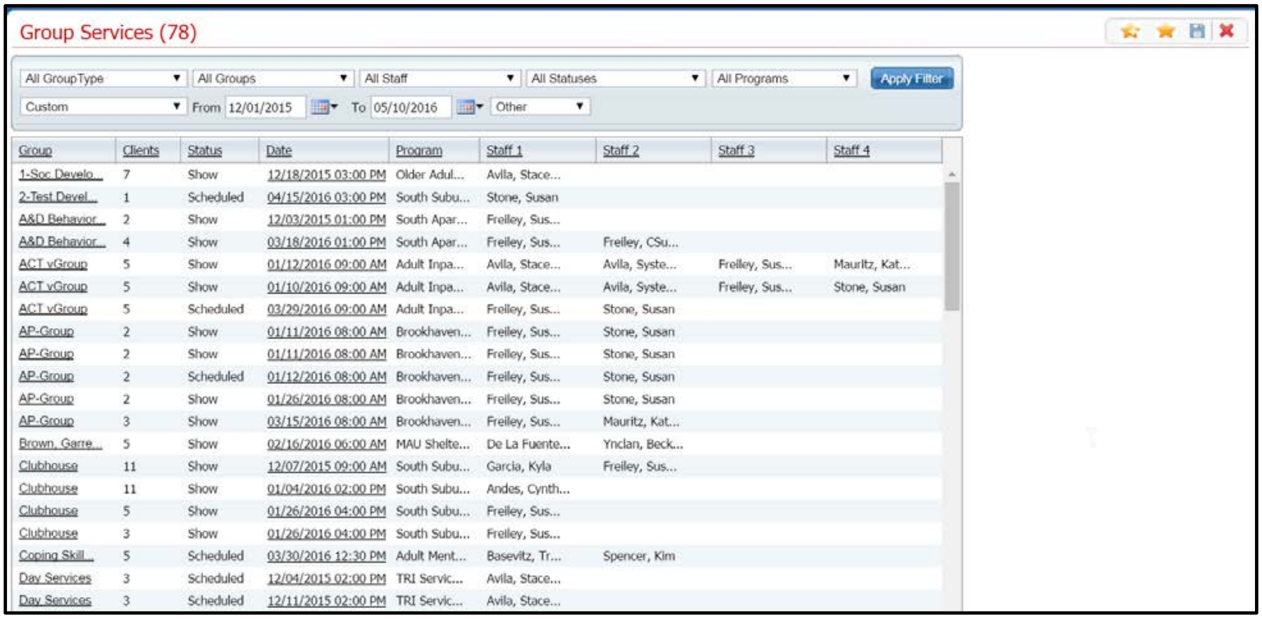
Define View Window Field Definitions



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 Codes	Identifies the procedure codes that are available to add to the procedure group you are creating.
Selected Procedure Codes	Identifies the procedure codes you are adding to the procedure group.
Procedure View	
Lists the procedure groups 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. *Some* indicates that one or more procedure codes were added to the group. *All* indicates that all available procedure codes was added to the group.

Group Services List Page Field Definitions



Field	Description
All Group Type	Select from the drop-down list to filter data to display below. Options are: • All Group Types • Choose from a list of all group types in the system
All Groups	Select from the drop-down list to filter data to display below. Options are: • All Groups • Choose from a list of all groups in the system
All Staff	Select from the drop-down list to filter data to display below. Options are: • All Staff • Choose from a list of all staff members in the system
All Statuses	Select from the drop-down list to filter data to display below. Options are: • All Statuses • Scheduled • Scheduled and Show • Complete
All Programs	Select from the drop-down list to filter data to display below. Options are: • All Programs • 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 *From* and *To* fields.
From	If you chose *Custom* in the previous drop down list, use the calendar icon to choose a beginning of group services to display.
To	If you chose *Custom* 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 field definitions (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.

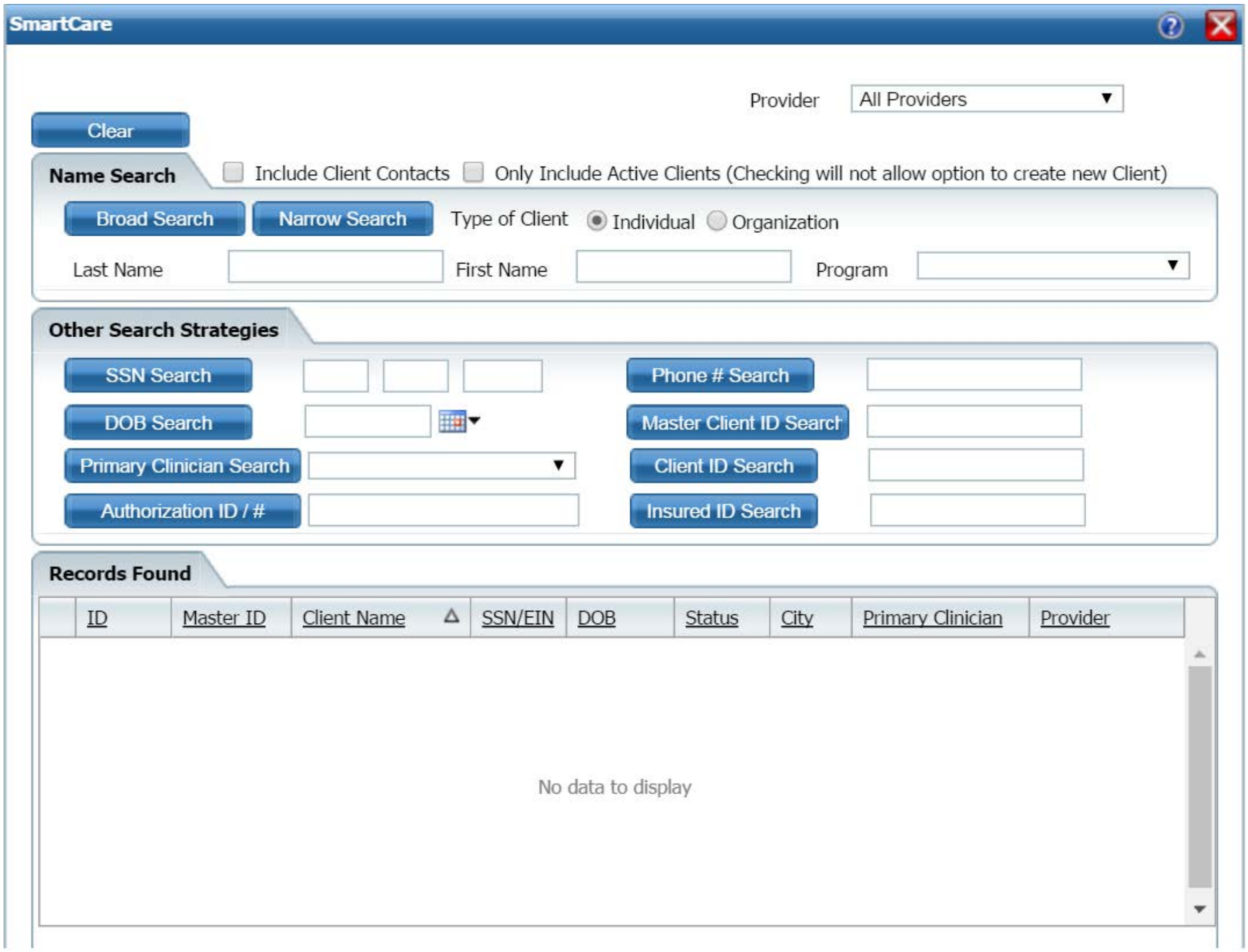
   c. Click the **Select** button.

   -or-

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

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

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.

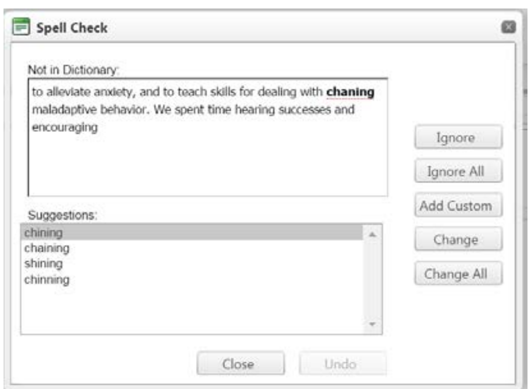
1. Complete all comment fields on a page or window.

2. Click the **spell check**  icon in the task bar.

   Spell Check searches all comment fields.

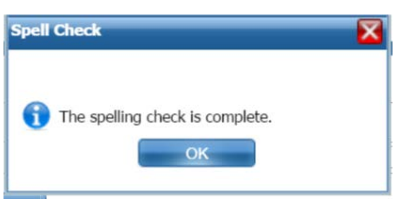
   If a misspelled word is found, the *Spell Check* window is displayed.

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.



-or-

If the *Spell check is complete* window is displayed, the spell 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 sub-banner.**

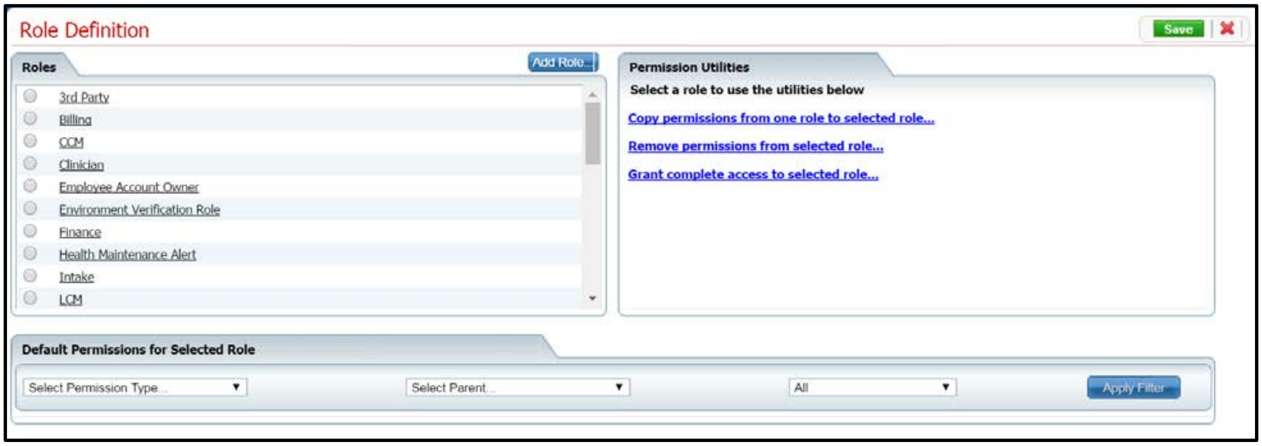
   The *Role Definition* page is displayed. View field definitions (See page 16).

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



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 Selected 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 *Roles* 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 *Copy Permission from...* drop down list. However, If there are permission already set up on the *Selected Role*, 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.