

# **Services and Service Notes User Guide**

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# Services and Service Notes User Guide

## Services and Services/Notes

You manage services, service notes and documents for clients in the *Services* and *Services/Notes* banners. Entering a service is the first step in creating a charge for billing insurance plans for payment. A service is the activity that the agency or staff provides to the client.

When a service is scheduled for the client in the future, it has a status of *Scheduled*. This indicates that the service is on the schedule for the client or clinician.

### Billing Process

When the client appears for the service, the status is changed to *Show*.

Depending on the procedure code defined for the service, a service note may be required. If so, completing and signing the service note is the second step in creating a charge for billing plans for payment. After the service has ended, the clinician creates and signs the *Service Note*.

When the service has a status of *Show* and, where applicable, a signed note, there is an overnight process that runs that adds the charge to the service. The overnight process checks that all procedure and insurance plan rules are met and if met, changes the status to *Complete*.

If a rule is not met, the status remains *Show* and the service is listed in the *Service Needing Attention* widget on the *Dashboard*. If the charge cannot be billed, warning and error messages appear for the client's charge on the *Service Detail* page.

View [Service Notes Status](#) (See page 64)

### Access Services and Services/Notes

There are several ways you can access the *Services* page and the *Services/Notes* page. The access process you use, depends on your job function and permissions.

| Access From  | Purpose  | Manage a Note? |
|--|--|----------------|
| <b>My Office tab &gt; Billing banner &gt; Services sub-banner &gt; Service Detail page</b> | <ul style="list-style-type: none"><li>• Access all clients' services.</li><li>• Schedule a service for a client.</li><li>• Identify when the client arrives for the service.</li></ul>           | No             |
| <b>Client tab &gt; Services banner &gt; Service Detail page</b>                            | <ul style="list-style-type: none"><li>• Access a specific client's services.</li><li>• Schedule a service for that client.</li><li>• Identify when the client arrives for the service.</li></ul> | No             |

| Access From   | Purpose   | Manage a Note? |
|---|---|----------------|
| <b>Client tab &gt; Services/Notes banner &gt; Service Note page</b>                           | <ul style="list-style-type: none"> <li>• Access a specific client's services.</li> <li>• Schedule a service for the client.</li> <li>• Identify when the client arrives for the service.</li> <li>• Complete a service note.</li> <li>• Sign a service note.</li> <li>• View a service note.</li> </ul> | Yes            |
| <b>Create Service/Notes</b> drop down in the title bar; displays the <i>Service Note</i> page | <ul style="list-style-type: none"> <li>• Quick access to create a specific client's services with a status of <i>Show</i>.</li> </ul>   | Yes            |

From the *Services (###)* list page, you can:

Manage Services

[Export the Records on the List Page \(See page 141\)](#)

From the *Services/Notes (###)* list page, you can:

[Manage Services and Notes \(See page 29\)](#)

[Export the Services/Notes Information for a Client \(See page \*\*Error! Bookmark not defined.\*\*\)](#)

[Why can't I access these screens? \(See page \*\*Error! Bookmark not defined.\*\*\)](#)

## Manage Services for a Client

### Manage Services for a Client

From the *Service Detail* page, you can:

[Add a Service to a Client](#) (See page 3)

[Change a Service for a Client](#) (See page 8)

[Delete a Service for a Client](#) (See page 11)

[Move Documents](#) (See page 8)

[Print a Clinical Summary](#) (See page 53)

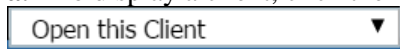
[Copy Service](#) (See page 1)

[Reschedule a Client](#) (See page 21)

[Schedule a Follow-up Service for a Client](#) (See page 25)

### To Add a Service to a Client

1. Display the client you want to work with.
  - a. To display a client, click the **Open this Client** drop down list



A screenshot of a dropdown menu. The text 'Open this Client' is displayed inside a rectangular box with a thin border. To the right of the text is a small black downward-pointing triangle, indicating that the menu can be expanded.

- b. Select the **<Client Search>** option.

The *Client Search* window is displayed. View field definitions.

The screenshot shows the SmartCare search interface. At the top, there is a 'Clear' button and a 'Provider' dropdown menu set to 'All Providers'. Below this is the 'Name Search' section, which includes checkboxes for 'Include Client Contacts' and 'Only Include Active Clients (Checking will not allow option to create new Client)'. There are 'Broad Search' and 'Narrow Search' buttons, and a 'Type of Client' section with radio buttons for 'Individual' (selected) and 'Organization'. Input fields for 'Last Name', 'First Name', and a 'Program' dropdown are present. The 'Other Search Strategies' section contains buttons for 'SSN Search', 'DOB Search', 'Primary Clinician Search', 'Authorization ID / #', 'Phone # Search', 'Master Client ID Search', 'Client ID Search', and 'Insured ID Search', each with corresponding input fields. At the bottom, the 'Records Found' section shows a table with columns: ID, Master ID, Client Name, SSN/EIN, DOB, Status, City, Primary Clinician, and Provider. The table is currently empty, displaying 'No data to display'.

2. Search for the client you want. [Tell me how...](#) (See page 133)
3. When the client you want is displayed and selected, click the **Select** button.

The *Client Summary* page is displayed. View [field definitions](#) (See page 86).

**Client Summary**

**Summary**

Client ID: 1652770 Master Client ID:

Name: Abbott, Bonnie Status: In Treatment DOB: 03/17/1965 Age: 51 Years Sex: Female Race: White SSN: 7099

Registered On: 02/13/2014 Last Seen On: 08/20/2016 Next Scheduled:

Primary Care Coord: Rael, Stacey Primary Program: Brookhaven CST Address: 13064 N. State Chicago, IL 60601

Emergency Contact: C725, W725 312-555-7695 Note: Phone: 312-555-1592

Presenting Problem:

Diagnosis:

| Type       | ICD9   | ICD10  | DSM5 | R/O | Description             |
|------------|--------|--------|------|-----|-------------------------|
| Primary    | 300.02 | F41.1  | No   |     | Generalized anxiety...  |
| Primary    | 300.00 | F41.9  | No   |     | Anxiety disorder, un... |
| Additional | 296.62 | F31.62 | No   |     | Bipolar disorder, cu... |
| Additional | 301.83 | F60.3  | Yes  |     | Borderline personali... |

Timeline Summary

GAF Score

Services 100  
Med Changes 50  
Hospitalization 0

Nov Dec Jan Feb Mar Apr May Jun Jul Aug Sep Oct

Admit Discharge

- Notice that a *Client* tab is displayed to the right of the *My Office* tab. The tab displays the client's last name, first name and the client ID in parentheses.



- Select **Services** from the *Client* banners.

The *Services (#)* window is displayed. View [field definitions](#) (See page 132).


**Services (9)**

Show Services Only | All Statuses | All Clinicians | Apply Filter

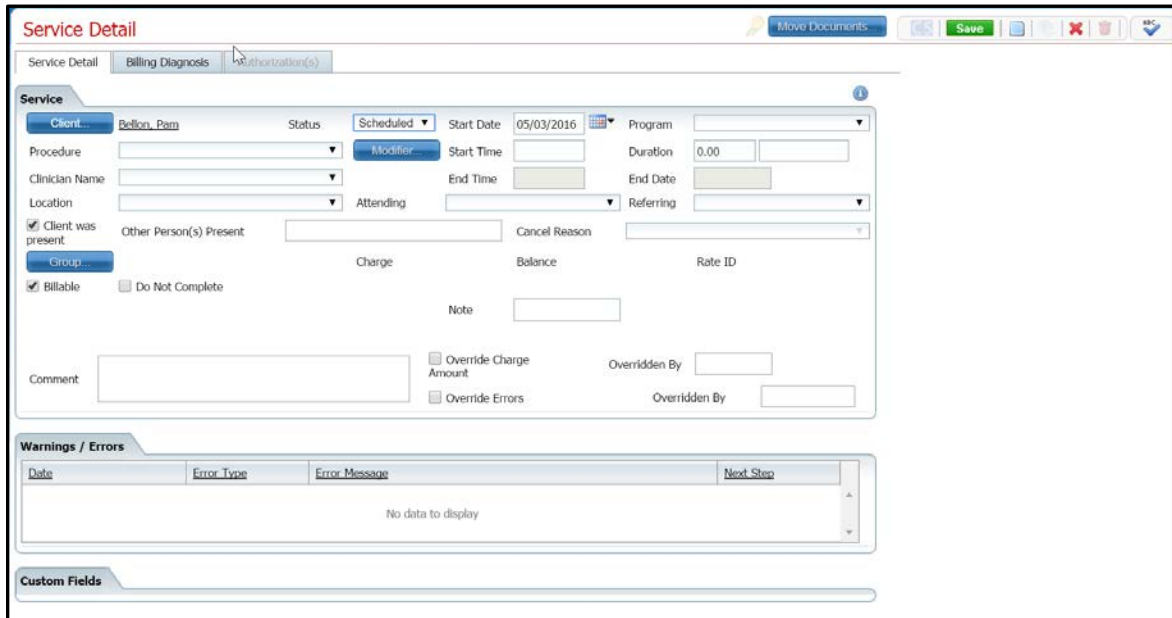
All Programs | DOS From 11/03/2015 | DOS To

| DOS                 | Procedure                  | Status        | Clinician/Provider | Program            | Location     | Charge  | Payment |
|---------------------|----------------------------|---------------|--------------------|--------------------|--------------|---------|---------|
| 05/03/2016 10:39 AM | Individual TheraBH 51 M... | Cancel (Co... | Acee, Lan SSW      | South Follow Along | Assisted ... | \$72.75 |         |
| 02/11/2016 10:30 AM | Individual Therapy 30 M... | Scheduled     | AuDuong, Bill LCSW | South Follow Along | Hope Apts    |         |         |
| 01/28/2016 10:30 AM | Individual Therapy 30 M... | Scheduled     | AuDuong, Bill LCSW | South Follow Along | Hope Apts    |         |         |
| 01/14/2016 10:30 AM | Individual Therapy 30 M... | No Show       | AuDuong, Bill LCSW | South Follow Along | Hope Apts    |         |         |
| 12/17/2015 10:30 AM | Individual Therapy 30 M... | Scheduled     | AuDuong, Bill LCSW | South Follow Along | Hope Apts    |         |         |
| 12/03/2015 10:30 AM | Individual Therapy 30 M... | Scheduled     | AuDuong, Bill LCSW | South Follow Along | Hope Apts    |         |         |
| 11/19/2015 10:30 AM | Individual Therapy 30 M... | Scheduled     | AuDuong, Bill LCSW | South Follow Along | Hope Apts    |         |         |
| 11/05/2015 11:00 AM | Med Mngmnt Nurse 15 ...    | Scheduled     | Smith, Maxine RN   | South Follow Along | Hope Apts    |         |         |
| 11/05/2015 10:30 AM | Individual Therapy 30 M... | Scheduled     | AuDuong, Bill LCSW | South Follow Along | Hope Apts    |         |         |

- Filter the list to determine the records that are displayed. [Tell me how...](#) (See page 142)

- To add a service to the client, click the **New** item  icon in the task bar.

The *Service Detail* page is displayed with the *Service Detail* tab active.



The screenshot shows the 'Service Detail' window with the 'Service' tab selected. The form contains the following fields and controls:

- Client:** Bellon, Pam
- Status:** Scheduled
- Start Date:** 05/03/2016
- Program:** (dropdown)
- Procedure:** (dropdown)
- Modifier:** (button)
- Start Time:** (input)
- Duration:** 0.00
- Clinician Name:** (dropdown)
- End Time:** (input)
- End Date:** (input)
- Location:** (dropdown)
- Attending:** (input)
- Referring:** (dropdown)
- Client was present
- Other Person(s) Present:** (input)
- Cancel Reason:** (input)
- Group:** (dropdown)
- Charge:** (input)
- Balance:** (input)
- Rate ID:** (input)
- Billable
- Do Not Complete
- Note:** (input)
- Comment:** (input)
- Override Charge Amount
- Overridden By:** (input)
- Override Errors
- Overridden By:** (input)

Below the form is a 'Warnings / Errors' table with columns: Date, Error Type, Error Message, Next Step. The table is currently empty with the message 'No data to display'.

At the bottom, there is a 'Custom Fields' section.

- Complete the **Service Detail** tab for this service. View [field definitions](#) (See page 116).
- Click the **Save** button.
- Click on the **Billing Diagnosis** tab to make it active.

The *Billing Diagnosis* tab is displayed.

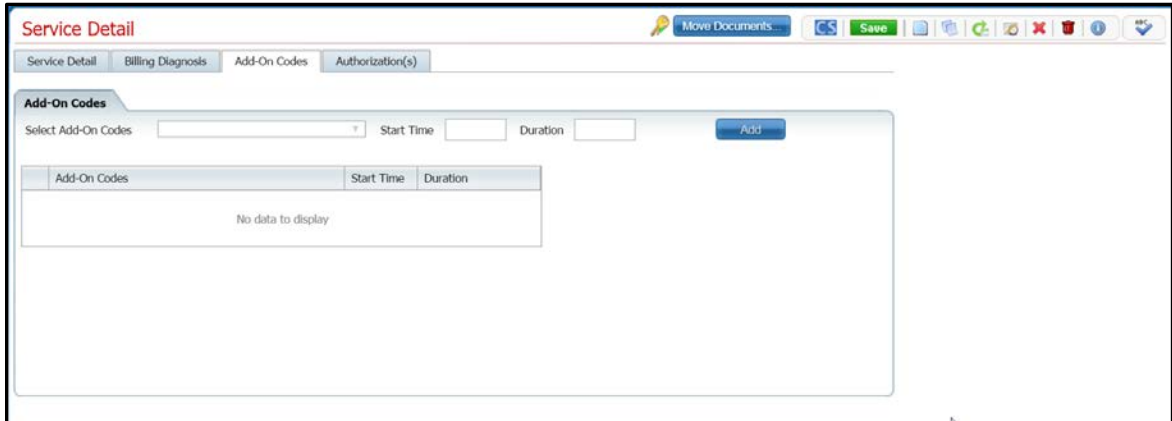


The screenshot shows the 'Service Detail' window with the 'Billing Diagnosis' tab selected. The form contains the following elements:

- DX Axis I & II:** (button)
- DX Axis III/Problem List:** (button)
- Diagnosis 1:** 295.30 - Paranoid schizophrenia
- Diagnosis 2:** V71.09 - Encounter for observation for other suspected diseases and conditions ruled out
- [Re-Order Diagnosis](#)
- [Refresh Diagnosis](#)

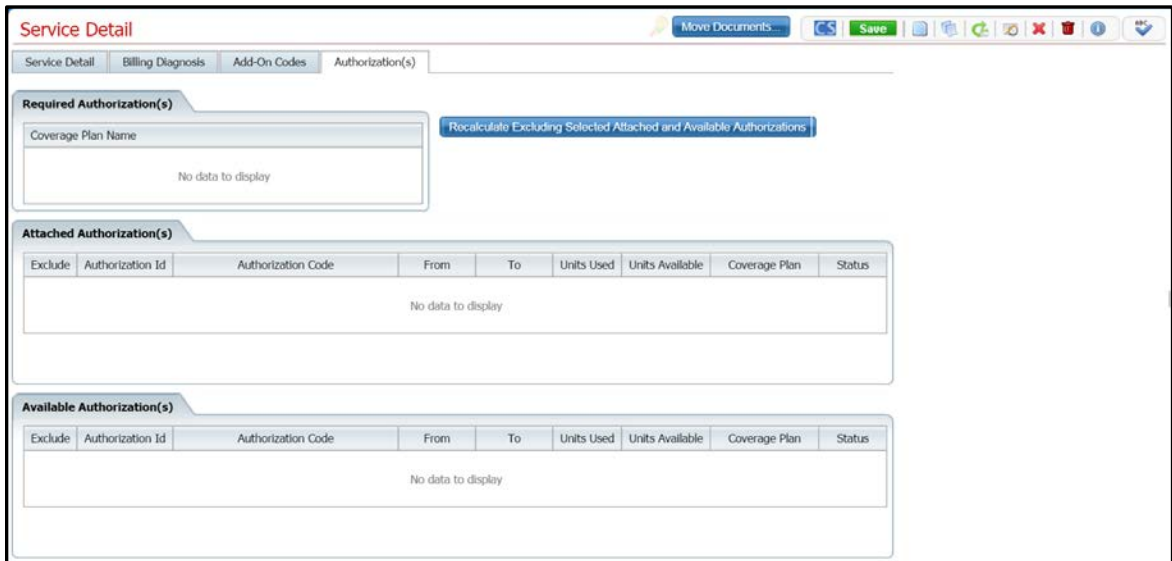
- Complete the **Billing Diagnosis** tab for this service. View [field definitions](#) (See page 115).
- Click on the **Save** button.
- If you added a procedure code on the *Service Detail* tab that is set up with add-on codes, the *Add-On Codes* tab is available on the *Service Detail* page.
- Click the **Add-On Codes** tab to make it active.


The *Add-On Codes* tab is displayed. View [field definitions](#) (See page 113).



15. Complete the **Add-On Codes** tab, if needed. [Tell me how...](#) (See page 37)
16. Click on the **Save** button.
17. Click on the **Authorization(s)** tab to make it active.

The *Authorization(s)* tab is displayed. View [field definitions](#). (See page 114)



18. Complete the **Authorization(s)** tab.
19. Click the **Save** button.
20. Click the **Exit** icon  to return to the *Services* list page.

**To Change an Existing Service for a Client**

1. Display the client you want to work with.
  - a. To display a client, click the **Open this Client** drop down list



- b. Select the <Client Search> option.

The *Client Search* window is displayed. View [field definitions](#) (See page 133).

2. Search for the client you want. [Tell me how...](#) (See page 133)
3. When the client you want is displayed and selected, click the **Select** button.

The *Client Summary* page is displayed. View [field definitions](#) (See page 86).

**Client Summary**

**Summary**

Client ID: 394180      Master Client ID:

Name: Bellon, Pam      Status: In Treatment      DOB: 01/12/1941      Age: 75 Years      Sex: Female      Race: White      SSN: 0999

Registered On: 01/08/1991      Last Seen On: 09/14/2015      Next Scheduled:

Primary Care Coord: AuDuong, Bill      Primary Program: South Follow Along      Address: 1830 N. State Chicago, IL 60601      Phone: 312-555-2153

Note:

Emergency Contact: P222, C222-312-555-2475      Presenting Problem:

Diagnosis:

| Type       | ICD9   | ICD10  | DSM5 | R/O | Description             |
|------------|--------|--------|------|-----|-------------------------|
| Primary    | 295.30 | F20.0  | No   |     | Paranoid schizophren... |
| Additional | V71.09 | Z03.89 | No   |     | Encounter for observ... |

Timeline Summary

GAF Score

Services 100

Med Changes 50

Hospitalization 0

Jun Jul Aug Sep Oct Nov Dec Jan Feb Mar Apr May

Admit ↑      Discharge ↓

- Notice that a *Client* tab is displayed to the right of the *My Office* tab. The tab displays the client's last name, first name and the client ID in parentheses.



- Select **Services** from the *Client* banners.

The *Services (#)* window is displayed. View [field definitions](#) (See page 131).

**Services (9)**

Show Services Only      All Statuses      All Clinicians      Apply Filter

All Programs      DOS From: 11/03/2015      DOS To:

| DOS                 | Procedure                  | Status        | Clinician/Provider | Program            | Location     | Charge  | Payment |
|---------------------|----------------------------|---------------|--------------------|--------------------|--------------|---------|---------|
| 05/03/2016 10:30 AM | Individual TheraBH 51 M... | Cancel (Co... | Acree, Lan SSW     | South Follow Along | Assisted ... | \$72.75 |         |
| 02/11/2016 10:30 AM | Individual Therapy 30 M... | Scheduled     | AuDuong, Bill LCSW | South Follow Along | Hope Apts    |         |         |
| 01/28/2016 10:30 AM | Individual Therapy 30 M... | Scheduled     | AuDuong, Bill LCSW | South Follow Along | Hope Apts    |         |         |
| 01/14/2016 10:30 AM | Individual Therapy 30 M... | No Show       | AuDuong, Bill LCSW | South Follow Along | Hope Apts    |         |         |
| 12/17/2015 10:30 AM | Individual Therapy 30 M... | Scheduled     | AuDuong, Bill LCSW | South Follow Along | Hope Apts    |         |         |
| 12/03/2015 10:30 AM | Individual Therapy 30 M... | Scheduled     | AuDuong, Bill LCSW | South Follow Along | Hope Apts    |         |         |
| 11/19/2015 10:30 AM | Individual Therapy 30 M... | Scheduled     | AuDuong, Bill LCSW | South Follow Along | Hope Apts    |         |         |
| 11/05/2015 11:00 AM | Med Mngmnt Nurse 15 ...    | Scheduled     | Smith, Maxine RN   | South Follow Along | Hope Apts    |         |         |
| 11/05/2015 10:30 AM | Individual Therapy 30 M... | Scheduled     | AuDuong, Bill LCSW | South Follow Along | Hope Apts    |         |         |

- Filter the list to determine the records that are displayed. [Tell me how...](#) (See page 142)
- To change an existing service, click on the **date of service** in the *DOS* column.

The *Service Detail* page is displayed with the *Service Detail* tab active. View [field definitions](#) (See page 116).

**Service Detail**

Service Detail | Billing Diagnosis | Authorization(s)

**Service**

Client: Bellon, Pam | Status: Cancel | Start Date: 05/03/2016 | Program: South Follow Along

Procedure: Individual TheraBH | Start Time: 10:39 AM | Duration: Minutes

Clinician Name: Acreo, Lan | End Time: 10:39 AM | End Date: 05/03/2016

Location: Assisted Living | Attending: | Referring:

Client was present:  | Other Person(s) Present: | Cancel Reason: Agency or Clinician Cancelled

Group: | Charge: \$0.00 | Balance: | Rate ID:

Billable |  Do Not Complete

Note: 312-555-2153

Comment: |  Override Charge Amount | Overridden By: |  Override Errors | Overridden By:

**Warnings / Errors**

| Date                | Error Type | Error Message  | Next Step |
|---------------------|------------|--|-----------|
| 05/03/2016 11:07 AM | 4408       | Authorization for scheduled service missing for OP TRAD CAID MH-21301622 |           |

**Custom Fields**

8. Make changes on the **Service Detail** tab for this service, if needed.
9. Click the **Save** button.
10. Click on the **Billing Diagnosis** tab to make it active.

The *Billing Diagnosis* tab is displayed. View [field definitions](#) (See page 128).

**Service Detail**

Service Detail | Billing Diagnosis | Authorization(s)

**Billing Diagnosis**

DX Axis I & II | DX Axis III/Problem List

295.30 - Paranoid schizophrenia

V71.09 - Encounter for observation for other suspected diseases and conditions ruled out

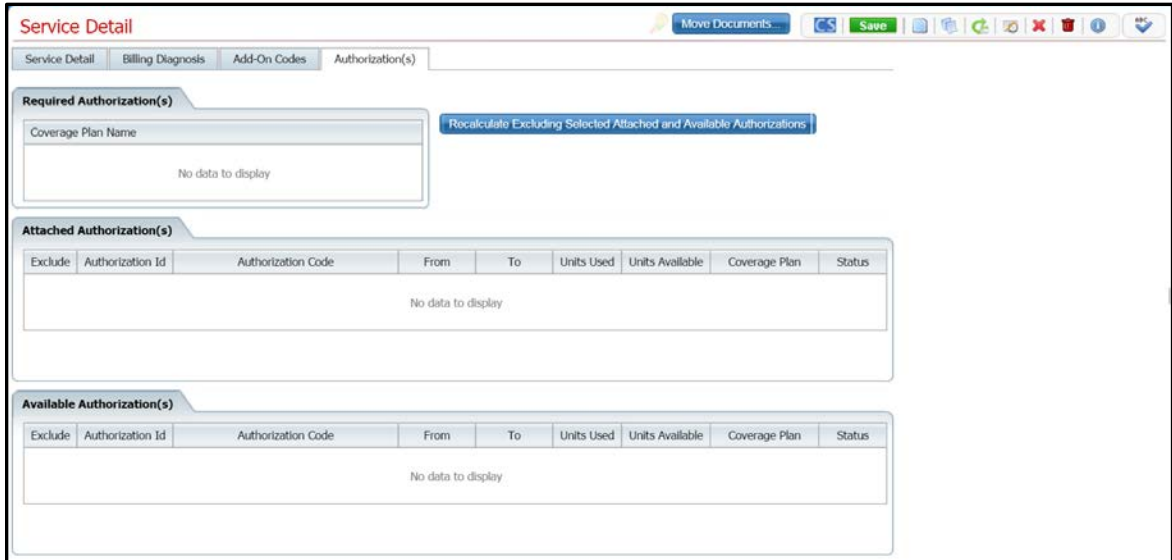
[Re-Order Diagnosis](#) | [Refresh Diagnosis](#)


11. Make changes on the **Billing Diagnosis** tab for this service, if needed.
12. Click on the **Save** button.
13. If the *Add-On Codes* tab is present, click the **Add-On Codes** tab to make it active.

The *Add-On Codes* tab is displayed. View [field definitions](#) (See page 113).

14. Make changes on the **Add-On Codes** tab, if needed. [Tell me how...](#) (See page 15)
15. Click the **Authorization(s)** tab to make it active.

The *Authorization(s)* tab is displayed. View [field definitions](#). (See page 114)

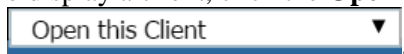


16. Make changes on the **Authorization(s)** tab, if needed.
17. Click the **Save** button.
18. When you are done making changes, click the **Exit** icon  to return to the *Services* list page.

### To Delete a Service

You **cannot** delete a service that shows a status of *Complete*. Take care when deleting a service as deleting records can cause problems throughout the system and on billing procedures.

1. Display the client you want to work with.
  - a. To display a client, click the **Open this Client** drop down list
- b. Select the **<Client Search>** option.



The *Client Search* window is displayed. View [field definitions](#) (See page 133).

The screenshot shows the SmartCare application window. At the top right, there is a 'Provider' dropdown menu set to 'All Providers'. Below this is a 'Clear' button. The 'Name Search' section includes checkboxes for 'Include Client Contacts' and 'Only Include Active Clients (Checking will not allow option to create new Client)'. It also has 'Broad Search' and 'Narrow Search' buttons, and radio buttons for 'Type of Client' set to 'Individual'. Input fields for 'Last Name', 'First Name', and 'Program' are present. The 'Other Search Strategies' section contains buttons for 'SSN Search', 'DOB Search', 'Primary Clinician Search', 'Authorization ID / #', 'Phone # Search', 'Master Client ID Search', 'Client ID Search', and 'Insured ID Search', each with corresponding input fields. The 'Records Found' section features a table with columns: ID, Master ID, Client Name, SSN/EIN, DOB, Status, City, Primary Clinician, and Provider. The table is currently empty, displaying 'No data to display'. At the bottom, there are buttons for 'Create Provider Client', 'Create New Potential Client', 'Select', 'Cancel', 'New Registration', 'Registration (Selected Client)', 'Inquiry (Selected Client)', and 'Inquiry (New Client)'.

2. Search for the client you want. [Tell me how...](#) (See page 133)
  3. When the client you want is displayed and selected, click the **Select** button.
- The *Client Summary* page is displayed. View [field definitions](#) (See page 86).

**Client Summary**

**Summary**

Client ID: 394180      Master Client ID:

Name: Bellon, Pam      Status: In Treatment      DOB: 01/12/1941      Age: 75 Years      Sex: Female      Race: White      SSN: 0999

Registered On: 01/08/1991      Last Seen On: 09/14/2015      Next Scheduled:

Primary Care Coord: AuDuong, Bill      Primary Program: South Follow Along      Address: 1830 N. State Chicago, IL 60601      Phone: 312-555-2153

Note:

Emergency Contact: 6222\_C222-312-555-2475      Presenting Problem:

Diagnosis:

| Type       | ICD9   | ICD10  | DSM5 | R/O | Description             |
|------------|--------|--------|------|-----|-------------------------|
| Primary    | 295.30 | F20.0  | No   |     | Paranoid schizophren... |
| Additional | V71.09 | Z03.89 | No   |     | Encounter for observ... |

Timeline Summary

GAF Score

Services 100

Med Changes 50

Hospitalization 0

Jun Jul Aug Sep Oct Nov Dec Jan Feb Mar Apr May

Admit ↑      Discharge ↓

- Notice that a *Client* tab is displayed to the right of the *My Office* tab. The tab displays the client's last name, first name and the client ID in parentheses.



- Select **Services** from the *Client* banners.

The *Services (#)* window is displayed. View [field definitions](#) (See page 131).

**Services (9)**

Show Services Only      All Statuses      All Clinicians      Apply Filter

All Programs      DOS From: 11/03/2015      DOS To:

| DOS                 | Procedure                  | Status        | Clinician/Provider | Program            | Location     | Charge  | Payment |
|---------------------|----------------------------|---------------|--------------------|--------------------|--------------|---------|---------|
| 05/03/2016 10:30 AM | Individual TheraBH 51 M... | Cancel (Co... | Acree, Lan SSW     | South Follow Along | Assisted ... | \$72.75 |         |
| 02/11/2016 10:30 AM | Individual Therapy 30 M... | Scheduled     | AuDuong, Bill LCSW | South Follow Along | Hope Apts    |         |         |
| 01/28/2016 10:30 AM | Individual Therapy 30 M... | Scheduled     | AuDuong, Bill LCSW | South Follow Along | Hope Apts    |         |         |
| 01/14/2016 10:30 AM | Individual Therapy 30 M... | No Show       | AuDuong, Bill LCSW | South Follow Along | Hope Apts    |         |         |
| 12/17/2015 10:30 AM | Individual Therapy 30 M... | Scheduled     | AuDuong, Bill LCSW | South Follow Along | Hope Apts    |         |         |
| 12/03/2015 10:30 AM | Individual Therapy 30 M... | Scheduled     | AuDuong, Bill LCSW | South Follow Along | Hope Apts    |         |         |
| 11/19/2015 10:30 AM | Individual Therapy 30 M... | Scheduled     | AuDuong, Bill LCSW | South Follow Along | Hope Apts    |         |         |
| 11/05/2015 11:00 AM | Med Mngmnt Nurse 15 ...    | Scheduled     | Smith, Maxine RN   | South Follow Along | Hope Apts    |         |         |
| 11/05/2015 10:30 AM | Individual Therapy 30 M... | Scheduled     | AuDuong, Bill LCSW | South Follow Along | Hope Apts    |         |         |

- Filter the list to determine the records that are displayed. [Tell me how...](#) (See page 142)
- To delete a service, click on the **date of service** in the *DOS* column.

The *Service Detail* page is displayed with the *Service Detail* tab active.

**Service Detail**

Service Detail | Billing Diagnosis | Authorization(s)

**Service**

Client: Bellon, Pam | Status: Cancel | Start Date: 05/03/2016 | Program: South Follow Along

Procedure: Individual TheraBH | Start Time: 10:39 AM | Duration: | Minutes

Clinician Name: Acree, Lan | End Time: 10:39 AM | End Date: 05/03/2016

Location: Assisted Living | Attending: | Referring: |

Client was present:  Other Person(s) Present: | Cancel Reason: Agency or Clinician Cancelled

Charge: \$0.00 | Balance: | Rate ID: |

Billable |  Do Not Complete



Note: 312-555-2153

Comment: |  Override Charge Amount | Overridden By: |  Override Errors | Overridden By: |

**Warnings / Errors**

| Date                | Error Type | Error Message  | Next Step |
|---------------------|------------|--|-----------|
| 05/03/2016 11:07 AM | 4408       | Authorization for scheduled service missing for OP TRAD CAID MH-21301622 |           |

**Custom Fields**

8. Click the **trash can**  icon in the task bar.
9. Click the **Yes** button in the *Confirmation Message* window.
10. Click the **Exit** icon  to return to the *Services* list page.

[Why can't I access these screens?](#) (See page **Error! Bookmark not defined.**)

## Add a Code to the Service Procedure Code

1. From the *Service Detail* page, click the **Add-On Codes** tab to make it active.

The *Add-On Codes* tab is displayed. View [field definitions](#) (See page 114).

| Add-On Codes       | Start Time | Duration |
|--------------------|------------|----------|
| No data to display |            |          |

2. Click the **drop down arrow** in the *Select Add-On Codes* field.

The list of authorized add-on codes for the service procedure code are listed.


3. Select the **add-on code** you want.

The start time for the service is displayed in the *Start Time* field.

The *Duration* that is set up for the add-on code is displayed in the *Duration* field. The units for the code are displayed to the right of the *Duration* field.

4. Click the **Add** button.

The information about the add-on code is added to the list.

5. If you need to delete an add-on code, click the  icon on the record you want to delete.

6. When you are done working with add-on codes, click the **Save** button.

Use the left arrow in your browser to return to the topic that you linked from.

[Why can't I access these screens?](#) (See page **Error! Bookmark not defined.**)

## Add a Diagnosis Code to a Client's Service

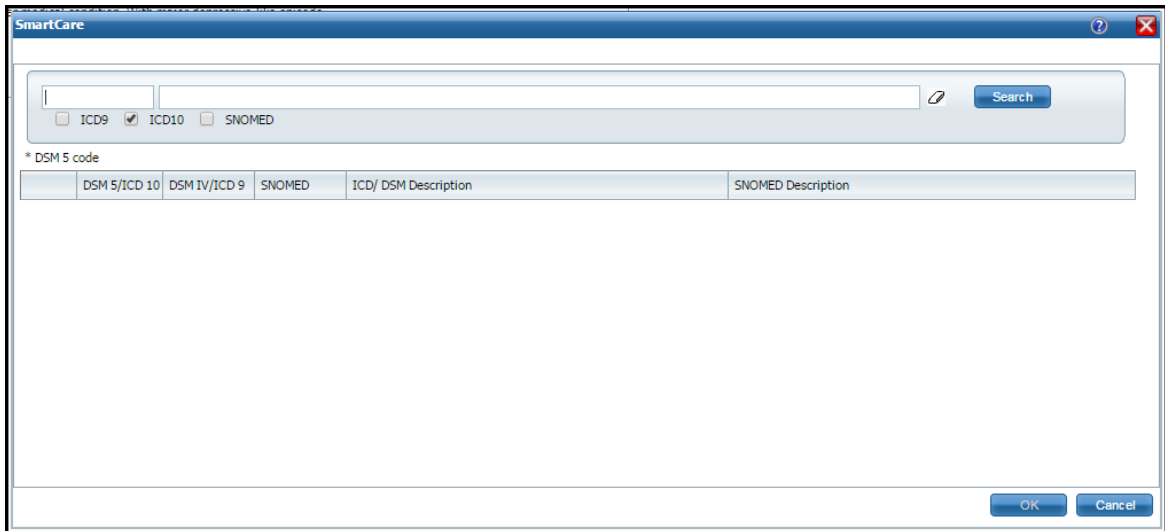
1. Display the *Service Detail* page with the *Billing Diagnosis* tab active.

The *Service Detail* page is displayed with the *Billing Diagnosis* tab active. View [field definitions](#) (See page 115).



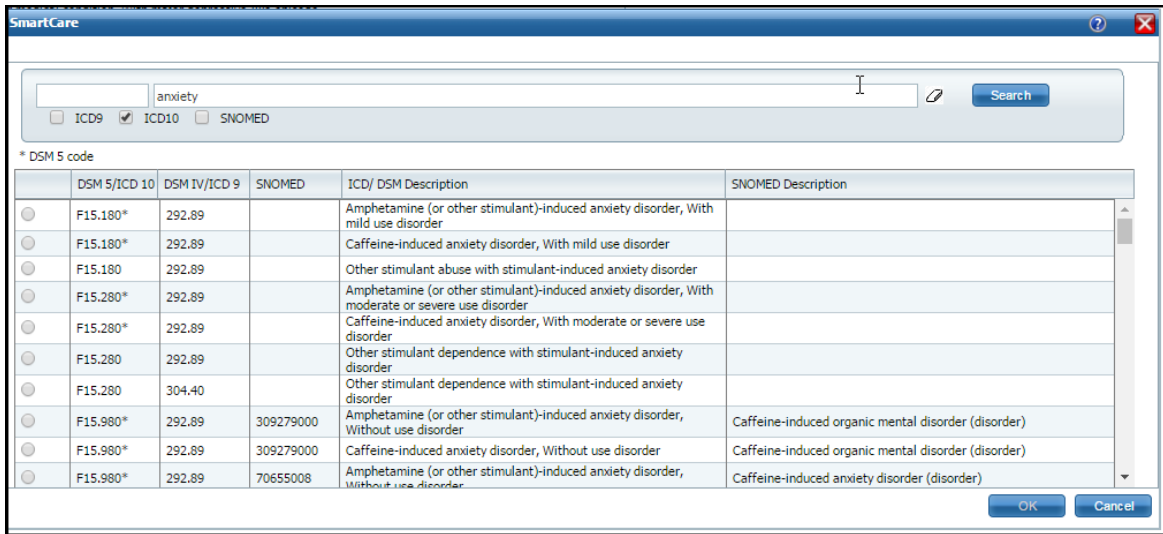
2. Click the **ICD 10** button.

The *Diagnosis Code* window is displayed. View [field definitions](#) (See page 113).



3. Type a partial or full diagnosis code or description in the first two fields.
4. Click the **Search** button.

When a match(es) are found, the *Search for a diagnosis code* window is re-displayed with the diagnosis codes listed.



5. Click the **radio button** in the left column of the diagnosis code you want to add to the client.
6. Click the **OK** button.

The window is closed and the diagnosis code is listed in the *Billing Diagnosis* tab.

Return to the [Service Details Page Billing Diagnosis Tab Field Definitions](#) (See page 115) page.

[Why can't I access these screens?](#)

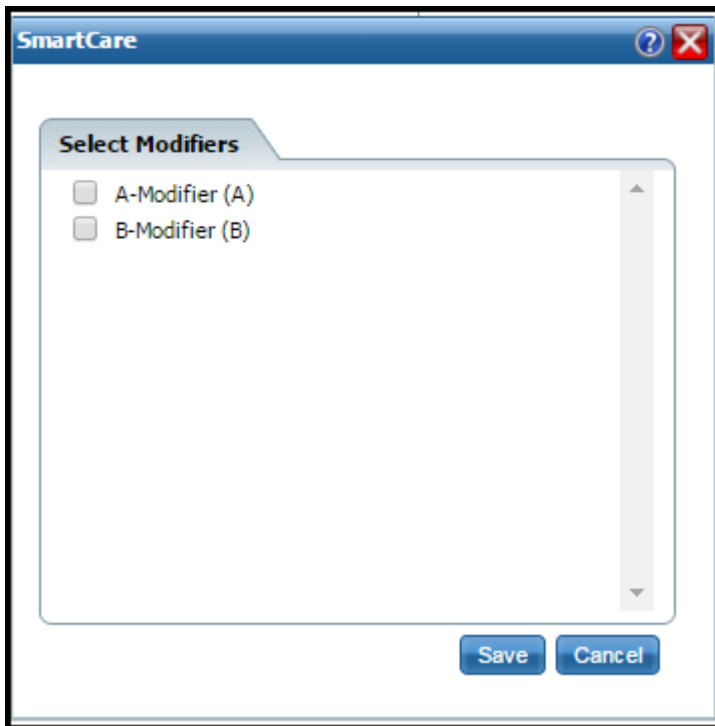
## Add a Modifier to a Procedure when Adding a Service

1. Make sure the *Service Detail* page is displayed. [Tell me how...](#) (See page 5)
2. Enter the **Program, Clinician Name, Location** and **Procedure** codes.

When you have entered a valid procedure, the *Modifier* button is activated.

**Note:** For the *Modifier* button to be activated, the procedure must be set up with modifiers.

The *Select Modifiers* window is displayed.



3. Select the **modifier(s)** you want to add to the procedure code.
4. Click the **Save** button.

The window is closed. The name of the modifier you chose is displayed on the *Modifier* button.



[Why can't I access these screens?](#)

## Copy Service



Use this feature on the *Service Detail* page for a client with an existing service. The *Copy Service* icon lets you make a copy of the service that is displayed, and then allows you to make changes to the service, if needed. This is an efficient process if the majority of the existing service details are the same for the copy of the service you make.

### To Copy a Client's Service

1. Display the client you want to work with.
  - a. To display a client, click the **Open this Client** drop down list

A screenshot of a dropdown menu with the text 'Open this Client' and a downward-pointing arrow.

- b. Select the **<Client Search>** option.

The *Client Search* window is displayed. View [field definitions](#) (See page 133).

A screenshot of the 'SmartCare' Client Search window. The window has a title bar with 'SmartCare' and standard window controls. It contains several sections: a 'Clear' button, a 'Provider' dropdown menu set to 'All Providers', a 'Name Search' section with checkboxes for 'Include Client Contacts' and 'Only Include Active Clients', and buttons for 'Broad Search' and 'Narrow Search'. Below this are input fields for 'Last Name', 'First Name', and a 'Program' dropdown. The 'Other Search Strategies' section includes buttons for 'SSN Search', 'DOB Search', 'Primary Clinician Search', 'Authorization ID / #', 'Phone # Search', 'Master Client ID Search', 'Client ID Search', and 'Insured ID Search', each with an associated input field. At the bottom, there is a 'Records Found' section with a table header containing columns: ID, Master ID, Client Name, SSN/EIN, DOB, Status, City, Primary Clinician, and Provider. The table body is empty, displaying 'No data to display'. At the very bottom of the window are several action buttons: 'Create Provider Client', 'Create New Potential Client', 'Select', 'Cancel', 'New Registration', 'Registration (Selected Client)', 'Inquiry (Selected Client)', and 'Inquiry (New Client)'.

2. Search for the client you want. [Tell me how...](#) (See page 133)

- When the client you want is displayed and selected, click the **Select** button.

The *Client Summary* page is displayed. View [field definitions](#) (See page 86).

**Client Summary**

Summary

Client ID: 394180      Master Client ID:

Name: Bellon, Pam      Status: In Treatment      DOB: 01/12/1941      Age: 75 Years      Sex: Female      Race: White      SSN: 0999

Registered On: 01/08/1991      Last Seen On: 09/14/2015      Next Scheduled:

Primary Care Coord: AuDuong, Bill      Primary Program: South Follow Along      Address: 1830 N. State, Chicago, IL 60601      Phone: 312-555-2153

Emergency Contact: 8222\_C222.312-555-2475      Note:

Presenting Problem:

Diagnosis:

| Type       | ICD9   | ICD10  | DSM5 | R/O | Description             |
|------------|--------|--------|------|-----|-------------------------|
| Primary    | 295.30 | F20.0  | No   |     | Paranoid schizophren... |
| Additional | V71.09 | Z03.89 | No   |     | Encounter for observ... |

Timeline Summary

GAF Score

Services 100

Med Changes 50

Hospitalization 0

Jun Jul Aug Sep Oct Nov Dec Jan Feb Mar Apr May

Admit ↑      Discharge ↓

- Notice that a *Client* tab is displayed to the right of the *My Office* tab. The tab displays the client's last name, first name and the client ID in parentheses.

My Office    **Abbott, Tera (1651160) X**    Program    Administration

- Select **Services** from the *Client* banners.

The *Services (#)* window is displayed. View [field definitions](#) (See page 131).

**Services (9)**


Show Services Only    All Statuses    All Clinicians    Apply Filter

All Programs    DOS From: 11/03/2015    DOS To:

| DOS                 | Procedure                  | Status        | Clinician/Provider | Program            | Location     | Charge  | Payment |
|---------------------|----------------------------|---------------|--------------------|--------------------|--------------|---------|---------|
| 05/03/2016 10:39 AM | Individual TheraBH 51 M... | Cancel (Co... | Acree, Lan SSW     | South Follow Along | Assisted ... | \$72.75 |         |
| 02/11/2016 10:30 AM | Individual Therapy 30 M... | Scheduled     | AuDuong, Bill LCSW | South Follow Along | Hope Apts    |         |         |
| 01/28/2016 10:30 AM | Individual Therapy 30 M... | Scheduled     | AuDuong, Bill LCSW | South Follow Along | Hope Apts    |         |         |
| 01/14/2016 10:30 AM | Individual Therapy 30 M... | No Show       | AuDuong, Bill LCSW | South Follow Along | Hope Apts    |         |         |
| 12/17/2015 10:30 AM | Individual Therapy 30 M... | Scheduled     | AuDuong, Bill LCSW | South Follow Along | Hope Apts    |         |         |
| 12/03/2015 10:30 AM | Individual Therapy 30 M... | Scheduled     | AuDuong, Bill LCSW | South Follow Along | Hope Apts    |         |         |
| 11/19/2015 10:30 AM | Individual Therapy 30 M... | Scheduled     | AuDuong, Bill LCSW | South Follow Along | Hope Apts    |         |         |
| 11/05/2015 11:00 AM | Med Mngmnt Nurse 15 ...    | Scheduled     | Smith, Maxine RN   | South Follow Along | Hope Apts    |         |         |
| 11/05/2015 10:30 AM | Individual Therapy 30 M... | Scheduled     | AuDuong, Bill LCSW | South Follow Along | Hope Apts    |         |         |

- Filter the list to determine the records that are displayed. [Tell me how...](#) (See page 142)
- To make a copy of an existing service, click on the **date of service** you want in the *DOS* column.

The *Service Detail* page is displayed with the *Service Detail* tab active.

8. Verify this is the service you want to copy.
9. Click the **Save** button.
10. Click the **Copy Service**  icon in the task bar.

A copy of the *Service Detail* page is displayed. Notice that the *date of service* is changed to the current day's date and the status is changed to *Scheduled*.

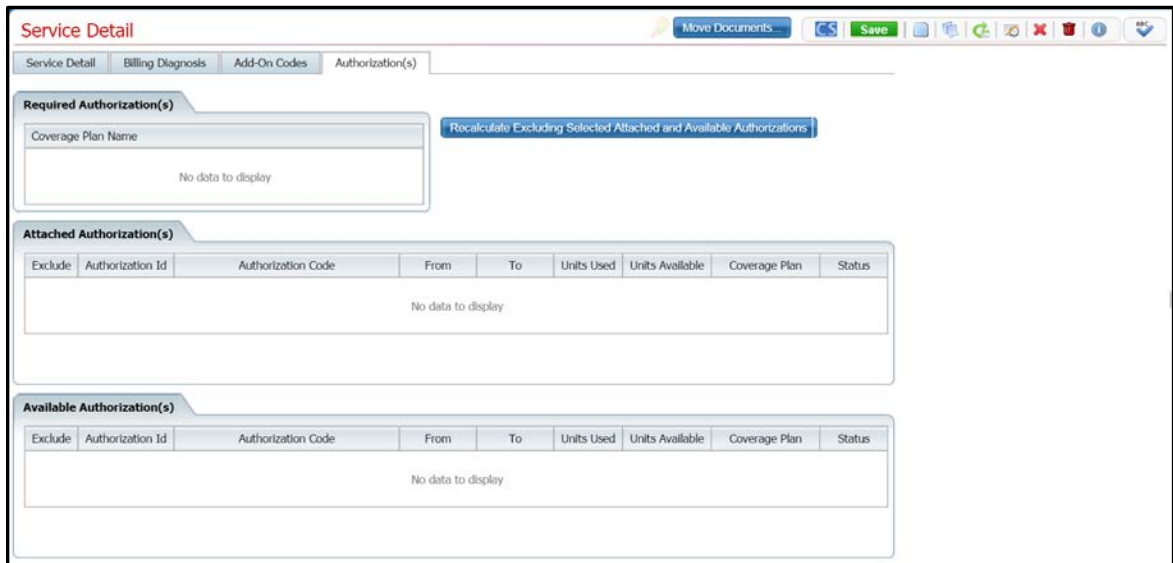
11. Make changes on the **Service Detail** tab for this service, if needed. View field definitions.
12. Click the **Save** button.
13. Click on the **Billing Diagnosis** tab to make it active.

The *Billing Diagnosis* tab is displayed.


14. Make changes on the **Billing Diagnosis** tab for this service, if needed. View [field definitions](#) (See page 115).

15. Click on the **Save** button.
16. If the *Add-On Codes* tab is present, click the **Add-On Codes** tab to make it active.
17. The *Add-On Codes* tab is displayed.
18. Make changes on the *Add-On Codes* tab, if needed. [Tell me how...](#) (See page 15) View [field definitions](#) (See page 113).
19. Click the **Authorization(s)** tab to make it active.

The *Authorization(s)* tab is displayed. View [field definitions](#) (See page 114).



The screenshot shows the 'Service Detail' window with the 'Authorization(s)' tab selected. The window has a title bar with 'Move Documents...', 'Save', and other icons. Below the title bar are tabs for 'Service Detail', 'Billing Diagnosis', 'Add-On Codes', and 'Authorization(s)'. The main content area is divided into three sections: 'Required Authorization(s)', 'Attached Authorization(s)', and 'Available Authorization(s)'. Each section contains a table with columns for 'Exclude', 'Authorization Id', 'Authorization Code', 'From', 'To', 'Units Used', 'Units Available', 'Coverage Plan', and 'Status'. All three tables currently display 'No data to display'. A button labeled 'Recalculate Excluding Selected Attached and Available Authorizations' is located to the right of the 'Required Authorization(s)' section.

20. Make changes on the **Authorization(s)** tab, if needed.
21. Click the **Save** button.
22. When you are done making changes, click the **Exit** icon  to return to the *Services* list page.

[Why can't I access these screens?](#) (See page **Error! Bookmark not defined.**)

## Display the Service Detail Page

1. Display the client you want to work with.
  - a. To display a client, click the **Open this Client** drop down list

- b. Select the **<Client Search>** option.

The *Client Search* window is displayed. View [field definitions](#) (See page 133).

2. Search for the client you want. [Tell me how...](#) (See page 133)
3. When the client you want is displayed and selected, click the **Select** button.

The *Client Summary* page is displayed. View [field definitions](#) (See page 86).

**Client Summary**

**Summary**

Client ID: 394180      Master Client ID:

Name: Bellon, Pam      Status: In Treatment      DOB: 01/12/1941      Age: 75 Years      Sex: Female      Race: White      SSN: 0999

Registered On: 01/08/1991      Last Seen On: 09/14/2015      Next Scheduled:

Primary Care Coord: AuDuong, Bill      Primary Program: South Follow Along      Address: 1830 N. State Chicago, IL 60601      Phone: 312-555-2153

Note:

Emergency Contact: 6222\_C222\_312-555-2475      Presenting Problem:

Diagnosis:

| Type       | ICD9   | ICD10  | DSM5 | R/O | Description             |
|------------|--------|--------|------|-----|-------------------------|
| Primary    | 295.30 | F20.0  | No   |     | Paranoid schizophren... |
| Additional | V71.09 | Z03.89 | No   |     | Encounter for observ... |

Timeline Summary

GAF Score

Services 100

Med Changes 50

Hospitalization 0

Jun Jul Aug Sep Oct Nov Dec Jan Feb Mar Apr May

Admit ↑      Discharge ↓

- Notice that a *Client* tab is displayed to the right of the *My Office* tab. The tab displays the client's last name, first name and the client ID in parentheses.



- Select **Services** from the *Client* banners.

The *Services (#)* window is displayed. View [field definitions](#) (See page 131).

**Services (9)**

Show Services Only      All Statuses      All Clinicians      Apply Filter

All Programs      DOS From: 11/03/2015      DOS To:

| DOS                 | Procedure                  | Status        | Clinician/Provider | Program            | Location     | Charge  | Payment |
|---------------------|----------------------------|---------------|--------------------|--------------------|--------------|---------|---------|
| 05/03/2016 10:30 AM | Individual TheraBH 51 M... | Cancel (Co... | Acree, Lan SSW     | South Follow Along | Assisted ... | \$72.75 |         |
| 02/11/2016 10:30 AM | Individual Therapy 30 M... | Scheduled     | AuDuong, Bill LCSW | South Follow Along | Hope Apts    |         |         |
| 01/28/2016 10:30 AM | Individual Therapy 30 M... | Scheduled     | AuDuong, Bill LCSW | South Follow Along | Hope Apts    |         |         |
| 01/14/2016 10:30 AM | Individual Therapy 30 M... | No Show       | AuDuong, Bill LCSW | South Follow Along | Hope Apts    |         |         |
| 12/17/2015 10:30 AM | Individual Therapy 30 M... | Scheduled     | AuDuong, Bill LCSW | South Follow Along | Hope Apts    |         |         |
| 12/03/2015 10:30 AM | Individual Therapy 30 M... | Scheduled     | AuDuong, Bill LCSW | South Follow Along | Hope Apts    |         |         |
| 11/19/2015 10:30 AM | Individual Therapy 30 M... | Scheduled     | AuDuong, Bill LCSW | South Follow Along | Hope Apts    |         |         |
| 11/05/2015 11:00 AM | Med Mngmnt Nurse 15 ...    | Scheduled     | Smith, Maxine RN   | South Follow Along | Hope Apts    |         |         |
| 11/05/2015 10:30 AM | Individual Therapy 30 M... | Scheduled     | AuDuong, Bill LCSW | South Follow Along | Hope Apts    |         |         |

- Filter the list to determine the records that are displayed. [Tell me how...](#) (See page 142)
- To change an existing service, click on the **date of service** in the *DOS* column.

The *Service Detail* page is displayed with the *Service Detail* tab active.

**Service Detail**

Service Detail | Billing Diagnosis | Authorization(s)

**Service**

Client: Bellon, Pam | Status: Cancel | Start Date: 05/03/2016 | Program: South Follow Along

Procedure: Individual TheraBH | Start Time: 10:39 AM | Duration: | Minutes: |

Clinician Name: Acree, Lan | End Time: 10:39 AM | End Date: 05/03/2016

Location: Assisted Living | Attending: | Referring: |

Client was present:  Other Person(s) Present: | Cancel Reason: Agency or Clinician Cancelled

Group: | Charge: \$0.00 | Balance: | Rate ID: |

Billable  Do Not Complete

Note: 312-555-2153

Comment: |  Override Charge Amount | Overridden By: |  Override Errors | Overridden By: |

**Warnings / Errors**

| Date                | Error Type | Error Message  | Next Step |
|---------------------|------------|--|-----------|
| 05/03/2016 11:07 AM | 4408       | Authorization for scheduled service missing for OP TRAD CAID MH-21301622 |           |

**Custom Fields**

To return to the last topic you were reading, click the **left arrow** in the browser window.

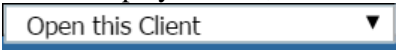
[Why can't I access these screens?](#) (See page **Error! Bookmark not defined.**)

## Move Documents between Dates of Service

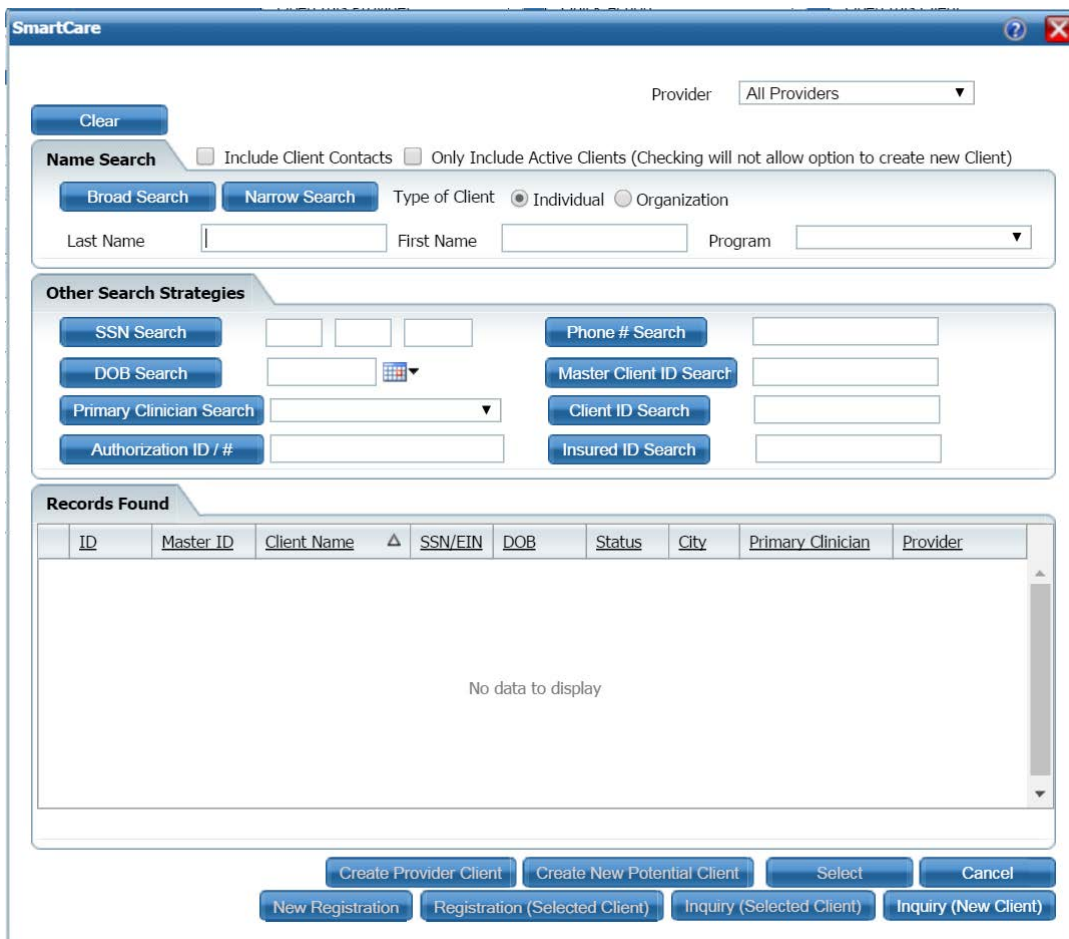
From the client's *Service Detail* page, you can move documents. To move documents, means to move a document(s) from one of the client's service to another service of that client's. When you move a document, the service you move the document from no longer has a document attached to the service. The service date you moved the document from now has a status of *Error*. The document is now attached to the service you moved it to.

You choose the dates of service that you are moving the document from and to. The date of service currently displayed on the *Service Detail* page does not affect the move action.

### To Move Documents between Dates of Service

1. Display the client you want to work with.
  - a. To display a client, click the **Open this Client** drop down list  

  - b. Select the **<Client Search>** option.

The *Client Search* window is displayed. View [field definitions](#) (See page 133).



2. Search for the client you want move documents for. [Tell me how...](#) (See page 133)
3. When the client you want is displayed and selected, click the **Select** button.

The *Client Summary* page is displayed. View [field definitions](#) (See page 86).



4. Notice that a *Client* tab is displayed to the right of the *My Office* tab. The tab displays the client's last name, first name and the client ID in parentheses. Notice that the client tab is dark blue. This indicates that the banners that are displayed are specific to client activities you can perform.



5. Select **Services** from the *Client* banners.

The *Services (#)* window is displayed. View [field definitions](#) (See page 131).

**Services (9)**

Show Services Only    All Statuses    All Clinicians    Apply Filter

All Programs    DOS From 11/03/2015    DOS To

| DOS                 | Procedure                  | Status        | Clinician/Provider | Program            | Location     | Charge  | Payment |
|---------------------|----------------------------|---------------|--------------------|--------------------|--------------|---------|---------|
| 05/03/2016 10:39 AM | Individual TheraBH 51 M... | Cancel (Co... | Acree, Ian SW      | South Follow Along | Assisted ... | \$72.75 |         |
| 02/11/2016 10:30 AM | Individual Therapy 30 M... | Scheduled     | AuDuong, Bill LCSW | South Follow Along | Hope Apts    |         |         |
| 01/28/2016 10:30 AM | Individual Therapy 30 M... | Scheduled     | AuDuong, Bill LCSW | South Follow Along | Hope Apts    |         |         |
| 01/14/2016 10:30 AM | Individual Therapy 30 M... | No Show       | AuDuong, Bill LCSW | South Follow Along | Hope Apts    |         |         |
| 12/17/2015 10:30 AM | Individual Therapy 30 M... | Scheduled     | AuDuong, Bill LCSW | South Follow Along | Hope Apts    |         |         |
| 12/03/2015 10:30 AM | Individual Therapy 30 M... | Scheduled     | AuDuong, Bill LCSW | South Follow Along | Hope Apts    |         |         |
| 11/19/2015 10:30 AM | Individual Therapy 30 M... | Scheduled     | AuDuong, Bill LCSW | South Follow Along | Hope Apts    |         |         |
| 11/05/2015 11:00 AM | Med Mngmnt Nurse 15 ...    | Scheduled     | Smith, Maxine RN   | South Follow Along | Hope Apts    |         |         |
| 11/05/2015 10:30 AM | Individual Therapy 30 M... | Scheduled     | AuDuong, Bill LCSW | South Follow Along | Hope Apts    |         |         |

6. Filter the list to determine the records that are displayed. [Tell me how...](#) (See page 142)

- Click on the **hyperlinked date of service** in the *DOS* column.

The *Service Detail* page is displayed with the *Service Detail* tab active.

**Service Detail**

Service Detail | Billing Diagnosis | Authorization(s)

**Service**

Client: Bellon, Pam | Status: Cancel | Start Date: 05/03/2016 | Program: South Follow Along

Procedure: Individual TheraBH | Start Time: 10:39 AM | Duration: Minutes

Clinician Name: Acree, Lan | End Time: 10:39 AM | End Date: 05/03/2016

Location: Assisted Living | Attending: | Referring: | Cancel Reason: Agency or Clinician Cancelled

Charge: \$0.00 | Balance: | Rate ID: | Note: 312-555-2153

Warnings / Errors

| Date                | Error Type | Error Message  | Next Step |
|---------------------|------------|--|-----------|
| 05/03/2016 11:07 AM | 4408       | Authorization for scheduled service missing for OP TRAD CAID MH-21301622 |           |

Custom Fields

- Click on the **Move Documents** button  **Move Documents...** in the task bar.

The *Move Documents* window is displayed.

**SmartCare**

Move Document From | Preview | Move Document | Close

Select the service which has the existing document that you would like moved. That document will be moved to the current service. After clicking 'Move Document' the status of the service in 'Move Document from' will be set to 'Error' and no document will exist for that service.

Clinician : Acree, Lan | All Programs | Other | Apply Filter

DOS From | DOS To

| DOS                | Procedure Name | Status | Clinician Name | Program Name |
|--------------------|----------------|--------|----------------|--------------|
| No data to display |                |        |                |              |

- Filter the list to determine the records that are displayed. [Tell me how...](#) (See page 142)

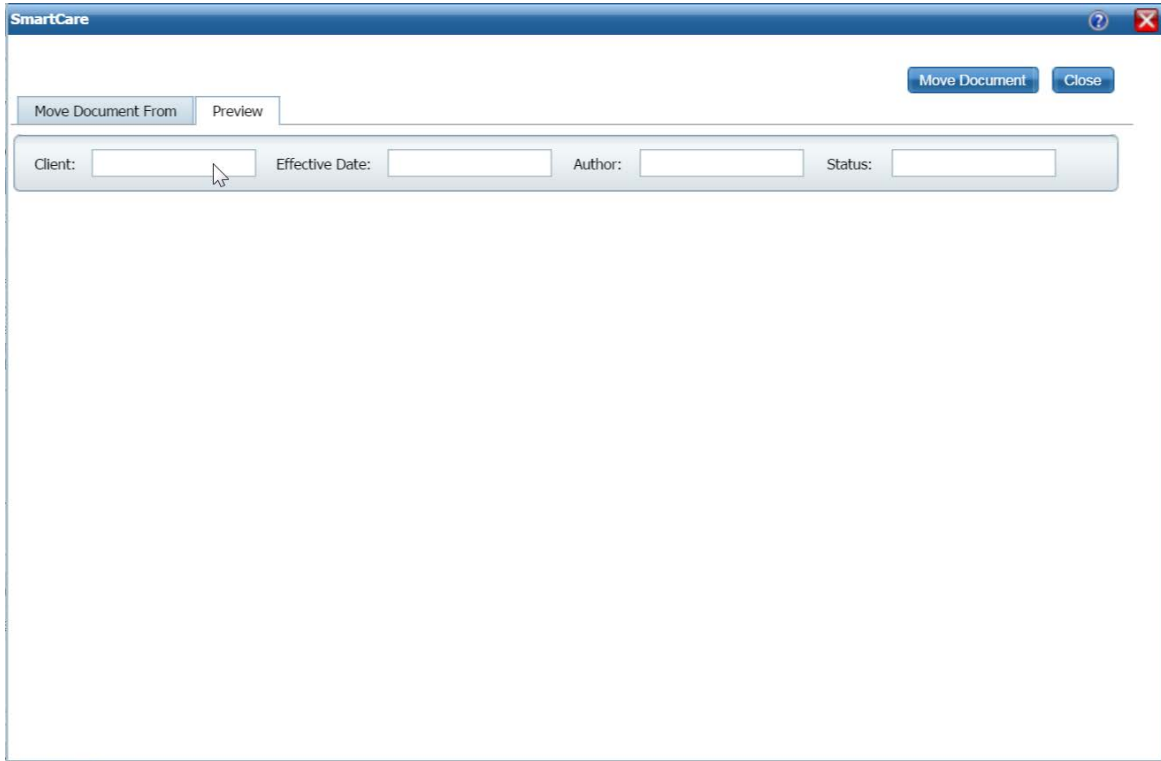
10. Click the **Apply Filter** button.

The records that match your search filters are displayed.

11. Find the document that you want to move.

12. Click on the **hyperlinked date of service** in the *DOS* column to view the details of the document.

13. Click on the **Preview** tab to view the details of the document.



14. When you are ready to move the document, click the **Move Document** button on the *Move Document* window.

15. Click the **Close** button to close the window.

The *Service Detail* page is displayed.

[Why can't I access these screens?](#) (See page **Error! Bookmark not defined.**)

## Print Clinical Summary

1. Display the *Services/Notes* (###) list page. [Tell me how...](#) (See page 47)

The *Services/Notes* (###) list page is displayed. View [field definitions](#) (See page 130).

| Auth | DOS              | Status     | Document          | Procedure                       | Clinician         | Program                   | Comment |
|------|------------------|------------|-------------------|---------------------------------|-------------------|---------------------------|---------|
|      | 02/16/2016 09:00 | Show       |                   | PRS Group Weekly 120.00 M...    | De La Fuente, Eva | South Suburbs IOP         |         |
|      | 02/16/2016 09:00 | Show       |                   | PsychoEd Wkly Grp 360.00 M...   | Adams, Olivia     | South Suburbs IOP         |         |
|      | 02/15/2016 09:30 | Show       | Grp Note          | Day Service Non-Bill 60.00 M... | Mauritz, Katie    | Brookhaven ACCESS A       |         |
|      | 02/15/2016 08:00 | Schedul... |                   | PRS Group Weekly 20.00 Min...   | De La Fuente, Eva | South Suburbs IOP         |         |
|      | 02/01/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Freiley, Susan    | Brookhaven CST            |         |
|      | 01/19/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Freiley, Susan    | Brookhaven CST            |         |
|      | 01/18/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Hensley, Katie    | Brookhaven CST            |         |
|      | 01/18/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Hensley, Katie    | Calhoun CSI               |         |
|      | 10/29/2015 09:00 | Show       | Shift Summary     | ShiftNote 60.00 Minutes         | Freiley, Susan    | TRI Service Cleaning      |         |
|      | 10/27/2015 10:00 | Show       | IDD Individual... | Individual Service N 60.00 M... | Freiley, Susan    | Brookhaven CST            |         |
|      | 09/30/2015 11:30 | Show       | Grp Note          | Group Therapy 60.00 Minutes     | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/30/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/30/2015 09:00 | Show       | Grp Note          | Group Therapy 90.00 Minutes     | Adams, Olivia     | Chicago Apts Ex Tenants   |         |
|      | 09/30/2015 09:00 | Show       | Grp Note          | Group Therapy 90.00 Minutes     | Adams, Olivia     | Chicago Apts Ex Tenants   |         |
|      | 09/30/2015 08:00 | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | 09/28/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/28/2015 08:00 | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | 09/25/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/25/2015 08:00 | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | 09/24/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |

2. Click on the **hyperlinked date of service** in the *DOS* column that you want to print the clinical summary for.

The *Service Note* page is displayed. **Note:** the name of the page depends on the document assigned to the service you selected. View [field definitions](#) (See page 120).

Individual Service Note

05/20/2016 - Grp Note

Go To: [Dropdown] Sign

View | Share | Status: In Progress | Effective: 05/23/2016 | Author: Hensley, Katie | More Detail

Service | Note | Billing Diagnosis | Warnings

**Service**

Status: Show | Start Date: 05/23/2016 | Date In: 05/23/2016

Program: Brookhaven CST

Procedure: AP Group Therap | Start: 9:00 AM | End: 10:00 AM | End Date: 05/23/2016 | Duration: 60 Minutes

Location: Office | Time In: 9:00 AM | Time Out: 10:00 AM | Date Out: 05/23/2016

Clinician: Hensley, Katie | Attending: [Dropdown] | Referring: [Dropdown]

Specific Location: [Dropdown] | Comment: [Text Area]

Cancel Reason: [Dropdown]

3. Extend the task bar by clicking the left pointing blue arrow. Notice the red box outlining the arrow in the screen image below.

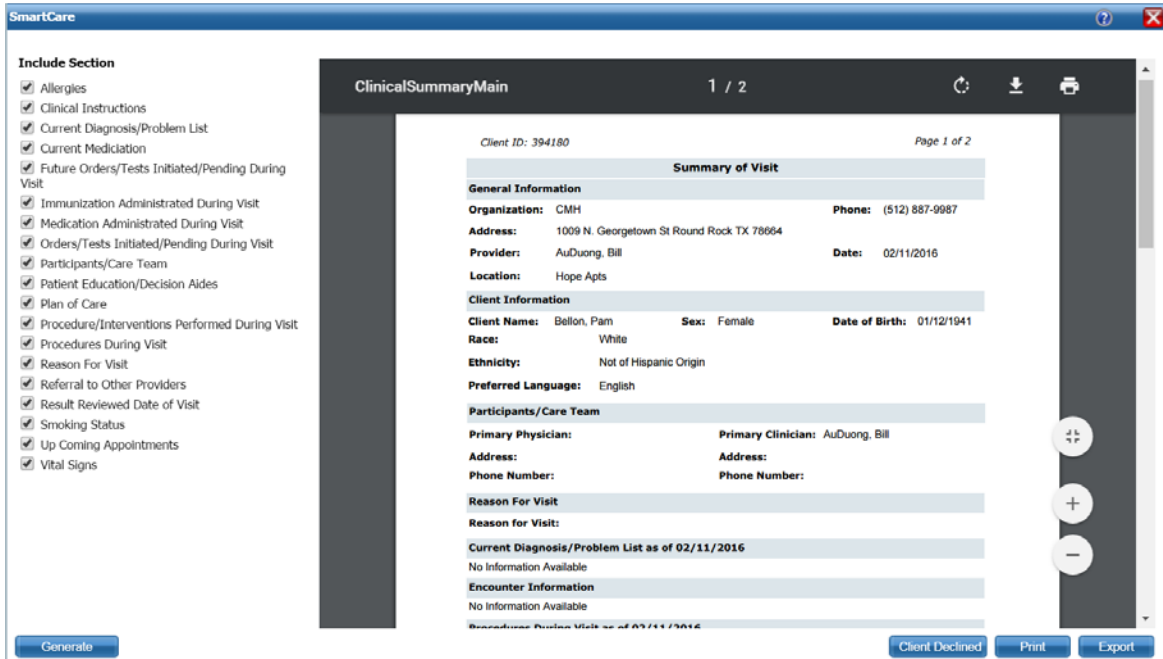


The task bar extends to the left.



4. Click the **Print Clinical Summary** icon in the extended task bar. Notice the red outlined icon in the screen image above.


The *Clinical Summary* window is displayed. Tell me how to [View the Clinical Summary Document](#). (See page 15)



5. Notice in the *Include Section*, that all components of the clinical summary are listed and selected. If an option is selected, the information appears on the printed *Summary*.
6. To avoid including a component on the printed *Clinical Summary*, deselect the **components** you do not want included and click the **Generate** button to re-display the *Summary* with those components removed.
7. To print the *Summary*, click the **print icon** in the window to print the document.
8. If the client declines a copy of the printed *Summary*, click the **Client Declined** button.
9. You can export the *Clinical Summary* to an .xml format file. To do this, click the **Export** button. The exported file is displayed in the download bar at the bottom of your screen.
10. Click on the **download document** icon to open the document.

The screenshot displays the 'Services/Notes (27)' window. At the top, there are tabs for 'My Office', 'Thomas, Kenneth (2104210)', 'Program', and 'Administration'. Below the tabs, there are filters for 'All Clinicians', 'All Statuses', 'All Procedures', and 'Other', along with an 'Apply Filter' button. A date range filter is set to 'Past 12 Months' from '08/30/2015'. The main area contains a table with the following columns: Auth, DOS, Status, Document, Procedure, Clinician, Program, and Comment. The table lists various services and notes, including 'Court Appointment 120.00', 'Nursing Note 60.00 Minutes', 'IDD Ind Therapy 60.00 Minut...', 'Nursing Note 30.00 Minutes', 'Interpretive Svcs 30.00 Min...', 'IDD Ind Therapy 60.00 Minut...', 'Group Therapy 60.00 Minutes', 'Group MFam Therapy 15.00 ...', 'Daily TheraBH 30.00 Minutes', 'Ind Therapy School 30.00 Mi...', 'UA SelfPay Lab 1.00 Units', 'Group MFam TheraBH 15.00 ...', 'Group TheraBH 60.00 Minutes', 'Group TheraBH 60.00 Minutes', 'Ind Thrpy Tx Pln Rev 60.00 ...', 'old 1.00', 'Group TheraBH 60.00 Minutes', 'Group TheraBH 60.00 Minutes', 'Group Therapy 60.00 Minutes', 'Grp Thrpy Commercial 120.0...', 'Group Therapy 45.00 Minutes', 'Daily TheraBH 120.00 Minutes', 'UA SelfPay Lab 1.00 Units', 'UA SelfPay Lab 1.00 Units', 'Pharm Mng 60.00 Minutes', and 'Daily TheraBH 120.00 Minutes'. At the bottom left, there is a button labeled 'ExportData (45).xls'.

When you click on the *download document* icon, the *Print Summary* window is closed and the *Service Note* page is displayed.

- When you are finished working with the *Clinical Summary*, click the **Exit**  button in the top right corner of the window.

[Why can't I access these screens?](#) (See page **Error! Bookmark not defined.**)

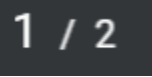


## View the Clinical Summary Document before Printing





1. With the *Print Clinical Summary* window displayed, move the cursor over the document image.

These icons appear on the image. Refer to the [icon definitions table](#) (See page 15) below the image for a definition of each icon.



### Icon Definitions


| Field  | Description   |
|--|---|
| When you hover your cursor over the <i>Clinical Summary</i> image, these icons are displayed.            |   |
| <br>Page numbers      | The number to the right of the slash / indicates the number of pages in the summary document. The number to the left of the slash identifies the number of the page that is displayed.<br><br>Use the <b>PgDn</b> button on your keyboard or the scroll bar in the image to move to a different page. |
| <br>Rotate clockwise  | Click this icon to rotate the image of the summary document clockwise on quarter turn. To return to the original display, you can keep clicking the icon to continue rotating the document clockwise a quarter turn.  |
| <br>Download document | Click the icon to download a copy of the summary document to the local drive on your computer.  |

| Field   | Description  |
|---|--|
| <br>Print document                                 | Click this icon to print the document.                             |
| <br>Fit the document to page size                  | Click this icon to increase the size of the document to page-size. |
| <br>Zoom in to magnify the view of the document    | Click this icon to zoom in to magnify the view of the document.    |
| <br>Zoom out to decrease the view of the document. | Click this icon to zoom out to decrease the view of the document.  |

Return to the *Print Clinical Summary* topic.

## Copy Service

Use *Copy Service* to copy the service information between dates of service for the same client. Find this

feature on the *Services/Notes* page for the client. The *Copy Service*  toolbar item lets you make a copy of the service that is displayed, and then allows you to make changes to the service, if needed. This is an efficient process if the majority of the existing service details are the same for the copy of the service you make.

### To Copy a Client's Service

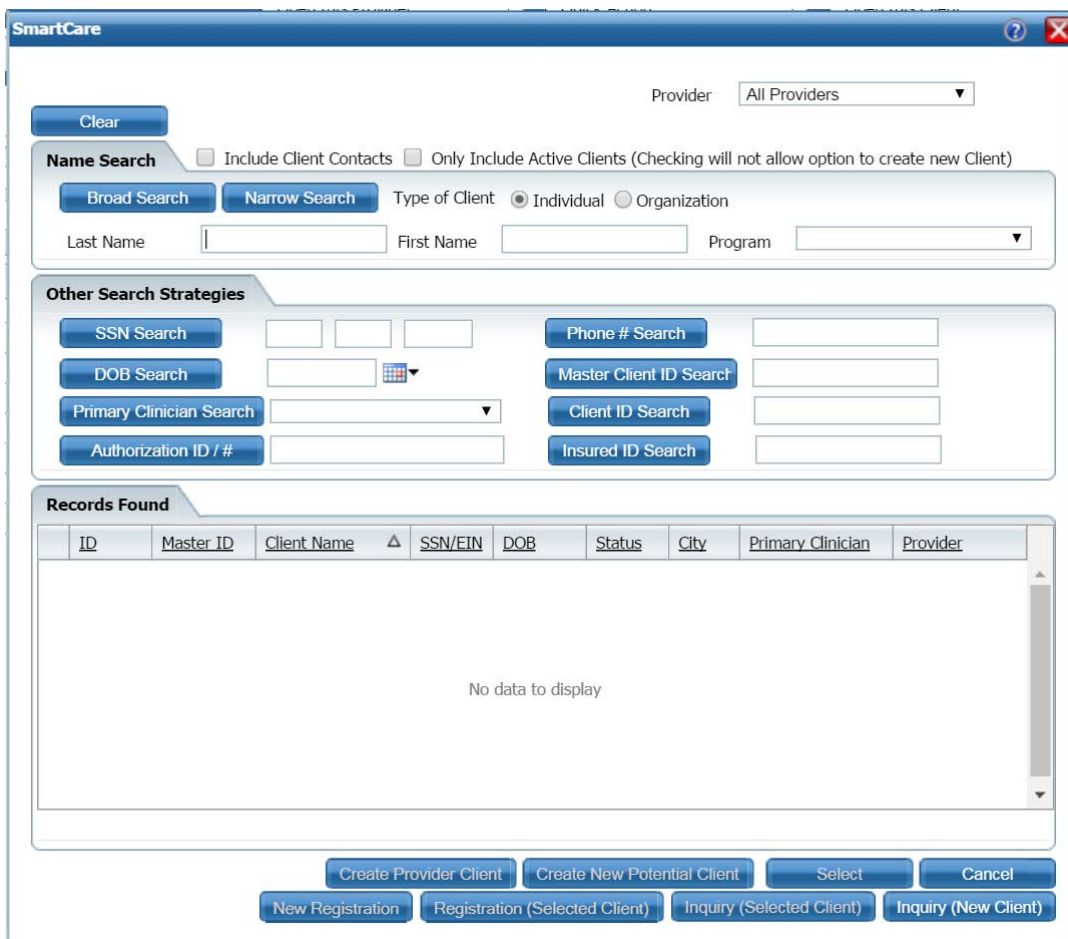
1. Display the client you want to work with.
  - a. To display a client, click the **Open this Client** drop down list



A screenshot of a dropdown menu with the text "Open this Client" and a downward-pointing arrow on the right side.

- b. Select the **<Client Search>** option.

The *Client Search* window is displayed. View [field definitions](#) (See page 134).



The screenshot shows the "SmartCare" Client Search window. At the top right, there is a "Provider" dropdown menu set to "All Providers" and a "Clear" button. Below this is the "Name Search" section, which includes checkboxes for "Include Client Contacts" and "Only Include Active Clients (Checking will not allow option to create new Client)". It also has "Broad Search" and "Narrow Search" buttons, a "Type of Client" section with radio buttons for "Individual" (selected) and "Organization", and input fields for "Last Name", "First Name", and a "Program" dropdown. The "Other Search Strategies" section contains several search buttons: "SSN Search", "DOB Search", "Primary Clinician Search", "Authorization ID / #", "Phone # Search", "Master Client ID Search", "Client ID Search", and "Insured ID Search", each with an associated input field. At the bottom of the search area is a "Records Found" table with columns: ID, Master ID, Client Name, SSN/EIN, DOB, Status, City, Primary Clinician, and Provider. The table is currently empty, displaying "No data to display". At the very bottom of the window are several action buttons: "Create Provider Client", "Create New Potential Client", "Select", "Cancel", "New Registration", "Registration (Selected Client)", "Inquiry (Selected Client)", and "Inquiry (New Client)".

2. Search for the client you want. [Tell me how...](#) (See page 133)

- When the client you want is displayed and selected, click the **Select** button.

The *Client Summary* page is displayed. View [field definitions](#) (See page 86).

**Client Summary**

**Summary**

Client ID: 394180      Master Client ID:

Name: Bellon, Pam      Status: In Treatment      DOB: 01/12/1941      Age: 75 Years      Sex: Female      Race: White      SSN: 0999

Registered On: 01/08/1991      Last Seen On: 09/14/2015      Next Scheduled:

Primary Care Coord: AuDuona, Bill      Primary Program: South Follow Along      Address: 1830 N. State Chicago, IL 60601      Phone: 312-555-2153

Emergency Contact: 0222\_C222.312-555-2475      Note:

Presenting Problem:

Diagnosis:

| Type       | ICD9   | ICD10  | DSM5 | R/O | Description             |
|------------|--------|--------|------|-----|-------------------------|
| Primary    | 295.30 | F20.0  | No   |     | Paranoid schizophren... |
| Additional | V71.09 | Z03.89 | No   |     | Encounter for observ... |

Timeline Summary

GAF Score

Services 100  
Med Changes 50  
Hospitalization 0

Jun Jul Aug Sep Oct Nov Dec Jan Feb Mar Apr May

Admit ↑      Discharge ↓

- Notice that a *Client* tab is displayed to the right of the *My Office* tab. The tab displays the client's last name, first name and the client ID in parentheses.

My Office      **Abbott, Tera (1651160) X**      Program      Administration

- Select **Services/Notes** from the *Client* banners.

The *Services/Notes* (###) list page is displayed. View [field definitions](#) (See page 130).

**Services/Notes (196)**

All Clinicians      All Statuses      All Procedures      Other      Apply Filter

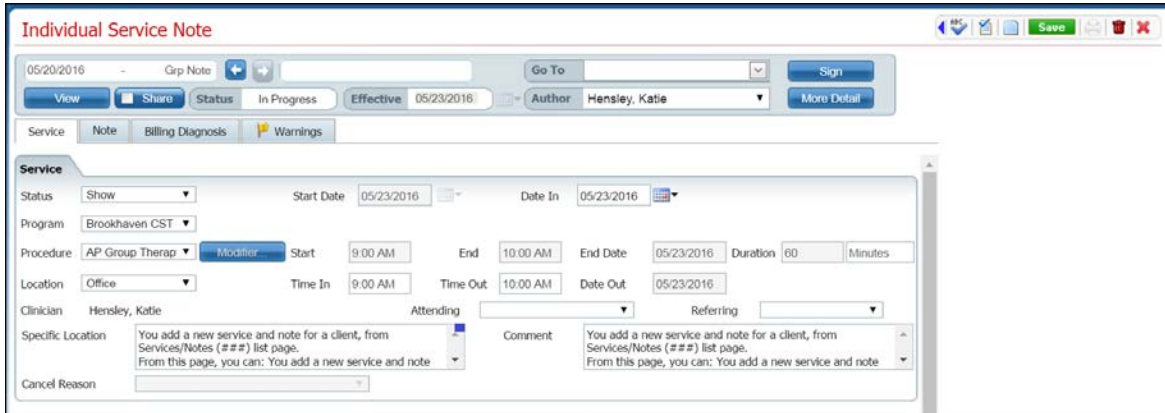
Show Services and Care Mgmt Claims      Past 12 Months      From 05/20/2015      To      All Programs

| Auth | DOS              | Status     | Document          | Procedure                       | Clinician         | Program                   | Comment |
|------|------------------|------------|-------------------|---------------------------------|-------------------|---------------------------|---------|
|      | 02/16/2016 09:00 | Show       |                   | PRS Group Weekly 120.00 M...    | De La Fuente, Eva | South Suburbs IOP         |         |
|      | 02/16/2016 09:00 | Show       |                   | PsychoEd Wkly Grp 360.00 M...   | Adams, Olivia     | South Suburbs IOP         |         |
|      | 02/15/2016 09:30 | Show       | Grp Note          | Day Service Non-Bill 60.00 M... | Mauritz, Katie    | Brookhaven ACCESS A       |         |
|      | 02/15/2016 06:00 | Schedul... |                   | PRS Group Weekly 20.00 Min...   | De La Fuente, Eva | South Suburbs IOP         |         |
|      | 02/01/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Freiley, Susan    | Brookhaven CST            |         |
|      | 01/19/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Freiley, Susan    | Brookhaven CST            |         |
|      | 01/18/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Hensley, Katie    | Brookhaven CST            |         |
|      | 01/18/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Hensley, Katie    | Calhoun CSI               |         |
|      | 10/29/2015 09:00 | Show       | Shift Summary     | ShiftNote 60.00 Minutes         | Freiley, Susan    | TRI Service Cleaning      |         |
|      | 10/27/2015 10:00 | Show       | IDD Individual... | Individual Service N 60.00 M... | Freiley, Susan    | Brookhaven CST            |         |
|      | 09/30/2015 11:30 | Show       | Grp Note          | Group Therapy 60.00 Minutes     | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/30/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/30/2015 09:00 | Show       | Grp Note          | Group Therapy 90.00 Minutes     | Adams, Olivia     | Chicago Apts Ex Tenants   |         |
|      | 09/30/2015 09:00 | Show       | Grp Note          | Group Therapy 90.00 Minutes     | Adams, Olivia     | Chicago Apts Ex Tenants   |         |
|      | 09/30/2015 08:00 | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | 09/28/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/28/2015 08:00 | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | 09/25/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/25/2015 08:00 | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | 09/24/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |

6. Filter the list to determine the records that are displayed. [Tell me how...](#) (See page 142)
7. To make a copy of an existing service, click on the **date of service** you want in the *DOS* column.


The *Service Note* page is displayed with the *Service* tab active. View [field definitions](#) (See page 120).

**Note:** the name of the page differs depending on the type of service performed on the date of service that you selected.



8. Verify this is the service you want to copy.
9. Click the **Save** button.
10. Click the left pointing blue arrow in the task bar to extend the display of icons. See the arrow outlined in red in the screen image below.



11. Click the **Copy Service**  icon in the task bar. See the icon outlined in red in the screen image below.

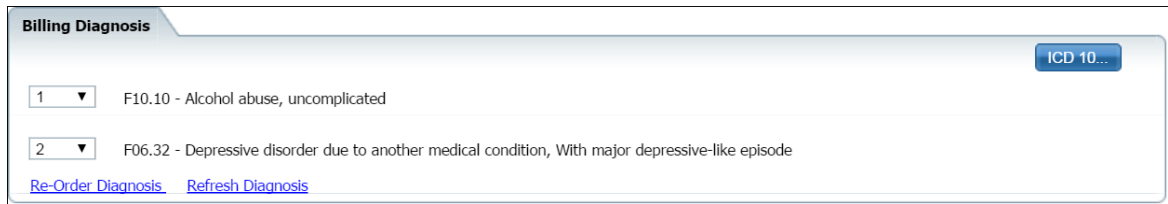


A copy of the *Service Note* page is displayed. Notice that the *date of service* is changed to the current day's date and the status is changed to *Scheduled*.


12. Make changes on the **Service** tab for this new service, if needed. View [field definitions](#) (See page 120).
13. Click the **Save** button.

14. Click on the **Billing Diagnosis** tab to make it active.

The *Billing Diagnosis* tab is displayed. View [field definitions](#) (See page 116).




The screenshot shows a web interface for the 'Billing Diagnosis' tab. At the top left, the tab is labeled 'Billing Diagnosis'. In the top right corner, there is a blue button labeled 'ICD 10...'. Below this, there are two rows of diagnostic codes. The first row has a dropdown menu with '1' selected, followed by the text 'F10.10 - Alcohol abuse, uncomplicated'. The second row has a dropdown menu with '2' selected, followed by the text 'F06.32 - Depressive disorder due to another medical condition, With major depressive-like episode'. At the bottom of the form, there are two blue links: 'Re-Order Diagnosis' and 'Refresh Diagnosis'.

15. Make changes on the **Billing Diagnosis** tab for this service, if needed.
16. Click on the **Save** button.
17. When you are done making changes, click the **Exit** icon  to return to the *Services/Notes* list page.

[Why can't I access these screens?](#) (See page **Error! Bookmark not defined.**)

## Reschedule a Service for a Client



Use this  toolbar item to reschedule a service for a client. Any status required to reschedule a service? Cannot reschedule a service that has a status of Show?

### Reschedule a Service for a Client

1. Display the *Services/Notes (###)* list page. [Tell me how...](#) (See page 47)

The *Services/Notes (###)* list page is displayed. View [field definitions](#) (See page 130).

| Auth | DOS              | Status     | Document          | Procedure                       | Clinician         | Program                   | Comment |
|------|------------------|------------|-------------------|---------------------------------|-------------------|---------------------------|---------|
|      | 02/16/2016 09:00 | Show       |                   | PRS Group Weekly 120.00 M...    | De La Fuente, Eva | South Suburbs IOP         |         |
|      | 02/16/2016 09:00 | Show       |                   | PsychoEd Wkly Grp 360.00 M...   | Adams, Olivia     | South Suburbs IOP         |         |
|      | 02/15/2016 09:30 | Show       | Grp Note          | Day Service Non-Bill 60.00 M... | Mauritz, Katie    | Brookhaven ACCESS A       |         |
|      | 02/15/2016 08:00 | Schedul... |                   | PRS Group Weekly 20.00 Min...   | De La Fuente, Eva | South Suburbs IOP         |         |
|      | 02/01/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Freiley, Susan    | Brookhaven CST            |         |
|      | 01/19/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Freiley, Susan    | Brookhaven CST            |         |
|      | 01/18/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Hensley, Katie    | Brookhaven CST            |         |
|      | 01/18/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Hensley, Katie    | Calhoun CSI               |         |
|      | 10/20/2015 09:00 | Show       | Shift Summary     | ShiftNote 60.00 Minutes         | Freiley, Susan    | TRI Service Cleaning      |         |
|      | 10/27/2015 10:00 | Show       | IDD Individual... | Individual Service N 60.00 M... | Freiley, Susan    | Brookhaven CST            |         |
|      | 09/30/2015 11:30 | Show       | Grp Note          | Group Therapy 60.00 Minutes     | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/30/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/30/2015 09:00 | Show       | Grp Note          | Group Therapy 90.00 Minutes     | Adams, Olivia     | Chicago Apts Ex Tenants   |         |
|      | 09/30/2015 09:00 | Show       | Grp Note          | Group Therapy 90.00 Minutes     | Adams, Olivia     | Chicago Apts Ex Tenants   |         |
|      | 09/30/2015 08:00 | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | 09/28/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/28/2015 08:00 | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | 09/25/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/25/2015 08:00 | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | 09/24/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |

2. Click on the **hyperlinked date of service** in the *DOS* column that you want to reschedule.

The *Service Note* page is displayed. **Note:** the name of the page depends on the document assigned to the service you selected. View [field definitions](#) (See page 120).

Individual Service Note

05/20/2016 - Grp Note

View Share Status In Progress Effective 05/23/2016 Author Hensley, Katie

Service Note Billing Diagnosis Warnings

Service

Status Show Start Date 05/23/2016 Date In 05/23/2016

Program Brookhaven CST

Procedure AP Group Therap Modifiers Start 9:00 AM End 10:00 AM End Date 05/23/2016 Duration 60 Minutes

Location Office Time In 9:00 AM Time Out 10:00 AM Date Out 05/23/2016

Clinician Hensley, Katie Attending Referring

Specific Location You add a new service and note for a client, from Services/Notes (###) list page. From this page, you can: You add a new service and note

Comment You add a new service and note for a client, from Services/Notes (###) list page. From this page, you can: You add a new service and note

Cancel Reason

3. Extend the toolbar by clicking the **left pointing blue arrow**. Notice the red box outlining the arrow in the screen image below.

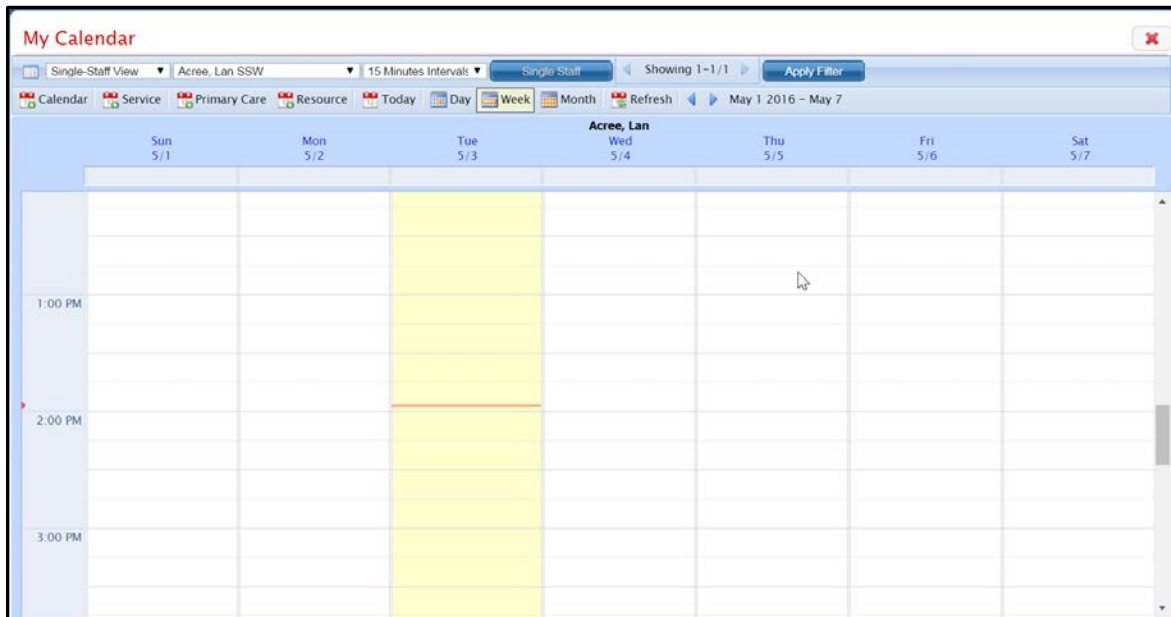


The toolbar extends to the left.



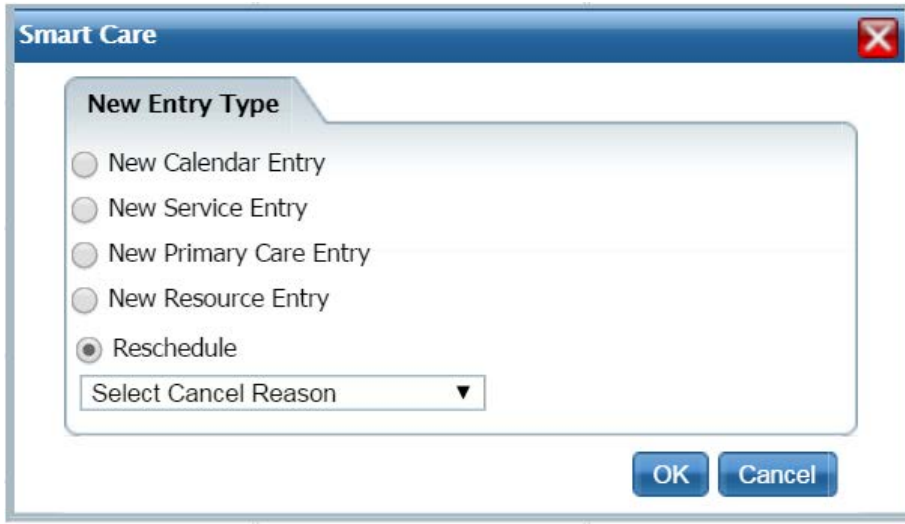
4. Click the **Reschedule** icon in the extended toolbar. Notice the red outlined toolbar item in the screen image above.

The *My Calendar* page is displayed. The calendar for the staff member who was assigned to the service where you clicked on the *Reschedule Service* icon is displayed. View field definitions.



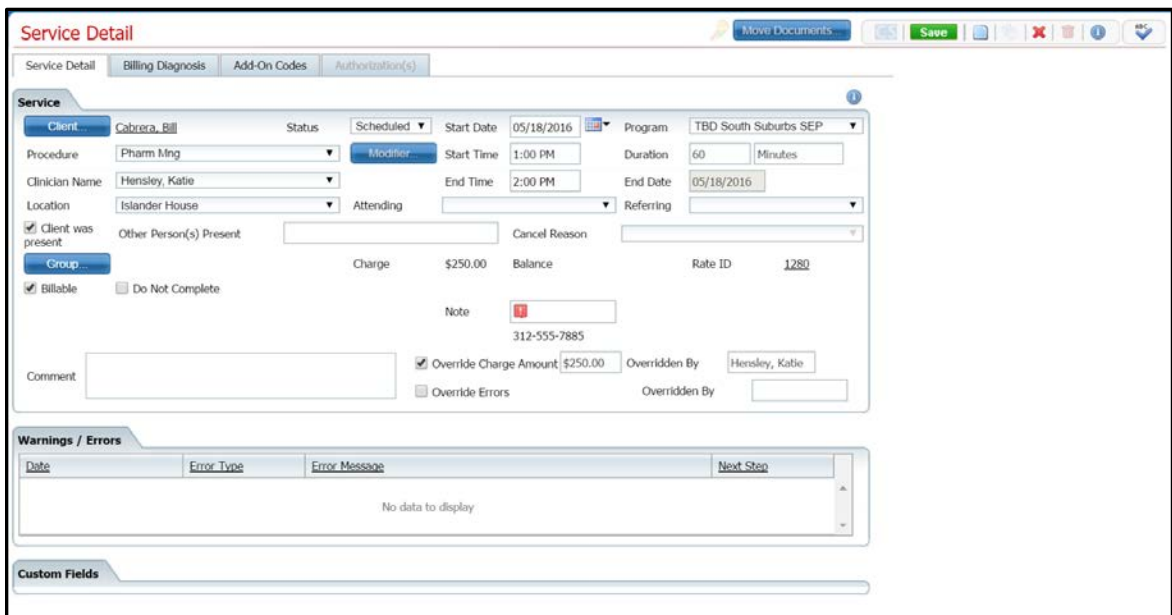
5. Find a **date and time** when you want to reschedule the client's service.
6. Click in the **date and time space** on the calendar.

The *New Entry Type* window is displayed.



7. Select the **Reschedule** option.
8. Select a **Cancel Reason** from the drop down list.
9. Click the **OK** button.


The *Service Detail* page is displayed with the service information from the service you are rescheduling showing with the new date and time you indicated on the calendar. View field definitions.



10. Change **information** on the rescheduled service, if needed.
11. Click the **Save** button.


12. Click the **Exit**  icon in the toolbar.

The *My Calendar* page is displayed with the original date information displayed. The service you rescheduled has been moved.

13. Click the **Exit**  icon to close the *My Calendar* page(s).

The *Service Note* page is re-displayed for the rescheduled date.

14. Click the **Save** button in the toolbar.

15. Click the **Exit**  icon to close the *Service Note* page.

[Why can't I access these screens?](#)

## Schedule Follow-up Service

1. Display the *Services/Notes* (###) list page. [Tell me how...](#) (See page 47)

The *Services/Notes* (###) list page is displayed. View [field definitions](#) (See page 130).

| Auth | DOS              | Status     | Document          | Procedure                       | Clinician         | Program                   | Comment |
|------|------------------|------------|-------------------|---------------------------------|-------------------|---------------------------|---------|
|      | 02/16/2016 09:00 | Show       |                   | PRS Group Weekly 120.00 M...    | De La Fuente, Eva | South Suburbs IOP         |         |
|      | 02/16/2016 09:00 | Show       |                   | PsychoEd Wkly Grp 360.00 M...   | Adams, Olivia     | South Suburbs IOP         |         |
|      | 02/15/2016 09:30 | Show       | Grp Note          | Day Service Non-Bill 60.00 M... | Mauritz, Katie    | Brookhaven ACCESS A       |         |
|      | 02/15/2016 08:00 | Schedul... |                   | PRS Group Weekly 20.00 Min...   | De La Fuente, Eva | South Suburbs IOP         |         |
|      | 02/01/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Freiley, Susan    | Brookhaven CST            |         |
|      | 01/19/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Freiley, Susan    | Brookhaven CST            |         |
|      | 01/18/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Hensley, Katie    | Brookhaven CST            |         |
|      | 01/18/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Hensley, Katie    | Calhoun CSI               |         |
|      | 10/29/2015 09:00 | Show       | Shift Summary     | ShiftNote 60.00 Minutes         | Freiley, Susan    | TRI Service Cleaning      |         |
|      | 10/27/2015 10:00 | Show       | IDD Individual... | Individual Service N 60.00 M... | Freiley, Susan    | Brookhaven CST            |         |
|      | 09/30/2015 11:30 | Show       | Grp Note          | Group Therapy 60.00 Minutes     | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/30/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/30/2015 09:00 | Show       | Grp Note          | Group Therapy 90.00 Minutes     | Adams, Olivia     | Chicago Apts Ex Tenants   |         |
|      | 09/30/2015 09:00 | Show       | Grp Note          | Group Therapy 90.00 Minutes     | Adams, Olivia     | Chicago Apts Ex Tenants   |         |
|      | 09/30/2015 08:00 | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | 09/28/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/28/2015 08:00 | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | 09/25/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/25/2015 08:00 | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | 09/24/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |

2. Click on the **hyperlinked date of service** in the *DOS* column that you want to reschedule.

The *Service Note* page is displayed. **Note:** the name of the page depends on the document assigned to the service you selected. View [field definitions](#) (See page 120).

3. Extend the task bar by clicking the **left pointing blue arrow**. Notice the red box outlining the arrow in the screen image below.

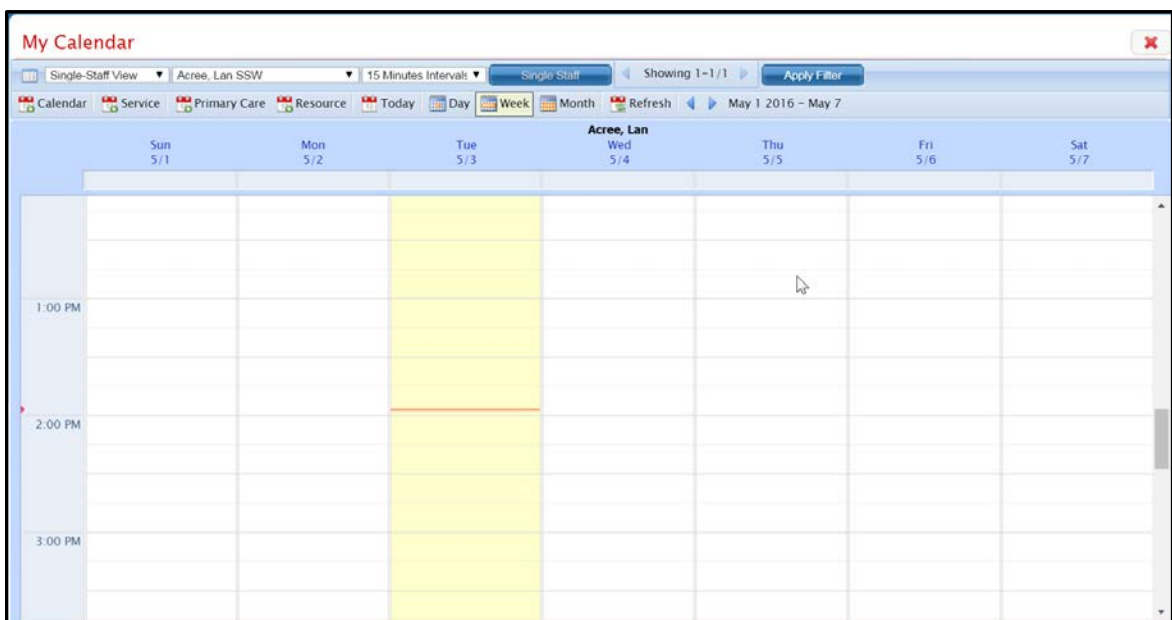
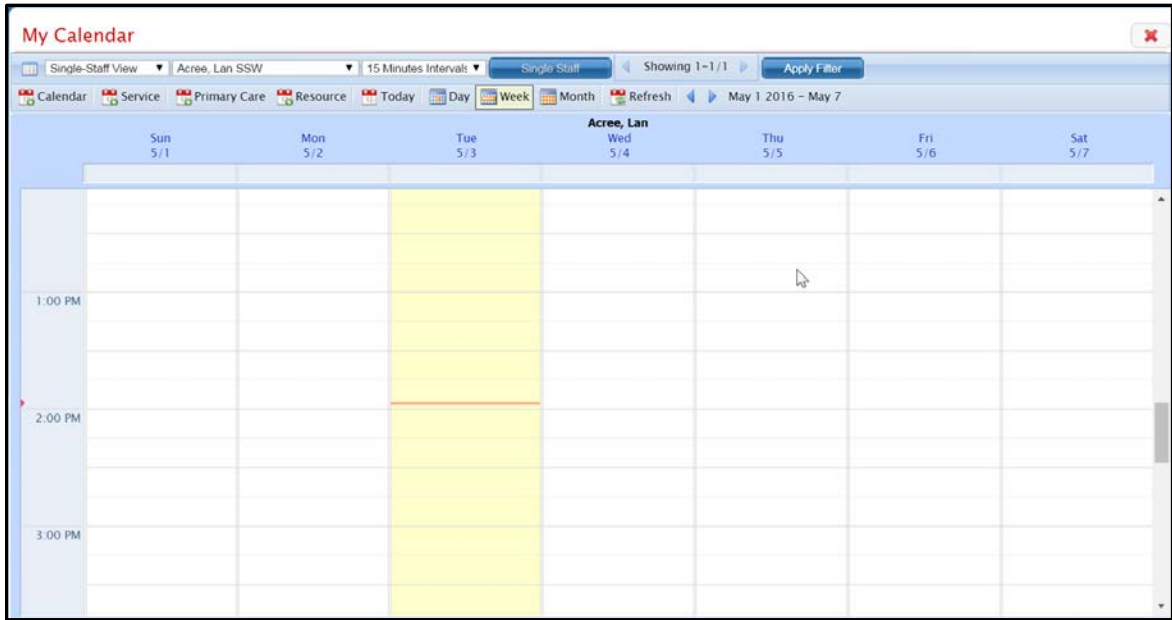


The task bar extends to the left.



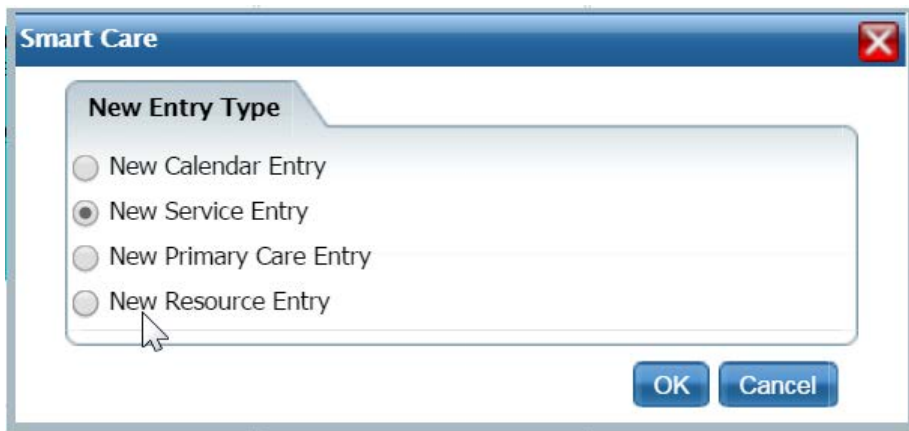
4. Click the **Schedule Follow-Up** icon in the extended task bar. Notice the red outlined icon in the screen image above.

The *My Calendar* page is displayed. The calendar for the staff member who was assigned to the service where you clicked on the *Schedule Follow-Up* icon is displayed.



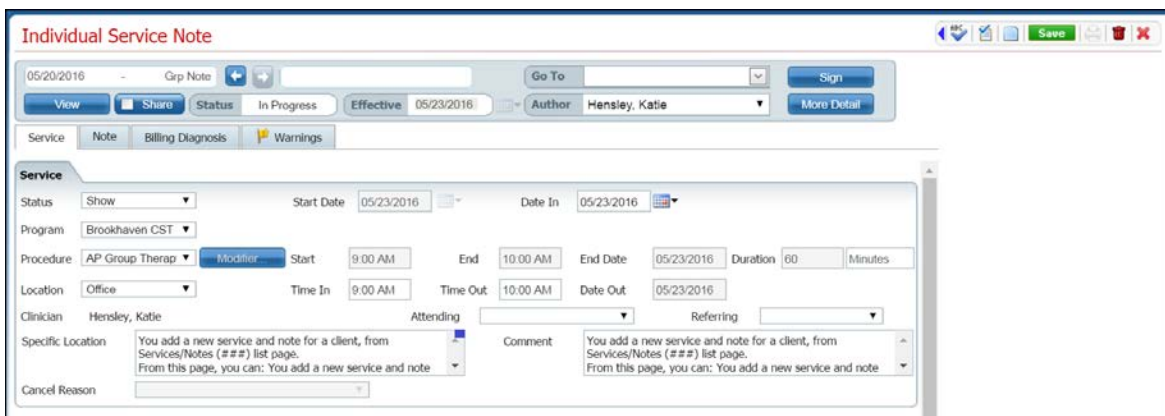
5. Find the **date and time** when you want to schedule a follow-up visit. Tell me how... View [field definitions](#) (See page 106).
6. Change the **intervals** you view on the calendar, if desired.
7. Change the **view** of the calendar, if needed.
8. Click in the **time slot** on the day when you want to schedule the follow-up visit.

The *New Entry Type* window is displayed. View [field definitions](#) (See page 109).




9. Select the **New Service Entry** option to schedule a follow-up visit.
10. Click the **OK** button.

The *Service Note* page for the follow-up visit is displayed with the date and time you selected on the calendar.



11. Make **changes** on the *Service Note* page, if needed.
12. When the follow-up visit is complete, click the **Save** button in the task bar.

The icons in the task bar are activated and you can complete other procedures for this client related to services.

13. Click the **Exit**  icon in the task bar to return to the *Services* list page.

[Why can't I access these screens?](#) (See page **Error! Bookmark not defined.**)

## Manage Service Notes

### Manage Services/Notes

You access the *Service Note* page from the *Client* tab. You can create a new service or work on a service note on an existing service. The *Note* tab is added when the service is created with a procedure code that is set up to require a note be completed by the clinician.

From the *Services/Notes* list page, you can:

[Add a Service and Service Note to a Client](#) (See page 29)

[Change a Service for a Client](#) (See page 31)

[Change a Service Note for a Client](#) (See page 32)


[Delete a Service and Service Note](#) (See page 35)

### To Add a Service and Service Note to a Client

1. Display the *Services/Notes* list page. [Tell me how...](#) (See page 47)

The *Services/Notes* list page is displayed. View [field definitions](#) (See page 130).

| Auth | DOS              | Status     | Document          | Procedure                       | Clinician         | Program                   | Comment |
|------|------------------|------------|-------------------|---------------------------------|-------------------|---------------------------|---------|
|      | 02/16/2016 09:00 | Show       |                   | PRS Group Weekly 120.00 M...    | De La Fuente, Eva | South Suburbs IOP         |         |
|      | 02/16/2016 09:00 | Show       |                   | PsychoEd Wkly Grp 360.00 M...   | Adams, Olivia     | South Suburbs IOP         |         |
|      | 02/15/2016 09:30 | Show       | Grp Note          | Day Service Non-Bill 60.00 M... | Mauritz, Katie    | Brookhaven ACCESS A       |         |
|      | 02/15/2016 08:00 | Schedul... |                   | PRS Group Weekly 20.00 Min...   | De La Fuente, Eva | South Suburbs IOP         |         |
|      | 02/01/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Frelley, Susan    | Brookhaven CST            |         |
|      | 01/19/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Frelley, Susan    | Brookhaven CST            |         |
|      | 01/18/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Hensley, Katie    | Brookhaven CST            |         |
|      | 01/18/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Hensley, Katie    | Calhoun CSI               |         |
|      | 10/29/2015 08:00 | Show       | Shift Summary     | ShiftNote 60.00 Minutes         | Frelley, Susan    | TRI Service Cleaning      |         |
|      | 10/27/2015 10:00 | Show       | IDD Individual... | Individual Service N 60.00 M... | Frelley, Susan    | Brookhaven CST            |         |
|      | 09/30/2015 11:30 | Show       | Grp Note          | Group Therapy 60.00 Minutes     | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/30/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/30/2015 09:00 | Show       | Grp Note          | Group Therapy 90.00 Minutes     | Adams, Olivia     | Chicago Apts Ex Tenants   |         |
|      | 09/30/2015 09:00 | Show       | Grp Note          | Group Therapy 90.00 Minutes     | Adams, Olivia     | Chicago Apts Ex Tenants   |         |
|      | 09/30/2015 08:00 | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | 09/28/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/28/2015 08:00 | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | 09/25/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/25/2015 08:00 | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | 09/24/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |

2. Click on the New Item icon  in the toolbar.

The *Service Note* page is displayed. View [field definitions](#) (See page 120).

3. Complete the **fields** on the *Service* tab.
4. Click the **Save** button in the toolbar.

If the procedure code you enter requires a note, the *Note* tab is added for the type of note needed.

5. Click on the **Note** tab to make it active.

The *Note* tab is displayed. View [field definitions](#) (See page 120). Since the *Note* tab is custom to your organization, follow your organization's training to complete the tab.


6. Click the **Save** button in the toolbar.
7. Click on the **Billing Diagnosis** tab to make it active.

The *Billing Diagnosis* page is displayed. View [field definitions](#) (See page 116).

8. Complete the **Billing Diagnosis** tab.

Notice that there is a *Warnings* tab which will be blank until the service note goes through the overnight process. If there are problems processing the service and note, then check the *Warning* tab to determine why the service was not processed.

9. Click the **Save** button in the toolbar.

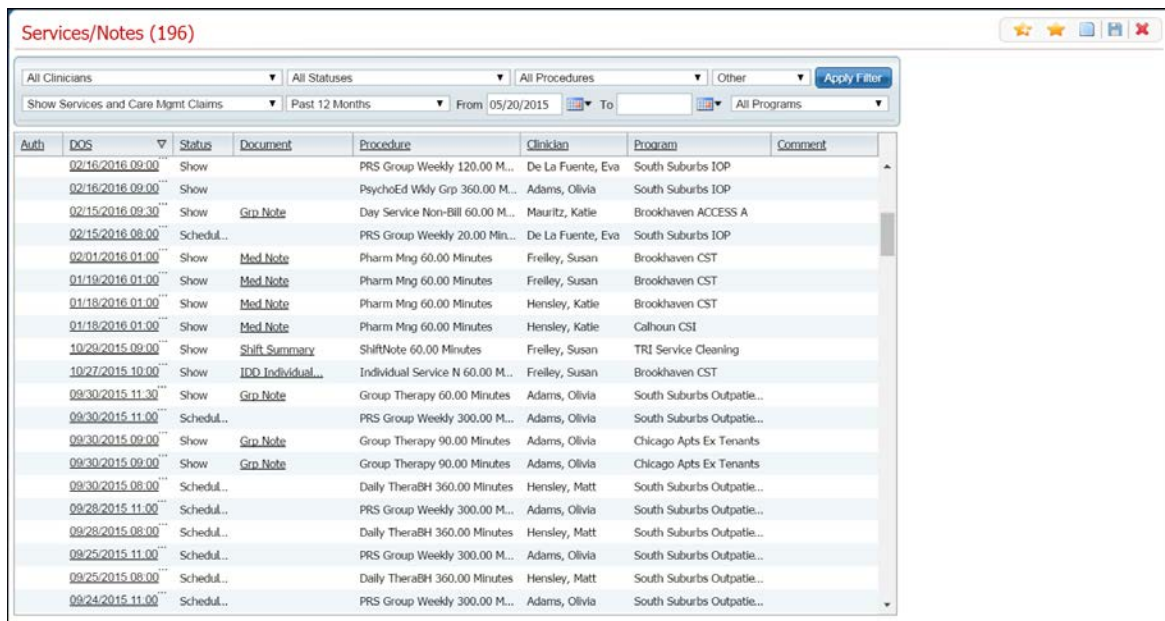
10. Click the **Exit**  toolbar item to close the service and note page.

### To Change a Service for a Client

Use this procedure to change service information. If there is a service note with the service, use this task if the note has not been signed yet. Otherwise, use the [To Change a Signed Service Note for a Client](#) (See page 32).

1. Display the *Services/Notes* list page. [Tell me how...](#) (See page 47)

The *Services/Notes* list page is displayed. View [field definitions](#) (See page 130).



| Auth | DOS              | Status     | Document          | Procedure                       | Clinician         | Program                   | Comment |
|------|------------------|------------|-------------------|---------------------------------|-------------------|---------------------------|---------|
|      | 02/16/2016 09:00 | Show       |                   | PRS Group Weekly 120.00 M...    | De La Fuente, Eva | South Suburbs IOP         |         |
|      | 02/16/2016 09:00 | Show       |                   | PsychoEd Wkly Grp 360.00 M...   | Adams, Olivia     | South Suburbs IOP         |         |
|      | 02/15/2016 09:30 | Show       | Grp Note          | Day Service Non-Bill 60.00 M... | Mauritz, Katie    | Brookhaven ACCESS A       |         |
|      | 02/15/2016 08:00 | Schedul... |                   | PRS Group Weekly 20.00 Min...   | De La Fuente, Eva | South Suburbs IOP         |         |
|      | 02/01/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Frelley, Susan    | Brookhaven CST            |         |
|      | 01/19/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Frelley, Susan    | Brookhaven CST            |         |
|      | 01/18/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Hensley, Katie    | Brookhaven CST            |         |
|      | 01/18/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Hensley, Katie    | Calhoun CSI               |         |
|      | 10/29/2015 09:00 | Show       | Shift Summary     | ShiftNote 60.00 Minutes         | Frelley, Susan    | TRI Service Cleaning      |         |
|      | 10/27/2015 10:00 | Show       | IDQ Individual... | Individual Service N 60.00 M... | Frelley, Susan    | Brookhaven CST            |         |
|      | 09/30/2015 11:30 | Show       | Grp Note          | Group Therapy 60.00 Minutes     | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/30/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/30/2015 09:00 | Show       | Grp Note          | Group Therapy 90.00 Minutes     | Adams, Olivia     | Chicago Apts Ex Tenants   |         |
|      | 09/30/2015 09:00 | Show       | Grp Note          | Group Therapy 90.00 Minutes     | Adams, Olivia     | Chicago Apts Ex Tenants   |         |
|      | 09/30/2015 08:00 | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | 09/28/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/28/2015 08:00 | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | 09/25/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/25/2015 08:00 | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | 09/24/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |

2. Click on the **hyperlinked date of service** in the *DOS* column for the service you want to change.


The *Service Note* page is displayed. View [field definitions](#) (See page 120).

3. Change **fields** on the *Service* tab, if needed.
4. Click the **Save** button in the toolbar.
5. Click on the **Billing Diagnosis** tab to make it active.

The *Billing Diagnosis* page is displayed. View [field definitions](#) (See page 116).

6. Change the **Billing Diagnosis** tab, if needed.

Notice that there is a *Warnings* tab which will be blank until the service note goes through the overnight process. If there are problems processing the service and note, then check the *Warning* tab to determine why the service was not processed.

7. Click the **Save** button in the toolbar.
8. Click the **Exit**  toolbar item to close the service and note page.

### To Change a Signed Service Note for a Client

If the service note has been signed, then the document is displayed.

1. Display the *Services/Notes* list page. [Tell me how...](#) (See page 47)

The *Services/Notes* list page is displayed. View [field definitions](#) (See page 130).

| Auth | DOS              | Status     | Document          | Procedure                       | Clinician         | Program                   | Comment |
|------|------------------|------------|-------------------|---------------------------------|-------------------|---------------------------|---------|
|      | 02/16/2016 09:00 | Show       |                   | PRS Group Weekly 120.00 M...    | De La Fuente, Eva | South Suburbs IOP         |         |
|      | 02/16/2016 09:00 | Show       |                   | PsychoEd Wkly Grp 360.00 M...   | Adams, Olivia     | South Suburbs IOP         |         |
|      | 02/15/2016 09:30 | Show       | Grp Note          | Day Service Non-Bill 60.00 M... | Mauritz, Katie    | Brookhaven ACCESS A       |         |
|      | 02/15/2016 08:00 | Schedul... |                   | PRS Group Weekly 20.00 Min...   | De La Fuente, Eva | South Suburbs IOP         |         |
|      | 02/01/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Frelley, Susan    | Brookhaven CST            |         |
|      | 01/19/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Frelley, Susan    | Brookhaven CST            |         |
|      | 01/18/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Hensley, Katie    | Brookhaven CST            |         |
|      | 01/18/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Hensley, Katie    | Calhoun CSI               |         |
|      | 10/29/2015 09:00 | Show       | Shift Summary     | ShiftNote 60.00 Minutes         | Frelley, Susan    | TRI Service Cleaning      |         |
|      | 10/27/2015 10:00 | Show       | IDD Individual... | Individual Service N 60.00 M... | Frelley, Susan    | Brookhaven CST            |         |
|      | 09/30/2015 11:30 | Show       | Grp Note          | Group Therapy 60.00 Minutes     | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/30/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/30/2015 09:00 | Show       | Grp Note          | Group Therapy 90.00 Minutes     | Adams, Olivia     | Chicago Apts Ex Tenants   |         |
|      | 09/30/2015 09:00 | Show       | Grp Note          | Group Therapy 90.00 Minutes     | Adams, Olivia     | Chicago Apts Ex Tenants   |         |
|      | 09/30/2015 08:00 | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | 09/28/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/28/2015 08:00 | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | 09/25/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/25/2015 08:00 | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | 09/24/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |

- If the service note has been signed, then clicking on either the **hyperlinked date of service** in the *DOS* column or on the **hyperlinked document name** in the *Document* column displays the document page.

Client ID : 1227660 Page 1 of 2

**Texoma Progress Note**

**Client Information**

|                            |                            |
|----------------------------|----------------------------|
| Client Name: Cabrera, Bill | Client ID: 1227660         |
| DOB: 01/30/1993            | Effective Date: 08/03/2016 |

Chief Complaint: This 23 year old Male presents with a history of abdominal pain.

Vitals  
None

Subjective:

- Click the **Edit** button to open the document for changing. Notice the red box in the figure above for the location of the *Edit* button.

The *Confirmation Message* window is displayed.

- Click the **OK** button in the *Confirmation Message* window.

The *Service Note* page is displayed. View [field definitions](#) (See page 120).

The screenshot shows the 'Individual Service Note' form. At the top, there's a header with the date '05/20/2016', a 'Grp Note' dropdown, and a 'Go To' dropdown. Below that are buttons for 'View', 'Share', 'Status' (set to 'In Progress'), 'Effective' (05/23/2016), 'Author' (Hensley, Katie), and 'Sign'. The main form has tabs for 'Service', 'Note', 'Billing Diagnosis', and 'Warnings'. The 'Service' tab is selected, showing a form with the following fields: Status (Show), Start Date (05/23/2016), Date In (05/23/2016), Program (Brookhaven CST), Procedure (AP Group Therap), Start (9:00 AM), End (10:00 AM), End Date (05/23/2016), Duration (00 Minutes), Location (Office), Time In (9:00 AM), Time Out (10:00 AM), Date Out (05/23/2016), Clinician (Hensley, Katie), Attending (dropdown), Referring (dropdown), Specific Location (text area with a tooltip), and Comment (text area with a tooltip). There is also a 'Cancel Reason' dropdown at the bottom left.

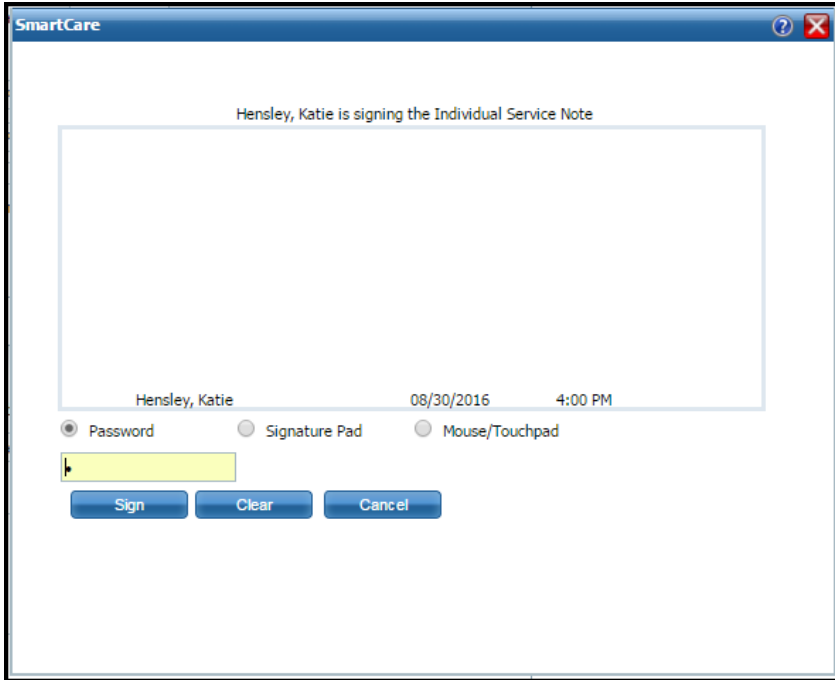
5. Make changes as needed to the Service tab, Note tab and Billing Diagnosis tab.
6. Click the **Save** button in the toolbar.
7. Click the **Sign** button.

The *Reason for New Version* window is displayed for you to leave comments about the changes.


The screenshot shows a dialog box titled 'SmartCare'. It has a text area with the placeholder text 'Reason for new version:'. Below the text area are two buttons: 'Ok' and 'Cancel'.

8. Type **comments** in the window.
9. When your comments are complete, click the **OK** button.

The *Signature* window is displayed.



10. Sign the **document**. [Tell me how....](#) (See page 65)

11. Click the **Exit**  toolbar item to close the *Service Note* page.

### To Delete a Service or a Service Note

You can only delete a service with a status of *Scheduled*.

1. Display the *Services/Notes* list page. [Tell me how...](#) (See page 47)

The *Services/Notes* list page is displayed. View [field definitions](#) (See page 130).

Services/Notes (196)

All Clinicians | All Statuses | All Procedures | Other | Apply Filter

Show Services and Care Mgmt Claims | Past 12 Months | From 05/20/2015 | To | All Programs

| Auth | DOS              | Status     | Document          | Procedure                       | Clinician         | Program                   | Comment |
|------|------------------|------------|-------------------|---------------------------------|-------------------|---------------------------|---------|
|      | 02/16/2016 09:00 | Show       |                   | PRS Group Weekly 120.00 M...    | De La Fuente, Eva | South Suburbs IOP         |         |
|      | 02/16/2016 09:00 | Show       |                   | PsychoEd Wkly Grp 360.00 M...   | Adams, Olivia     | South Suburbs IOP         |         |
|      | 02/15/2016 09:30 | Show       | Grp Note          | Day Service Non-Bill 60.00 M... | Mauritz, Katie    | Brookhaven ACCESS A       |         |
|      | 02/15/2016 08:00 | Schedul... |                   | PRS Group Weekly 20.00 Min...   | De La Fuente, Eva | South Suburbs IOP         |         |
|      | 02/01/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Frelley, Susan    | Brookhaven CST            |         |
|      | 01/19/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Frelley, Susan    | Brookhaven CST            |         |
|      | 01/18/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Hensley, Katie    | Brookhaven CST            |         |
|      | 01/18/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Hensley, Katie    | Calhoun CSI               |         |
|      | 10/29/2015 09:00 | Show       | Shift Summary     | ShiftNote 60.00 Minutes         | Frelley, Susan    | TRI Service Cleaning      |         |
|      | 10/27/2015 10:00 | Show       | IDD Individual... | Individual Service N 60.00 M... | Frelley, Susan    | Brookhaven CST            |         |
|      | 09/30/2015 11:30 | Show       | Grp Note          | Group Therapy 60.00 Minutes     | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/30/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/30/2015 09:00 | Show       | Grp Note          | Group Therapy 90.00 Minutes     | Adams, Olivia     | Chicago Apts Ex Tenants   |         |
|      | 09/30/2015 09:00 | Show       | Grp Note          | Group Therapy 90.00 Minutes     | Adams, Olivia     | Chicago Apts Ex Tenants   |         |
|      | 09/30/2015 08:00 | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | 09/28/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/28/2015 08:00 | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | 09/25/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/25/2015 08:00 | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | 09/24/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |

2. Filter the list to determine the records that are displayed. [Tell me how...](#) (See page 142)
3. Find the client whose service you want to delete.
4. Click on the hyperlinked date of service in the *DOS* column.

Individual Service Note

05/20/2016 - Grp Note | Go To | Sign

View | Share | Status: In Progress | Effective: 05/23/2016 | Author: Hensley, Katie | More Detail

Service | Note | Billing Diagnosis | Warnings

**Service**

Status: Show | Start Date: 05/23/2016 | Date In: 05/23/2016

Program: Brookhaven CST

Procedure: AP Group Therap | Start: 9:00 AM | End: 10:00 AM | End Date: 05/23/2016 | Duration: 60 Minutes

Location: Office | Time In: 9:00 AM | Time Out: 10:00 AM | Date Out: 05/23/2016

Clinician: Hensley, Katie | Attending: | Referring: |

Specific Location: You add a new service and note for a client, from Services/Notes (###) list page. From this page, you can: You add a new service and note

Comment: You add a new service and note for a client, from Services/Notes (###) list page. From this page, you can: You add a new service and note


Cancel Reason: |

5. Click on the **trash can**  toolbar item.  
The *Confirmation Message* window is displayed.
6. Click the **OK** button in the *Confirmation Message* window.  
The *Services/Notes* list page is displayed.

[Why can't I access these screens?](#) (See page **Error! Bookmark not defined.**)

### Acknowledgements



Use this  toolbar item to let other staff view a document once the document has been signed by the author. The additional staff who view the document acknowledge that they have viewed the document.

### Add a Code to the Service Procedure Code

1. From the *Service Detail* page, click the **Add-On Codes** tab to make it active.

The *Add-On Codes* tab is displayed. View [field definitions](#) (See page 114).

| Add-On Codes       | Start Time | Duration |
|--------------------|------------|----------|
| No data to display |            |          |

2. Click the **drop down arrow** in the *Select Add-On Codes* field.

The list of authorized add-on codes for the service procedure code are listed.


3. Select the **add-on code** you want.

The start time for the service is displayed in the *Start Time* field.

The *Duration* that is set up for the add-on code is displayed in the *Duration* field. The units for the code are displayed to the right of the *Duration* field.

4. Click the **Add** button.

The information about the add-on code is added to the list.

5. If you need to delete an add-on code, click the  icon on the record you want to delete.


6. When you are done working with add-on codes, click the **Save** button.

Use the left arrow in your browser to return to the topic that you linked from.

[Why can't I access these screens?](#) (See page **Error! Bookmark not defined.**)

## Copy Service

Use *Copy Service* to copy the service information between dates of service for the same client. Find this

feature on the *Services/Notes* page for the client. The *Copy Service*  toolbar item lets you make a copy of the service that is displayed, and then allows you to make changes to the service, if needed. This is an efficient process if the majority of the existing service details are the same for the copy of the service you make.

### To Copy a Client's Service

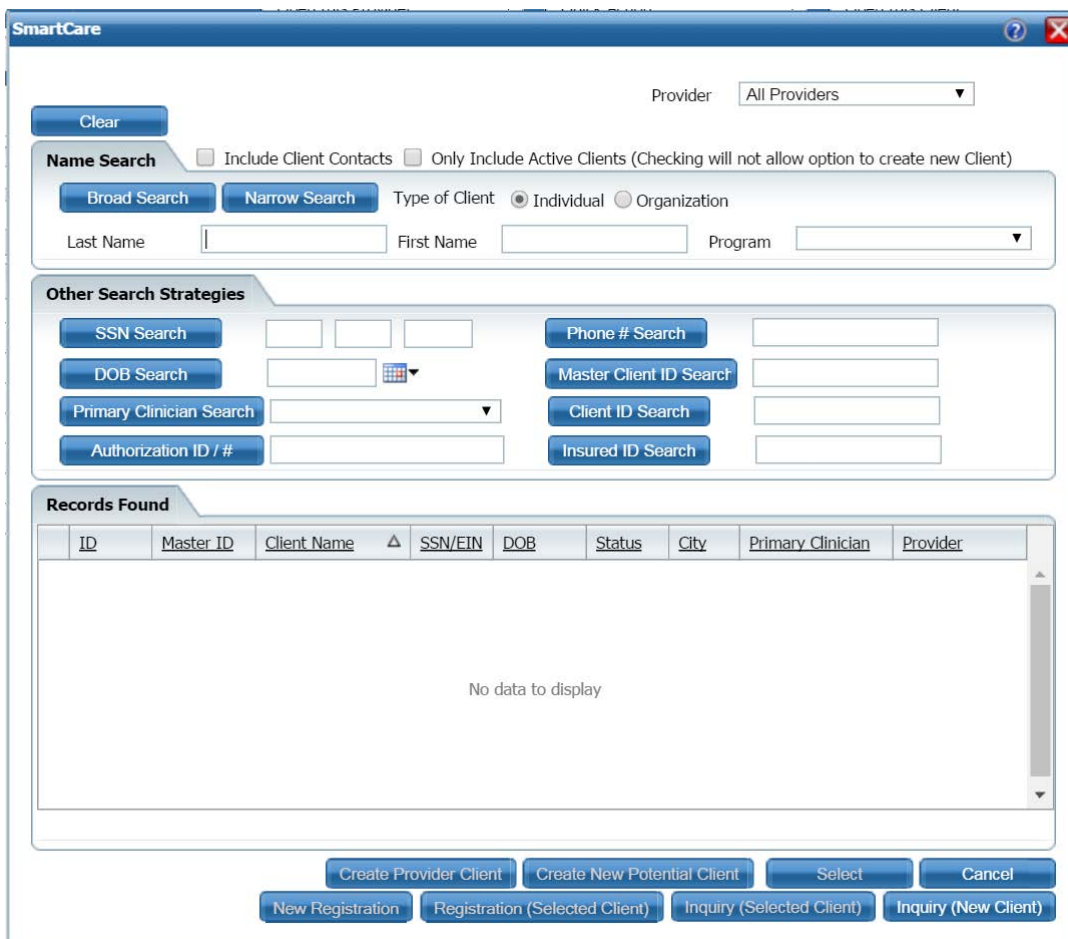
1. Display the client you want to work with.
  - a. To display a client, click the **Open this Client** drop down list



A screenshot of a dropdown menu with the text "Open this Client" and a downward-pointing arrow on the right side.

- b. Select the **<Client Search>** option.

The *Client Search* window is displayed. View [field definitions](#) (See page 134).



The screenshot shows the "SmartCare" Client Search window. At the top right, there is a "Provider" dropdown menu set to "All Providers" and a "Clear" button. Below this is the "Name Search" section with checkboxes for "Include Client Contacts" and "Only Include Active Clients (Checking will not allow option to create new Client)". It includes "Broad Search" and "Narrow Search" buttons, a "Type of Client" radio button group (selected "Individual", unselected "Organization"), and input fields for "Last Name", "First Name", and a "Program" dropdown. The "Other Search Strategies" section contains several search buttons: "SSN Search", "DOB Search", "Primary Clinician Search", "Authorization ID / #", "Phone # Search", "Master Client ID Search", "Client ID Search", and "Insured ID Search", each with an associated input field. The "Records Found" section features a table with columns: ID, Master ID, Client Name, SSN/EIN, DOB, Status, City, Primary Clinician, and Provider. The table is currently empty, displaying "No data to display". At the bottom, there are buttons for "Create Provider Client", "Create New Potential Client", "Select", "Cancel", "New Registration", "Registration (Selected Client)", "Inquiry (Selected Client)", and "Inquiry (New Client)".

2. Search for the client you want. [Tell me how...](#) (See page 133)

- When the client you want is displayed and selected, click the **Select** button.

The *Client Summary* page is displayed. View [field definitions](#) (See page 86).

**Client Summary**

**Summary**

Client ID: 394180      Master Client ID:

Name: Bellon, Pam      Status: In Treatment      DOB: 01/12/1941      Age: 75 Years      Sex: Female      Race: White      SSN: 0999

Registered On: 01/08/1991      Last Seen On: 09/14/2015      Next Scheduled:

Address: 1830 N. State Chicago, IL 60601

Primary Care Coord: Auduong, Bill      Primary Program: South Follow Along      Phone: 312-555-2153

Emergency Contact: P222\_C222\_312-555-2475      Note:

Presenting Problem:

Diagnosis:

| Type       | ICD9   | ICD10  | DSM5 | R/O | Description             |
|------------|--------|--------|------|-----|-------------------------|
| Primary    | 295.30 | F20.0  | No   |     | Paranoid schizophren... |
| Additional | V71.09 | Z03.89 | No   |     | Encounter for observ... |

Timeline Summary

GAF Score

Services 100  
Med Changes 50  
Hospitalization 0

Jun Jul Aug Sep Oct Nov Dec Jan Feb Mar Apr May

Admit ↑      Discharge ↓

- Notice that a *Client* tab is displayed to the right of the *My Office* tab. The tab displays the client's last name, first name and the client ID in parentheses.

My Office    **Abbott, Tera (1651160) X**    Program    Administration

- Select **Services/Notes** from the *Client* banners.

The *Services/Notes* (###) list page is displayed. View [field definitions](#) (See page 130).

**Services/Notes (196)**

All Clinicians    All Statuses    All Procedures    Other    Apply Filter

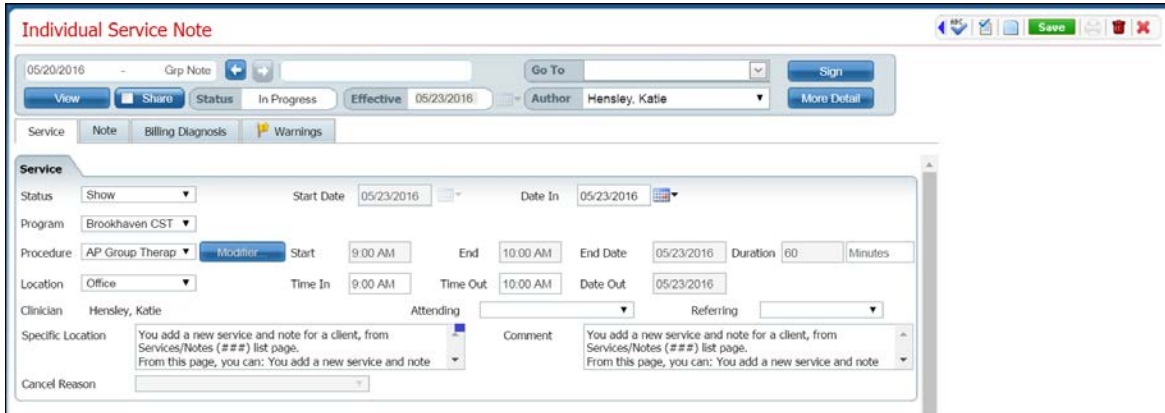
Show Services and Care Mgmt Claims    Past 12 Months    From 05/20/2015    To    All Programs

| Auth | DOS              | Status     | Document          | Procedure                       | Clinician         | Program                   | Comment |
|------|------------------|------------|-------------------|---------------------------------|-------------------|---------------------------|---------|
|      | 02/16/2016 09:00 | Show       |                   | PRS Group Weekly 120.00 M...    | De La Fuente, Eva | South Suburbs IOP         |         |
|      | 02/16/2016 09:00 | Show       |                   | PsychoEd Wkly Grp 360.00 M...   | Adams, Olivia     | South Suburbs IOP         |         |
|      | 02/15/2016 09:30 | Show       | Grp Note          | Day Service Non-Bill 60.00 M... | Mauritz, Katie    | Brookhaven ACCESS A       |         |
|      | 02/15/2016 08:00 | Schedul... |                   | PRS Group Weekly 20.00 Min...   | De La Fuente, Eva | South Suburbs IOP         |         |
|      | 02/01/2016 01:00 | Show       | Med Note          | Pharm Ming 60.00 Minutes        | Frelley, Susan    | Brookhaven CST            |         |
|      | 01/19/2016 01:00 | Show       | Med Note          | Pharm Ming 60.00 Minutes        | Frelley, Susan    | Brookhaven CST            |         |
|      | 01/18/2016 01:00 | Show       | Med Note          | Pharm Ming 60.00 Minutes        | Hensley, Katie    | Brookhaven CST            |         |
|      | 01/18/2016 01:00 | Show       | Med Note          | Pharm Ming 60.00 Minutes        | Hensley, Katie    | Calhoun CSI               |         |
|      | 10/29/2015 09:00 | Show       | Shift Summary     | ShiftNote 60.00 Minutes         | Frelley, Susan    | TRI Service Cleaning      |         |
|      | 10/27/2015 10:00 | Show       | IDD Individual... | Individual Service N 60.00 M... | Frelley, Susan    | Brookhaven CST            |         |
|      | 09/30/2015 11:30 | Show       | Grp Note          | Group Therapy 60.00 Minutes     | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/30/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/30/2015 09:00 | Show       | Grp Note          | Group Therapy 90.00 Minutes     | Adams, Olivia     | Chicago Apts Ex Tenants   |         |
|      | 09/30/2015 08:00 | Show       | Grp Note          | Group Therapy 90.00 Minutes     | Adams, Olivia     | Chicago Apts Ex Tenants   |         |
|      | 09/30/2015 08:00 | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | 09/28/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/28/2015 08:00 | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | 09/25/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/25/2015 08:00 | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | 09/24/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |

6. Filter the list to determine the records that are displayed. [Tell me how...](#) (See page 142)
7. To make a copy of an existing service, click on the **date of service** you want in the *DOS* column.


The *Service Note* page is displayed with the *Service* tab active. View [field definitions](#) (See page 120).

**Note:** the name of the page differs depending on the type of service performed on the date of service that you selected.



8. Verify this is the service you want to copy.
9. Click the **Save** button.
10. Click the left pointing blue arrow in the task bar to extend the display of icons. See the arrow outlined in red in the screen image below.



11. Click the **Copy Service**  icon in the task bar. See the icon outlined in red in the screen image below.

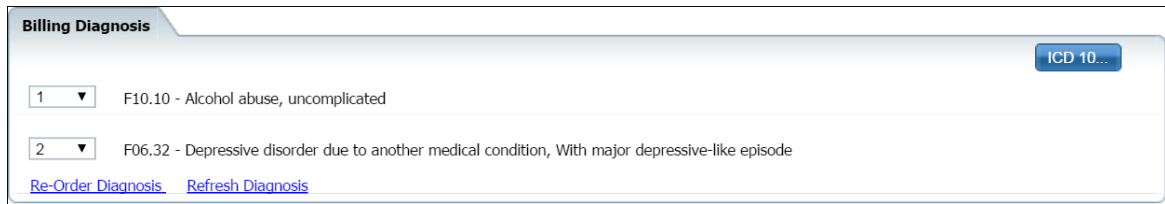


A copy of the *Service Note* page is displayed. Notice that the *date of service* is changed to the current day's date and the status is changed to *Scheduled*.


12. Make changes on the **Service** tab for this new service, if needed. View [field definitions](#) (See page 120).
13. Click the **Save** button.

14. Click on the **Billing Diagnosis** tab to make it active.

The *Billing Diagnosis* tab is displayed. View [field definitions](#) (See page 116).



The screenshot shows a web interface for the 'Billing Diagnosis' tab. At the top left, the tab is labeled 'Billing Diagnosis'. In the top right corner, there is a blue button labeled 'ICD 10...'. Below this, there are two rows of diagnostic codes. The first row has a dropdown menu with '1' selected, followed by the text 'F10.10 - Alcohol abuse, uncomplicated'. The second row has a dropdown menu with '2' selected, followed by the text 'F06.32 - Depressive disorder due to another medical condition, With major depressive-like episode'. At the bottom of the form, there are two blue links: 'Re-Order Diagnosis' and 'Refresh Diagnosis'.

15. Make changes on the **Billing Diagnosis** tab for this service, if needed.
16. Click on the **Save** button.
17. When you are done making changes, click the **Exit** icon  to return to the *Services/Notes* list page.

[Why can't I access these screens?](#) (See page **Error! Bookmark not defined.**)

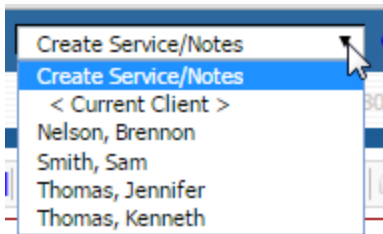
## Create Service/Notes

You can quickly display the *Service Note* page for a specific client using the drop down list on the title bar. Refer to the red box in the figure below. The figure illustrates the SmartCare title bar.



### To Create Service/Notes

1. From the SmartCare title bar, click on the **down arrow** in the *Create Service/Notes* drop down. Refer to the red box in the figure above for the location of the down arrow. The list is displayed. See figure below.



2. From the drop down, select:

Current client - if a client account is open, the name is listed in the client tab. Refer to the darker blue tab in the figure below.



From a list of recently accessed clients - refer to the figure after step 1 for the list.

The *Service Note* page is displayed for the selected client. Notice that the *Status* defaults to *Show* for the current date.

## Display the Client Plans and Time Spans Page

1. Display the client you want to work with.
  - a. To display a client, click the **Open this Client** drop down list

Open this Client ▼

- b. Select the <Client Search> option.

The *Client Search* window is displayed. View [field definitions](#) (See page 133).

2. Search for the client you want. Tell me how...
3. When the client you want is displayed and selected, click the **Select** button.

The *Client Summary* page is displayed. View [field definitions](#) (See page 86).

**Client Summary**

**Summary**

Client ID: 394180      Master Client ID:

Name: Bellon, Pam      Status: In Treatment      DOB: 01/12/1941      Age: 75 Years      Sex: Female      Race: White      SSN: 0999

Registered On: 01/08/1991      Last Seen On: 09/14/2015      Next Scheduled:

Primary Care Coord: AuDuong, Bill      Primary Program: South Follow Along      Address: 1830 N. State Chicago, IL 60601      Phone: 312-555-2153

Note:

Emergency Contact: P222\_C222 312-555-2475      Presenting Problem:

Diagnosis:

| Type       | ICD9   | ICD10  | DSM5 | R/O | Description             |
|------------|--------|--------|------|-----|-------------------------|
| Primary    | 295.30 | F20.0  | No   |     | Paranoid schizophren... |
| Additional | V71.09 | Z03.89 | No   |     | Encounter for observ... |

Timeline Summary

GAF Score

Services 100

Med Changes 50

Hospitalization 0

Jun Jul Aug Sep Oct Nov Dec Jan Feb Mar Apr May

Admit ↑      Discharge ↓

- Notice that a *Client* tab is displayed to the right of the *My Office* tab. The tab displays the client's last name, first name and the client ID in parentheses. When a tab in these tabs is dark blue, then the banners displayed below are specific to that area of the system.



- From the client banners, select **Finance banner > Insurance sub-banner**.

The *Client Plans And Time Spans (#)* page is displayed. View field definitions.

**Client Plans And Time Spans (2)**

Verification History    Verify Eligibility    View/Scan ID Cards

**Client Plans**

| Plan Name           | Insured Id | Co-Pay | Start Date | End Date | COB | Service Area |     |
|---------------------|------------|--------|------------|----------|-----|--------------|-----|
| Aetna Better Health | 121212     |        |            |          |     | BHRS         | Add |
| APS Healthcare      |            |        |            |          |     | Consultation | Add |

Show Current Plans Only    BHRS    Maximize Time Spans

**Plan Time Spans**

01/01/2015 - No End Date    Change COB Order

|   |                     |                                       |  |              |
|---|---------------------|---------------------------------------|--|--------------|
| X | Aetna Better Health | 121212-PO Box 62198 Phoenix, AZ 85082 |  | Set End Date |
|---|---------------------|---------------------------------------|--|--------------|

[Why can't I access these screens?](#)

## Display the Services List Page

1. Follow this path: **My Office tab > Billing banner > Services sub-banner.**

The *Services* list page is displayed. View [field definitions](#) (See page 131).

Services (29574)

| Client Name      | DOS                 | Charge (Rate Id) | Procedure            | Status    | Clinician          | Program             | Location           |
|------------------|---------------------|------------------|----------------------|-----------|--------------------|---------------------|--------------------|
| Bellon, Pam      | 02/11/2016 10:30 AM |                  | Individual Therapy   | Scheduled | AuDuong, Bill      | South Follow Along  | Hope Apts          |
| Sutton, Edve     | 02/11/2016 9:30 AM  |                  | Individual Therapy   | Scheduled | AuDuong, Bill      | South Follow Along  | Hope Apts          |
| Jones, Jenny     | 02/10/2016 4:00 PM  | 236.60 ( 10 )    | Psychological Test   | Show      | Spencer, Kim       | Brookhaven CST      | Client's Residence |
| Parkinson, Ruben | 02/10/2016 2:30 PM  |                  | Individual Therapy   | Scheduled | AuDuong, Bill      | South Follow Along  | Hope Apts          |
| Miller, Juanita  | 02/10/2016 2:30 PM  |                  | Pharm Mng            | Scheduled | Whatcott, Sara     | South Follow Along  | Hope Apts          |
| Smith, Natalie   | 02/10/2016 1:00 PM  |                  | Pharm Mng            | Scheduled | Whatcott, Sara     | South Follow Along  | Hope Apts          |
| Wilkins, Charlie | 02/10/2016 10:00 AM | 194.25 ( 32 )    | Ind Thrpy Commercial | Scheduled | Bernardo, Jesse    | No Episode          | Client's Residence |
| Abbott, Amanda   | 02/10/2016 9:00 AM  | 45.20 ( 52 )     | Group Therapy        | Show      | Frelley, Susan     | Adult Inpatient     | Austin Apartments  |
| Clark, Kevin     | 02/10/2016 9:00 AM  | 45.20 ( 52 )     | Group Therapy        | Show      | Frelley, Susan     | Adult Inpatient     | Austin Apartments  |
| Clark, Mary      | 02/10/2016 9:00 AM  | 45.20 ( 52 )     | Group Therapy        | Show      | Frelley, Susan     | Adult Inpatient     | Austin Apartments  |
| Herrick, Polze   | 02/09/2016 1:30 PM  |                  | Individual Therapy   | Scheduled | AuDuong, Bill      | South Follow Along  | Hope Apts          |
| Romero, Harley   | 02/09/2016 11:00 AM |                  | Individual Therapy   | Scheduled | AuDuong, Bill      | South Follow Along  | Hope Apts          |
| Roucher, Heather | 02/08/2016 3:00 PM  |                  | Nursing Note         | Scheduled | Avila, Stacey      | Brookhaven ACCESS A | AOT Hospital Visit |
| Clark, Kevin     | 02/08/2016 1:30 PM  | 260.00 ( 35 )    | Ind Thrpy Crisis 31+ | Show      | Avila, Stacey      | Brookhaven CST      | 4101 N Ravenswo    |
| Burdick, Douglas | 02/08/2016 12:00 PM | 194.25 ( 14 )    | Individual Therapy   | Scheduled | Jackson, Leann     | South Suburbs IOP   | Grals Apartments   |
| Darzer, Briana   | 02/08/2016 11:00 AM | 166.30 ( 1280 )  | Pharm Mng            | Scheduled | Avila, Stacey      | South Suburbs IOP   | Office             |
| Harbaugh, John   | 02/08/2016 8:00 AM  | 260.00 ( 35 )    | Ind Thrpy Crisis 31+ | Show      | Frelley, Susan     | No Episode          | 5000 W Roosevelt   |
| Barry, Don       | 02/06/2016 11:00 AM | 194.25 ( 32 )    | Ind Thrpy Commercial | Scheduled | Uwimpuhwe, Clifton | No Episode          | Client's Residence |
| Romrell, Ricky   | 02/05/2016 3:30 PM  |                  | Individual Therapy   | Scheduled | AuDuong, Bill      | South Follow Along  | Hope Apts          |

1 2 3 4 5 6 7 8 9 10 ... Next Last 1

From the Services list page, you can:

[Manage Services](#) (See page 3)

[Export the List Page Records](#) (See page 141)

[Why can't I access these screens?](#) (See page **Error! Bookmark not defined.**)

## Display the Services/Notes List Page

1. Display the client you want to work with.
  - a. To display a client, click the **Open this Client** drop down list

Open this Client ▼

- b. Select the <Client Search> option.

The *Client Search* window is displayed. View [field definitions](#) (See page 133).

2. Search for the client you want. [Tell me how...](#) (See page 133)
3. When the client you want is displayed and selected, click the **Select** button.

The *Client Summary* page is displayed. View [field definitions](#) (See page 86).

**Client Summary**

**Summary**

Client ID: 394180      Master Client ID:

Name: Bellon, Pam      Status: In Treatment      DOB: 01/12/1941      Age: 75 Years      Sex: Female      Race: White      SSN: 0999

Registered On: 01/08/1991      Last Seen On: 09/14/2015      Next Scheduled:

Primary Care Coord: AuDuong, Bill      Primary Program: South Follow Along      Address: 1830 N. State Chicago, IL 60601

Emergency Contact: P222\_C222 312-555-2475      Note:      Phone: 312-555-2153

Presenting Problem:

Diagnosis:

| Type       | ICD9   | ICD10  | DSM5 | R/O | Description             |
|------------|--------|--------|------|-----|-------------------------|
| Primary    | 295.30 | F20.0  | No   |     | Paranoid schizophren... |
| Additional | V71.09 | Z03.89 | No   |     | Encounter for observ... |

Timeline Summary

GAF Score

Services 100

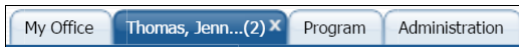
Med Changes 50

Hospitalization 0

Jun Jul Aug Sep Oct Nov Dec Jan Feb Mar Apr May

Admit ↑      Discharge ↓

- Notice that a *Client* tab is displayed to the right of the *My Office* tab. The tab displays the client's last name, first name and the client ID in parentheses. When a tab in this row of tabs is dark blue, then the banners displayed below the tabs are specific to that area of the system.



- From the client banners, select **Services/Notes**.

**Note:** All the work you complete on the *Services/Notes* list page is for the specific client you selected.

The *Services/Notes (###)* list page is displayed. View [field definitions](#) (See page 130).

**Services/Notes (196)**

All Clinicians      All Statuses      All Procedures      Other      Apply Filter

Show Services and Care Mgmt Claims      Past 12 Months      From 05/20/2015      To      All Programs

| Auth | DOS              | Status     | Document          | Procedure                       | Clinician         | Program                   | Comment |
|------|------------------|------------|-------------------|---------------------------------|-------------------|---------------------------|---------|
|      | 02/16/2016 09:00 | Show       |                   | PRS Group Weekly 120.00 M...    | De La Fuente, Eva | South Suburbs IOP         |         |
|      | 02/16/2016 09:00 | Show       |                   | PsychoEd Wkly Grp 360.00 M...   | Adams, Olivia     | South Suburbs IOP         |         |
|      | 02/15/2016 09:30 | Show       | Grp Note          | Day Service Non-Bill 60.00 M... | Mauritz, Katie    | Brookhaven ACCESS A       |         |
|      | 02/15/2016 09:00 | Schedul... |                   | PRS Group Weekly 20.00 Min...   | De La Fuente, Eva | South Suburbs IOP         |         |
|      | 02/01/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Freiley, Susan    | Brookhaven CST            |         |
|      | 01/19/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Freiley, Susan    | Brookhaven CST            |         |
|      | 01/18/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Hensley, Katie    | Brookhaven CST            |         |
|      | 01/18/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Hensley, Katie    | Calhoun CSI               |         |
|      | 10/29/2015 09:00 | Show       | Shift Summary     | ShiftNote 60.00 Minutes         | Freiley, Susan    | TRI Service Cleaning      |         |
|      | 10/27/2015 10:00 | Show       | IDD Individual... | Individual Service N 60.00 M... | Freiley, Susan    | Brookhaven CST            |         |
|      | 09/30/2015 11:30 | Show       | Grp Note          | Group Therapy 60.00 Minutes     | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/30/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/30/2015 09:00 | Show       | Grp Note          | Group Therapy 90.00 Minutes     | Adams, Olivia     | Chicago Apts Ex Tenants   |         |
|      | 09/30/2015 09:00 | Show       | Grp Note          | Group Therapy 90.00 Minutes     | Adams, Olivia     | Chicago Apts Ex Tenants   |         |
|      | 09/30/2015 08:00 | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | 09/28/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/28/2015 08:00 | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | 09/25/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/25/2015 08:00 | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | 09/24/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |

[Why can't I access these screens?](#) (See page **Error! Bookmark not defined.**)

## Print Amendment Requests



This icon lets you view and any amendment requests initiated by the client on service notes.

1. Display the *Services/Notes* (###) list page. [Tell me how...](#) (See page 47)

The *Services/Notes* (###) list page is displayed. View [field definitions](#) (See page 130).

| Auth | DOS                              | Status     | Document          | Procedure                       | Clinician         | Program                   | Comment |
|------|----------------------------------|------------|-------------------|---------------------------------|-------------------|---------------------------|---------|
|      | <a href="#">02/16/2016 09:00</a> | Show       |                   | PRS Group Weekly 120.00 M...    | De La Fuente, Eva | South Suburbs IOP         |         |
|      | <a href="#">02/16/2016 09:00</a> | Show       |                   | PsychoEd Wkly Grp 360.00 M...   | Adams, Olivia     | South Suburbs IOP         |         |
|      | <a href="#">02/15/2016 09:30</a> | Show       | Grp Note          | Day Service Non-Bill 60.00 M... | Mauritz, Katie    | Brookhaven ACCESS A       |         |
|      | <a href="#">02/15/2016 08:00</a> | Schedul... |                   | PRS Group Weekly 20.00 Min...   | De La Fuente, Eva | South Suburbs IOP         |         |
|      | <a href="#">02/01/2016 01:00</a> | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Freiley, Susan    | Brookhaven CST            |         |
|      | <a href="#">01/19/2016 01:00</a> | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Freiley, Susan    | Brookhaven CST            |         |
|      | <a href="#">01/18/2016 01:00</a> | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Hensley, Katie    | Brookhaven CST            |         |
|      | <a href="#">01/18/2016 01:00</a> | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Hensley, Katie    | Calhoun CSI               |         |
|      | <a href="#">10/29/2015 09:00</a> | Show       | Shift Summary     | ShiftNote 60.00 Minutes         | Freiley, Susan    | TRI Service Cleaning      |         |
|      | <a href="#">10/27/2015 10:00</a> | Show       | IDD Individual... | Individual Service N 60.00 M... | Freiley, Susan    | Brookhaven CST            |         |
|      | <a href="#">09/30/2015 11:30</a> | Show       | Grp Note          | Group Therapy 60.00 Minutes     | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | <a href="#">09/30/2015 11:00</a> | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | <a href="#">09/30/2015 09:00</a> | Show       | Grp Note          | Group Therapy 90.00 Minutes     | Adams, Olivia     | Chicago Apts Ex Tenants   |         |
|      | <a href="#">09/30/2015 09:00</a> | Show       | Grp Note          | Group Therapy 90.00 Minutes     | Adams, Olivia     | Chicago Apts Ex Tenants   |         |
|      | <a href="#">09/30/2015 08:00</a> | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | <a href="#">09/28/2015 11:00</a> | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | <a href="#">09/28/2015 08:00</a> | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | <a href="#">09/25/2015 11:00</a> | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | <a href="#">09/25/2015 08:00</a> | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | <a href="#">09/24/2015 11:00</a> | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |

2. Click on the **hyperlinked date of service** in the *DOS* column that you want the print the amendment request for.

The *Service Note* page is displayed. **Note:** the name of the page depends on the document assigned to the service you selected. View [field definitions](#) (See page 120).

Individual Service Note

05/20/2016 - Grp Note

Go To: [Dropdown] Sign

View | Share | Status: In Progress | Effective: 05/23/2016 | Author: Hensley, Katie | More Detail

Service | Note | Billing | Diagnosis | Warnings

**Service**

Status: Show | Start Date: 05/23/2016 | Date In: 05/23/2016

Program: Brookhaven CST

Procedure: AP Group Therap | Start: 9:00 AM | End: 10:00 AM | End Date: 05/23/2016 | Duration: 60 Minutes

Location: Office | Time In: 9:00 AM | Time Out: 10:00 AM | Date Out: 05/23/2016

Clinician: Hensley, Katie | Attending: [Dropdown] | Referring: [Dropdown]

Specific Location: You add a new service and note for a client, from Services/Notes (###) list page. From this page, you can: You add a new service and note

Comment: You add a new service and note for a client, from Services/Notes (###) list page. From this page, you can: You add a new service and note

Cancel Reason: [Dropdown]

3. Extend the toolbar by clicking the left pointing blue arrow. Notice the red box outlining the arrow in the screen image below.



The task bar extends to the left.



4. Click the **Print Amendment Requests** icon in the extended task bar. Notice the red outlined icon in the screen image above.

The *Amendment Requests* window is displayed.



5. Use the **Select a format** drop down list to choose the format you want for the report.
6. Click the **Export** hyperlink.

The export file link button is displayed in the lower left corner of your browser screen. Refer to the red box in the image below.

The screenshot displays a web application interface for managing services and notes. The top navigation bar includes 'My Office', 'Thomas, Kenneth (2104210)', 'Program', and 'Administration'. The main content area is titled 'Services/Notes (27)' and features a search and filter section with dropdown menus for 'All Clinicians', 'All Statuses', 'All Procedures', and 'Other'. Below this is a section for 'Show Services and Care Mgmt Claims' with a date range filter set to 'Past 12 Months' from '08/30/2015' to a blank 'To' field, and a dropdown for 'All Programs'. The main table lists service records with columns for 'Auth', 'DOS', 'Status', 'Document', 'Procedure', 'Clinician', 'Program', and 'Comment'. The table contains 27 rows of data. At the bottom left of the browser's task bar, a red box highlights the 'ExportData (45).xls' button.

| Auth | DOS              | Status    | Document           | Procedure                      | Clinician       | Program                     | Comment       |
|------|------------------|-----------|--------------------|--------------------------------|-----------------|-----------------------------|---------------|
|      | 06/29/2016 03:00 | Schedu... | Misc               | Court Appointment 120.00 ...   | Freiley, CSusan | Veterans Project            |               |
|      | 06/28/2016 11:00 | Show      | Nurse Note         | Nursing Note 60.00 Minutes     | Hensley, Katie  | Veterans Project            |               |
|      | 06/28/2016 10:00 | Schedu... | IDD Individual...  | IDD Ind Therapy 60.00 Minut... | Lewis, Matt     | Veterans Project            |               |
|      | 06/27/2016 11:00 | Schedu... | Nurse Note         | Nursing Note 30.00 Minutes     | Reynoso, Cary   | Veterans Project            |               |
|      | 05/18/2016 02:30 | Schedu... | Nurse Note         | Nursing Note 30.00 Minutes     | Freiley, CSusan | Veterans Project            |               |
|      | 12/09/2015 11:30 | Schedu... | Misc               | Interpretive Srvc 30.00 Min... | Avila, System   | Veterans Project            |               |
|      | 12/08/2015 09:00 | Schedu... | IDD Individual...  | IDD Ind Therapy 60.00 Minut... | Lewis, Matt     | Veterans Project            |               |
|      | 09/29/2015 11:30 | Show      | Grp Note           | Group Therapy 60.00 Minutes    | Adams, Olivia   | South Suburbs Outpatie...   |               |
|      | 09/28/2015 12:00 | Show      | Grp Note           | Group MFam Therapy 15.00 ...   | Day, Cindy      | Shelter Plus Care I Nort... |               |
|      | 09/23/2015 01:00 | Schedu... |                    | Daily TheraBH 30.00 Minutes    | Day, Cindy      | Veterans Project            |               |
|      | 09/21/2015 03:00 | Schedu... |                    | Ind Therapy School 30.00 Mi... | Day, Cindy      | Veterans Project            |               |
|      | 09/18/2015 12:00 | Compl...  | Misc               | UA SelfPay Lab 1.00 Units      | Maccoe, Enea    | MAU Austin Safe Haven       |               |
|      | 09/18/2015 12:00 | Show      | Group Commercia... | Group MFam TheraBH 15.00 ...   | Day, Cindy      | Veterans Project            |               |
|      | 09/15/2015 11:30 | Show      | Grp Note           | Group TheraBH 60.00 Minutes    | Adams, Olivia   | South Suburbs Outpatie...   |               |
|      | 09/14/2015 11:30 | Show      | Grp Note           | Group TheraBH 60.00 Minutes    | Adams, Olivia   | South Suburbs Outpatie...   |               |
|      | 09/10/2015 05:00 | Schedu... | Indv Note          | Ind Thrpy Tx Pln Rev 60.00 ... | Hensley, Marcy  | South Suburbs MFP           | [Comment] ... |
|      | 09/05/2015 12:00 | Compl...  |                    | old 1.00                       | Ryland, David   | Brookhaven ACT              |               |
|      | 09/04/2015 11:30 | Show      | Grp Note           | Group TheraBH 60.00 Minutes    | Blaum, Wasif    | South Suburbs Outpatie...   |               |
|      | 09/04/2015 11:30 | Show      | Grp Note           | Group TheraBH 60.00 Minutes    | Kindred, Deej   | South Suburbs Outpatie...   |               |
|      | 09/03/2015 11:30 | Show      | Grp Note           | Group Therapy 60.00 Minutes    | Kindred, Deej   | South Suburbs Outpatie...   |               |
|      | 09/02/2015 06:00 | Show      | Group Commercia... | Grp Thrpy Commercial 120.0...  | Hensley, Marcy  | Brookhaven CST              |               |
|      | 09/02/2015 11:30 | Show      | Grp Note           | Group Therapy 45.00 Minutes    | Day, Cindy      | South Suburbs Outpatie...   |               |
|      | 09/02/2015 11:00 | Show      | Grp Note           | Daily TheraBH 120.00 Minutes   | Kindred, Deej   | Veterans Project            |               |
|      | 09/01/2015 02:00 | Compl...  | Misc               | UA SelfPay Lab 1.00 Units      | Brock, Jessica  | MAU Austin Safe Haven       |               |
|      | 09/01/2015 10:29 | Show      | Misc               | UA SelfPay Lab 1.00 Units      | Ray, Richard    | MAU Austin Safe Haven       |               |
|      | 09/01/2015 10:00 | Show      | Med Note           | Pharm Mng 60.00 Minutes        | Kindred, Deej   | MAU Austin Safe Haven       |               |
|      | 09/01/2015 01:00 | Show      | Grp Note           | Daily TheraBH 120.00 Minutes   | Kindred, Deej   | Veterans Project            |               |

7. Click the **Export** file button in the lower left corner of your browser's task bar.

The document is opened on your computer's local drive in the software that produces the file format you selected.

8. Use the **software page** that opens in the format in the software you requested and print the document.
9. Use the **Save As** feature in the software to rename the file and put it in a different location, if you want.

When the printing is complete, the *Print* window is closed and the *Service Note* page is displayed.

## Print Clinical Summary

1. Display the *Services/Notes* (###) list page. [Tell me how...](#) (See page 47)

The *Services/Notes* (###) list page is displayed. View [field definitions](#) (See page 130).

| Auth | DOS              | Status     | Document          | Procedure                       | Clinician         | Program                   | Comment |
|------|------------------|------------|-------------------|---------------------------------|-------------------|---------------------------|---------|
|      | 02/16/2016 09:00 | Show       |                   | PRS Group Weekly 120.00 M...    | De La Fuente, Eva | South Suburbs IOP         |         |
|      | 02/16/2016 09:00 | Show       |                   | PsychoEd Wkly Grp 360.00 M...   | Adams, Olivia     | South Suburbs IOP         |         |
|      | 02/15/2016 09:30 | Show       | Grp Note          | Day Service Non-Bill 60.00 M... | Mauritz, Katie    | Brookhaven ACCESS A       |         |
|      | 02/15/2016 08:00 | Schedul... |                   | PRS Group Weekly 20.00 Min...   | De La Fuente, Eva | South Suburbs IOP         |         |
|      | 02/01/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Freiley, Susan    | Brookhaven CST            |         |
|      | 01/19/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Freiley, Susan    | Brookhaven CST            |         |
|      | 01/18/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Hensley, Katie    | Brookhaven CST            |         |
|      | 01/18/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Hensley, Katie    | Calhoun CSI               |         |
|      | 10/29/2015 09:00 | Show       | Shift Summary     | ShiftNote 60.00 Minutes         | Freiley, Susan    | TRI Service Cleaning      |         |
|      | 10/27/2015 10:00 | Show       | IDD Individual... | Individual Service N 60.00 M... | Freiley, Susan    | Brookhaven CST            |         |
|      | 09/30/2015 11:30 | Show       | Grp Note          | Group Therapy 60.00 Minutes     | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/30/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/30/2015 09:00 | Show       | Grp Note          | Group Therapy 90.00 Minutes     | Adams, Olivia     | Chicago Apts Ex Tenants   |         |
|      | 09/30/2015 09:00 | Show       | Grp Note          | Group Therapy 90.00 Minutes     | Adams, Olivia     | Chicago Apts Ex Tenants   |         |
|      | 09/30/2015 08:00 | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | 09/28/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/28/2015 08:00 | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | 09/25/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/25/2015 08:00 | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | 09/24/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |

2. Click on the **hyperlinked date of service** in the *DOS* column that you want to print the clinical summary for.

The *Service Note* page is displayed. **Note:** the name of the page depends on the document assigned to the service you selected. View [field definitions](#) (See page 120).

3. Extend the task bar by clicking the left pointing blue arrow. Notice the red box outlining the arrow in the screen image below.

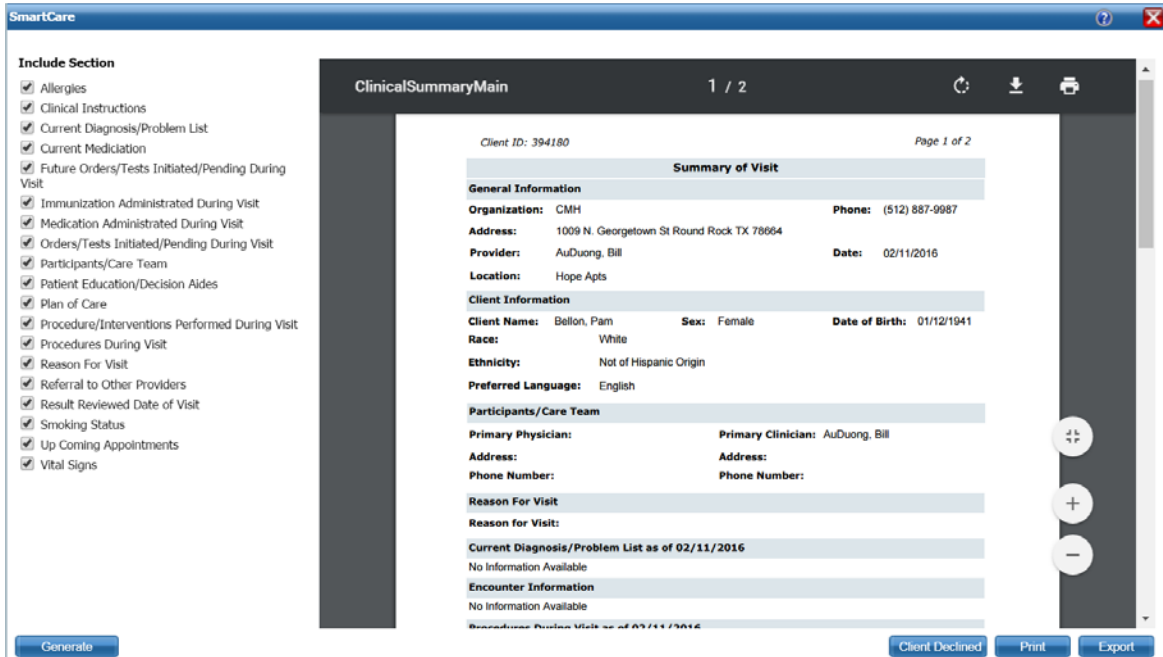


The task bar extends to the left.



4. Click the **Print Clinical Summary** icon in the extended task bar. Notice the red outlined icon in the screen image above.


The *Clinical Summary* window is displayed. Tell me how to [View the Clinical Summary Document](#). (See page 15)



5. Notice in the *Include Section*, that all components of the clinical summary are listed and selected. If an option is selected, the information appears on the printed *Summary*.
6. To avoid including a component on the printed *Clinical Summary*, deselect the **components** you do not want included and click the **Generate** button to re-display the *Summary* with those components removed.
7. To print the *Summary*, click the **print icon** in the window to print the document.
8. If the client declines a copy of the printed *Summary*, click the **Client Declined** button.
9. You can export the *Clinical Summary* to an .xml format file. To do this, click the **Export** button. The exported file is displayed in the download bar at the bottom of your screen.
10. Click on the **download document** icon to open the document.

The screenshot displays the 'Services/Notes (27)' interface. At the top, there are navigation tabs for 'My Office', 'Thomas, Kenneth (2104210)', 'Program', and 'Administration'. Below these are filter options for 'All Clinicians', 'All Statuses', 'All Procedures', and 'Other', along with an 'Apply Filter' button. A date range filter is set to 'Past 12 Months' from '08/30/2015'. The main area contains a table with the following columns: Auth, DOS, Status, Document, Procedure, Clinician, Program, and Comment. The table lists various services such as 'Court Appointment 120.00', 'Nursing Note 60.00 Minutes', 'IDD Ind Therapy 60.00 Minut...', 'Nursing Note 30.00 Minutes', 'Interpretive Svcs 30.00 Min...', 'IDD Ind Therapy 60.00 Minut...', 'Group Therapy 60.00 Minutes', 'Group MFam Therapy 15.00 ...', 'Daily TheraBH 30.00 Minutes', 'Ind Therapy School 30.00 Mi...', 'UA SelfPay Lab 1.00 Units', 'Group MFam TheraBH 15.00 ...', 'Group TheraBH 60.00 Minutes', 'Group TheraBH 60.00 Minutes', 'Ind Thrpy Tx Pln Rev 60.00 ...', 'old 1.00', 'Group TheraBH 60.00 Minutes', 'Group TheraBH 60.00 Minutes', 'Group Therapy 60.00 Minutes', 'Grp Thrpy Commercial 120.0...', 'Group Therapy 45.00 Minutes', 'Daily TheraBH 120.00 Minutes', 'UA SelfPay Lab 1.00 Units', 'UA SelfPay Lab 1.00 Units', 'Pharm Mng 60.00 Minutes', and 'Daily TheraBH 120.00 Minutes'. At the bottom left, a red box highlights the 'ExportData (45).xls' button.


When you click on the *download document* icon, the *Print Summary* window is closed and the *Service Note* page is displayed.

- When you are finished working with the *Clinical Summary*, click the **Exit**  button in the top right corner of the window.

[Why can't I access these screens?](#) (See page **Error! Bookmark not defined.**)

## Reschedule a Service for a Client



Use this  toolbar item to reschedule a service for a client. Any status required to reschedule a service? Cannot reschedule a service that has a status of Show?

### Reschedule a Service for a Client

1. Display the *Services/Notes (###)* list page. [Tell me how...](#) (See page 47)

The *Services/Notes (###)* list page is displayed. View [field definitions](#) (See page 130).

| Auth | DOS              | Status     | Document          | Procedure                       | Clinician         | Program                   | Comment |
|------|------------------|------------|-------------------|---------------------------------|-------------------|---------------------------|---------|
|      | 02/16/2016 09:00 | Show       |                   | PRS Group Weekly 120.00 M...    | De La Fuente, Eva | South Suburbs IOP         |         |
|      | 02/16/2016 09:00 | Show       |                   | PsychoEd Wkly Grp 360.00 M...   | Adams, Olivia     | South Suburbs IOP         |         |
|      | 02/15/2016 09:30 | Show       | Grp Note          | Day Service Non-Bill 60.00 M... | Mauritz, Katie    | Brookhaven ACCESS A       |         |
|      | 02/15/2016 08:00 | Schedul... |                   | PRS Group Weekly 20.00 Min...   | De La Fuente, Eva | South Suburbs IOP         |         |
|      | 02/01/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Freiley, Susan    | Brookhaven CST            |         |
|      | 01/19/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Freiley, Susan    | Brookhaven CST            |         |
|      | 01/18/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Hensley, Katie    | Brookhaven CST            |         |
|      | 01/18/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Hensley, Katie    | Calhoun CSI               |         |
|      | 10/20/2015 09:00 | Show       | Shift Summary     | ShiftNote 60.00 Minutes         | Freiley, Susan    | TRI Service Cleaning      |         |
|      | 10/27/2015 10:00 | Show       | IDD Individual... | Individual Service N 60.00 M... | Freiley, Susan    | Brookhaven CST            |         |
|      | 09/30/2015 11:30 | Show       | Grp Note          | Group Therapy 60.00 Minutes     | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/30/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/30/2015 09:00 | Show       | Grp Note          | Group Therapy 90.00 Minutes     | Adams, Olivia     | Chicago Apts Ex Tenants   |         |
|      | 09/30/2015 09:00 | Show       | Grp Note          | Group Therapy 90.00 Minutes     | Adams, Olivia     | Chicago Apts Ex Tenants   |         |
|      | 09/30/2015 08:00 | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | 09/28/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/28/2015 08:00 | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | 09/25/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/25/2015 08:00 | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | 09/24/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |

2. Click on the **hyperlinked date of service** in the *DOS* column that you want to reschedule.

The *Service Note* page is displayed. **Note:** the name of the page depends on the document assigned to the service you selected. View [field definitions](#) (See page 120).

Individual Service Note

05/20/2016 - Grp Note

View Share Status In Progress Effective 05/23/2016 Author Hensley, Katie

Service Note Billing Diagnosis Warnings

Service

Status Show Start Date 05/23/2016 Date In 05/23/2016

Program Brookhaven CST

Procedure AP Group Therap Start 9:00 AM End 10:00 AM End Date 05/23/2016 Duration 60 Minutes

Location Office Time In 9:00 AM Time Out 10:00 AM Date Out 05/23/2016

Clinician Hensley, Katie Attending Referring

Specific Location You add a new service and note for a client, from Services/Notes (###) list page. From this page, you can: You add a new service and note

Comment You add a new service and note for a client, from Services/Notes (###) list page. From this page, you can: You add a new service and note

Cancel Reason

3. Extend the toolbar by clicking the **left pointing blue arrow**. Notice the red box outlining the arrow in the screen image below.

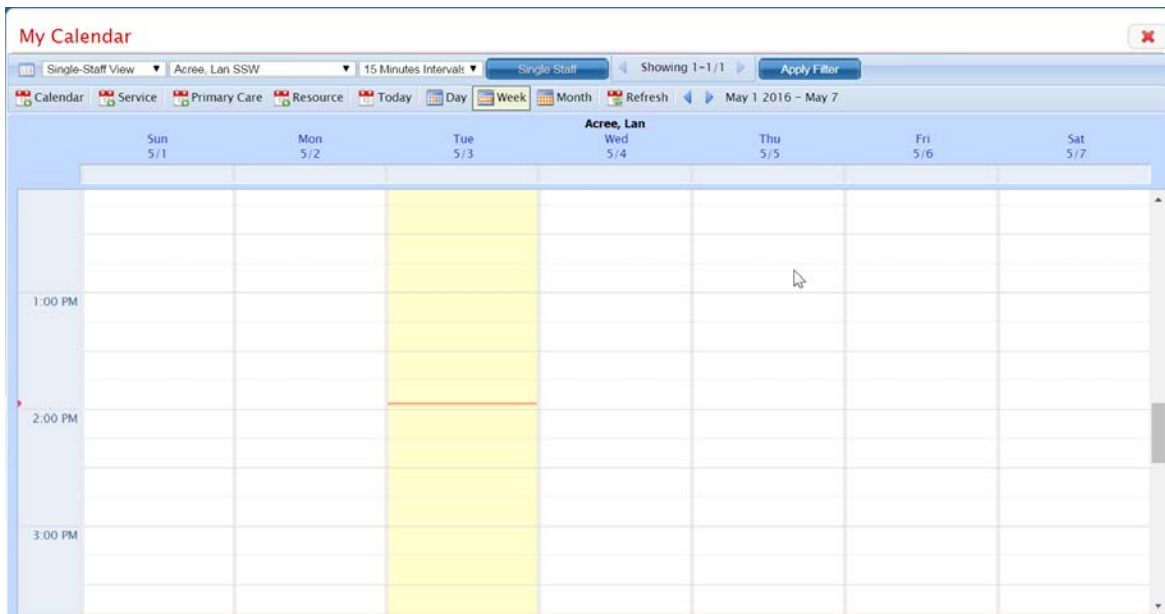


The toolbar extends to the left.



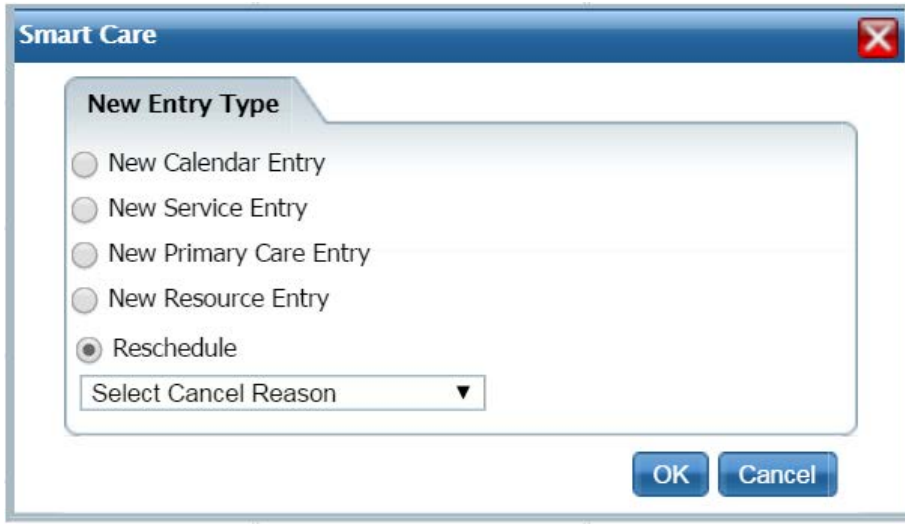
4. Click the **Reschedule** icon in the extended toolbar. Notice the red outlined toolbar item in the screen image above.

The *My Calendar* page is displayed. The calendar for the staff member who was assigned to the service where you clicked on the *Reschedule Service* icon is displayed. View [field definitions](#) (See page 105).



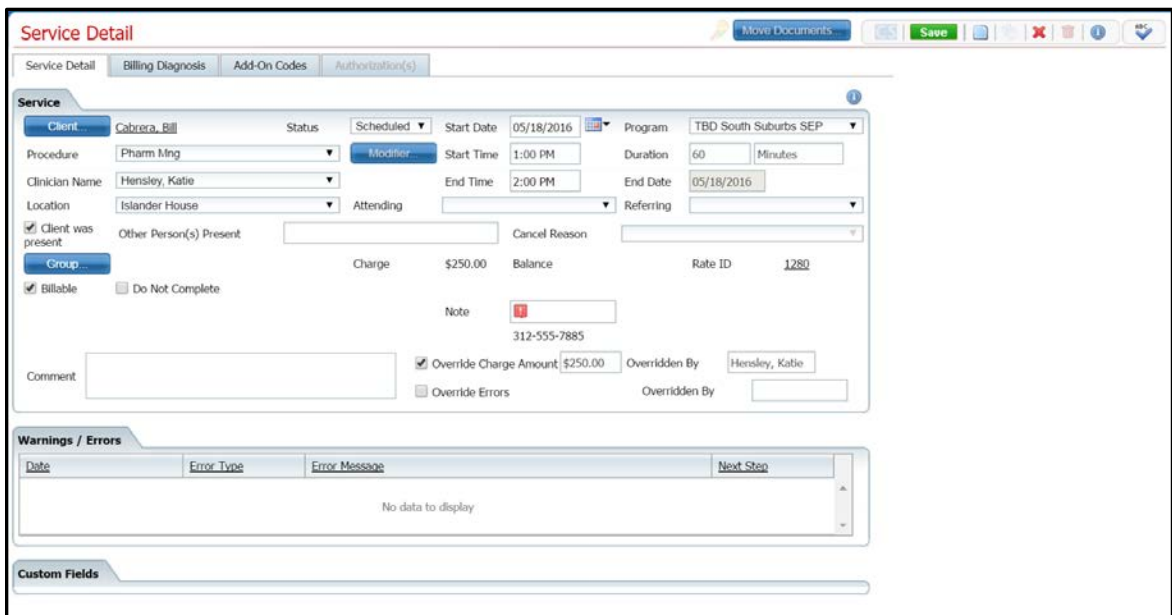
5. Find a **date and time** when you want to reschedule the client's service.
6. Click in the **date and time space** on the calendar.

The *New Entry Type* window is displayed.



7. Select the **Reschedule** option.
8. Select a **Cancel Reason** from the drop down list.
9. Click the **OK** button.


The *Service Detail* page is displayed with the service information from the service you are rescheduling showing with the new date and time you indicated on the calendar. View field definitions.



10. Change **information** on the rescheduled service, if needed.
11. Click the **Save** button.


12. Click the **Exit**  icon in the toolbar.

The *My Calendar* page is displayed with the original date information displayed. The service you rescheduled has been moved.

13. Click the **Exit**  icon to close the *My Calendar* page(s).

The *Service Note* page is re-displayed for the rescheduled date.

14. Click the **Save** button in the toolbar.

15. Click the **Exit**  icon to close the *Service Note* page.

[Why can't I access these screens?](#)

## Schedule Follow-up Service

1. Display the *Services/Notes* (###) list page. [Tell me how...](#) (See page 47)

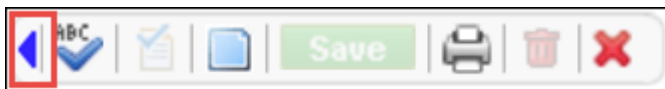
The *Services/Notes* (###) list page is displayed. View [field definitions](#) (See page 130).

| Auth | DOS              | Status     | Document          | Procedure                       | Clinician         | Program                   | Comment |
|------|------------------|------------|-------------------|---------------------------------|-------------------|---------------------------|---------|
|      | 02/16/2016 09:00 | Show       |                   | PRS Group Weekly 120.00 M...    | De La Fuente, Eva | South Suburbs IOP         |         |
|      | 02/16/2016 09:00 | Show       |                   | PsychoEd Wkly Grp 360.00 M...   | Adams, Olivia     | South Suburbs IOP         |         |
|      | 02/15/2016 09:30 | Show       | Grp Note          | Day Service Non-Bill 60.00 M... | Mauritz, Katie    | Brookhaven ACCESS A       |         |
|      | 02/15/2016 08:00 | Schedul... |                   | PRS Group Weekly 20.00 Min...   | De La Fuente, Eva | South Suburbs IOP         |         |
|      | 02/01/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Freiley, Susan    | Brookhaven CST            |         |
|      | 01/19/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Freiley, Susan    | Brookhaven CST            |         |
|      | 01/18/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Hensley, Katie    | Brookhaven CST            |         |
|      | 01/18/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Hensley, Katie    | Calhoun CSI               |         |
|      | 10/29/2015 09:00 | Show       | Shift Summary     | ShiftNote 60.00 Minutes         | Freiley, Susan    | TRI Service Cleaning      |         |
|      | 10/27/2015 10:00 | Show       | IDD Individual... | Individual Service N 60.00 M... | Freiley, Susan    | Brookhaven CST            |         |
|      | 09/30/2015 11:30 | Show       | Grp Note          | Group Therapy 60.00 Minutes     | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/30/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/30/2015 09:00 | Show       | Grp Note          | Group Therapy 90.00 Minutes     | Adams, Olivia     | Chicago Apts Ex Tenants   |         |
|      | 09/30/2015 09:00 | Show       | Grp Note          | Group Therapy 90.00 Minutes     | Adams, Olivia     | Chicago Apts Ex Tenants   |         |
|      | 09/30/2015 08:00 | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | 09/28/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/28/2015 08:00 | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | 09/25/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/25/2015 08:00 | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | 09/24/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |

2. Click on the **hyperlinked date of service** in the *DOS* column that you want to reschedule.

The *Service Note* page is displayed. **Note:** the name of the page depends on the document assigned to the service you selected. View [field definitions](#) (See page 120).

3. Extend the task bar by clicking the **left pointing blue arrow**. Notice the red box outlining the arrow in the screen image below.

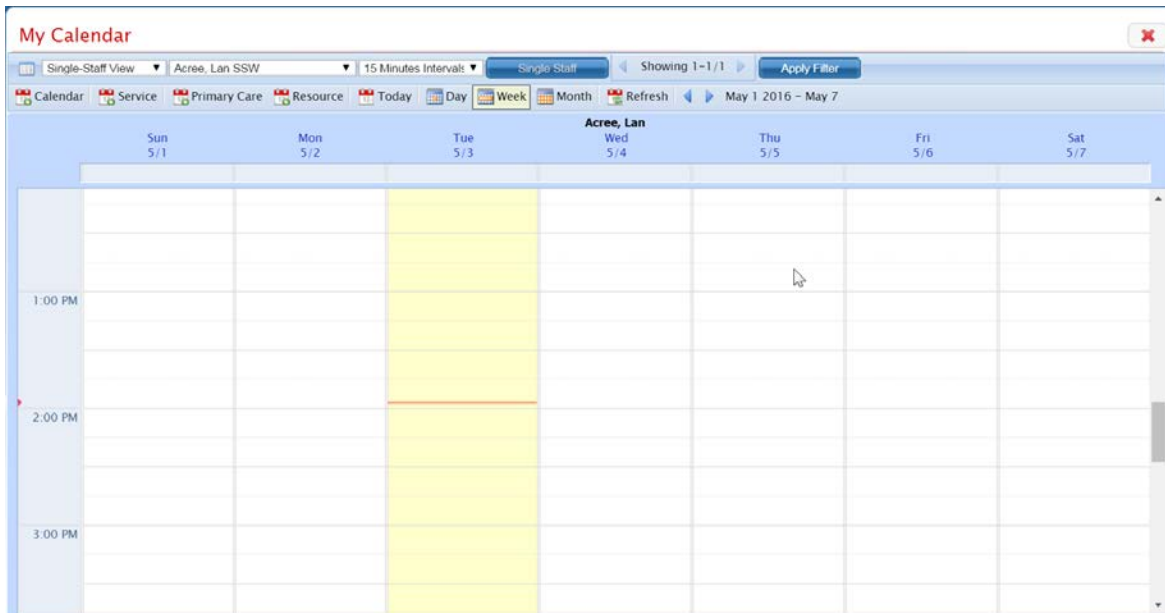


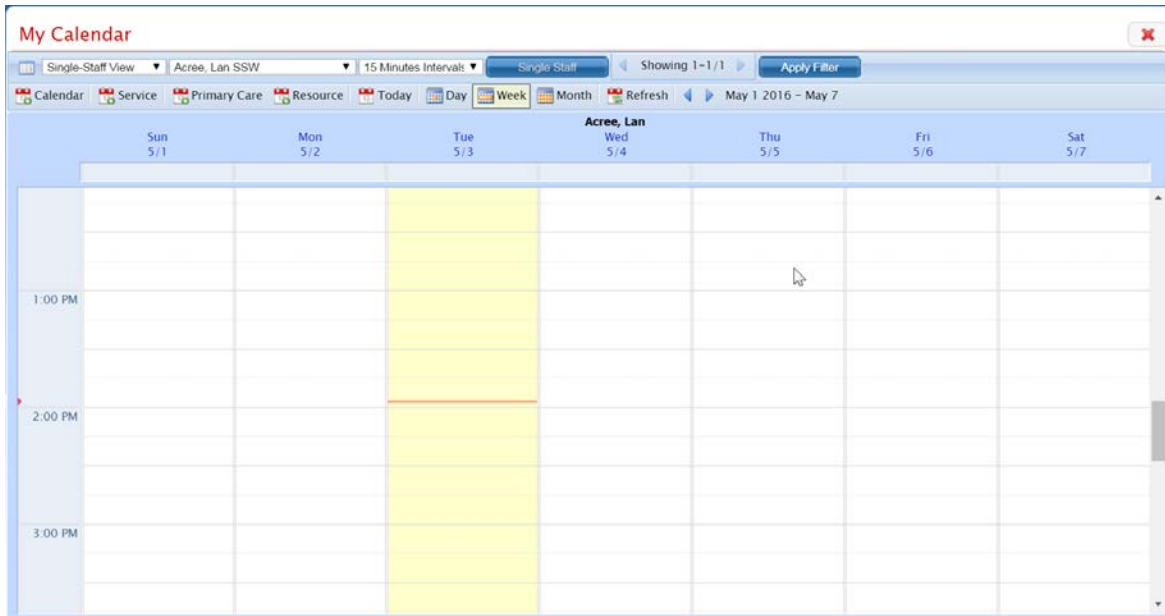
The task bar extends to the left.



4. Click the **Schedule Follow-Up** icon in the extended task bar. Notice the red outlined icon in the screen image above.

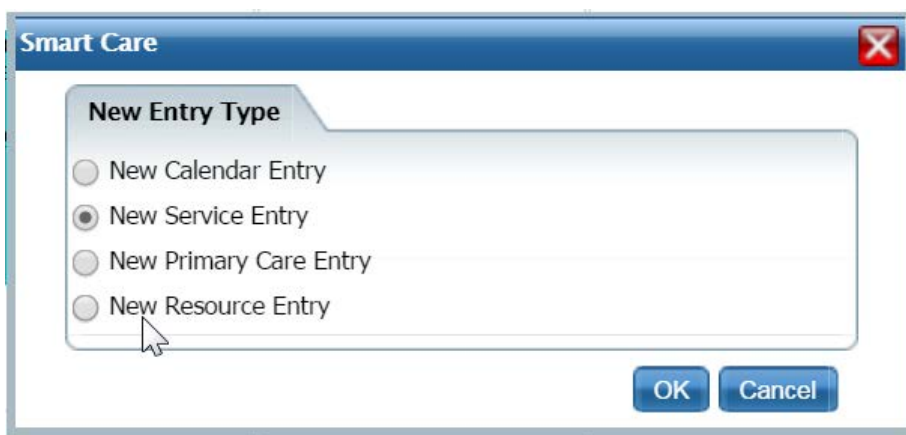
The *My Calendar* page is displayed. The calendar for the staff member who was assigned to the service where you clicked on the *Schedule Follow-Up* icon is displayed. View [field definitions](#) (See page 105).





5. Find the **date and time** when you want to schedule a follow-up visit. View [field definitions](#) (See page 106).
6. Change the **intervals** you view on the calendar, if desired.
7. Change the **view** of the calendar, if needed.
8. Click in the **time slot** on the day when you want to schedule the follow-up visit.

The *New Entry Type* window is displayed. View [field definitions](#) (See page 109).




9. Select the **New Service Entry** option to schedule a follow-up visit.
10. Click the **OK** button.

The *Service Note* page for the follow-up visit is displayed with the date and time you selected on the calendar.

The screenshot shows a web application interface for an 'Individual Service Note'. At the top, there's a header with the date '05/20/2016', a 'Grp Note' dropdown, and a 'Go To' field. Below this is a navigation bar with buttons for 'View', 'Share', 'Status' (set to 'In Progress'), 'Effective' (05/23/2016), 'Author' (Hensley, Katie), and 'More Detail'. A task bar at the top right contains icons for back, forward, save, and exit. The main form is divided into tabs: 'Service', 'Note', 'Billing Diagnosis', and 'Warnings'. The 'Service' tab is selected, showing a form with the following fields: Status (Show), Start Date (05/23/2016), Date In (05/23/2016), Program (Brookhaven CST), Procedure (AP Group Therap), Start (9:00 AM), End (10:00 AM), End Date (05/23/2016), Duration (00 Minutes), Location (Office), Time In (9:00 AM), Time Out (10:00 AM), Date Out (05/23/2016), Clinician (Hensley, Katie), Attending (dropdown), and Referring (dropdown). There are also text areas for 'Specific Location' and 'Comment', both containing a placeholder message: 'You add a new service and note for a client, from Services/Notes (###) list page. From this page, you can: You add a new service and note'. A 'Cancel Reason' dropdown is at the bottom left.

11. Make **changes** on the *Service Note* page, if needed. [Tell me how...](#) (See page 43)
12. When the follow-up visit is complete, click the **Save** button in the task bar.

The icons in the task bar are activated and you can complete other procedures for this client related to services.

13. Click the **Exit**  icon in the task bar to return to the *Services* list page.

[Why can't I access these screens?](#) (See page **Error! Bookmark not defined.**)

## Service Notes Statuses

The status appears on the *Services/Notes* list page for each date of service. Note the red box in the figure below.

| Auth | DOS              | Status    | Document          | Procedure                      | Clinician       | Program          | Comment |
|------|------------------|-----------|-------------------|--------------------------------|-----------------|------------------|---------|
|      | 06/29/2016 03:00 | Schedu... | Misc              | Court Appointment 120.00 ...   | Freiley, CSusan | Veterans Project |         |
|      | 06/28/2016 11:00 | Show      | Nurse Note        | Nursing Note 60.00 Minutes     | Hensley, Katie  | Veterans Project |         |
|      | 06/28/2016 10:00 | Schedu... | IDD Individual... | IDD Ind Therapy 60.00 Minut... | Lewis, Matt     | Veterans Project |         |
|      | 06/27/2016 11:00 | Schedu... | Nurse Note        | Nursing Note 30.00 Minutes     | Reynoso, Cary   | Veterans Project |         |
|      | 05/16/2016 02:30 | Schedu... | Nurse Note        | Nursing Note 30.00 Minutes     | Freiley, CSusan | Veterans Project |         |
|      | 12/09/2015 11:30 | Schedu... | Misc              | Interpretive Srvc 30.00 Min... | Avila, System   | Veterans Project |         |
|      | 12/08/2015 09:00 | Schedu... | IDD Individual... | IDD Ind Therapy 60.00 Minut... | Lewis, Matt     | Veterans Project |         |

Service statuses are:

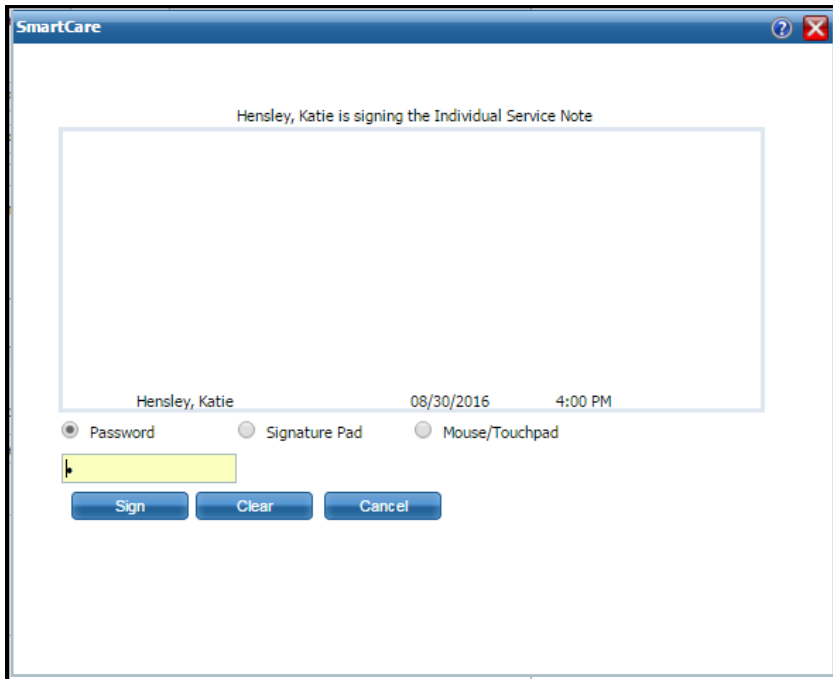
| Status    | Description   |
|-----------|---|
| Scheduled | Identifies that a service is scheduled for the client.  |
| Show      | Identifies that the client appeared for the service.  |
| Complete  | Identifies that the clinician created and signed a note and the service successfully finished the overnight process and the charge for the service was added. |
| No Show   | Identifies that the client did not show for the service.  |
| Error     | Identifies that the service was scheduled in error.   |

## Sign a Service Note

After the tabs in the *Service Note* page are complete, you are ready to sign the note.

1. Click the **Sign** button.

The *Signature* window is displayed.



2. Select **how you will sign** the note. Options are:

| Signature Method | Explanation   |
|------------------|---|
| Password         | Type your <b>password</b> in the field below the <i>Password</i> radio button.  |
| Signature Pad    | <ol style="list-style-type: none"> <li>1. Click the <b>radio button</b> to select <i>Signature Pad</i>.</li> <li>2. Sign your name using the signature pad.</li> </ol>              |
| Mouse/Touchpad   | <ol style="list-style-type: none"> <li>1. Click the <b>radio button</b> to select <i>Mouse/Touchpad</i>.</li> <li>2. Use the <b>mouse or touchpad</b> to sign your name.</li> </ol> |

3. Click the **Sign** button.

The window is closed and the service note document is displayed.

Individual Service Note
Page: 1 of 2

08/30/2016
Go To
Go To
Sign

File
Share
Status
Signed
Effective
08/30/2016
Author
Hensley, Katie
More Detail

Client ID 2104210

**Grp Note**

|   |                                    |                          |
|---|------------------------------------|--------------------------|
| <b>Client Name:</b> Thomas, Kenneth     | <b>Client ID:</b> 2104210          | <b>Status:</b> Show      |
| <b>Clinician Name:</b> Hensley, Katie   | <b>Service:</b> AP Group Therapy   |                          |
| <b>Date Of Service:</b> 08/30/16        | <b>Start Time:</b> 1:00 PM         | <b>End Time:</b> 2:00 PM |
| <b>Program:</b>                         | <b>Duration:</b> 60 Minutes        |                          |
| <b>Location:</b> MARDefaultLocationCode | <b>Specific Location:</b> Room 106 |                          |

|                              |   |
|------------------------------|---|
| <b>Mode of Delivery:</b>     | <b>Client Participated:</b>   |
| <b>Second Staff:</b>         | <b>Other Participants:</b>  |
| <b>Goals and Objectives:</b> | <input type="checkbox"/> Family Member(s) <input type="checkbox"/> Internal Collateral <input type="checkbox"/> External Collateral |

**Billing Diagnosis**

E75.00 GM2 gangliosidosis, unspecified

**Information**

Current Life Events No Life Events found

**Tracks/EBPs Utilized During the Session**

DBT
  OQ/YOQ
  Motivational Interviewing (MI)
  EMDR
  DV
  TF-CBT

**Client's Current Condition**

Mood/Affect  Unremarkable  Remarkable

Thought Process/Orientation  Unremarkable  Remarkable








Behavior/Functioning  Unremarkable  Remarkable









## Use Items on the Toolbar

On the *Service Note* page, there are a number of items available on the toolbar that only appear on the *Service Note* page:



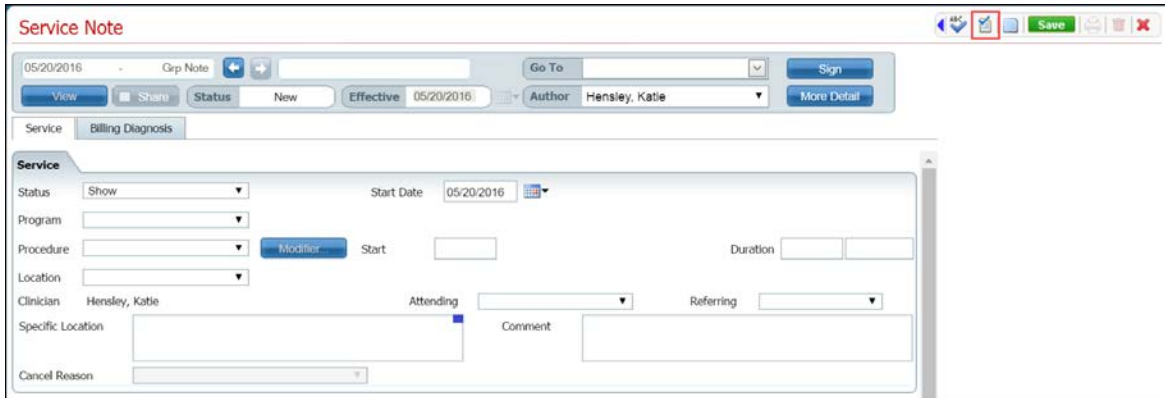
Refer to the table below for more information about each toolbar item, starting from the left end.

| Toolbar Item  | Purpose   |
|---|---|
| <p>Authorship</p>                | <p>Use this toolbar item to assign authorship to someone other than the assigned staff.</p>   |
| <p>Print Amendment Requests</p>  | <p>Use this toolbar item to view any client amendment requests that have been submitted. From this window, you can print the document. <a href="#">Tell me how...</a> (See page 50)</p> |
| <p>Print Clinical Summary</p>  | <p>Use this toolbar item to print a client's <i>Clinical Summary</i>. <a href="#">Tell me how...</a> (See page 12)</p>  |
| <p>View Message</p>            | <p>Use this toolbar item to view any messages that another staff member has sent to you. <a href="#">Tell me how...</a> (See page 73)</p>   |
| <p>Send</p>                    | <p>Use this toolbar item to send a message to another staff member(s). <a href="#">Tell me how...</a> (See page 76)</p>   |
| <p>Acknowledgements</p>        | <p>Use this toolbar item to send a signed and complete document to other staff members for review and acknowledgement.</p>  |
| <p>Comments</p>                | <p>Use this toolbar item to add comments to a completed service note that you have changed. The comment explains the reason for the edited changes.</p>                                 |

| Toolbar Item   | Purpose   |
|--|---|
| <p>Copy Service</p>         | <p>Use this toolbar item to copy a previous service for the client to a new service. This allows you to copy similar services to save time entering a service. <a href="#">Tell me how...</a> (See page 17)</p> |
| <p>Reschedule Service</p>   | <p>Use this toolbar item to reschedule a service for a client. <a href="#">Tell me how...</a> (See page 21)</p>   |
| <p>Schedule Follow-Up</p>   | <p>Use this toolbar item to schedule a follow-up visit for the client. <a href="#">Tell me how...</a> (See page 25)</p>   |
| <p>Open Service Detail</p>  | <p>Use this toolbar item to open the <i>Service Detail</i> page to view or make changes to the service. Tell me how...</p>  |
| <p>Information</p>        | <p>Hover your cursor over the <i>Information</i> toolbar item to view information about the <i>Service Note</i>.</p>  |
| <p>Upload File</p>        | <p>Use this toolbar item to upload details from an offline file. This is a custom item.</p>   |
| <p>Spell Check</p>        | <p>Use this toolbar item to check the spelling in free form fields, such as a comment field. <a href="#">Tell me how...</a> (See page 138)</p>  |
| <p>Validate</p>           | <p>Use this toolbar item to validate the information in the service and notes are accurate and complete. <a href="#">Tell me how...</a> (See page 69)</p>   |

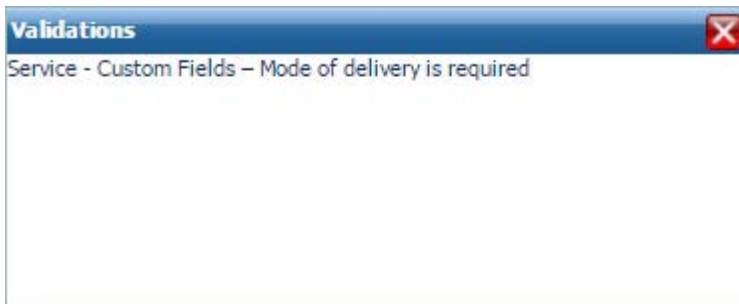
## Validate Service Note

1. Make sure the *Service Note* page is displayed. **Note:** the page will have a different name when a document is displayed.
2. When you have completed the service note, click the **Validate** toolbar item. Note the red box outlining the toolbar item in the figure below.



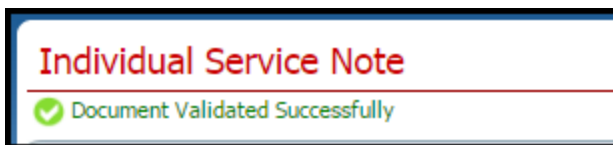
The system validates that all necessary fields are completed.

2. If some fields are blank, the following message window is displayed. The text in the window explains what needs to be completed.



-or-

If all fields are complete, the following message is displayed.



You are ready to save and complete the page.

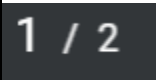
## View the Clinical Summary Document before Printing







1. With the *Print Clinical Summary* window displayed, move the cursor over the document image.

These icons appear on the image. Refer to the [icon definitions table](#) (See page 15) below the image for a definition of each icon.



### Icon Definitions

| Field   | Description  |
|---|--|
|   | When you hover your cursor over the <i>Clinical Summary</i> image, these icons are displayed.  |
|  | The number to the right of the slash / indicates the number of pages in the summary document. The number to the left of the slash identifies the number of the page that is displayed. |
| Page numbers  | Use the <b>PgDn</b> button on your keyboard or the scroll bar in the image to move to a different page.  |

| Field   | Description  |
|---|--|
| <br>Rotate clockwise                                 | Click this icon to rotate the image of the summary document clockwise on quarter turn. To return to the original display, you can keep clicking the icon to continue rotating the document clockwise a quarter turn. |
| <br>Download document                                | Click the icon to download a copy of the summary document to the local drive on your computer.   |
| <br>Print document                                   | Click this icon to print the document.   |
| <br>Fit the document to page size                    | Click this icon to increase the size of the document to page-size.   |
| <br>Zoom in to magnify the view of the document    | Click this icon to zoom in to magnify the view of the document.  |
| <br>Zoom out to decrease the view of the document. | Click this icon to zoom out to decrease the view of the document.  |

Return to the *Print Clinical Summary* topic.

## Manage Messages

### Manage the Messages Inbox

1. Display the *Services/Notes (###)* list page. [Tell me how...](#) (See page **Error! Bookmark not defined.**)

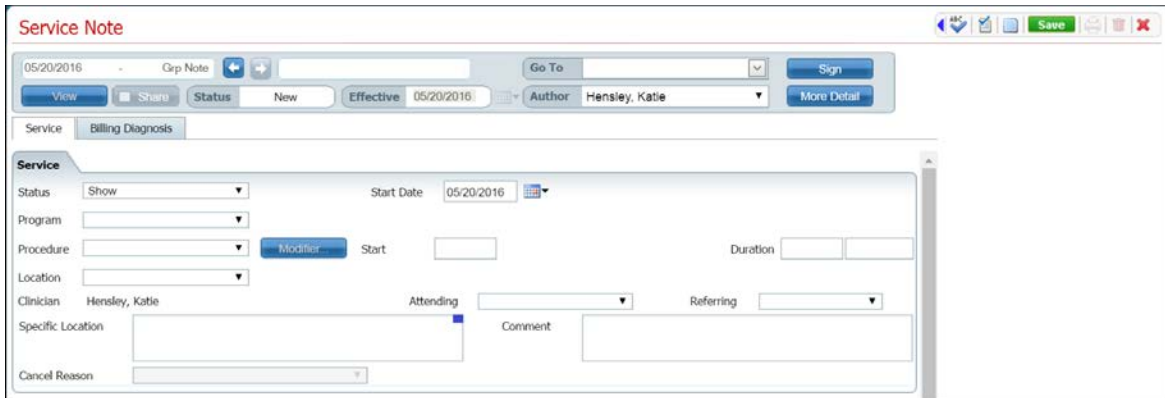
The *Services/Notes (###)* list page is displayed. View [field definitions](#) (See page 130).

| Auth | DOS              | Status     | Document          | Procedure                       | Clinician         | Program                   | Comment |
|------|------------------|------------|-------------------|---------------------------------|-------------------|---------------------------|---------|
|      | 02/16/2016 09:00 | Show       |                   | PRS Group Weekly 120.00 M...    | De La Fuente, Eva | South Suburbs IOP         |         |
|      | 02/16/2016 09:00 | Show       |                   | PsychoEd Wkly Grp 360.00 M...   | Adams, Olivia     | South Suburbs IOP         |         |
|      | 02/15/2016 09:30 | Show       | Grp Note          | Day Service Non-Bill 60.00 M... | Mauritz, Katie    | Brookhaven ACCESS A       |         |
|      | 02/15/2016 06:00 | Schedul... |                   | PRS Group Weekly 20.00 Min...   | De La Fuente, Eva | South Suburbs IOP         |         |
|      | 02/01/2016 01:00 | Show       | Med Note          | Pharm Ming 60.00 Minutes        | Freiley, Susan    | Brookhaven CST            |         |
|      | 01/19/2016 01:00 | Show       | Med Note          | Pharm Ming 60.00 Minutes        | Freiley, Susan    | Brookhaven CST            |         |
|      | 01/18/2016 01:00 | Show       | Med Note          | Pharm Ming 60.00 Minutes        | Hensley, Katie    | Brookhaven CST            |         |
|      | 01/18/2016 01:00 | Show       | Med Note          | Pharm Ming 60.00 Minutes        | Hensley, Katie    | Calhoun CSI               |         |
|      | 10/29/2015 09:00 | Show       | Shift Summary     | ShiftNote 60.00 Minutes         | Freiley, Susan    | TRI Service Cleaning      |         |
|      | 10/27/2015 10:00 | Show       | IDD Individual... | Individual Service N 60.00 M... | Freiley, Susan    | Brookhaven CST            |         |
|      | 09/30/2015 11:30 | Show       | Grp Note          | Group Therapy 60.00 Minutes     | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/30/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/30/2015 09:00 | Show       | Grp Note          | Group Therapy 90.00 Minutes     | Adams, Olivia     | Chicago Apts Ex Tenants   |         |
|      | 09/30/2015 09:00 | Show       | Grp Note          | Group Therapy 90.00 Minutes     | Adams, Olivia     | Chicago Apts Ex Tenants   |         |
|      | 09/30/2015 08:00 | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | 09/28/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/28/2015 08:00 | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | 09/25/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/25/2015 08:00 | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | 09/24/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |

2. To view the messages *Inbox*, click the **hyperlinked date** in the *DOS* column for the date of service you want.

A *Note* page is displayed. View [field definitions](#) (See page 120).

**Note:** The name of the page that is displayed is different depending on the type of service and document that comprise the service. For example, if the service is *Pharmacy Management* service with a *Medical Note* document, the page that displays is called *Medical Note* and only the document is displayed. However, if the procedure code is *Group Therapy*, a *Group Therapy* page is displayed with fields that are similar to the *Service* tab shown below.




3. Click the **left blue arrow** in the task bar to view all icons on the task bar. The blue left arrow is outlined in red in the screen image below.

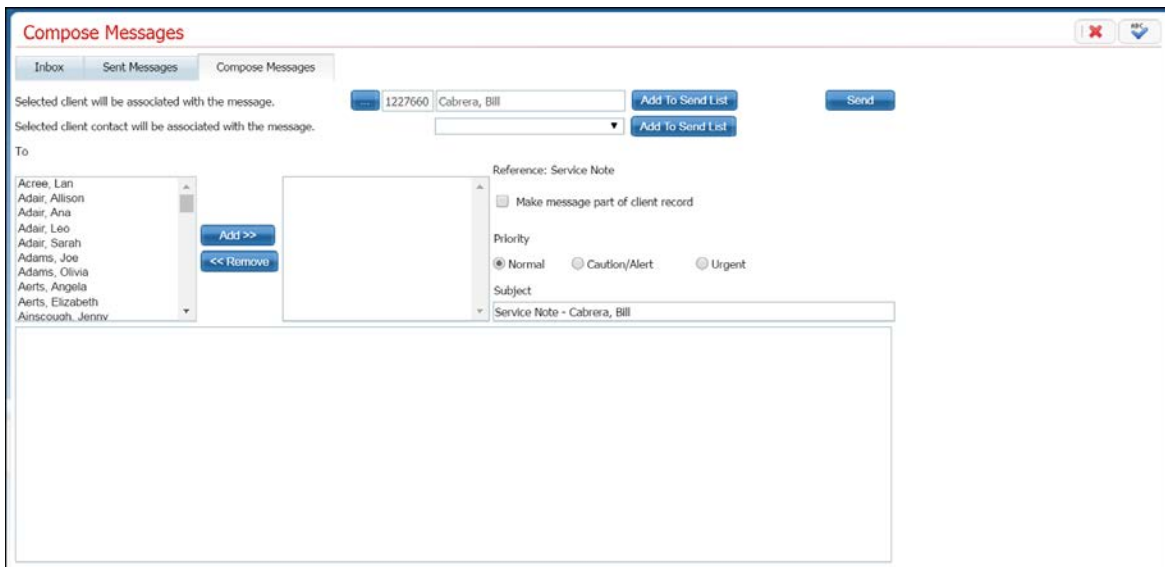


4. Notice that the **Send** icon is active. It is outlined in red in the screen image below.



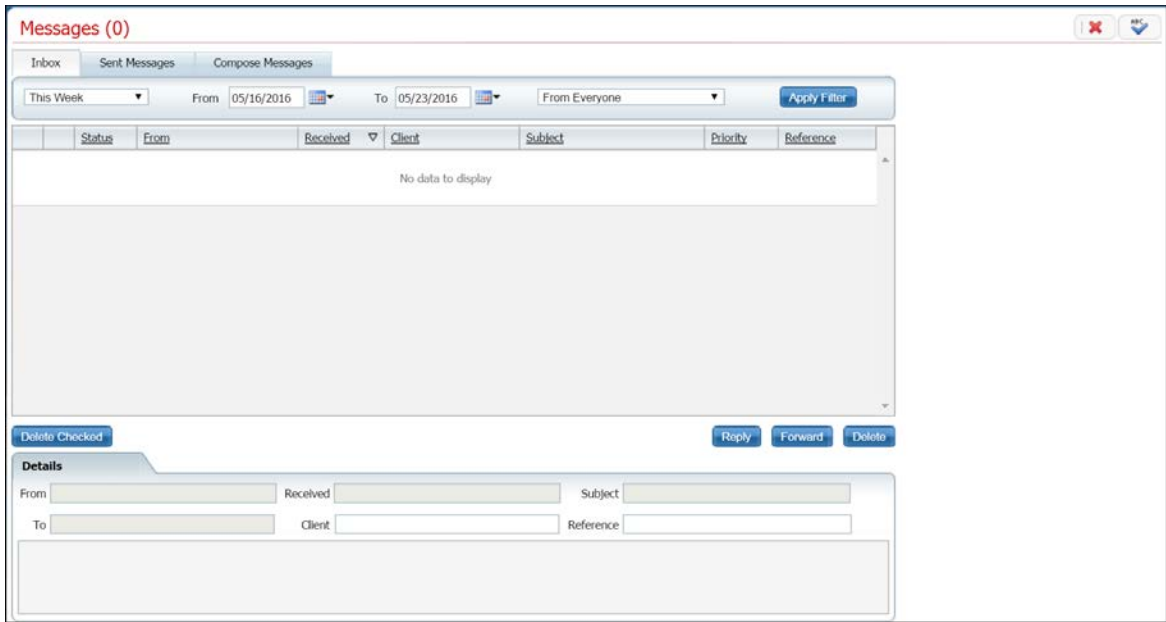
5. Click the **Send**  icon on the extended task bar.

The *Compose Messages* page is displayed. View [field definitions](#) (See page 90).



6. Click the **Inbox** tab to make it active.

The *Messages Inbox* tab is displayed. View [field definitions](#) (See page 98).



7. Click the **Send** button when the message is complete.

[Why can't I access these screens?](#) (See page **Error! Bookmark not defined.**)

## Forward a Message

You can forward a message that is listed in either the *Inbox* or *Sent Messages* tab.

1. Display the *Services/Notes (###)* list page. [Tell me how...](#) (See page **Error! Bookmark not defined.**)

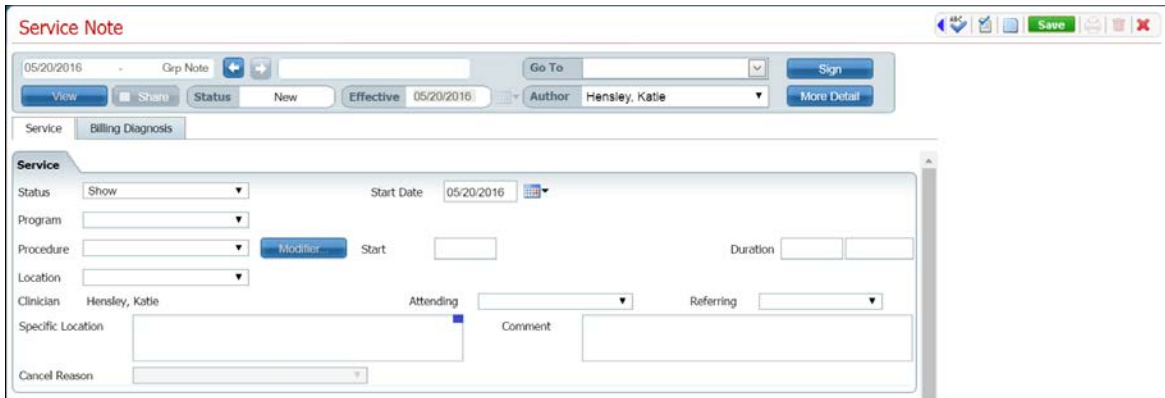
The *Services/Notes (###)* list page is displayed. View [field definitions](#) (See page 130).

| Auth | DOS              | Status     | Document          | Procedure                       | Clinician         | Program                   | Comment |
|------|------------------|------------|-------------------|---------------------------------|-------------------|---------------------------|---------|
|      | 02/16/2016 09:00 | Show       |                   | PRS Group Weekly 120.00 M...    | De La Fuente, Eva | South Suburbs IOP         |         |
|      | 02/16/2016 09:00 | Show       |                   | PsychoEd Wkly Grp 360.00 M...   | Adams, Olivia     | South Suburbs IOP         |         |
|      | 02/15/2016 09:30 | Show       | Grp Note          | Day Service Non-Bill 60.00 M... | Mauritz, Katie    | Brookhaven ACCESS A       |         |
|      | 02/15/2016 08:00 | Schedul... |                   | PRS Group Weekly 20.00 Min...   | De La Fuente, Eva | South Suburbs IOP         |         |
|      | 02/01/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Frelley, Susan    | Brookhaven CST            |         |
|      | 01/19/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Frelley, Susan    | Brookhaven CST            |         |
|      | 01/18/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Hensley, Katie    | Brookhaven CST            |         |
|      | 01/18/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Hensley, Katie    | Calhoun CSI               |         |
|      | 10/29/2015 09:00 | Show       | Shift Summary     | ShiftNote 60.00 Minutes         | Frelley, Susan    | TRI Service Cleaning      |         |
|      | 10/27/2015 10:00 | Show       | IDD Individual... | Individual Service N 60.00 M... | Frelley, Susan    | Brookhaven CST            |         |
|      | 09/30/2015 11:30 | Show       | Grp Note          | Group Therapy 60.00 Minutes     | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/30/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/30/2015 09:00 | Show       | Grp Note          | Group Therapy 90.00 Minutes     | Adams, Olivia     | Chicago Apts Ex Tenants   |         |
|      | 09/30/2015 09:00 | Show       | Grp Note          | Group Therapy 90.00 Minutes     | Adams, Olivia     | Chicago Apts Ex Tenants   |         |
|      | 09/30/2015 08:00 | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | 09/28/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/28/2015 08:00 | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | 09/25/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/25/2015 08:00 | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | 09/24/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |

2. To send service notes for a client's service, click the **hyperlinked date** in the *DOS* column for the date of service you want.

A *Note* page is displayed. View [field definitions](#) (See page 120).

**Note:** The name of the page that is displayed is different depending on the type of service and document that comprise the service. For example, if the service is *Pharmacy Management* service with a *Medical Note* document, the page that displays is called *Medical Note* and only the document is displayed. However, if the procedure code is *Group Therapy*, a *Group Therapy* page is displayed with fields that are similar to the *Service* tab shown below.




3. Click the **left blue arrow** in the task bar to view all icons on the task bar. The blue left arrow is outlined in red in the screen image below.

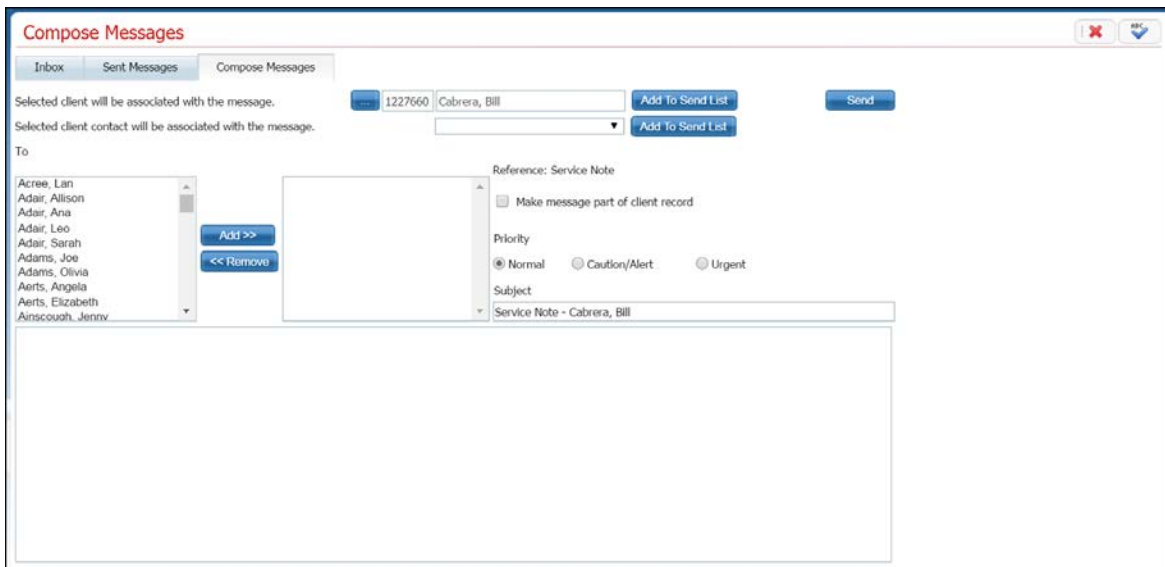


4. Notice that the **Send** icon is active. It is outlined in red in the screen image below.



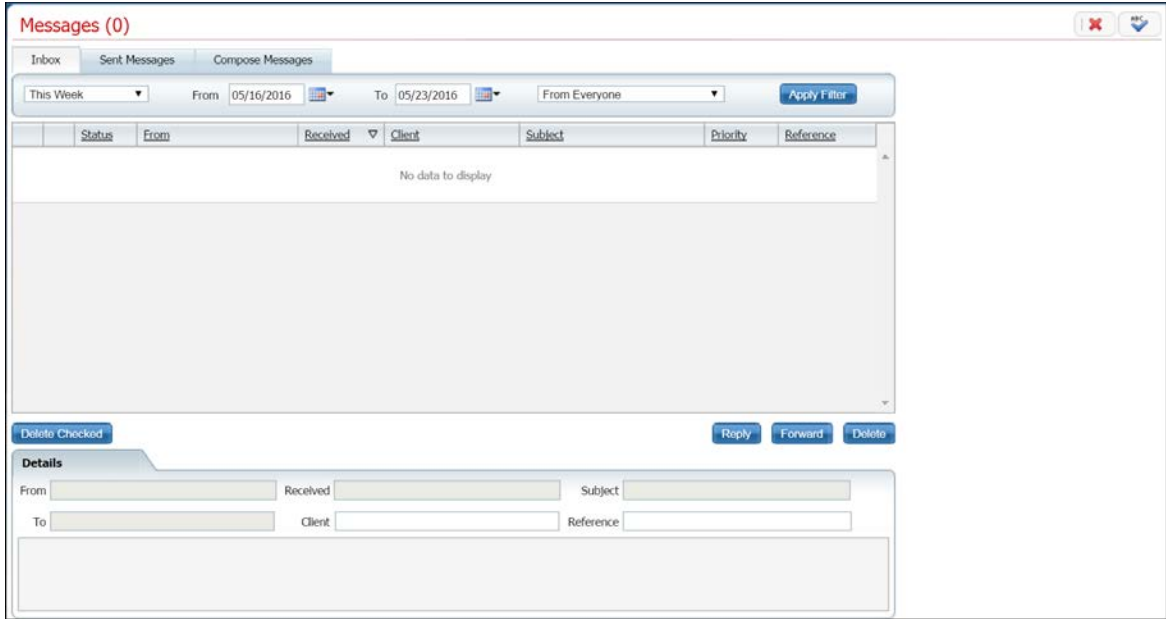
5. Click the **Send**  icon on the extended task bar.

The *Compose Messages* page is displayed. View [field definitions](#) (See page 90).



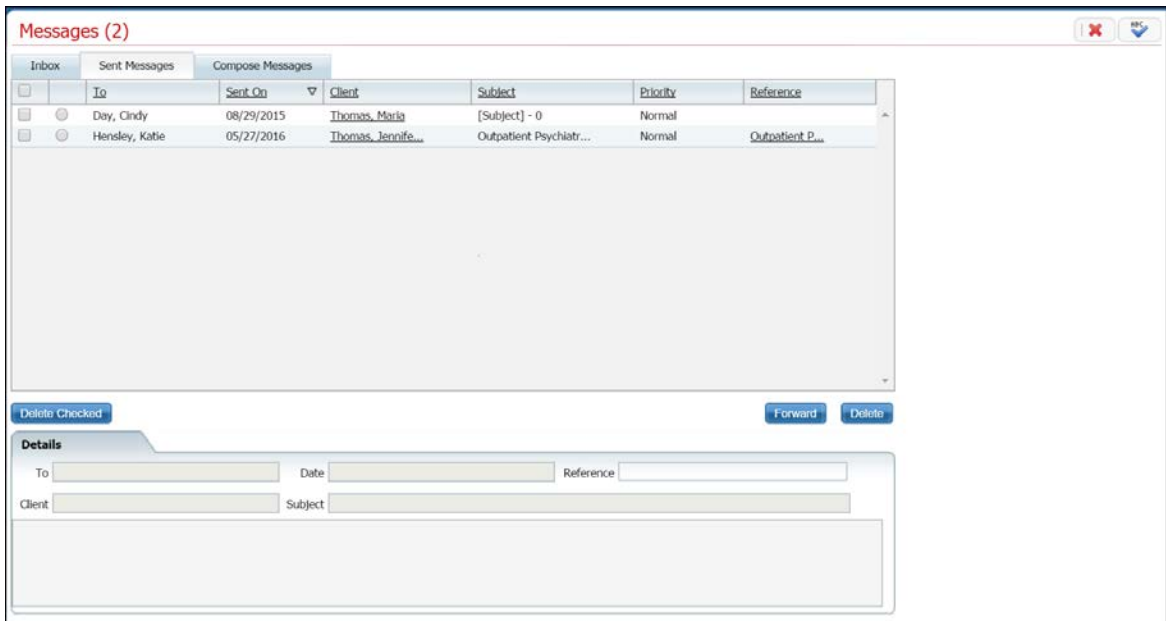
6. Click on either the **Inbox** tab or the **Sent Messages** tab to find the message you want to forward.


The *Inbox* tab is displayed. View [field definitions](#) (See page 98).



-OI-

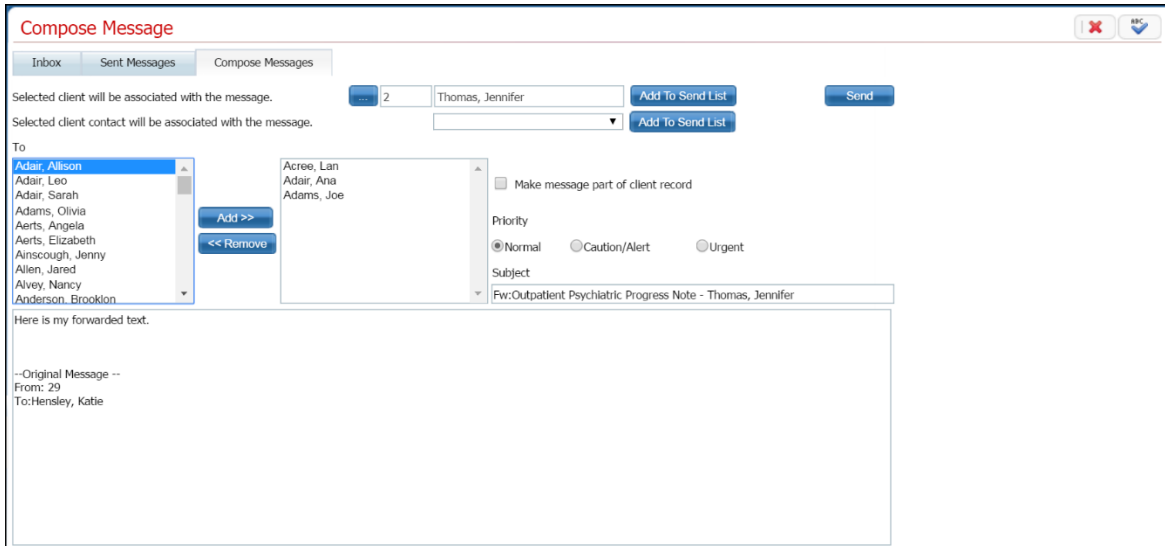
The *Sent Messages* tab is displayed. View [field definitions](#) (See page 100).



7. Click the **radio button**  of the message you want to forward.


8. Click the **Forward**  button.

The *Compose Message* page is displayed with the *Compose Messages* tab active. The information from the message you are forwarding is displayed.



9. Select the **people** you want to forward the message to.
10. Make any **other changes** as needed.
11. Type **text** in the message text portion of the page.
12. Click the **Send** button when the message is complete.

The *Compose Messages* tab is cleared. The *Messages* page is displayed with the *Inbox* tab active.

13. Click the **Exit**  icon in the task to exit from the *Messages* page.

## Send Service Notes

When a service note is in a *Completed* status, you can send a message about the service and document to other staff in your organization.

You can also send the message to the client and/or the client's contacts. However, to send service notes and include the client, the client must be registered in the Patient Portal. You register the client in the Patient Portal using the **Administration tab > User/Role Setup > Non-Staff Users**.

From the *Compose Message* page, you can:

[Compose a Message to Send](#) (See page 80)

[Manage Your Message Inbox](#) (See page 73)

View Sent Messages

## Compose a Message to Send

1. Display the *Services/Notes* (###) list page. [Tell me how...](#) (See page **Error! Bookmark not defined.**)

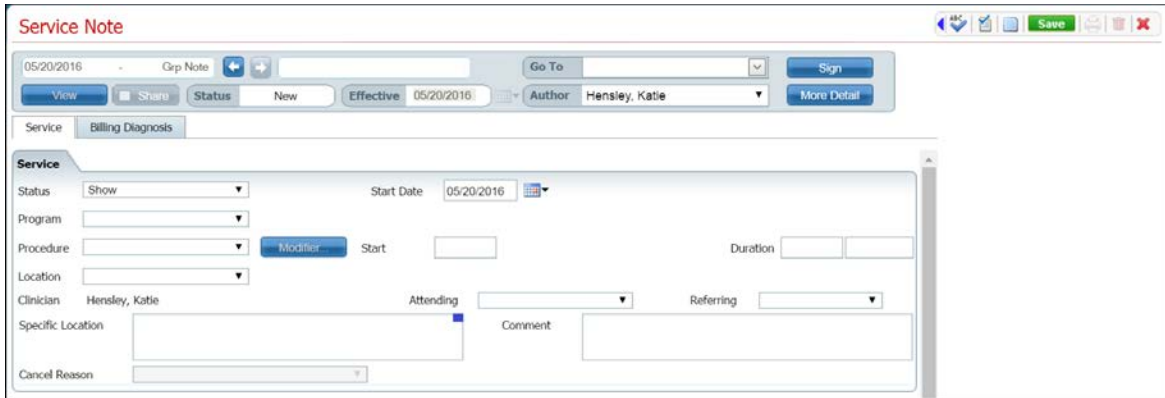
The *Services/Notes* (###) list page is displayed. View [field definitions](#) (See page 130).

| Auth | DOS              | Status     | Document          | Procedure                       | Clinician         | Program                   | Comment |
|------|------------------|------------|-------------------|---------------------------------|-------------------|---------------------------|---------|
|      | 02/16/2016 09:00 | Show       |                   | PRS Group Weekly 120.00 M...    | De La Fuente, Eva | South Suburbs IOP         |         |
|      | 02/16/2016 09:00 | Show       |                   | PsychoEd Wkly Grp 360.00 M...   | Adams, Olivia     | South Suburbs IOP         |         |
|      | 02/15/2016 09:30 | Show       | Grp Note          | Day Service Non-Bill 60.00 M... | Mauritz, Katie    | Brookhaven ACCESS A       |         |
|      | 02/15/2016 08:00 | Schedul... |                   | PRS Group Weekly 20.00 Min...   | De La Fuente, Eva | South Suburbs IOP         |         |
|      | 02/01/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Freiley, Susan    | Brookhaven CST            |         |
|      | 01/19/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Freiley, Susan    | Brookhaven CST            |         |
|      | 01/18/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Hensley, Katie    | Brookhaven CST            |         |
|      | 01/18/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Hensley, Katie    | Calhoun CSI               |         |
|      | 10/28/2015 09:00 | Show       | Shift Summary     | ShiftNote 60.00 Minutes         | Freiley, Susan    | TRI Service Cleaning      |         |
|      | 10/27/2015 10:00 | Show       | IDO Individual... | Individual Service N 60.00 M... | Freiley, Susan    | Brookhaven CST            |         |
|      | 09/30/2015 11:30 | Show       | Grp Note          | Group Therapy 60.00 Minutes     | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/30/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/30/2015 09:00 | Show       | Grp Note          | Group Therapy 90.00 Minutes     | Adams, Olivia     | Chicago Apts Ex Tenants   |         |
|      | 09/30/2015 09:00 | Show       | Grp Note          | Group Therapy 90.00 Minutes     | Adams, Olivia     | Chicago Apts Ex Tenants   |         |
|      | 09/30/2015 08:00 | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | 09/28/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/28/2015 08:00 | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | 09/25/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/25/2015 08:00 | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | 09/24/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |

2. To send service notes for a client's service, click the **hyperlinked date** in the *DOS* column for the date of service you want.

A *Note* page is displayed. View [field definitions](#) (See page 120).

**Note:** The name of the page that is displayed is different depending on the type of service and document that comprise the service. For example, if the service is *Pharmacy Management* service with a *Medical Note* document, the page that displays is called *Medical Note* and only the document is displayed. However, if the procedure code is *Group Therapy*, a *Group Therapy* page is displayed with fields that are similar to the *Service* tab shown below.



3. Click the **left blue arrow** in the task bar to view all icons on the task bar. The blue left arrow is outlined in red in the screen image below.

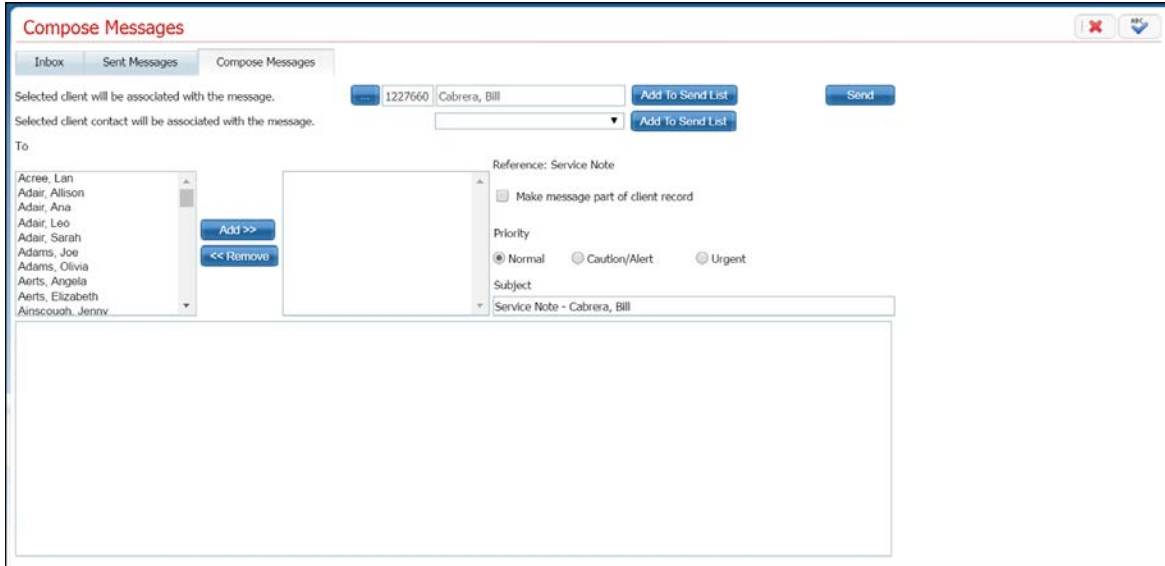


4. Notice that the **Send** icon is active. It is outlined in red in the screen image below.



5. Click the **Send**  icon on the extended task bar.

The *Compose Messages* page is displayed. View [field definitions](#) (See page 90).



6. Complete the **Compose Messages** tab.
7. Click the **Send** button when the message is complete.

## View Sent Messages

1. Display the *Services/Notes (###)* list page. [Tell me how...](#) (See page **Error! Bookmark not defined.**)

The *Services/Notes (###)* list page is displayed. View [field definitions](#) (See page 130).

| Auth | DOS              | Status     | Document          | Procedure                       | Clinician         | Program                   | Comment |
|------|------------------|------------|-------------------|---------------------------------|-------------------|---------------------------|---------|
|      | 02/16/2016 09:00 | Show       |                   | PRS Group Weekly 120.00 M...    | De La Fuente, Eva | South Suburbs IOP         |         |
|      | 02/16/2016 09:00 | Show       |                   | PsychoEd Wkly Grp 360.00 M...   | Adams, Olivia     | South Suburbs IOP         |         |
|      | 02/15/2016 09:30 | Show       | Grp Note          | Day Service Non-Bill 60.00 M... | Mauritz, Katie    | Brookhaven ACCESS A       |         |
|      | 02/15/2016 08:00 | Schedul... |                   | PRS Group Weekly 20.00 Min...   | De La Fuente, Eva | South Suburbs IOP         |         |
|      | 02/01/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Freiley, Susan    | Brookhaven CST            |         |
|      | 01/19/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Freiley, Susan    | Brookhaven CST            |         |
|      | 01/18/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Hensley, Katie    | Brookhaven CST            |         |
|      | 01/18/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Hensley, Katie    | Calhoun CSI               |         |
|      | 10/29/2015 09:00 | Show       | Shift Summary     | ShiftNote 60.00 Minutes         | Freiley, Susan    | TRI Service Cleaning      |         |
|      | 10/27/2015 10:00 | Show       | IDD Individual... | Individual Service N 60.00 M... | Freiley, Susan    | Brookhaven CST            |         |
|      | 09/30/2015 11:30 | Show       | Grp Note          | Group Therapy 60.00 Minutes     | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/30/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/30/2015 09:00 | Show       | Grp Note          | Group Therapy 90.00 Minutes     | Adams, Olivia     | Chicago Apts Ex Tenants   |         |
|      | 09/30/2015 09:00 | Show       | Grp Note          | Group Therapy 90.00 Minutes     | Adams, Olivia     | Chicago Apts Ex Tenants   |         |
|      | 09/30/2015 08:00 | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | 09/28/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/28/2015 08:00 | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | 09/25/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/25/2015 08:00 | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | 09/24/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |

2. To send service notes for a client's service, click the **hyperlinked date** in the *DOS* column for the date of service you want.

A *Note* page is displayed. View [field definitions](#) (See page 120).

**Note:** The name of the page that is displayed is different depending on the type of service and document that comprise the service. For example, if the service is *Pharmacy Management* service with a *Medical Note* document, the page that displays is called *Medical Note* and only the document is displayed. However, if the procedure code is *Group Therapy*, a *Group Therapy* page is displayed with fields that are similar to the *Service* tab shown below.

Service Note

05/20/2016 Grp Note

Go To: [Dropdown] Sign

View Share Status: New Effective: 05/20/2016 Author: Hensley, Katie More Detail

Service Billing Diagnosis

Service

Status: Show Start Date: 05/20/2016

Program: [Dropdown]

Procedure: [Dropdown] Modifier Start [Text] Duration [Text]

Location: [Dropdown]

Clinician: Hensley, Katie Attending: [Dropdown] Referring: [Dropdown]

Specific Location: [Text] Comment: [Text]

Cancel Reason: [Dropdown]

- Click the **left blue arrow** in the task bar to view all icons on the task bar. The blue left arrow is outlined in red in the screen image below.

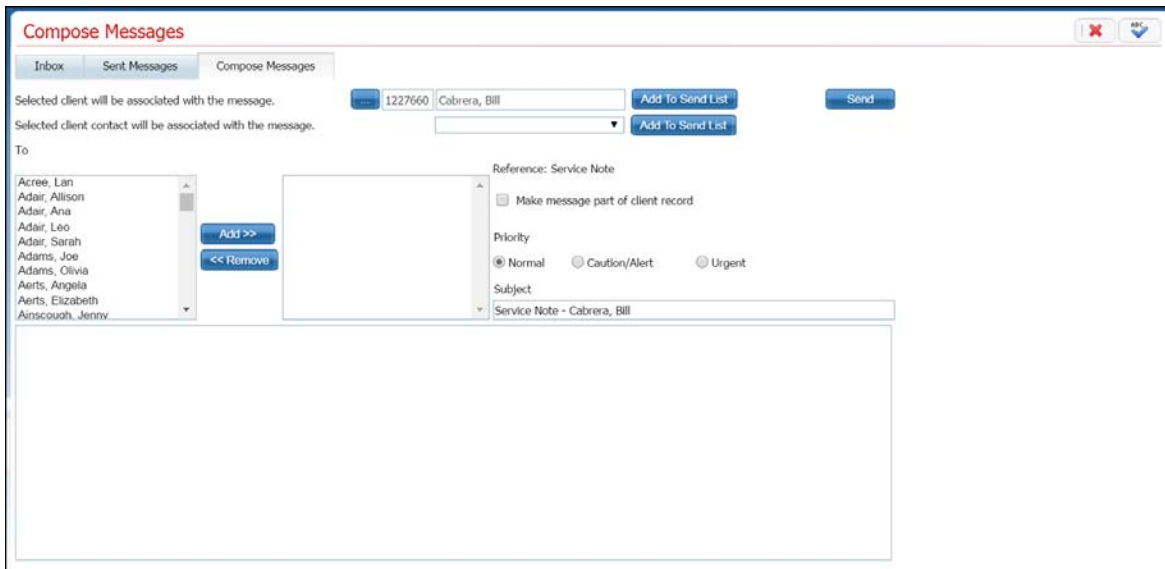


- Notice that the **Send** icon is active. It is outlined in red in the screen image below.



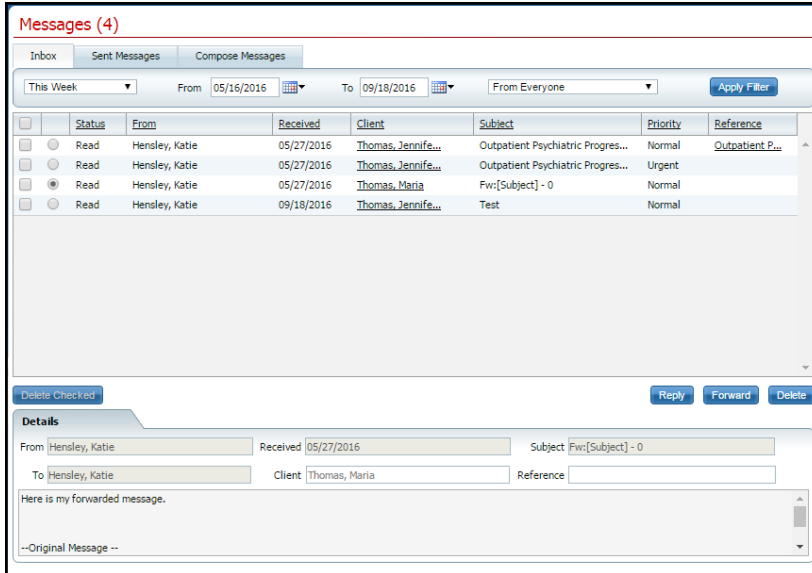
- Click the **Send**  icon on the extended task bar.

The *Compose Messages* page is displayed. View [field definitions](#) (See page 90).



- Click on the *Inbox* tab to make it active.

The *Inbox* tab is displayed. View field definitions.











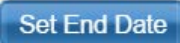
7. Click the **Send** button when the message is complete.

## Field Definitions

### Client Plans and Time Spans 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  |
|--|--|
| Verification History button<br> | Use the <b>Verification History</b> button to display the <i>Electronic Eligibility Verification History</i> window. This window displays all verifications for all plans, including the date when the plan was verified and the response from the plan on the verification procedure. |
| Verify Eligibility button<br>   | Use the <b>Verify Eligibility</b> button to create and send a request to the insurance plan for information on the client's eligibility for coverage under the plan with the information provided.   |
| View/Scan ID Cards button<br>   | Use the <b>View/Scan ID Cards</b> button to scan a client's plan ID card, delete an image of a client's plan ID card, view the existing scans of a client's plan ID card(s).   |
| <b>Client Plans</b>  |  |
| Plan Name  | Identifies the name of the plan that provides coverage for the client.   |
| Insured ID   | Identifies the plan subscriber's ID number assigned by the plan.   |
| Co-Pay   | Identifies the amount of co-pay the client is responsible for from this plan.  |
| Start Date   | Identifies the date the client's coverage begins.  |
| End Date   | Identifies the date the client's coverage ends.  |
| COB  | Identifies the sequence in which the client's plans are billed for payment.  |
| Service Area   | Identifies the types of services the plan covers.  |
| Add button<br>                  | Enter the <b>Start Date</b> and <b>COB number</b> . Then, click the <b>Add</b> button to add a Start Date, End Date or COB sequence to the plan.   |
| <b>Plan Time Spans</b>   |  |
| Show Current Plans Only  | Select the <i>Show Current Plans Only</i> option to show the active, current plans only for this client. If you deselect this option, all plans entered for the client are listed, including plans that are past the end date.   |

| Field   | Description   |
|---|---|
| drop down list  | Identifies service areas set up for the client. Select the service area from the drop down list to view client plans for that service area.   |
| Maximize Time Spans button<br> | Use the <b>Maximize Time Spans</b> button to display more items in the <i>Time Spans</i> list. Click the button again to display only the first six items.  |
| Date - End Date   | Identifies the start date and end date of the client's plans.   |
| Change COB Order button<br>    | Use the <b>Change COB Order</b> button to change the coordination of benefits order for the plans listed. The COB order controls the order in which multiple coverage plans are billed to the plan for payment. |
|                                | Click the  icon to delete a listed plan.   |
| <plan name>   | Identifies the name of the plan.  |
| <plan address>  | Identifies the mailing address for claims.  |
| <date field>  | Use this field and button to set an end date for the client's plan.   |
| Set End Date button<br>        | Use this button with the blank field to the left of the button to set an end date for this plan.  |

Client Summary Page Field Definitions

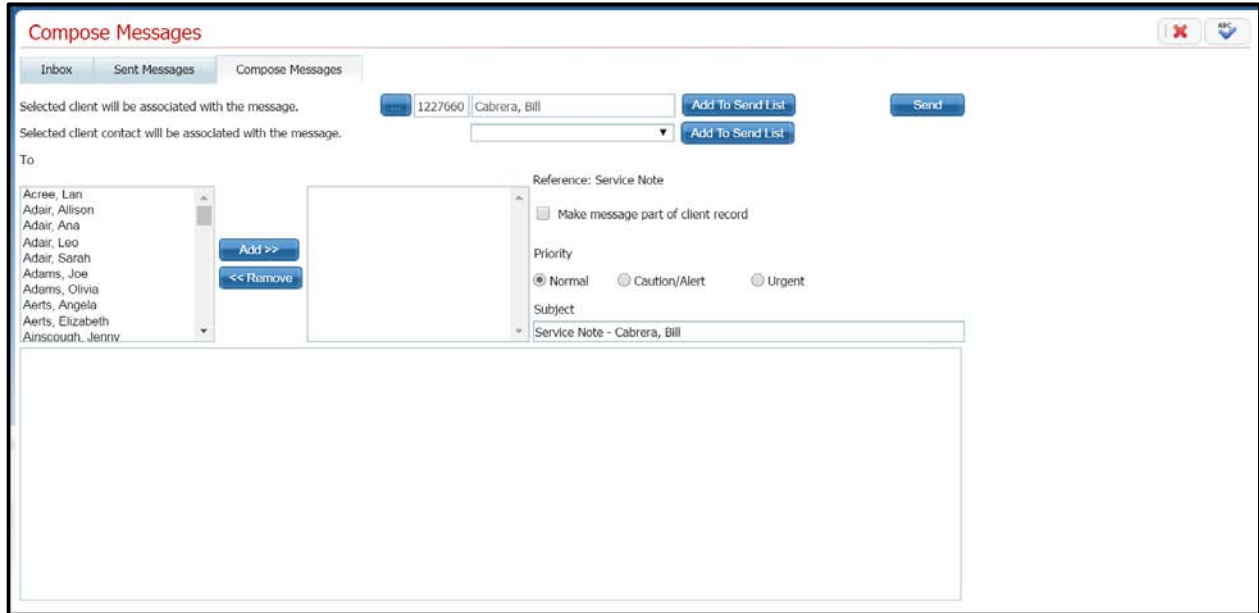


A **Yes** in the *Required?* column below identifies those fields that are required in the Core SmartCare system. Your system may have been customized to require additional fields.





| Field              | Description  |
|--------------------|--|
| <b>Summary</b>     |  |
| Client ID          | Identifies the system-assigned number created for the client when first registered.  |
| Master Client ID   | Identifies that a client has multiple accounts and IDs in the system. Multiple accounts are allowed for confidentiality purposes. The Master ID covers all other accounts. |
| Name               | Identifies the client's last name, first name.   |
| Status             | Identifies the client's current status.  |
| DOB                | Identifies the client's date of birth.   |
| Age                | Identifies the client's age.   |
| Sex                | Identifies the client's sex.   |
| Race               | Identifies the client's race.  |
| SSN                | Identifies the last four digits of the client's social security number.  |
| Registered On      | Identifies the date when the client was registered in the system.  |
| Last Seen On       | Identifies the last date the client was seen in the facility.  |
| Next Scheduled     | Identifies the next scheduled visit for the client.  |
| Address            | Identifies the client's address.   |
| Primary Care Coord | Identifies the client's assigned primary care coordinator.   |
| Primary Program    | Identifies the primary program that the client is enrolled in.   |
| Phone              | Identifies the client's phone number.  |
| Note               | Identifies any note entered where??? for the client.   |
| Emergency Contact  | Identifies the client's emergency information and phone number.  |
| Presenting Problem | Identifies the client's presenting problem for this visit.   |
| Diagnosis          | Identifies the diagnoses assigned to the client for this visit. The information is arranged in a table.  |




| <b>Field</b>            | <b>Description</b>  |
|-------------------------|---|
| Type                    | Notice that the Types set up columns for the diagnosis code information table. Headings are: <ul style="list-style-type: none"> <li>• ICD9</li> <li>• ICD10</li> <li>• DSM5</li> <li>• R/O (rule out)</li> <li>• Description</li> </ul> |
| Primary                 | This row identifies the primary diagnosis for the client. Entries may be listed in each column.   |
| Additional              | This row identifies any additional diagnoses for the client. Entries may be listed in each column.  |
| <b>Timeline Summary</b> |   |
| GAF Score               | Identifies the GAF (Global Assessment of Functioning) score for the client on the graph.  |
| Y-axis                  | The items on the Y-axis are: <ul style="list-style-type: none"> <li>• Hospitalization 0</li> <li>• Med Changes 50</li> <li>• Services 100</li> </ul>  |
| X-axis                  | The items on the X-axis are the months of the year.   |
| Flags                   | The red flag identifies an admission; the green flag identifies a discharge.  |

## Compose Messages 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   |
|--|---|
| Compose Messages Tab   |   |
|                             | <br>Click the client search button to select a client for the message.   |
| <client ID>  | Identifies the client's ID number assigned in the system.   |
| <client name>  | Identifies the client's last name, first name.  |
| Add To Send List button<br> | While the client is associated with the message, he/she does not receive a copy of the message and document unless you click the Add To Send List button. When you click this button, a copy of the message and associated document are sent to the client. If you click this button, the client's name is listed in the right-hand panel below.<br><br>Note: the client can only be added to the <i>Send List</i> if he/she is set up as a <i>Patient Portal</i> user. |
| Send button<br>             | When you have completed all fields and are ready to send the message and document, click the Send button.<br>When you click the button, the message is sent and the <i>Inbox</i> tab is displayed.  |
| Selected client contact will be associated with the message.<br><drop down list>                               | Select a client contact from the drop down list to associate with this message. What does "associate" mean???<br>Why are client's contacts not displayed in the drop down list???   |

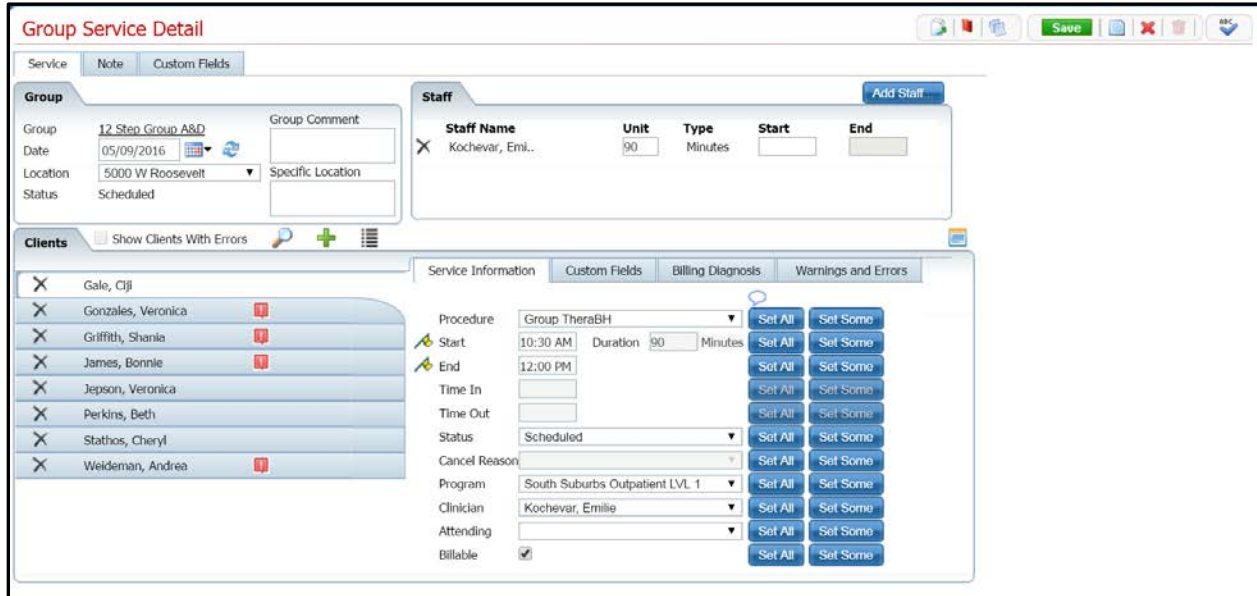
| Field  | Description   |
|--|---|
| Add To Send List button<br> | Click the Add To Send List button to send a copy of the message and document to the client's contact that you selected.<br><br>Note: the client contact can only be added to the <i>Send List</i> if he/she is set up as a <i>Patient Portal</i> user.  |
| To   | The <i>To</i> panel lists all clinicians set up in the system. To send this message and document to any of these staff, select his/her name and click the Add>> button. <ul style="list-style-type: none"> <li>To select names out of sequence, hold down the Ctrl key and select the names.</li> <li>To select a list of names in sequence, click on the first name you want and hold down the Shift key and select the last name you want. All names in between the first and last names you highlighted are selected.</li> </ul> |
| Add>> button<br>            | When you have selected names from the <i>To</i> panel, click the Add>> button to list them in the right-hand panel which is the send-to list.   |
| <<Remove button<br>         | If you have added a name to the send-to list in error and want to remove it, select the name in the right-hand panel and click the <<Remove button.   |
| <defined list panel>   | This panel displays the names you select from the <i>To</i> panel. This panel lists the staff members you want to send the message and document to.   |
| Reference  | Identifies the document that will be sent with this message.  |
| Make message part of client record   | Select this check box to save a copy of this message to the client's record.  |
| Priority   | Identifies the priority for the message. Options are: <ul style="list-style-type: none"> <li>Normal</li> <li>Caution/Alert</li> <li>Urgent</li> </ul>   |
| Subject  | Identifies the subject of the messages. The system provides a default subject line which lists the document that is included and the client's name. You can edit this field if you want to.   |
| <message>  | Free-form message field. You can enter an unlimited number of characters. When you finish typing your comment, you can spell check your entry. <a href="#">Tell me how...</a> (See page 138)  |

## Diagnosis Code Window






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  |
|---|--|
| <b>Filter</b>   |  |
| <code>  | Enter a code or part of a code to search for.  |
| <code name>   | Enter a code name or part of the name to search for.   |
| Eraser icon<br>  | Use the eraser icon to clear text entered in the code and code name fields.  |
| ICD9<br>ICD10<br>SNOMED   | Select the check box to indicate which diagnosis code version you want to search.<br>SNOMED stands for: Systematized Nomenclature of Medicine. |
| <b>List</b>   |  |
| Radio button<br> | Select the radio button to select the diagnosis code to add to the Billing Diagnosis sub-tab on the Group Service Detail page.                 |
| DSM 5/ICD 10  | Identifies the code from the DSM5/ICD 10 diagnosis code classification versions.   |
| DSM IV/ICD 9  | Identifies the code from the DSMIV/ICD 9 diagnosis code classification versions.   |
| ICD/DSM Description   | Identifies the description of the diagnosis code from both versions.   |
| SNOMED Description  | Identifies the description from the SNOMED classification for the ICD 10 diagnosis code.   |


Group Service Detail Page Service Tab 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  |
|--|--|
| Group  |  |
| Group  | Identifies the group name assigned to the group when the group was first set up.   |
| Date   | Identifies the first date the group service meets. Defined when the group service was set up.  |
| Make Recurring icon<br>         | To make a group service recurring for a new group service, complete the <i>Service</i> tab, including the <i>Service Information</i> sub-tab for each client, then click the Make Recurring icon.                                  |
| Location   | Identifies the location set up for the group.  |
| Status   | Identifies the status of the group service. When the group service is first set up, the status shows as <i>Scheduled</i> . When the service has occurred and the clients have been checked in, the status appears as <i>Show</i> . |
| Group Comment  | Enter a comment about the group. You can enter unlimited characters. A scroll bar is provided if you enter more characters than can be viewed in the window.   |
| Specific Location  | Enter specific information to identify the location of the group meeting. You can enter unlimited characters. A scroll bar is provided if you enter more characters than can be viewed in the window.                              |
| <b>Clients</b>   |  |
| Show Clients With Errors   | Click to display only clients with errors in the list. Grayed out.   |
| Search for Client icon<br>      | Click the magnifying glass  icon to display the <i>Client Search</i> window to search for a client to add to the group. Tell me how...          |
| Add Client from Roster icon<br> | Click the green plus sign  icon to select a client from the list of clients set up in the group. Tell me how...                                 |

| Field   | Description  |
|---|--|
| Add Client from Program icon<br> | Click the list  icon to select a client from a list of all clients enrolled in the program assigned to the group when it was set up. Tell me how...   |
| Scroll list icon<br>             | If the list of clients enrolled in the group is longer than can be displayed in the <i>Clients</i> list window, this icon  is displayed. Click the left arrow to display from the top of the list. Click the right arrow to scroll down in the list.  |
| Show Service Report icon<br>     | Click the show service report  icon to display the service report for the group service. View field definitions.  |
|                                  | Click the  icon to the left of a client's name to delete the client from the list of clients enrolled in the group service.   |
| Client name   | Identifies the client's last name, first name who is enrolled in the group service.  |
| Information icon<br>             | The information  icon next to a client's name indicates there is information about the client that needs attention in the system. Hover your mouse cursor over the icon and an information pop-up box is displayed that contains the information.   |
| <b>Service Information tab</b>  |  |
| Select a client's name  | When you click on a client's name in the list of clients, the information displayed to the right in the four tabs is specific to the selected client. This allows you to work on each client individually. When you click on the client, notice that the client's row is white and all other client rows are blue.<br><br>However, the action you take on a single client can be passed to all clients in the list or to some clients using the buttons to the right in the tab. |
| Warning icon<br>               | The yellow flag icon indicates that the selected client's information is different than the other clients in the list for this group service. The icon is displayed to the left of each field that contains different values.  |
| Procedure   | Identifies the procedure code used to bill for the group service.  |
| Start   | Identifies the scheduled start time of the group service.  |
| Duration  | Identifies the amount of time by unit that the group service takes.  |
| End   | Identifies the scheduled end time for the group service.   |
| Time In   | Identifies when the client arrived for the group service.  |
| Time Out  | Identifies when the client left the group service.   |
| Status  | Identifies the client's status for this group service.   |
| Cancel Reason   | If cancelled is selected in the Status drop down, a <i>Cancel</i> reason is required. The <i>Cancel Reason</i> drop down list becomes active if you choose cancelled in the Status field.  |
| Program   | Identifies the program that is assigned to the group service.  |
| Clinician   | Identifies the clinician identified for the group service.   |
| Attending   | Identifies the attending physician for the group or client.  |
| Billable  | Identifies whether or not the group service is billable. If the Billable check box is deselected, the group service does not create a charge and will not be included on a bill to the payer.  |
| Set All button<br>             | When you make a change in a field for a selected client, you can cascade the change to all clients in the list by clicking the Set All button. No changes appear on the screen when you click this button, but if you select a client's row, you will see that the information in the field was changed.<br><br>The button is disabled for any field that you cannot edit.   |

| Field  | Description  |
|--|--|
| <p>Set Some button</p>  | <p>When you make a change in a field for a selected client, you can cascade the change to specific clients in the list by clicking the Set Some button. When you click the <i>Set Some</i> button, the "" window is displayed. Select the clients whose information you want to change.</p> <p>No changes appear on the screen when you click this button, but if you select a client's row, you will see that the information in the field was changed.</p> <p>The button is disabled for any field that you cannot edit.</p> |
|  |  |
|  |  |
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Group Services List Page Field Definitions

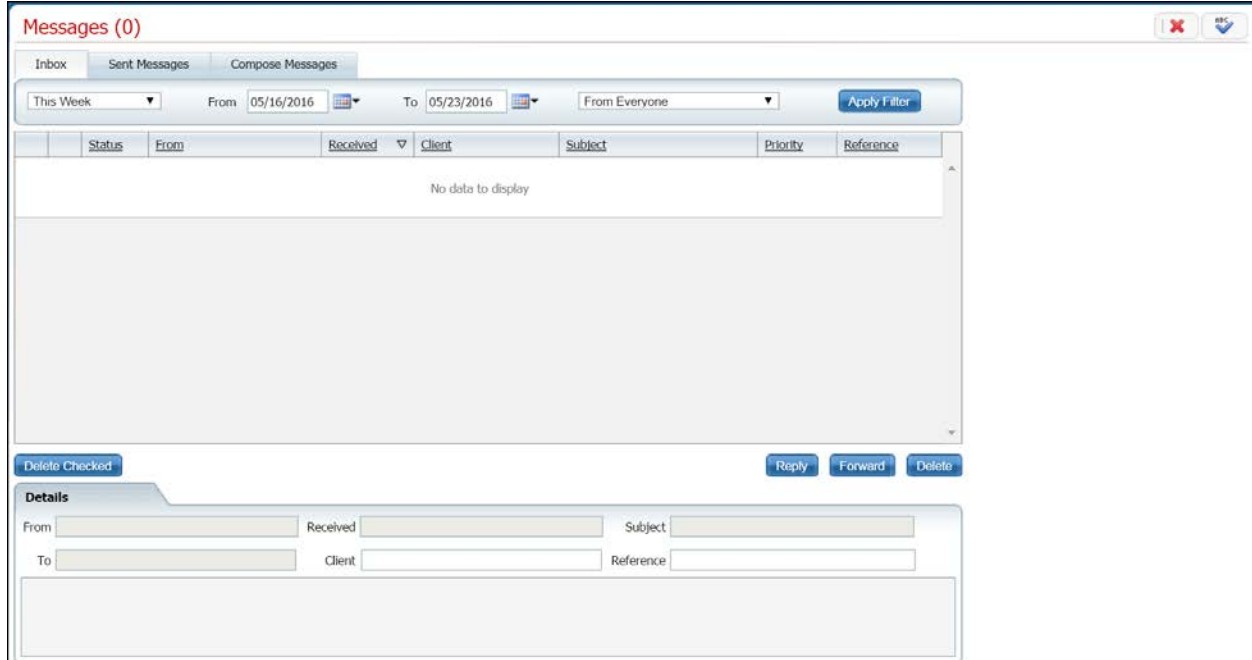
| Group           | Clients | Status    | Date                | Program       | Staff 1         | Staff 2         | Staff 3         | Staff 4         |
|-----------------|---------|-----------|---------------------|---------------|-----------------|-----------------|-----------------|-----------------|
| 1-Soc Develo    | 7       | Show      | 12/18/2015 03:00 PM | Older Adul... | Avila, Stace... |                 |                 |                 |
| 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 yGroup      | 5       | Show      | 01/12/2016 09:00 AM | Adult Inpa... | Avila, Stace... | Avila, Syste... | Freiley, Sus... | Mauritz, Kat... |
| ACT yGroup      | 5       | Show      | 01/10/2016 09:00 AM | Adult Inpa... | Avila, Stace... | Avila, Syste... | Freiley, Sus... | Stone, Susan    |
| ACT yGroup      | 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 Garne...  | 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... |                 |                 |                 |
| 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... |                 |                 |                 |

A **Yes** in the *Required?* column below identifies those fields that are required in the Core SmartCare system. Your system may have been customized to require additional fields.



| Field          | Description  |
|----------------|--|
| Filter         |  |
| All Group Type | Select from the drop-down list to filter data to display below. Options are: <ul style="list-style-type: none"> <li>All Group Types</li> <li>Choose from a list of all group types in the system</li> </ul>  |
| All Groups     | Select from the drop-down list to filter data to display below. Options are: <ul style="list-style-type: none"> <li>All Groups</li> <li>Choose from a list of all groups in the system</li> </ul>            |
| All Staff      | Select from the drop-down list to filter data to display below. Options are: <ul style="list-style-type: none"> <li>All Staff</li> <li>Choose from a list of all staff members in the system</li> </ul>      |
| All Statuses   | Select from the drop-down list to filter data to display below. Options are: <ul style="list-style-type: none"> <li>All Statuses</li> <li>Scheduled</li> <li>Scheduled and Show</li> <li>Complete</li> </ul> |
| All Programs   | Select from the drop-down list to filter data to display below. Options are: <ol style="list-style-type: none"> <li>All Programs</li> <li>Choose from a list of all programs in the system</li> </ol>        |




| <b>Field</b> | <b>Description</b>  |
|--------------|---|
| Custom       | Select from the drop-down list to filter data by date to display below. Options are: <ul style="list-style-type: none"> <li>• Today</li> <li>• This Week</li> <li>• Next Week</li> <li>• Last Week</li> <li>• This Month</li> <li>• Next Month</li> <li>• Last Month</li> <li>• Custom - select this option to set a range of dates in the <i>From</i> and <i>To</i> fields.</li> </ul> |
| 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.  |
| To           | 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: <ul style="list-style-type: none"> <li>• Other</li> <li>• Is this a custom list???</li> </ul>  |
| List         |   |
| 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: <ul style="list-style-type: none"> <li>• Scheduled</li> <li>• Show</li> <li>• Complete</li> <li>• Cancelled???</li> </ul>   |
| 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.   |

## Messages Page Inbox Tab Field Definitions

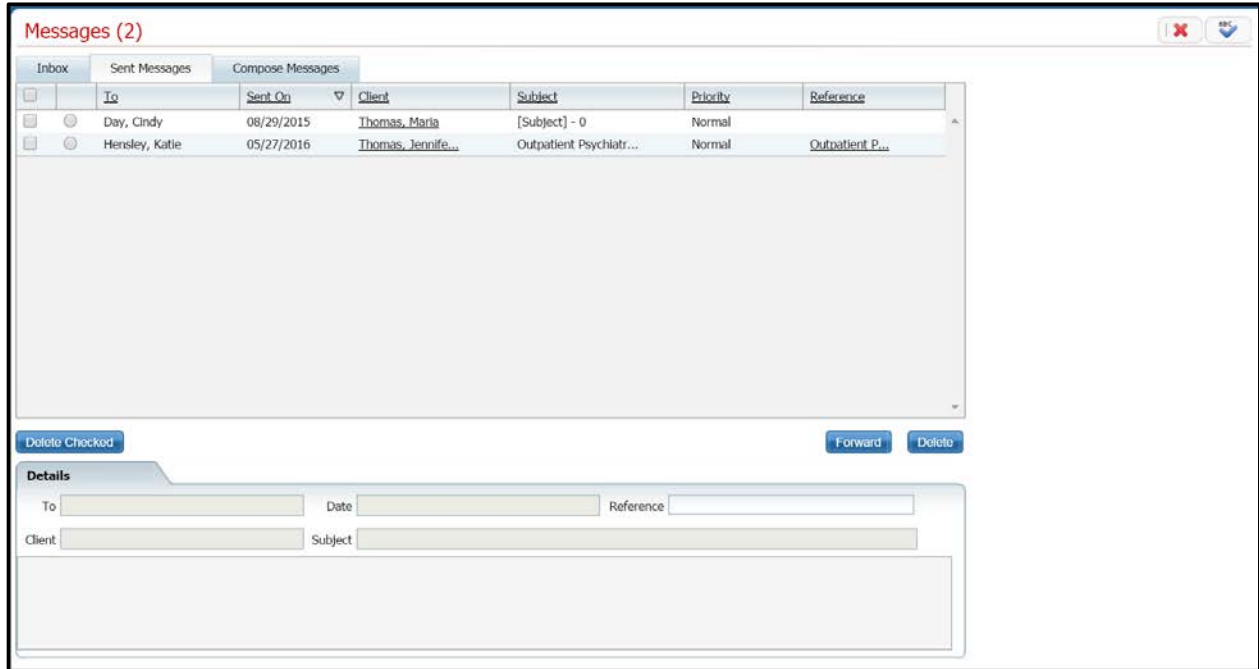


An asterisk (\*) following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

| Field   | Description   |
|---|---|
| <b>Filter</b>   |   |
| This Week   | Identifies the time frame that you want to view messages for. Options are: <ul style="list-style-type: none"> <li>• Today</li> <li>• This Week</li> <li>• This Month</li> <li>• Last Week</li> <li>• Last Month</li> <li>• Custom Date</li> </ul> |
| From  | Identifies the starting date of the time frame to view messages.  |
| To  | Identifies the ending date of the time frame you want to view messages.   |
| From Everyone   | Identifies the senders you want to view messages from. Options are: <ul style="list-style-type: none"> <li>• From Everyone</li> <li>• Choose from a list of all staff members in the system</li> </ul>  |
| <b>List</b>   |   |
| Delete record icon<br> | Click the <b>delete</b> icon to delete the message.   |
| Radio button icon<br>  | Click the <b>radio button</b> icon for the message you want to work on.   |
| Status  | Identifies the status of the message. Options are:  |
| From  | Identifies the sender of the message.   |

| Field   | Description  |
|---|--|
| Received  | Identifies the date you received the message.  |
| Client  | Identifies the client who is the subject of the message.   |
| Subject   | Identifies the subject line of the message.  |
| Priority  | Identifies the priority assigned to the message by the sender.   |
| Reference   | Identifies the document that is attached to the message.   |
| Delete Checked button   | To delete messages from your inbox, select the message(s) you want to delete and click the <b>Delete Checked</b> button. |
| Reply button<br>                 | Click the <b>Reply</b> button to reply to the selected message.  |
| Forward button<br>               | Click the <b>Forward</b> button to send the selected email to another person.  |
| Delete button<br>                | Click the <b>Delete</b> button to delete the selected message.   |
| <b>Details</b>  |  |
| Select the check box of the message you want to view. The information is displayed in the <i>Details</i> section. |  |
| From  | Identifies who sent the message.   |
| Received  | Identifies the date the message was received.  |
| Subject   | Identifies the subject of the message.   |
| To  | Identifies who the message was sent to.  |
| Client  | Identifies the client the message is referring to.   |
| Reference   | Identifies the document attached to the message.   |
| <message area>  | The text of the message is displayed here.   |

Messages Page Sent Messages Tab Field Definitions

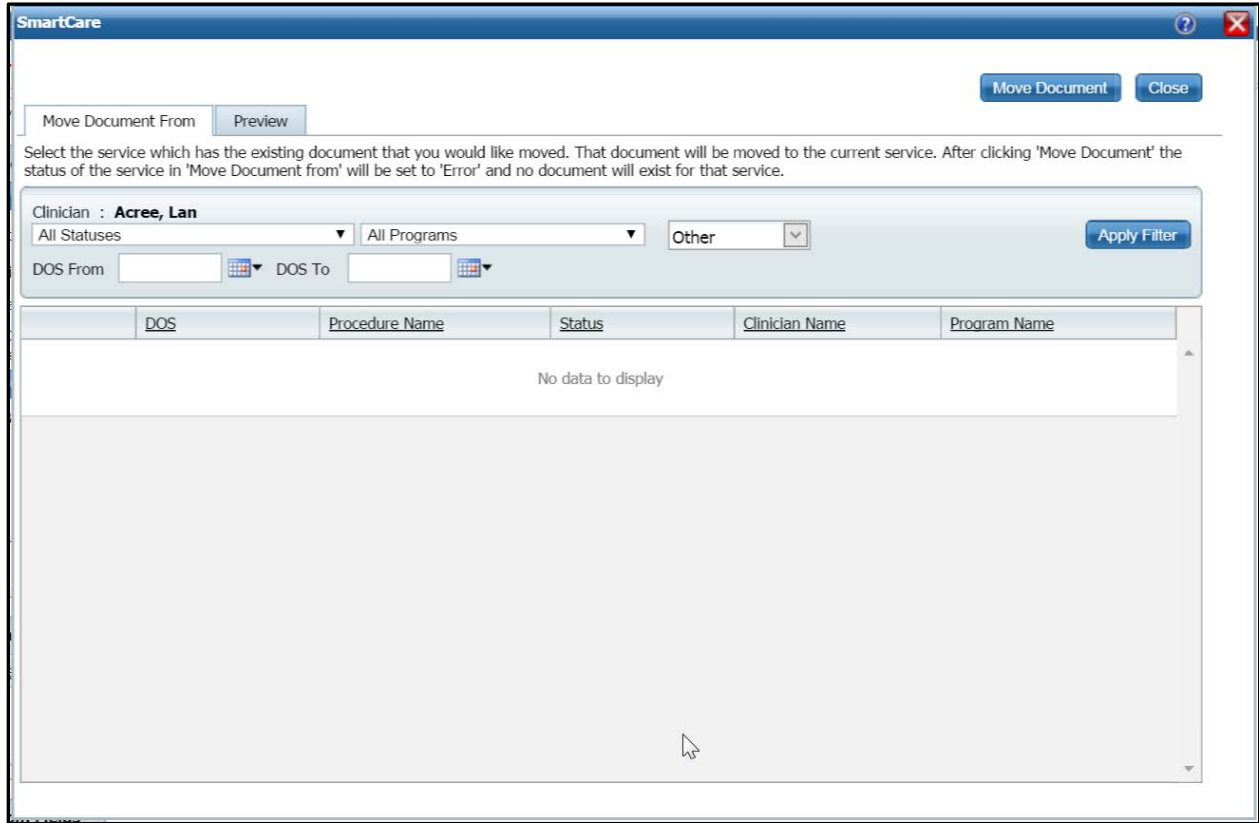


An asterisk (\*) following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

| Field  | Description   |
|--|---|
| <b>List</b>  |   |
| Check box<br><input type="checkbox"/>                                  | Click the check box <input type="checkbox"/> to delete a sent message. When you click a check box, the <b>Delete Checked</b> button is activated.   |
| Radio button<br><input type="radio"/>                                  | Click the radio button <input type="radio"/> on a sent message that you want to read. When you click on the radio button, the message is displayed in the <i>Details</i> section at the bottom of the page. |
| To   | Identifies who the message was sent to.   |
| Sent On  | Identifies the date the message was sent.   |
| Client   | Identifies the client who was referenced in the message.  |
| Subject  | Identifies the subject of the message.  |
| Priority   | Identifies the priority assigned to the message when it was sent. Options are: <ul style="list-style-type: none"> <li>• Normal</li> <li>• Caution/Alert</li> <li>• Urgent</li> </ul>                        |
| Reference  | Identifies the document that was attached to the message.   |
| Delete Checked button<br><input type="button" value="Delete Checked"/> | When you select a check box of a message(s) in the top panel of the page, use the Delete Checked button to delete the selected messages.  |
| Forward button<br><input type="button" value="Forward"/>               | When you select the radio button of a message, click the Forward button to send the message to another person that you enter in the <i>Compose Messages</i> tab.  |
| Delete button<br><input type="button" value="Delete"/>                 | When you select the <i>radio button</i> of a message, click the Delete button to delete the message.  |
| <b>Details</b>   |   |

| <b>Field</b>   | <b>Description</b>  |
|----------------|---|
|                | When you select a radio button of a message in the top panel on the page, the details of the message are displayed in the <i>Details</i> section. |
| To             | Identifies whom the message was sent to.  |
| Date           | Identifies the date and time the message was sent.  |
| Reference      | Identifies the document that was referenced in the original message.  |
| Client         | Identifies the client who was referenced in the original message.   |
| Subject        | Identifies the subject line of the original message.  |
| <message text> | The message text is displayed in this field.  |

## Move Document Window Field Definitions

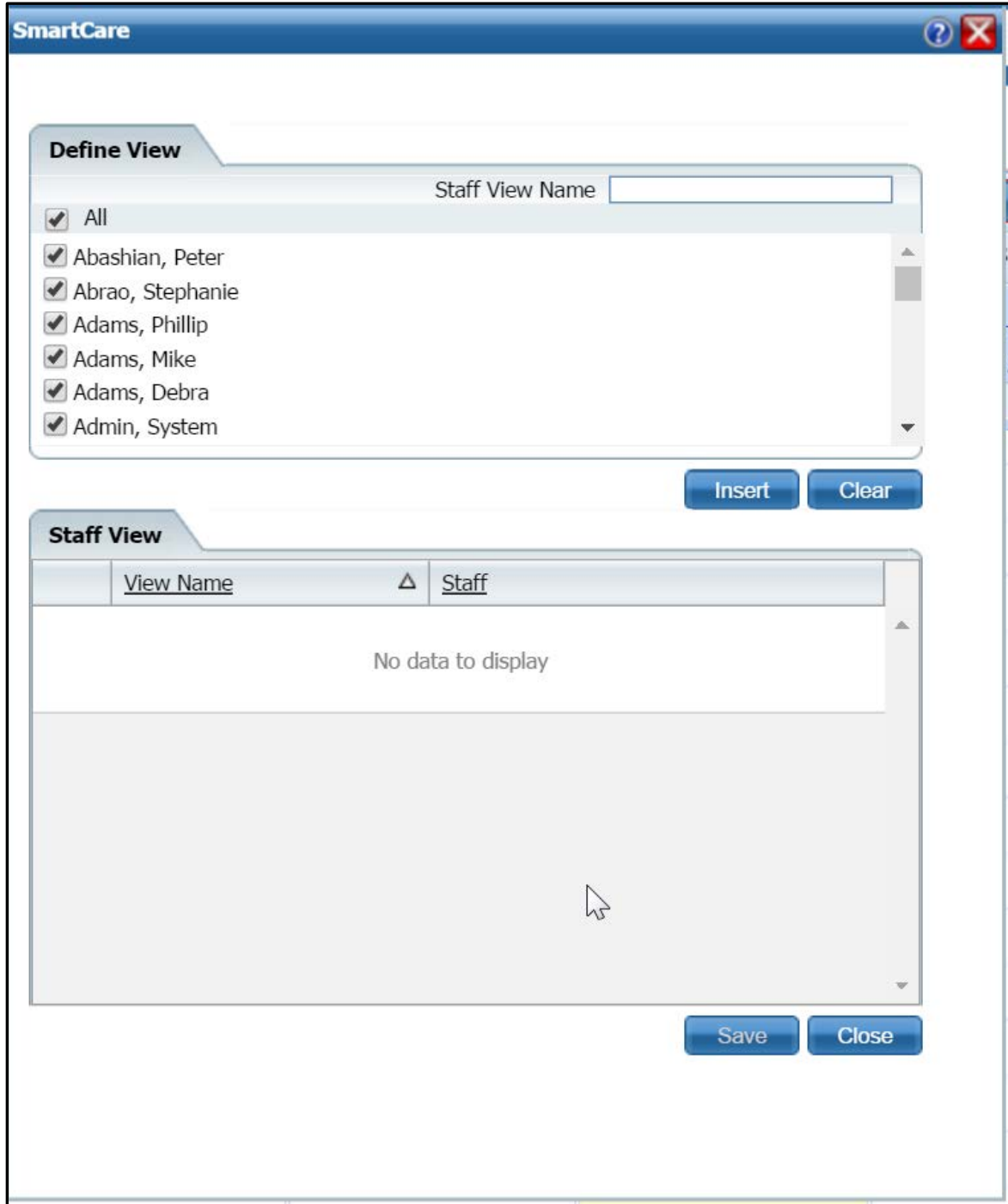


An asterisk (\*) following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

| Field                         | Description  |
|-------------------------------|--|
| <b>Move Document From Tab</b> |  |
| Clinician                     | Displays the clinician name that is assigned to the client service on the <i>Service Detail</i> page.  |
| All Statuses                  | Select the status for the service you want to view from the drop-down list. Options are: <ul style="list-style-type: none"> <li>• Scheduled</li> <li>• Show</li> <li>• No Show</li> <li>• Cancel</li> <li>• Complete</li> <li>• Error</li> </ul>             |
| All Programs                  | Select the program the client is enrolled in to filter the services you want to view from the drop-down list. Options are: <ul style="list-style-type: none"> <li>• All Programs</li> <li>• Choose from one of the programs defined in the system</li> </ul> |





| <b>Field</b>   | <b>Description</b>  |
|--|---|
| Other  | Select other criteria from the drop down list to filter the services to view. Options are: <ul style="list-style-type: none"> <li>• These options are custom to your organization.</li> </ul> |
| DOS From   | Identifies the starting date of service that you want to search from. Use the calendar icon to select the date.   |
| DOS To   | Identifies the ending date of service that you want to search from. Use the calendar icon to select the date.   |
| <b>List</b>  |   |
| The service(s) that match your filter are displayed in the list section of the window.                                       |   |
| DOS  | Identifies the date of service.   |
| Procedure Name   | Identifies the procedure code that defines the service.   |
| Status   | Identifies the status of the service.   |
| Clinician Name   | Identifies the clinician's name assigned to the service. Can they move a document from a different clinician?   |
| Program Name   | Identifies the program name that the client was enrolled in for the date of service.  |
| <b>Preview Tab</b>   |   |
| Use the preview tab to view the information in the service document before you move it to ensure it is the correct document. |   |
| Client   | Identifies the client who the document belongs to.  |
| Effective Date   | Identifies the effective date of the document.  |
| Author   | Identifies who created the document.  |
| Status   | Identifies the status of the document.  |

My Calendar Page Define Group Window Field Definitions

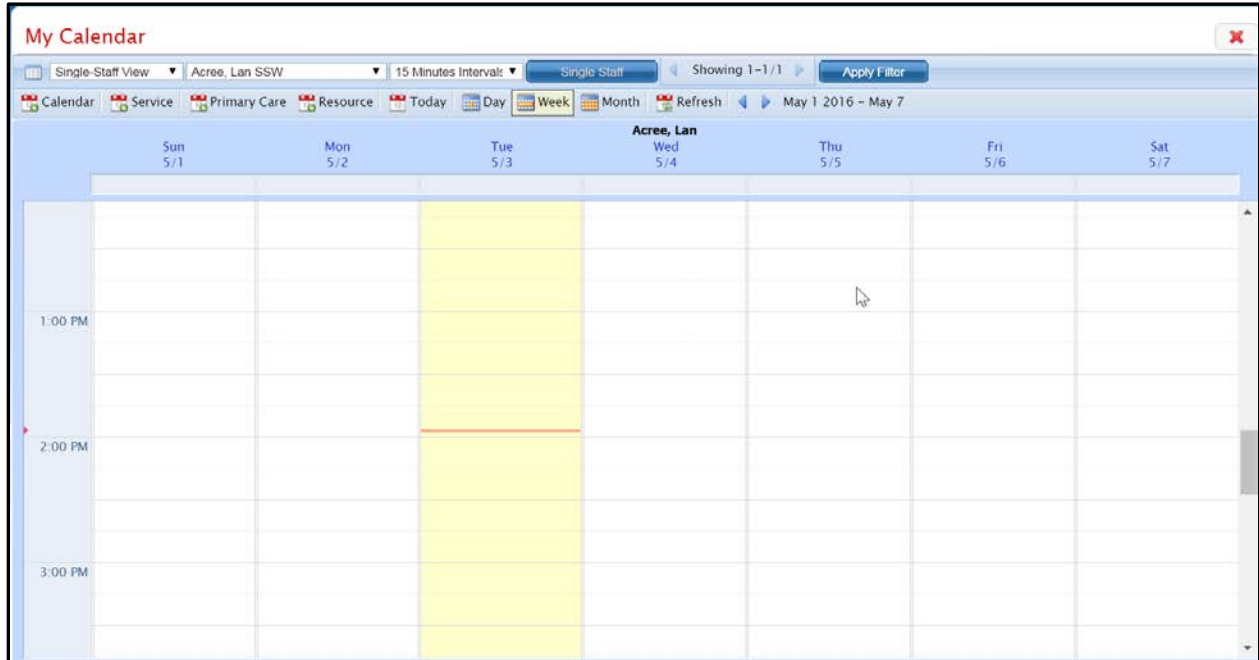


An asterisk (\*) following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

| Field       | Description |
|-------------|-------------|
| Define View |             |

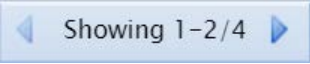
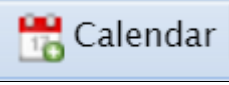

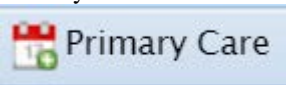
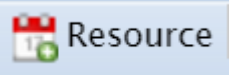

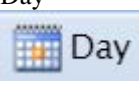
| <b>Field</b>  | <b>Description</b>   |
|---|--|
| Staff View Name*  | Identifies the name you give the group of staff you are creating. You use this group to schedule all members of the scheduling group at one time.              |
| All   | Select the All option to select all staff members listed. If all staff are selected and you do not want all staff, deselect the All check box.                 |
| List of staff members   | Select only the staff members you want to add to your scheduling group.  |
| <b>Staff View</b>   |  |
| After you insert the scheduling group you created, the group is displayed in the <i>Staff View</i> section. |  |
|                            | Click the  icon to delete the staff group.                                    |
|                            | Click the radio button  icon to select the group to modify the group.         |
| View Name   | Identifies the name assigned to the group when it was created.   |
| Staff   | If you selected certain staff members, the word "Some" is displayed in the <i>Staff</i> field. If you selected all staff members, the word "All" is displayed. |



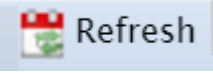
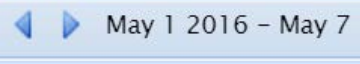
## My Calendar Page Field Definitions



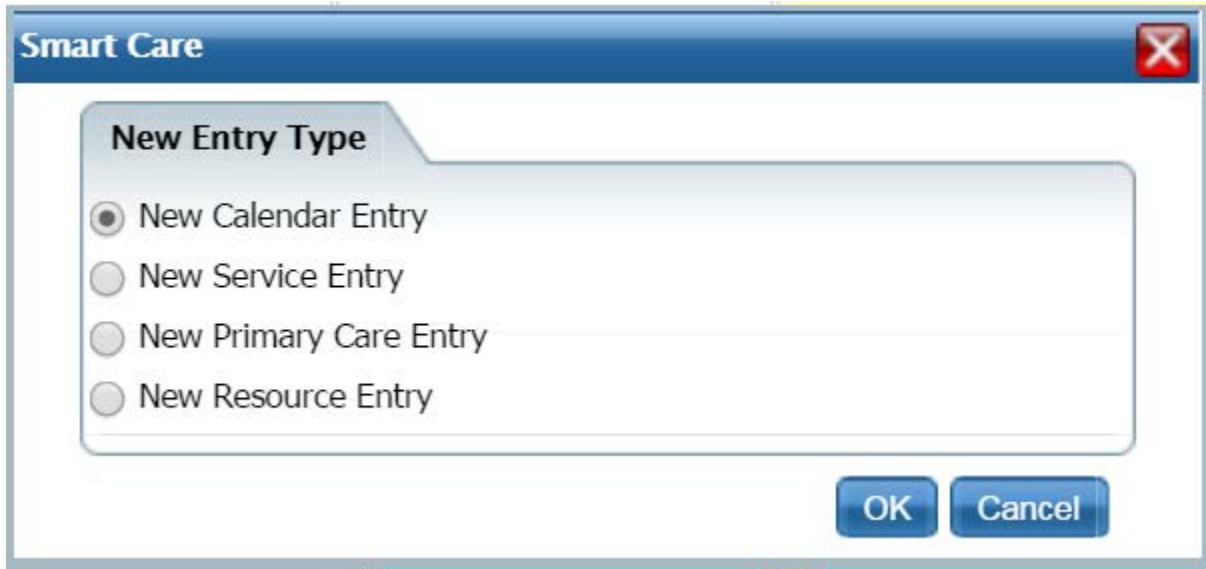
An asterisk (\*) following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

| Field             | Description  |
|-------------------|--|
| Filter            |  |
| Single-Staff View | <p>Identifies whose calendars you can view. You can filter whose calendar(s) you view. Options are:</p> <ul style="list-style-type: none"> <li>• Single-Staff View</li> <li>• Multi-Staff View</li> <li>• Multi-Staff Selected</li> </ul> <p>Note: This drop down list selection affects the button that appears to the right of the interval drop down. See the <a href="#">Single Staff button (See page 107)</a> definition below in this table.</p>  |
| Clinician name    | <p>The option selected in the <i>Single-Staff View</i> drop down list changes the clinician drop down list.</p> <ul style="list-style-type: none"> <li>• Single-Staff View - when selected, the clinician named on the existing service record is displayed.</li> <li>• Multi-Staff View - when selected, the clinician drop down field is blank and the <i>Define Group</i> button is displayed. When groups are defined, the group names are listed in the second drop down list where you can select the group you want. Tell me how...</li> <li>• Multi-Staff Selected - the clinician drop-down list is grayed out and the <i>Select Multiple Staff</i> button is displayed. Click the Multi-Staff Selected button to choose staff. Tell me how...</li> </ul> |

| Field  | Description  |
|--|--|
| Intervals  | Identifies the time intervals you want to view on the calendar. Options are: <ul style="list-style-type: none"> <li>• 5 minutes</li> <li>• 10 minutes</li> <li>• 15 minutes</li> <li>• 20 minutes</li> <li>• 30 minutes</li> <li>• 60 minutes</li> </ul>   |
| Single Staff button  | Identifies the staff whose calendar you are viewing. This button changes and becomes active depending on the options selected in the <i>Single-Staff View</i> drop down list. Options are: <ul style="list-style-type: none"> <li>• If you select <i>Multi-Staff View</i> in the drop-down list, then the button changes to Define Group and is active. Click the Define Group button, select the staff to create a group whose calendars you want to view. Tell me how...</li> <li>• If you select <i>Multi-Staff Selected</i> in the drop down list, the button changes to Select Multiple Staff, click the Select Multiple Staff button, select the staff whose calendars you want to view. Tell me how...</li> </ul> |
| Showing #-#/# scroll bar<br> | This field changes depending on the number of calendars that are displayed. The numbers identify the number of calendars that are displayed and which calendar is currently displayed on the page. Use the right and left arrows to scroll through the calendars you want to view.<br><br>Notice that when multiple staff calendars are displayed, the staff member's name appears at the top of the calendar.   |
| Icons  |  |
| Calendar<br>                | The <i>Calendar</i> icon is grayed out when you have selected multiple staff. Click the Calendar icon to add an entry to the staff member's calendar. Tell me how...   |
| Service<br>                 | The <i>Service</i> icon is grayed out when you have selected multiple staff. Click the Service icon to add a service note to the staff member's calendar. Tell me how...   |
| Primary Care<br>            | The <i>Primary Care</i> icon is grayed out when you have selected multiple staff. Click the Primary Care icon to add Primary Care service to the client. Tell me how...  |
| Resource<br>                | The <i>Resource</i> icon is grayed out when you have selected multiple staff. Click the Resource icon to add resources to a service for the client. Tell me how...   |
| Today<br>                   | Click the Today icon to display the current day on any calendars that appear. The icon background is yellow if it is the current view selected on the calendar(s).   |
| Day<br>                     | Click the Day icon to display the day of the week you want to view. Click the Day icon and then use the scroll arrows to move to the day you want to view. Use the left arrow to move to the previous day; use the right arrow to move to the next day. The icon background is yellow if it is the current view selected on the calendar(s).   |

| <b>Field</b>  | <b>Description</b>  |
|---|---|
| Week<br>             | Click the Week icon to display all calendars a week at a time. Use the <i>Showing 1-1/1</i> button to scroll through the calendars you are displaying. The icon background is yellow if it is the current view selected on the calendar(s).   |
| Month<br>            | The <i>Month</i> icon is only active when you are viewing one staff member. Click the Month icon to view an entire month for the staff member. To change the month you are viewing, click the arrow in the date scroll area. The icon background is yellow if it is the current view selected on the calendar(s).                             |
| Refresh<br>          | Click the Refresh icon at any time to ensure the data you are viewing on the calendar(s) is current. It is important to refresh the calendar if you have made changes to calendars and you are moving between multiple calendars.   |
| Date scroll area<br> | The date or range of dates displayed in the date area identify what calendar information is shown in the calendars. Use the left and right arrows to scroll through the dates by the date unit displayed. For example, the icon image in the first column identifies that the week of May 1, 2016 through May 7, 2016 is currently displayed. |

**My Calendar Page New Entry Type 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   |
|------------------------|---|
| <b>New Entry Type</b>  |   |
| New Calendar Entry     | Identifies tasks or meetings added to the staff member's calendar that is unrelated to a client service. For example, you might block out <i>Administrative</i> time for a staff member to write notes or return phone calls. |
| New Service Entry      | Identifies that you want to schedule a client service on the staff member's calendar.   |
| New Primary Care Entry | Identifies that you want to schedule procedures related to primary care health services during the allotted time.   |
| New Resource Entry     | Identifies that you want to add a resource to the service in the calendar.  |

Non Staff User Page General Tab Field Definitions

The screenshot shows the 'Non Staff User' configuration page. It has two tabs: 'General' (selected) and 'Roles/Permissions'. The 'Account' section includes fields for Authentication Type (Standard), User Code (jthomas2), Password, Confirm Password, Password Expires Next Login (checkbox), Expires (Never), and Expires On. There are also checkboxes for 'Send Connection Information to User', 'Send Password Via E-mail ID', and 'Notify User to Call for a Password'. The 'Client Information' section includes Client Id (2), a 'Link Client' button, Client Contact (Active checkbox), First Name (Jennifer), Last Name (Thomas), Display As (Thomas, Jennifer), and Last Visit (04/05/2016 11:44 AM). The 'General Settings' section includes Client Page Preference (Summary).

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   |
|---|---|
| <b>Account</b>  |   |
| Authentication Type   | Identifies the authentication protocol used to ensure the user code and password are valid for the <i>Patient Portal</i> . Options are: <ul style="list-style-type: none"> <li>• Active Directory</li> <li>• Combination</li> <li>• Standard</li> </ul>   |
| User Code   | Identifies the user sign on account for the client. You can enter up to 30 characters for the <i>User Code</i> . Any combination of letters, numbers and special characters, up to 30 characters.   |
| Password  | Identifies the password set up for the client which is used to sign in the first time. You can enter up to 30 characters, special characters or numbers for the password.   |
| Confirm Password  | Identifies the password was entered a second time the same as the first time to ensure the password is set up as intended.  |
| Password Expires Next Login   | Use this check box to have the password expire when the client signs in the first time. The client will be prompted to set up a new password at that time.  |
| Expires   | Identifies when the password should expire and the user will be required to create a new password.  |
| Expires On  | Nothing appears here.   |
| Send Connection Information to User   | Select the check box to send password information to the client. When you click the check box, the two options are activated.   |
| Send Password Via E-mail ID   | Select this option to send the password to the client via email.  |
| Notify the User to Call for a Password  | Select this options to notify the client to call the office to be given the password.   |
| <b>Client Information</b>   |   |
| Link Client button<br> | Use the <b>Link Client</b> button to pull client information from the system to the fields in the <i>Client Information</i> section.  |
| Client Id   | Identifies the <i>Client Id</i> assigned by the system when the client account was set up.  |
| Active  | Identifies that the client information is active and can be used for the <i>Patient Portal</i> .  |
| Client Contact  | Identifies the client's contact as set up in the client's account and information. If you select the client's contact in this section, the contact's name is filled in in place of the client's information. To remove the client's contact's information, select the blank line from the drop down list. |

## Services and Service Notes User Guide

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| <b>Field</b>            | <b>Description</b>   |
|-------------------------|--|
| First Name              | Identifies the client's information, unless you have selected a client contact in the <i>Client Contact</i> drop down field. |
| Last Name               | Identifies the client's information, unless you have selected a client contact in the <i>Client Contact</i> drop down field. |
| Display As              | Identifies the client's information, unless you have selected a client contact in the <i>Client Contact</i> drop down field. |
| Last Visit              | Identifies the date of the client's last service.  |
| <b>General Settings</b> |  |
| Client Page Preference  | Identifies the landing page for the client on the Patient Portal.  |

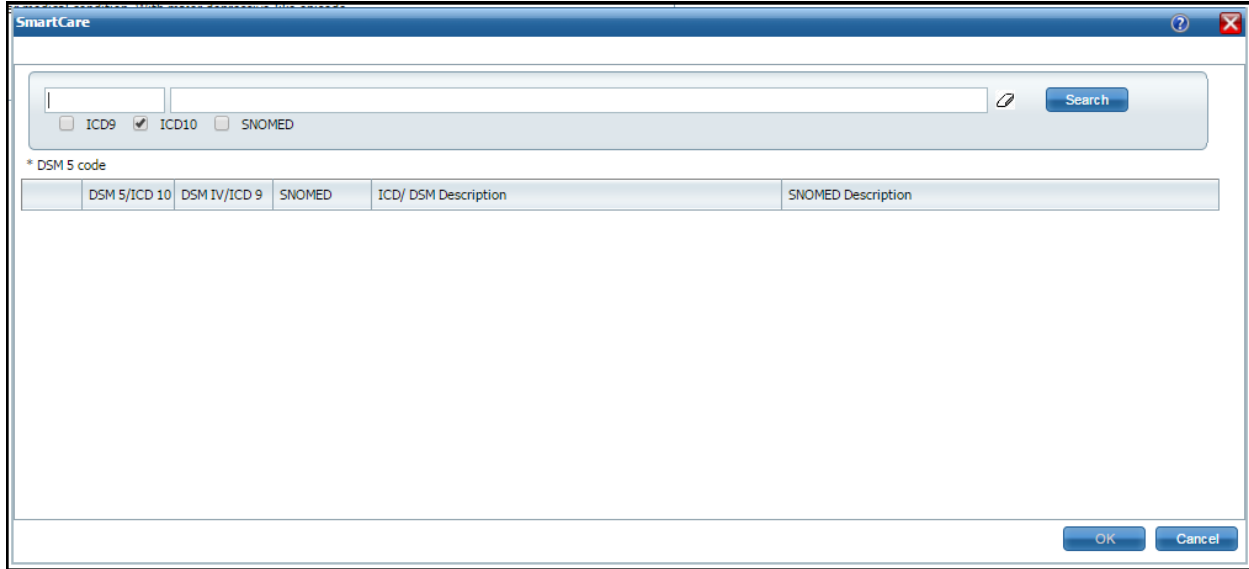
## Non Staff Users List Page Field Definitions

| Staff Name       | Display As       | Username | Phone # | Primary Program | Client Name      |
|------------------|------------------|----------|---------|-----------------|------------------|
| Nosack, Claudia  | Nosack, Claudia  | CNosack  |         |                 | Nosack, Claudia  |
| Thomas, Jennifer | Thomas, Jennifer | Jthomas2 |         |                 | Thomas, Jennifer |
| Thomas, Travis   | Thomas, Travis   | TThomas  |         |                 | Thomas, Travis   |
| Wilson, Sam      | Wilson, Sam      | SWilson  |         |                 | Wilson, Sam      |


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   |
|-----------------|---|
| <b>Filter</b>   |   |
| <name>          | Enter a name to filter for in the list.   |
| All             | Select from the drop-down list to filter records to display in the List area of the page.<br>Options are: <ul style="list-style-type: none"> <li>All</li> <li>Active</li> <li>Inactive</li> </ul>   |
| All Programs    | Select from the drop-down list to filter records to display in the List area of the page.<br>Options are: <ul style="list-style-type: none"> <li>All Programs</li> <li>Choose a program from the list of all programs set up in the system</li> </ul>   |
| All Roles       | Select from the drop-down list to filter records to display in the List area of the page.<br>Options are: <ul style="list-style-type: none"> <li>All Roles</li> <li>Choose a role from the list of all roles set up in the system</li> </ul> To specifically filter for clients who have been set up as <i>Patient Portal</i> users, select the PATIENTPORTALUSER item from the list in this field. |
| <b>List</b>     |   |
| Staff Name      | Identifies the name of the non staff user set up in the system.   |
| Display As      | Identifies the non staff user's <i>Display As</i> name. Usually last name, first name.  |
| Username        | Identifies the user name assigned to the user for access to the <i>Patient Portal</i> .   |
| Phone #         | Identifies the client's contact's phone number.   |
| Primary Program | Identifies the client's primary program enrollment.   |
| Client Name     | Identifies the client's name.   |

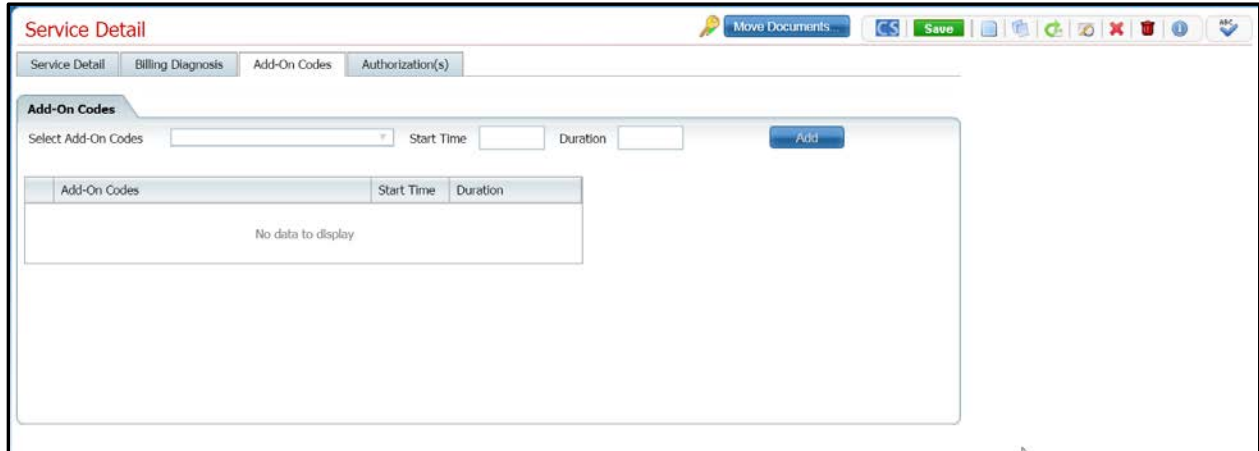
## Select Diagnosis Code Window Field Definitions





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  |
|--|--|
| Search   |  |
| <code>   | Type all or part of the ICD10 diagnosis code you want to select. Or, you can use the description field to search for a diagnosis code. |
| <description>  | Type all or part of the diagnosis code description you want to select.   |
| Eraser icon<br> | Click the eraser icon to delete any information entered in the code and description fields.  |
| ICD9<br>ICD10<br>SNOMED  | Identifies the ICD code book version that you want to search.. ICD10 is the default version.   |
| List   |  |
| <radio button>   | Use the radio button to select the diagnosis code you want to add to the client's service.   |
| DSM5/ICD10   | Identifies the code that is displayed in this column is from the DSM5/ICD10 version.   |
| DSM IV/ICD9  | Identifies the code that is displayed in this column is from the DSM IV/ICD9 version.  |
| SNOMED   | Identifies the code that is displayed in this column is from the SNOMED version.   |
| ICD/DSM Description  | Identifies the description of the diagnosis code from ICD/DSM.   |
| SNOMED Description   | Identifies the description of the diagnosis code from SNOMED.  |

Service Detail Page Add-On Codes Tab 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   |
|---|---|
| <b>Add-On Codes</b>   |   |
| Select Add-On Codes   | If the procedure code entered on the <i>Service Detail</i> tab is set up to allow add-on codes, the <i>Select Add-On Codes</i> field is active. Click the drop down arrow to add-on codes. Tell me how...                                       |
| Start Time  | Identifies the start time for the service that you are adding the add-on code(s) to.  |
| Duration  | Identifies the number or amount of units of duration you are adding to the service for the add-on codes service. When you select the add-on code, the description of the duration units is displayed to the right of the <i>Duration</i> field. |
| <b>List</b>   |   |
|  | Click the  icon to delete an add-on code that has been added to the service.   |
| Add-On Codes  | Identifies the name of the add-on code(s) that were added to the service.   |
| Start Time  | Identifies the start time for the service.  |
| Duration  | Identifies the duration or amount of service added to the original client service.  |

## Service Detail Page Authorization(s) Tab 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  |
|-----------------------------------|--|
| <b>Required Authorization(s)</b>  |  |
| Coverage Plan Name                | Identifies any coverage plan for this client that requires authorization for the service.                  |
| <b>Attached Authorization(s)</b>  |  |
| Exclude                           | Identifies that the plan has been excluded from the calculation for attached and available authorizations. |
| Authorization Id                  | Identifies the system-assigned ID for the authorization code.  |
| Authorization Code                | Identifies the name of the authorization code.   |
| From                              | Identifies the date when the authorization code became active.   |
| To                                | Identifies the date when the authorization code expires.   |
| Units Used                        | Identifies the number of units used for this service.  |
| Units Available                   | Identifies how many authorized units are still available.  |
| Coverage Plan                     | Identifies the client's coverage plan that requires authorization for this procedure.                      |
| Status                            | Identifies the status of the authorization.  |
| <b>Available Authorization(s)</b> |  |
| Exclude                           | Identifies that the plan has been excluded from the calculation for attached and available authorizations. |
| Authorization Id                  | Identifies the system-assigned ID for the authorization code.  |
| Authorization Code                | Identifies the name of the authorization code.   |
| From                              | Identifies the date when the authorization code became active.   |
| To                                | Identifies the date when the authorization code is no longer active.                                       |
| Units Used                        | Identifies the number of units used for this service.  |
| Units Available                   | Identifies how many units are still available for use on the authorization.                                |
| Coverage Plan                     | Identifies the client's coverage plan that requires authorization for this procedure.                      |
| Status                            | Identifies the status of the authorization process.  |

Service Detail Page Billing Diagnosis Tab 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   |
|--|---|
| <b>Billing Diagnosis</b>   |   |
| ICD 10<br>                  | Click the <b>ICD 10</b> button to add a diagnosis code to the list. <a href="#">Tell me how...</a> (See page 16)  |
| List of diagnosis codes  | Identifies the diagnoses assigned to the client.  |
| Sequence drop down list<br> | Use the drop down to set an order hierarchy to the diagnosis codes. Select the number that identifies the sequence for each code, then click the <b>Re-order Diagnosis</b> hyperlink to re-arrange the display. |
| Re-order Diagnosis   | After you have assigned an order to the diagnosis codes, click the <b>hyperlink</b> to display the diagnoses in the order you assigned.   |
| Refresh Diagnosis  | If there are diagnosis codes set up for the client on the <i>Diagnosis</i> document, click the <b>Refresh Diagnosis</b> hyperlink to display those diagnosis codes.   |

Service Detail Page Service Detail Tab Field Definitions

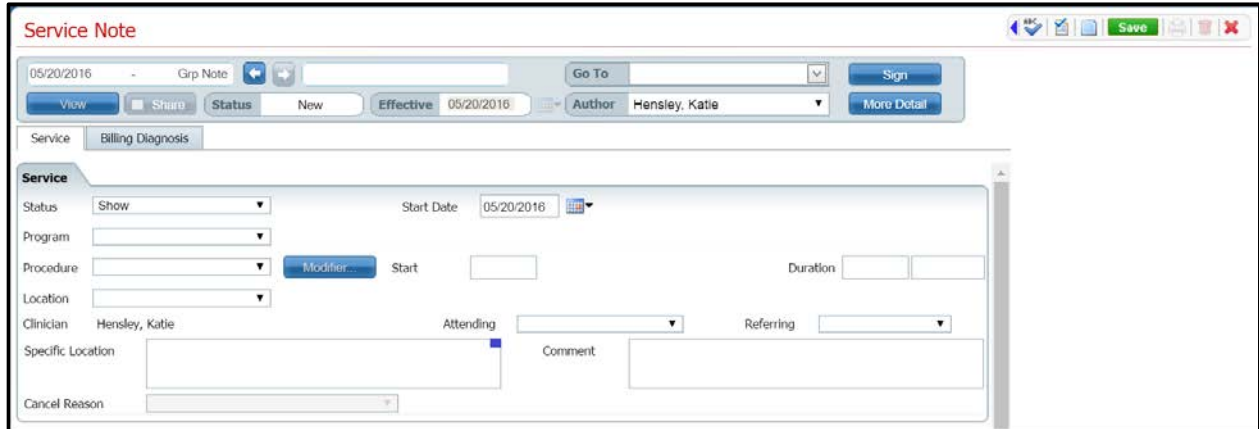
An asterisk (\*) following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

| Field  | Description  |
|--|--|
| <b>Service</b>   |  |
| Client button<br>   | Click the <b>Client</b> button to display the <i>Search for a Client</i> page. <a href="#">Tell me how...</a> (See page 133)   |
| Status   | Select the status for this service from the drop-down list. Options are: <ul style="list-style-type: none"> <li>• Cancel</li> <li>• Complete</li> <li>• Error</li> <li>• No Show</li> <li>• Scheduled</li> <li>• Show</li> </ul>                     |
| Start Date   | Identifies the start date for the service .The current day's date is defaulted. Use the calendar icon to select a date.  |
| Program*   | Identifies the program that the client is enrolled in for this service. Select the program from the drop-down list.  |
| Procedure*   | Identifies the procedure code for the service being added. Select from the drop-down list.   |
| Modifier button<br> | Identifies a code added to modify the service provided. The button is only active if the procedure code for the service has modifiers added to it. Click on the Modifier button to select a modifier code. <a href="#">Tell me how...</a>            |
| Start Time   | Identifies the start time of the service on the date selected in the <i>Start Date</i> field. Type the time in the ##:## format followed by a for a.m. or p for p.m. When you move the cursor to the next field, the time is displayed in the field. |
| Duration*  | Identifies the duration for the service. The system calculates the duration using the <i>Start Date and Time</i> and the <i>End Date and Time</i> .  |

| Field   | Description  |
|---|--|
| blank field   | Displays the unit of measurement for the service procedure code.   |
| Clinician Name*   | Identifies the clinician who provided the service. Select the clinician from the drop-down list.   |
| End Time  | Identifies the time when the service ended. The <i>End Time</i> field is activated depending on the procedure code that is selected.   |
| End Date  | Identifies the date when the service was completed. Grayed out. The <i>End Date</i> field is activated depending on the procedure code that is selected.   |
| Location*   | Identifies the location where the service took place. Select the location from the drop-down list. The locations that are listed in the drop down list depend on the program that is selected.   |
| Attending   | Identifies the client's attending physician for this visit. Select the attending physician from the drop-down list.  |
| Referring   | Identifies the person who referred the client. Select the referring person from the drop-down list.  |
| Client Was Present  | Identifies whether or not the client was present for the service. The check box defaults to <i>Client was present</i> . Deselect the check box if the client was not present for the service. For example, a phone call with the client's family where the client does not attend the call.  |
| Other Person(s) Present   | Identifies if other people were present for the service. Type the relationship of any other person(s) who was present for the service. You can enter up to 244 characters in this field.   |
| Cancel Reason*<br>Required is the Status is Cancel.   | If the service was cancelled, identifies the reason for the cancellation. When you select a status of <i>Cancel</i> in the <i>Status</i> drop down list, the <i>Cancel Reason</i> field becomes active. Click on the drop down arrow to select a cancellation reason.  |
| Group button<br> | Identifies whether the service involved a group of clients. Click the Group button to identify the group this client was involved with. Tell me how...   |
| Billable  | Identifies whether or not the service is billable to the client. The check box defaults to <i>Billable for this service</i> . Deselect the check box to make the service non-billable.   |
| Do Not Complete   | Identifies what???   |
| Note  | Displays any flags that have been assigned to this client. Flags are icons set up in <i>Administration</i> that identify a status about the client or the client's account that staff need to be aware of. View list of flags at the following path: <i>Administration tab &gt; User Interface banner &gt; Flag Types sub-banner</i> . |
| Comment   | Enter a comment about this service. You can enter an unlimited number of characters in this field. You can spell check your entry. <a href="#">Tell me how...</a> (See page 138)   |
| Override Charge Amount  | Identifies whether you want to override the charge amount for this service. Select the check box to display a blank field where you can enter the amount you are charging for the service.   |
| Overridden By   | The user's sign on name is displayed if you enter an override amount.  |
| Override Errors   | Identifies that you want to override errors in creating billing charges and billing for this service. Select the check box to override any errors.   |
| Overridden By   | The user's sign on name is displayed if you select the option to override errors check box.  |
| <b>Warnings/Errors</b>  |  |
| Date  | Identifies the date of any warnings or errors for this service. If there are warnings or errors, these are displayed when the service is validated and saved.  |
| Error Type  | Identifies the error type. The service is validated against the rules for the program, procedures and rates to make sure everything is filled in properly.   |
| Error Message   | Identifies the explanatory text about the error message. The service is validated against the rules for the program, procedures and rates to make sure everything is filled in properly. The message identifies what error condition was found during the validation.  |
| Next Step   | Identifies the next step that is needed to rectify the warning or error message.   |

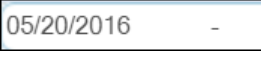






| Field                | Description   |
|----------------------|---|
| <b>Custom Fields</b> |   |
| Custom Fields        | Any fields added to the system for your organization are displayed in this section. |




Service Note Page with Service Tab 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.

**Note:** Many fields and tabs displayed on this page are custom based on your installation and how the *Programs* and *Procedure* codes are set up in SmartCare for your installation. The *Core* fields and tabs are documented below.

| Field   | Description   |
|---|---|
| Filter  |   |
|                        | These fields identify the previous and next documents created and signed for the client. The date identifies the date of the document or service. The information is listed in chronological order.                       |
|                        |   |
| Go To   | Display a drop down list where you can choose the document you want to view. The documents that you can view depend on the program the client is enrolled in and the procedure code that represents the service provided. |
| Sign button<br>        | Use the Sign button to sign documents, such as group notes, if one is required for the service.   |
| View button<br>        | Use the View button to view/edit the document.  |
| Share button<br>       | Use the Share button to share the document with other clinicians who are not the authors of the document to view and share the document.  |
| Status  | Identifies the status of the procedure, service and notes.  |
| Effective   | Identifies the effective date of the service and note. Typically, this is the date of service.  |
| Author  | Identifies who is writing the service note.   |
| More Detail button<br> | Use the More Detail button to display additional fields in the <i>Filter</i> area of the page.  |
| Less Detail button<br> | Use the Less Detail button to hide the additional fields that are displayed in the <i>More Detail</i> area.   |
| More Detail area  |   |
| Other Versions  | Identifies other versions of the service notes have been created.   |
| Signed By   | Identifies who signed the other versions of the service notes.  |

| Field  | Description   |
|--|---|
| Signer   | Identifies the original signer of the service notes.  |
| Add Signer(s)  | Use the Add Signer(s) drop down list to select additional signers for the service notes.  |
| Sign button<br>   | Use the Sign button to add the signer's name(s) to the service notes. <a href="#">Tell me how...</a> (See page 65)  |
| Decline button<br>  | Use the Decline button to avoid signing the service notes. Use by a staff member who received the document to remove themselves for viewing the document.   |
| <list panel>   |   |
| Service Tab  |   |
| Status   | Identifies the status of the service. When you create a new service, the status defaults to Show. Statuses are: <ul style="list-style-type: none"> <li>• Error</li> <li>• Scheduled</li> <li>• Show</li> <li>• Not Show</li> <li>• Cancel</li> </ul>  |
| Start Date   | Identifies the date of service. The <i>Start Date</i> defaults to the current day's date. Use the calendar icon to choose a different date.   |
| Program  | Identifies the program that the client is enrolled in for this service.   |
| Procedure  | Identifies the procedure code that will be used for billing the service. The procedure codes that are listed in the drop down are controlled by the program selected and the user's licenses/degrees.   |
| Modifier button<br>   | If the <i>Modifier</i> button is active, then there are modifier codes assigned to the procedure code. Use the Modifier button to select the appropriate additional codes. If the <i>Modifier</i> button is grayed out, the procedure code does not have any modifiers to select from.  |
| Location   | Identifies the place of service for the procedure code. The locations that are listed in the <i>Location</i> drop down list are controlled by the locations assigned to the program.  |
| The fields highlighted in gray appear depending on the procedure that you choose for the service. Therefore, different fields or combination of fields may be displayed. |   |
| Date In  |   |
| Start  | Identifies the start time set up for the service.   |
| End  | Identifies the end time set up for the service.   |
| End Date   | Identifies the end date for the service. The system fills in this field based on the values you enter in the <i>Time In</i> and <i>Time Out</i> fields.   |
| Duration   | Identifies the number of units used for the service. How the service duration is measured and the units are controlled by how the procedure code is set up in the system. When you enter the values in the <i>Time In</i> and <i>Time Out</i> fields, the system calculates the amount of time used and fills in the <i>Duration</i> fields.        |
| <unit field>   | Identifies the unit of measure used for the procedure code. How the service duration is measured and the units are controlled by how the procedure code is set up in the system. When you enter the values in the <i>Time In</i> and <i>Time Out</i> fields, the system calculates the amount of time used and fills in the <i>Duration</i> fields. |
| Time In  | Identifies the start time for the service.  |
| Time Out   | Identifies the end time for the service.  |
| Date Out   | Identifies the date when the service is complete.   |
| Clinician  | Identifies the clinician providing the service.   |
| Attending  | Identifies the client's attending physician.  |
| Referring  | Identifies the client's referring physician.  |
| Specific Location  | Identifies the specific location where the service is provided. You can enter an unlimited number of characters in this field. You can spell check your entry. <a href="#">Tell me how...</a> (See page 138)  |




| <b>Field</b>   | <b>Description</b>  |
|--|---|
| Comment  | Identifies any comments you enter describing the service provided. You can enter an unlimited number of characters in this field. You can spell check your entry. <a href="#">Tell me how...</a> (See page 138)   |
| Cancel Reason  | If you select <i>Cancel</i> in the <i>Status</i> field, the <i>Cancel Reason</i> field is activated. Select a cancellation reason from the drop down list.  |
| Billing Diagnosis  |   |
| This tab only appears if the service requires billing diagnoses.                                   |   |
| Billing Diagnosis Section  |   |
| ICD-10 button<br> | Use the ICD 10 button to select diagnosis codes for the client's service(s). The name of the button identifies the classification of diseases used for the procedure/service. ICD 10 indicates you are choosing diagnosis code from the ICD-10 version of codes.  |
| Re-Order Diagnosis   | The diagnosis codes applied to the client's service(s) are listed. If there are more than two diagnosis codes, select a number in the drop down list to the left of each diagnosis code to put the codes in the sequence you want. Click the Re-Order Diagnosis hyperlink to re-display the codes in the order you specify. |
| Refresh Diagnosis  | Use the Refresh Diagnosis hyperlink if no diagnosis codes are listed in the section. Any diagnosis codes already assigned to the client are displayed.  |


Service Note Page with Service Tab 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.

**Note:** Many fields and tabs displayed on this page are custom based on your installation and how the *Programs* and *Procedure* codes are set up in SmartCare for your installation. The *Core* fields and tabs are documented below.

| Field                   | Description   |
|-------------------------|---|
| <b>Filter</b>           |   |
|                         | These fields identify the previous and next documents created and signed for the client. The date identifies the date of the document or service. The information is listed in chronological order.                       |
|                         |   |
| Go To                   | Display a drop down list where you can choose the document you want to view. The documents that you can view depend on the program the client is enrolled in and the procedure code that represents the service provided. |
| Sign button<br>         | Use the <b>Sign</b> button to sign documents, such as group notes, if one is required for the service.  |
| View button<br>         | Use the <b>View</b> button to view/edit the document.   |
| Share button<br>        | Use the <b>Share</b> button to share the document with other clinicians who are not the authors of the document to view and share the document.   |
| Status                  | Identifies the status of the procedure, service and notes.  |
| Effective               | Identifies the effective date of the service and note. Typically, this is the date of service.  |
| Author                  | Identifies who is writing the service note.   |
| More Detail button<br>  | Use the <b>More Detail</b> button to display additional fields in the <i>Filter</i> area of the page.   |
| Less Detail button<br>  | Use the <b>Less Detail</b> button to hide the additional fields that are displayed in the <i>More Detail</i> area.  |
| <b>More Detail area</b> |   |
| Other Versions          | Identifies other versions of the service notes have been created.   |

| Field  | Description   |
|--|---|
| Signed By  | Identifies who signed the other versions of the service notes.  |
| Signer   | Identifies the original signer of the service notes.  |
| Add Signer(s)  | Use the <b>Add Signer(s)</b> drop down list to select additional signers for the service notes.   |
| Sign button<br>   | Use the <b>Sign</b> button to add the signer's name(s) to the service notes. <a href="#">Tell me how...</a> (See page 65)   |
| Decline button<br>  | Use the <b>Decline</b> button to avoid signing the service notes. Use by a staff member who received the document to remove themselves for viewing the document.  |
| <list panel>   |   |
| <b>Service Tab</b>   |   |
| Status   | Identifies the status of the service. When you create a new service, the status defaults to Show. Statuses are: <ul style="list-style-type: none"> <li>• Error</li> <li>• Scheduled</li> <li>• Show</li> <li>• Not Show</li> <li>• Cancel</li> </ul>  |
| Start Date   | Identifies the date of service. The <i>Start Date</i> defaults to the current day's date. Use the calendar icon to choose a different date.   |
| Program  | Identifies the program that the client is enrolled in for this service.   |
| Procedure  | Identifies the procedure code that will be used for billing the service. The procedure codes that are listed in the drop down are controlled by the program selected and the user's licenses/degrees.   |
| Modifier button<br>  | If the <i>Modifier</i> button is active, then there are modifier codes assigned to the procedure code. Use the <b>Modifier</b> button to select the appropriate additional codes. If the <i>Modifier</i> button is grayed out, the procedure code does not have any modifiers to select from.   |
| Location   | Identifies the place of service for the procedure code. The locations that are listed in the <i>Location</i> drop down list are controlled by the locations assigned to the program.  |
| The fields highlighted in gray appear depending on the procedure that you choose for the service. Therefore, different fields or combination of fields may be displayed. |   |
| Date In  |   |
| Start  | Identifies the start time set up for the service.   |
| End  | Identifies the end time set up for the service.   |
| End Date   | Identifies the end date for the service. The system fills in this field based on the values you enter in the <i>Time In</i> and <i>Time Out</i> fields.   |
| Duration   | Identifies the number of units used for the service. How the service duration is measured and the units are controlled by how the procedure code is set up in the system. When you enter the values in the <i>Time In</i> and <i>Time Out</i> fields, the system calculates the amount of time used and fills in the <i>Duration</i> fields.        |
| <unit field>   | Identifies the unit of measure used for the procedure code. How the service duration is measured and the units are controlled by how the procedure code is set up in the system. When you enter the values in the <i>Time In</i> and <i>Time Out</i> fields, the system calculates the amount of time used and fills in the <i>Duration</i> fields. |
| Time In  | Identifies the start time for the service.  |
| Time Out   | Identifies the end time for the service.  |
| Date Out   | Identifies the date when the service is complete.   |
| Clinician  | Identifies the clinician providing the service.   |
| Attending  | Identifies the client's attending physician.  |
| Referring  | Identifies the client's referring physician.  |
| Specific Location  | Identifies the specific location where the service is provided. You can enter an unlimited number of characters in this field. You can spell check your entry. <a href="#">Tell me how...</a> (See page 138)  |

| Field  | Description  |
|--|--|
| Comment  | Identifies any comments you enter describing the service provided. You can enter an unlimited number of characters in this field. You can spell check your entry. <a href="#">Tell me how...</a> (See page 138)  |
| Cancel Reason  | If you select <i>Cancel</i> in the <i>Status</i> field, the <i>Cancel Reason</i> field is activated. Select a cancellation reason from the drop down list.   |
| <b>Billing Diagnosis</b>   |  |
| This tab only appears if the service requires billing diagnoses.                                   |  |
| <b>Billing Diagnosis Section</b>   |  |
| ICD-10 button<br> | Use the <b>ICD 10</b> button to select diagnosis codes for the client's service(s). The name of the button identifies the classification of diseases used for the procedure/service. ICD 10 indicates you are choosing diagnosis code from the ICD-10 version of codes.  |
| Re-Order Diagnosis   | The diagnosis codes applied to the client's service(s) are listed. If there are more than two diagnosis codes, select a number in the drop down list to the left of each diagnosis code to put the codes in the sequence you want. Click the <b>Re-Order Diagnosis</b> hyperlink to re-display the codes in the order you specify. |
| Refresh Diagnosis  | Use the <b>Refresh Diagnosis</b> hyperlink if no diagnosis codes are listed in the section. Any diagnosis codes already assigned to the client are displayed.  |

**Service Note Page Warnings Tab Field Definitions**

| Service    | Note  | Billing Diagnosis | Warnings   |            |               |           |      |   |  |
|------------|---|-------------------|--|------------|---------------|-----------|------|---|--|
|            |   |                   | <table border="1"> <thead> <tr> <th>Error Type</th> <th>Error Message</th> <th>Next Step</th> </tr> </thead> <tbody> <tr> <td>4410</td> <td>Financial information has not been completed for this c</td> <td></td> </tr> </tbody> </table> | Error Type | Error Message | Next Step | 4410 | Financial information has not been completed for this c |  |
| Error Type | Error Message   | Next Step         |  |            |               |           |      |   |  |
| 4410       | Financial information has not been completed for this c |                   |  |            |               |           |      |   |  |

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  |
|-----------------|--|
| <b>Warnings</b> |  |
| Error Type      | Identifies the code type assigned by the system to the error message.    |
| Error Message   | Identifies the descriptive text of the error code.                       |
| Next Step       | If applicable, identifies any steps you need to take to clear the error. |

Service Notes Page Note Tab 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   |
|-------------------------|---|
| <b>Filter</b>           |   |
|                         | These fields identify the previous and next documents created and signed for the client. The date identifies the date of the document or service. The information is listed in chronological order.                       |
|                         |   |
| Go To                   | Display a drop down list where you can choose the document you want to view. The documents that you can view depend on the program the client is enrolled in and the procedure code that represents the service provided. |
| Sign button<br>         | Use the <b>Sign</b> button to sign documents, such as group notes, if one is required for the service.  |
| View button<br>         | Use the <b>View</b> button to view/edit the document.   |
| Share button<br>        | Use the <b>Share</b> button to share the document with other clinicians who are not the authors of the document to view and share the document.   |
| Status                  | Identifies the status of the procedure, service and notes.  |
| Effective               | Identifies the effective date of the service and note. Typically, this is the date of service.  |
| Author                  | Identifies who is writing the service note.   |
| More Detail button<br>  | Use the <b>More Detail</b> button to display additional fields in the <i>Filter</i> area of the page.   |
| Less Detail button<br>  | Use the <b>Less Detail</b> button to hide the additional fields that are displayed in the <i>More Detail</i> area.  |
| <b>More Detail area</b> |   |
| Other Versions          | Identifies other versions of the service notes have been created.   |
| Signed By               | Identifies who signed the other versions of the service notes.  |
| Signer                  | Identifies the original signer of the service notes.  |
| Add Signer(s)           | Use the <b>Add Signer(s)</b> drop down list to select additional signers for the service notes.   |
| Sign button<br>         | Use the <b>Sign</b> button to add the signer's name(s) to the service notes.  |
| Decline button<br>      | Use the <b>Decline</b> button to avoid signing the service notes. Use by a staff member who received the document to remove themselves for viewing the document.  |

| <b>Field</b> | <b>Description</b> |
|--------------|--------------------|
| <list panel> |                    |

Services Notes List Page Billing Diagnosis Tab 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  |
|--|--|
| <b>Billing Diagnosis</b>   |  |
| ICD-10 button<br> | Use the <b>ICD 10</b> button to select diagnosis codes for the client's service(s). The name of the button identifies the classification of diseases used for the procedure/service. <i>ICD 10</i> indicates you are choosing diagnosis code from the ICD-10 version of codes. |
| <drop down list>   | Use the drop down lists to change the order in which the diagnosis codes are listed. Choose the number to identify the sequence for each diagnosis codes. After you have changed the numbers, click the Re-Order Diagnosis hyperlink to re-display the list of codes.          |
| <diagnosis code>   | Identifies the diagnosis code as it appears in the diagnosis code reference list. For example, the first diagnosis code shown in the screen image above is <i>F10.10</i> .   |
| <diagnosis code description>   | Identifies the description of the diagnosis code. For example, the diagnosis description shown in the screen image above is, <i>Alcohol abuse, uncomplicated</i> .   |
| Re-Order Diagnosis   | Use the <b>Re-Order Diagnosis</b> hyperlink to change the order the diagnosis codes that are listed on the page.   |
| Refresh Diagnosis  | Use the <b>Refresh Diagnosis</b> hyperlink to ensure the most current diagnosis codes for the client are displayed.  |

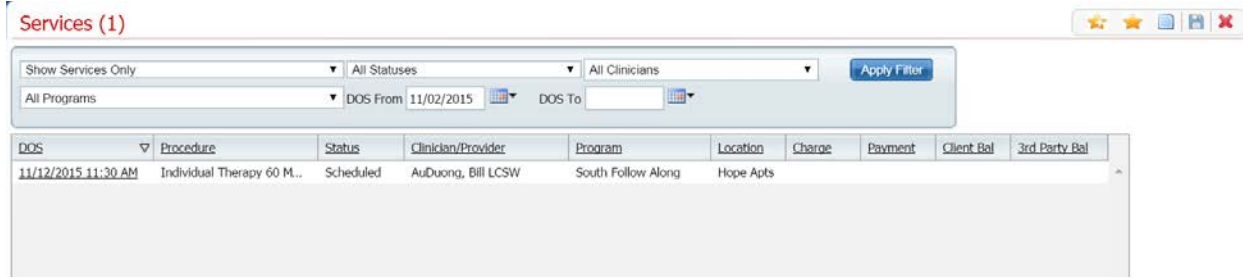
Services/Notes List Page Field Definitions

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         |   |
| All Clinicians | Select from the drop-down list to filter records to display in the List area of the page. Options are: <ul style="list-style-type: none"> <li>All Clinicians</li> <li>Choose a clinician from the list of all clinicians set up in the system</li> </ul>  |
| All Statuses   | Select from the drop-down list to filter data to display below. Options are: <ul style="list-style-type: none"> <li>All Statuses</li> <li>Scheduled/Show</li> <li>Scheduled</li> <li>Show</li> <li>No Show/Cancel</li> <li>Complete</li> <li>Entry Incomplete Claims</li> <li>Entry Complete Claims</li> <li>Approved Claims</li> <li>Paid Claims</li> <li>Denied Claims</li> <li>Pended Claims</li> <li>Partially Approved Claims</li> <li>Void</li> </ul> |
| All Procedures | Select from the drop-down list to filter records to display in the List area of the page. Options are: <ul style="list-style-type: none"> <li>All Procedure codes</li> <li>Choose a procedure code from the list of all procedure codes set up in the system</li> </ul>   |

| <b>Field</b>                       | <b>Description</b>  |
|------------------------------------|---|
| Other                              | Select from the drop-down list to filter records to display in the List area of the page. This is a custom field. Your organization may or may not have options in the list.  |
| Show Services and Care Mgmt Claims | Select from the drop-down list to filter records to display in the List area of the page.<br>Options are: <ul style="list-style-type: none"> <li>• Show Services and Care Mgmt Claims</li> <li>• Show Services Only</li> <li>• Show Care Mgmt Claims Only</li> </ul>  |
| All Dates                          | Select from the drop-down list to filter records to display in the List area of the page.<br>Options are: <ul style="list-style-type: none"> <li>• All Dates</li> <li>• Today</li> <li>• This Week</li> <li>• Next Week</li> <li>• This Month</li> <li>• Next Month</li> <li>• Last Week</li> <li>• Last Month</li> <li>• Customer Date</li> <li>• Past 6 Months</li> <li>• Past 12 Months</li> </ul> |
| From                               | Use the calendar icon to select a start date for viewing records.   |
| To                                 | Use the calendar icon to select an end date for viewing records.  |
| All Programs                       | Select from the drop-down list to filter records to display in the List area of the page.<br>Options are: <ul style="list-style-type: none"> <li>• All Programs</li> <li>• Choose a program from the list of all programs set up in the system</li> </ul>   |
| List                               |   |
| Auth                               | Identifies whether or not there is information in the Warnings tab on the Service Note page.  |
| DOS                                | Identifies the date of service. Click the hyperlinked date of service to view details for that date of service.   |
| Status                             | Identifies the status of the service. Statuses are: <ul style="list-style-type: none"> <li>• Scheduled</li> <li>• Show</li> <li>• Complete</li> <li>• Cancelled</li> </ul>  |
| Document                           | Identifies the document created with the service. The document that is used is defined by the procedure code.   |
| Procedure                          | Identifies the procedure code that represents the service provided to the client.   |
| Clinician                          | Identifies the staff member designated as the clinician when the staff were added to the service when it was set up.  |
| Program                            | Identifies the program the client is enrolled in for this service.  |
| Comment                            | Identifies any comment entered for the service on the procedure service page.   |

Services for a Client List 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             |  |
| Show Services Only | Select from the drop-down list to filter data as shown below. Options are: <ul style="list-style-type: none"> <li>• Show Services Only</li> <li>• Show Services and Care Mgmt Claims</li> <li>• Show Care Mgmt Claims Only</li> </ul>                                    |
| All Statuses       | Select from the drop-down list to filter data as shown below. Options are: <ul style="list-style-type: none"> <li>• All Statuses</li> <li>• Canceled and No Show Services</li> <li>• Complete Services</li> <li>• Scheduled Services</li> <li>• Show Services</li> </ul> |
| All Clinicians     | Select from the drop-down list to filter data as shown below. Options are: <ul style="list-style-type: none"> <li>• All Clinicians</li> <li>• Choose a clinician from the list of all clinicians in the system</li> </ul>  |
| All Programs       | Select from the drop-down list to filter data as shown below. Options are: <ul style="list-style-type: none"> <li>• All Programs</li> <li>• Choose a program from the list of all programs in the system</li> </ul>  |
| DOS From           | Select a beginning date to view services by date of service.   |
| DOS To             | Select an ending date to view services by date of service.   |
| <b>List</b>        |  |
| DOS                | Identifies the date when the service occurred.   |
| Procedure          | Identifies the procedure that was performed.   |
| Status             | Identifies the status of the service.  |
| Clinician/Provider | Identifies the clinician or provider who provided the service.   |
| Program            | Identifies the program the client was enrolled in for the service.   |
| Location           | Identifies the location where the service was performed.   |
| Charge             | Identifies the dollar amount charged for the service.  |
| Payment            | Identifies any payment made for the service.   |
| Client Bal         | Identifies the client's current balance.   |
| 3rd Party Bal      | Identifies any balance owing from a third party payer.   |

## 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 133).
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 143)

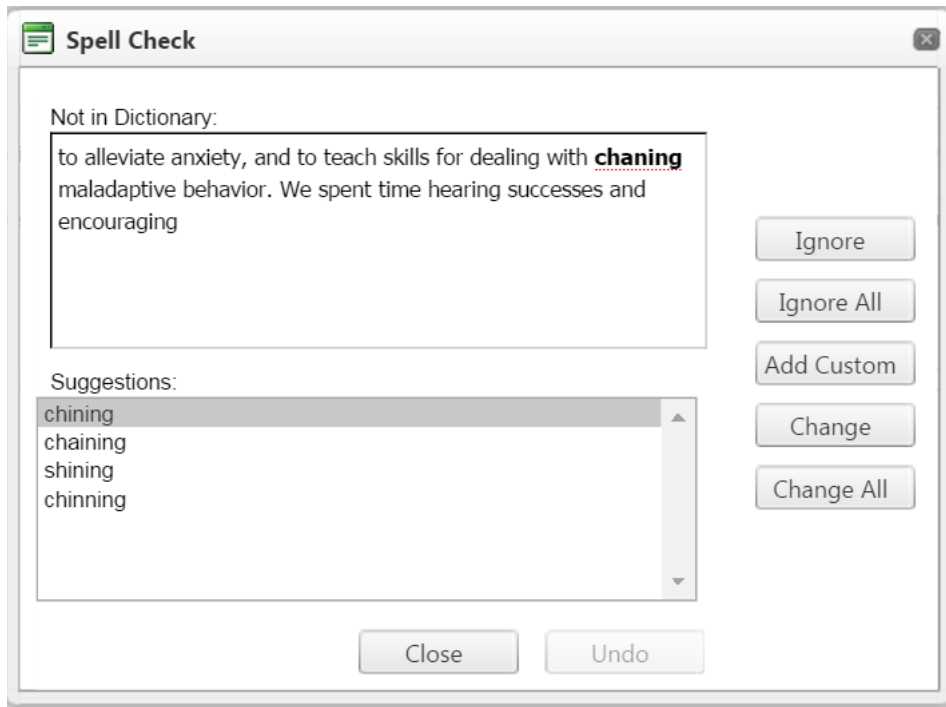
Client Search Window Field Definition

| Field                          | Description   |
|--------------------------------|---|
| Clear button                   | Use to clear any information filled in the field before you conduct a new search.   |
| Include Client Contacts        | Select to include contacts of the client in the search.   |
| 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.                  |
| <b>Name Search tab</b>         |   |
| 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.  |
| <b>Other Search Strategies</b> |   |
| 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. |

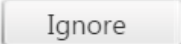

| <b>Field</b>         | <b>Description</b>   |
|----------------------|--|
| <b>Records Found</b> |  |
| ID                   | Identifies the Client's ID assigned in SmartCare.                  |
| Master ID            | Identifies the Client's Master ID if one is assigned in SmartCare. |
| First Name           | 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.                    |


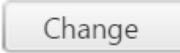

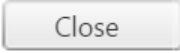
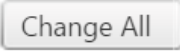
## Miscellaneous

### Spell Check 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   |
|--|---|
| <b>Not in Dictionary</b>   |   |
| <text>   | Displays the text that contains a misspelled word(s). The first misspelled word is bolded and underlined with a red dotted line.  |
| <b>Suggestions</b>   |   |
| Word list  | Words suggested by <i>Spell Check</i> to replace and correct the misspelled word. If no suggestions are listed, place your cursor in the misspelled word in the <i>Not in Dictionary</i> panel and correct the spelling. Click the <b>Change</b> or <b>Change All</b> button to correct the spelling. |
| <b>Buttons</b>   |   |
| Ignore button<br>     | Click the <b>Ignore</b> button to accept the spelling as it is shown in the comment field. Spell check displays and highlights the next misspelled word, if there are any.  |
| Ignore All button<br> | Click the <b>Ignore All</b> button to accept all incidents of the currently highlighted misspelled words as shown in the comment field.   |

| Field  | Description   |
|--|---|
| <p>Add Custom button</p>  | <p>Click the <b>Add Custom</b> button to add the word to the system dictionary. If you add the word with its shown spelling, it will not no longer be shown as a misspelled word. Use this function for words, such as brand name words, or commonly used abbreviations in your facility. By adding these custom words, they will no longer be shown as misspelled.</p> <p>When you click the <i>Add Custom</i> button, a message window asks if you want to add the word to the dictionary. Click <b>Yes</b> to save the word.</p> |
| <p>Change button</p>      | <p>In the <i>Suggestions</i> panel, highlight the correctly spelled word and click the <b>Change</b> button. The next misspelled word is displayed and highlighted in the <i>Not in Dictionary</i> panel.</p>   |
| <p>Change All button</p>  | <p>In the <i>Suggestions</i> panel, highlight the correctly spelled word and click the <b>Change All</b> button to correct all instances of this same misspelled word. The next misspelled word is displayed and highlighted in the <i>Not in Dictionary</i> panel.</p>   |
| <p>Close button</p>       | <p>When you have finished correcting misspelled words, click the <b>Close</b> button. The <i>Spell Check Complete</i> window is displayed if all misspelled words have been corrected or ignored.</p>   |
| <p>Undo button</p>        | <p>Click the <b>Undo</b> button to undo the last action that you took in the <i>Spell Check</i> window.</p>   |

## 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.

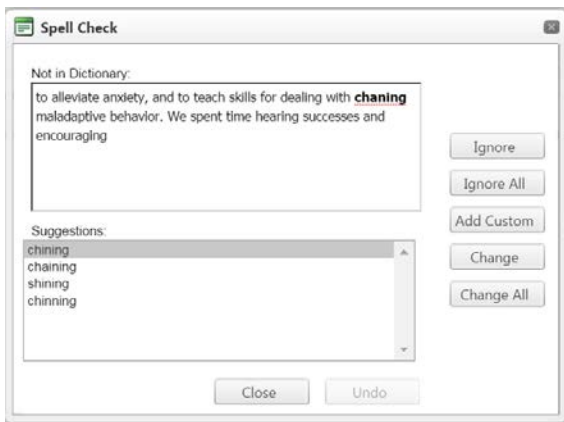
1. Complete all comment fields on a page or window.

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

*Spell Check* searches all comment fields.

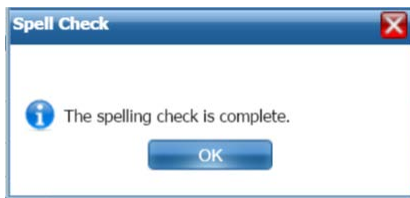
If a misspelled word is found, the *Spell Check* window is displayed.

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](#). (See page 136)



-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?](#)


## Export the Services/Notes List Page

Since you select a client before you display the *Services/Notes* list page, you are exporting information for the selected client.

1. Display the *Services/Notes* (###) list page. [Tell me how...](#) (See page **Error! Bookmark not defined.**)

The *Services/Notes* (###) list page is displayed. View [field definitions](#) (See page 130).

| Auth | DOS              | Status     | Document          | Procedure                       | Clinician         | Program                   | Comment |
|------|------------------|------------|-------------------|---------------------------------|-------------------|---------------------------|---------|
|      | 02/16/2016 09:00 | Show       |                   | PRS Group Weekly 120.00 M...    | De La Fuente, Eva | South Suburbs IOP         |         |
|      | 02/16/2016 09:00 | Show       |                   | PsychoEd Wkly Grp 360.00 M...   | Adams, Olivia     | South Suburbs IOP         |         |
|      | 02/15/2016 09:30 | Show       | Grp Note          | Day Service Non-Bill 60.00 M... | Mauritz, Katie    | Brookhaven ACCESS A       |         |
|      | 02/15/2016 08:00 | Schedul... |                   | PRS Group Weekly 20.00 Min...   | De La Fuente, Eva | South Suburbs IOP         |         |
|      | 02/01/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Frelley, Susan    | Brookhaven CST            |         |
|      | 01/19/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Frelley, Susan    | Brookhaven CST            |         |
|      | 01/18/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Hensley, Katie    | Brookhaven CST            |         |
|      | 01/18/2016 01:00 | Show       | Med Note          | Pharm Mng 60.00 Minutes         | Hensley, Katie    | Calhoun CSI               |         |
|      | 10/29/2015 09:00 | Show       | Shift Summary     | ShiftNote 60.00 Minutes         | Frelley, Susan    | TRI Service Cleaning      |         |
|      | 10/27/2015 10:00 | Show       | IDD Individual... | Individual Service N 60.00 M... | Frelley, Susan    | Brookhaven CST            |         |
|      | 09/30/2015 11:30 | Show       | Grp Note          | Group Therapy 60.00 Minutes     | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/30/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/30/2015 09:00 | Show       | Grp Note          | Group Therapy 90.00 Minutes     | Adams, Olivia     | Chicago Apts Ex Tenants   |         |
|      | 09/30/2015 09:00 | Show       | Grp Note          | Group Therapy 90.00 Minutes     | Adams, Olivia     | Chicago Apts Ex Tenants   |         |
|      | 09/30/2015 08:00 | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | 09/28/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/28/2015 08:00 | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | 09/25/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |
|      | 09/25/2015 08:00 | Schedul... |                   | Daily TheraBH 360.00 Minutes    | Hensley, Matt     | South Suburbs Outpatie... |         |
|      | 09/24/2015 11:00 | Schedul... |                   | PRS Group Weekly 300.00 M...    | Adams, Olivia     | South Suburbs Outpatie... |         |

2. Click the **Export**  icon in the task bar.

The *Export file* tab is displayed in the lower left corner of your screen. Refer to the red box in the figure below.


The screenshot displays a web application interface for viewing services and notes. The main content area is titled "Services/Notes (27)" and contains a table with the following columns: Auth, DOS, Status, Document, Procedure, Clinician, Program, and Comment. The table lists various services such as "Court Appointment 120.00", "Nursing Note 60.00 Minutes", "IDD Ind Therapy 60.00 Minut...", and "Group Therapy 60.00 Minutes". The interface also includes a navigation menu on the left with options like "Documents", "Finance", "Immunizations", and "Client Viewing". At the bottom left, there is a button labeled "ExportData (45).xls" which is highlighted with a red box.

3. Click on the **ExportData.xls** file button in the task bar in the lower left corner of your browser window to open the file in Microsoft Excel.
4. In Excel, you can **Save** the file with a new name and **Print** the file.

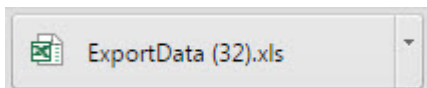
[Why can't I access these screens?](#) (See page **Error! Bookmark not defined.**)

## Export the Records on the List Page

You can export the Services on the list page to an Excel spreadsheet.

1. Display the list page.
2. Filter the list to determine the records that are displayed. [Tell me how...](#) (See page 142)
3. When the records are displayed that you want to export to an Excel spreadsheet, click the **Export**  icon in the tool bar.

The *ExportData* button is displayed in the footer of your browser window.



4. Click on the **button** to open the Excel file.

The file is opened in an Excel spreadsheet. You can edit, print and save the file as needed.

### 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 145).

From the *Permissions* page, you can:

### Determine Which Permissions Are Needed for the Services/Notes Pages

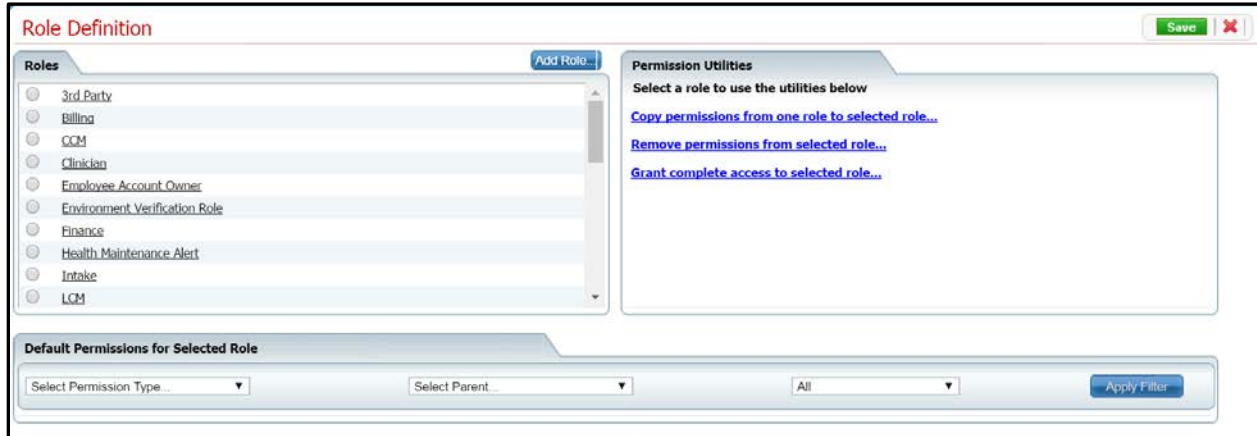
| You Need Permission Type | Parent         | Permission Item                 |
|--------------------------|----------------|---------------------------------|
| Banners                  | Client         | Client Summary (Client Summary) |
| Banners                  | Client         | Services/Notes                  |
| Screen (New Mode)        | Services/Notes | Export                          |
| Screen (New Mode)        | Services/Notes | New                             |
| Screen (New Mode)        | Service Detail | Delete                          |
| Screen (New Mode)        | Service Detail | New                             |
| Screen (New Mode)        | Service Detail | Save                            |
| Screen (Upload Mode)     | Services/Notes | Export                          |
| Screen (Upload Mode)     | Services/Notes | New                             |
| Screen (Upload Mode)     | Service Detail | Delete                          |
| Screen (Upload Mode)     | Service Detail | New                             |
| Screen (Upload Mode)     | Service Detail | Save                            |
| Screens                  | Client         | Add Other Signer                |

## Services and Service Notes User Guide


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| You Need Permission Type | Parent       | Permission Item    |
|--------------------------|--------------|--------------------|
| Screens                  | Client       | ClinicalSummary    |
| Screens                  | Client       | CMClinicalSummary  |
| Screens                  | Client       | PMClinicalSummary  |
| Screens                  | Client       | Comments Interface |
| Screens                  | Client       | Service Detail     |
| Screens                  | Client       | Sign Note          |
| Screens                  | Client       | SignaturePage      |
| Document                 | Codes (Edit) | ClinicalSummary    |
| Document                 | Codes (Edit) | Service Note       |
| Document                 | Codes (View) | ClinicalSummary    |
| Document                 | Codes (View) | Service Note       |

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   |
|---|---|
| <b>Roles</b>  |   |
| 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<br> | Click the Add Role button to add a new role to the system and assign permissions to that role.  |
| <b>Default Permissions for Selected Role</b>  |   |
| 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.   |
| <b>Permission Utilities</b>   |   |
| 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.  |