



Easter Seals Autism Services

CLINICIENT USER'S GUIDE



CONTENTS

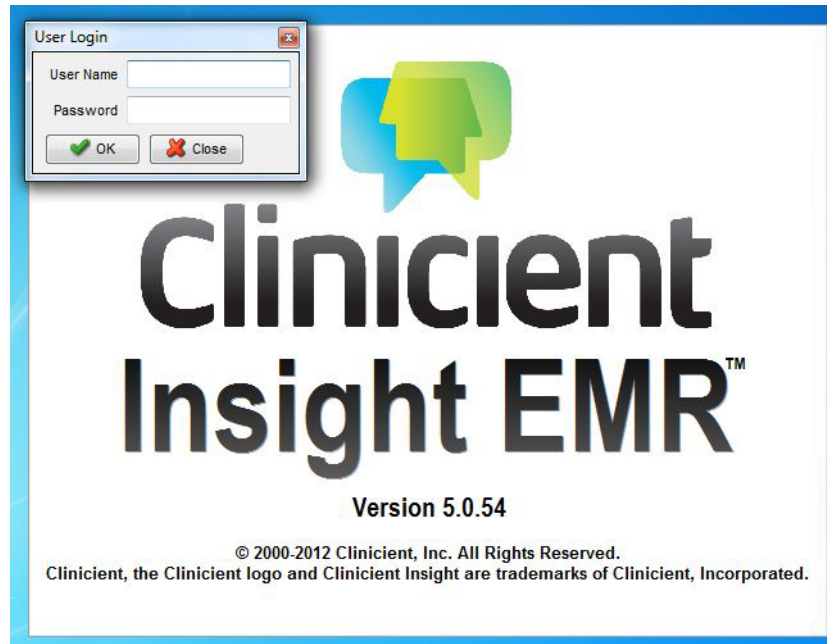
Getting Started	1
Logging On.....	1
Logging Off	2
Technical Support	2
Front Desk	3
Client Registration	3
Setting Up a New Client.....	3
Editing an Existing Client	6
Creating Staff Schedules	7
Scheduling Appointments	9
The Schedule Tab	9
Scheduling an Appointment	9
Interventionists	13
The Schedule Tab	14
Viewing Appointments.....	14
Checking in Clients.....	15
Entering SOAP Notes	17

GETTING STARTED

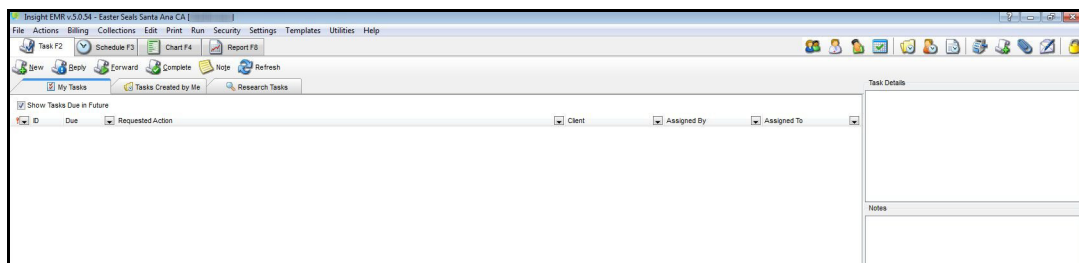
Logging On

To log on to Clinicient, do the following:

1. Open Clinicient by double-clicking the **Insight EMR** icon  on the desktop. The *User Login* screen displays.



2. Type your user name and password, then click **OK**. The main *Clinicient* screen opens.



3. Make sure your user name is displayed in the upper-left corner of the screen. You are now ready to do your work.

Logging Off

To log off Clinicient, select **File > Exit**.

Technical Support

The technical support department can be contacted using either of the following:

- Phone: (714) 834-1111 or (800) 281-8108 > select option 4
- E-mail: support@essc.org

FRONT DESK

The Front Desk role consists of performing the following tasks:

- Client registration
- Creating and managing staff schedules
- Scheduling and managing client appointments

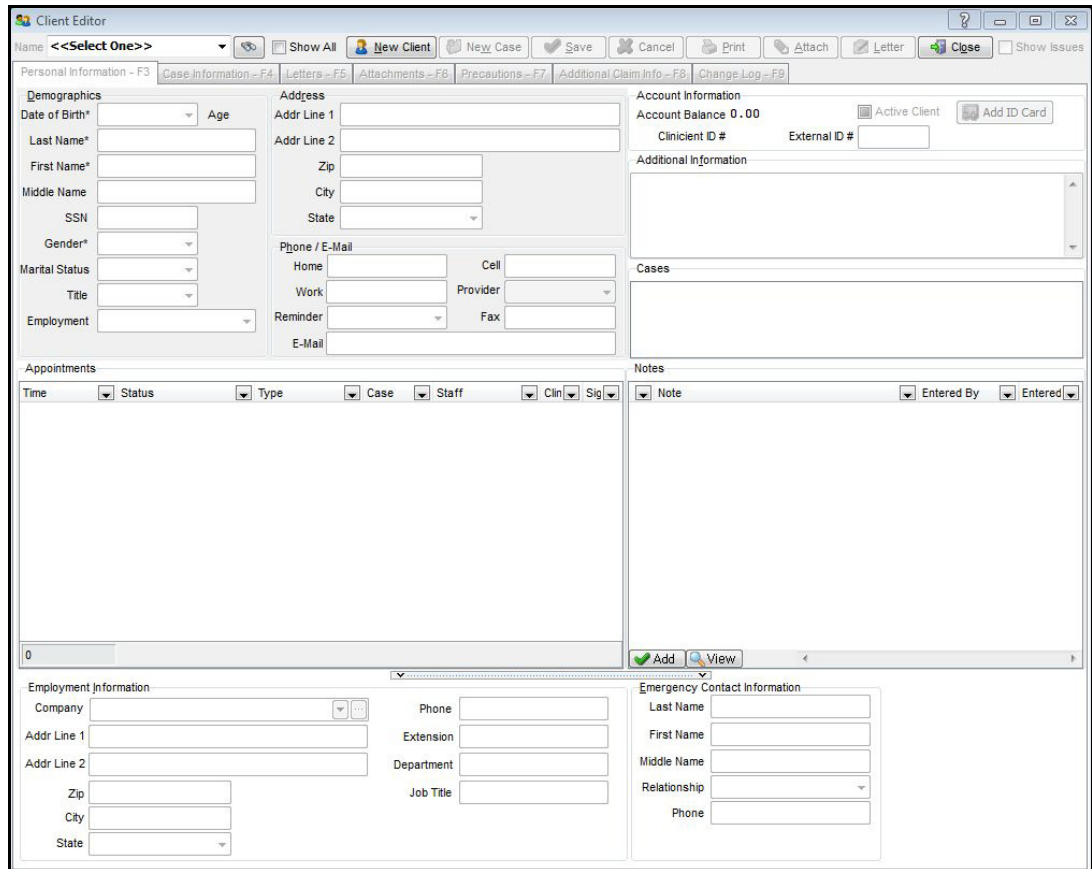
Client Registration


Setting Up a New Client

When a referral authorization is received from an insurance company for a new client, the Front Desk role needs to set up the client in Clinicient.

To set up new client in Clinicient, do the following:

1. Select **Edit > Clients**. The *Client Editor* opens.



2. Click the **New Client**  button. The fields in the screen become active. Make sure the *Personal Information* tab is displayed.

Personal Information Tab

As you enter the following information, be sure to save your work by clicking **Save**.

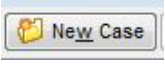
1. Enter the following information in the *Personal Information* tab:
 - Date of Birth
 - Last Name/First Name
 - Gender
 - Address (when the zip code is entered, the city and state fields will automatically populate)
 - The phone number(s), e-mail address, and employment information for the child's parents
 - Reminder — select *Email* if the client has consented to receive automated e-mail reminders
 - E-Mail address
 - Emergency contact information

2. Make sure the **Active Client** check box in the Account Information section (located next to the Address section) is selected.
3. When you have finished entering the information in the *Personal Information* tab, click **Save**.
4. Click the *Case Information* tab.

Case Information Tab

As you enter the following information, be sure to save your work by clicking **Save**.

Cases

1. Click the **New Case**  button. The *New Case Description* pop-up opens.
2. Type the description for **one** of the services that the client will be receiving using the following options (if the client has more than one case, just specify one case at this time — you will be able to enter additional cases after the first case is created):
 - ABA
 - Occupational Therapy
 - Physical Therapy
 - Speech Therapy
3. Click **OK**. The case displays in the *Cases* panel on the left side of the Client Editor.
4. Specify the following information in the *Case Information* section:
 - Signature Date and Admit Date (this is the *Valid From* date on the referral authorization form)
 - Authorized to Receive Payment (select the check box)
 - The facility that will be providing the treatment
 - The supervisor at the selected facility
 - The facility's program type

Referral Information

Select the Referral Source and Referring MD using the drop-down arrows. If the referring physician's name is not listed in the *Referring MD* drop-down menu, click the ellipses to add the physician's contact information.

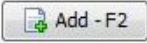
Diagnoses

To add a diagnosis for the client, do the following:

1. Click **Add**. A blank line displays.
2. Do one of the following:
 - Click the drop-down arrow, then locate the desired ICD code.
 - Click the ellipses, then search for the desired description and/or ICD code.

Payer Information

This section is used to enter the client's insurance information.

1. Click the **Add - F2**  button. The *Primary Payer* tab becomes active, and the *Version* field is populated.
2. Complete the information on the *Primary Payer* tab. Use the ellipses if the information must be created. In the *Member ID* field, type the client's Medical Record Number. In the *Co Pay* field, type the member's copay amount.

If it becomes necessary to add additional insurance information or edit the client's existing insurance information at a later point, click the **Edit - F2** button.

Insurance Authorizations

To add insurance authorization information, click **Add** in the Insurance Authorizations section, then enter the desired information.

If it becomes necessary to add an insurance authorization or edit an existing insurance authorization at a later point, click the **Edit - F2** button.

Place of Service Information


Specify the default Place of Service using the *Default P.O.S.* drop-down arrow. The available options are Home and Clinic.

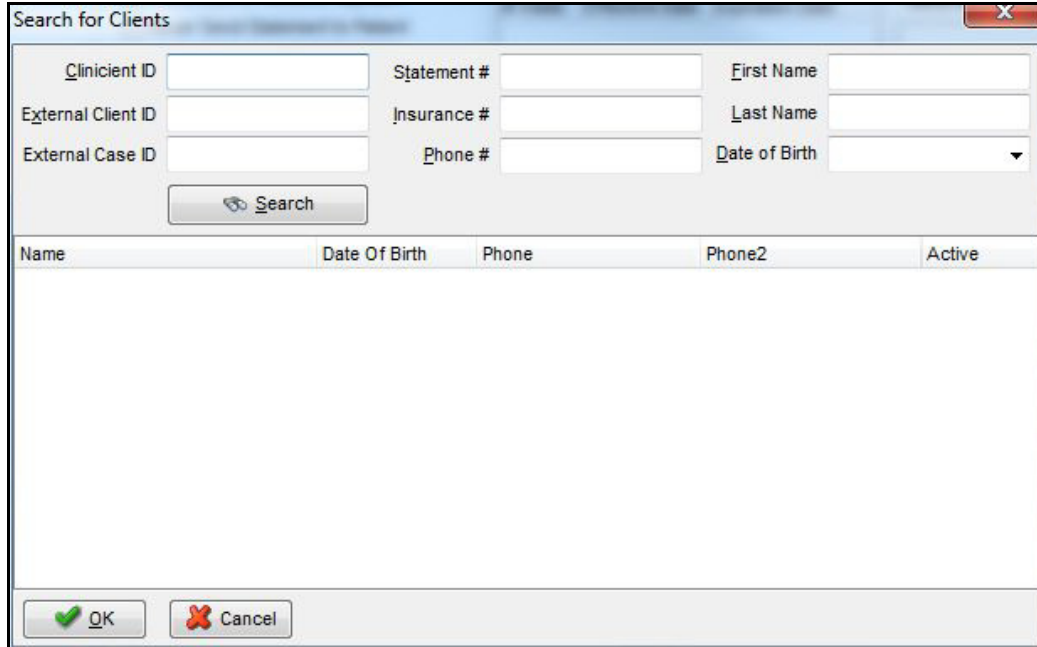
Notes

Enter the name and contact information for the Kaiser Permanente case manager, along with any other additional information about the client for the selected case (for example, where to fax clinical notes to).

Editing an Existing Client

To edit an existing client's information, do the following:

1. Select **Edit > Clients**. The *Client Editor* opens.
2. Do one of the following:
 - Click the **Name** drop-down arrow and select the desired client.
 - Click the **Search for Clients**  icon. The *Search for Clients* dialog box opens. Use these fields to locate the desired client.




Name	Date Of Birth	Phone	Phone2	Active
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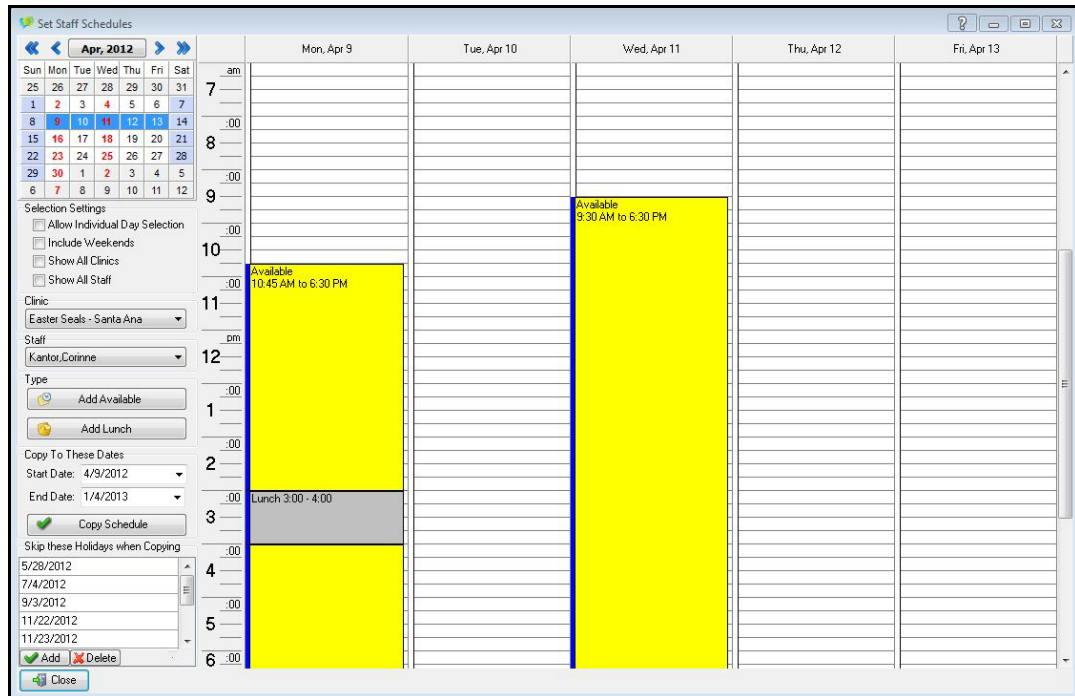
3. When you have located the client, make the desired changes, then click **Save**.


Creating Staff Schedules

Staff availability schedules must be set up in Clinicient before appointments can be made for staff members.

To create a staff schedule, do the following:

1. Click the **Staff Schedule**  icon. The *Set Staff Schedules* dialog box opens.



2. Use the Calendar Control to select the day(s) you wish to view for setting up a schedule.
3. If necessary, use the *Selection Settings* to specify options for creating staff schedules.
4. Use the *Clinic* and *Staff* drop-down arrows on the left panel to select the desired staff member.
5. Click the **Add Available**  button, then click the hour of the day when the staff member is available to start work. By default, nine hours of time are made available in an appointment block (eight hours of work time and one hour for lunch).

To schedule a lunch break, click the **Add Lunch**  button, then click the hour of the day when the staff member will be taking lunch.

To adjust the length of the *Available* and *Lunch* blocks, click the blue border at the bottom of the block, then drag it up or down to decrease or increase the number of hours in the appointment block. To adjust the starting time of a block, click the dark blue border at the top of the block, then drag the block into the appropriate location.

6. When you have finished creating the staff member's schedule, click **Close**.

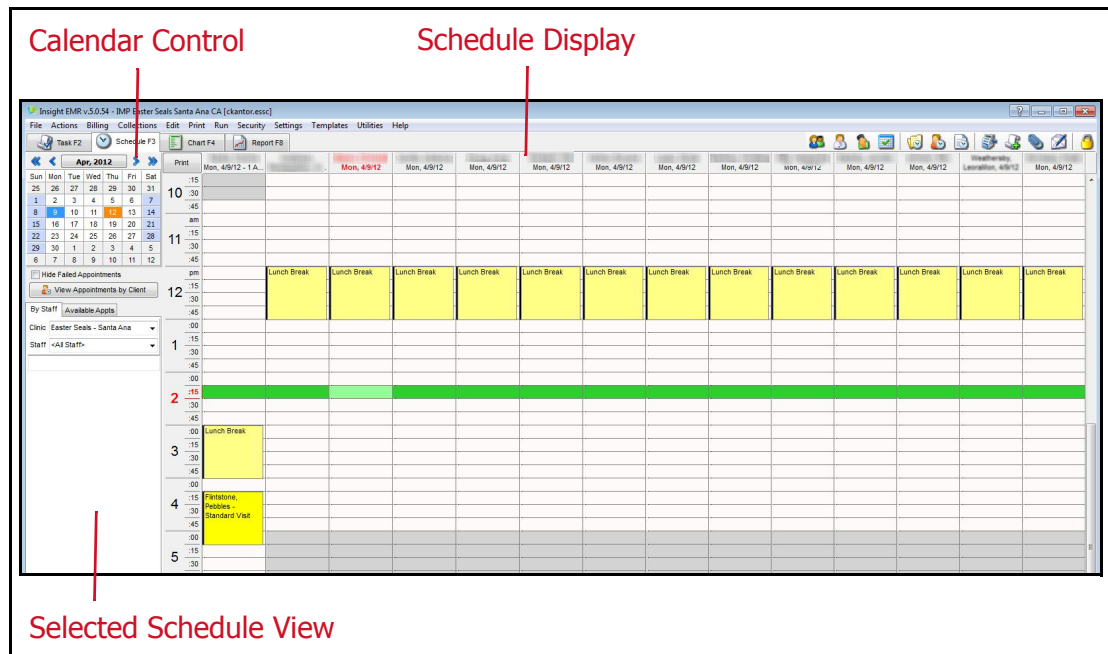
Copying Schedules

Clinicient allows you to copy an existing schedule to a specific date range. This is helpful so that you will not have to manually create a schedule for each day of availability. To copy a schedule, select the *Start Date* and *End Date* in the *Copy To These Dates* section,

then click the **Copy Schedule**  button.

Scheduling Appointments

The Schedule Tab




The *Schedule* tab contains the following areas:

- **Schedule Display** — displays all of the scheduled appointments for interventionists
- **Calendar Control** — select the days you wish to view appointments for
- **Selected Schedule View** — apply filters to the Schedule Display, display all of the appointments for a specific client, and display all of the available appointments for a clinic or an interventionist

Scheduling an Appointment

Viewing available appointment times

Before an appointment can be scheduled for an interventionist, it is important to view the appointment times that are available for the interventionist. To do this, click the *Available Appts* tab on the left panel, then select the desired clinic, staff member, and time frame.



Day	Date	Start	End
Mon	04/16	9:30 a	6:30 p
Wed	04/18	9:30 a	6:30 p
Mon	04/23	9:30 a	6:30 p
Wed	04/25	9:30 a	6:30 p
Mon	04/30	9:30 a	6:30 p
Wed	05/02	9:30 a	6:30 p
Mon	05/07	9:30 a	6:30 p
Wed	05/09	9:30 a	6:30 p
Mon	05/14	9:30 a	6:30 p
Wed	05/16	9:30 a	6:30 p
Mon	05/21	9:30 a	6:30 p
Wed	05/23	9:30 a	6:30 p

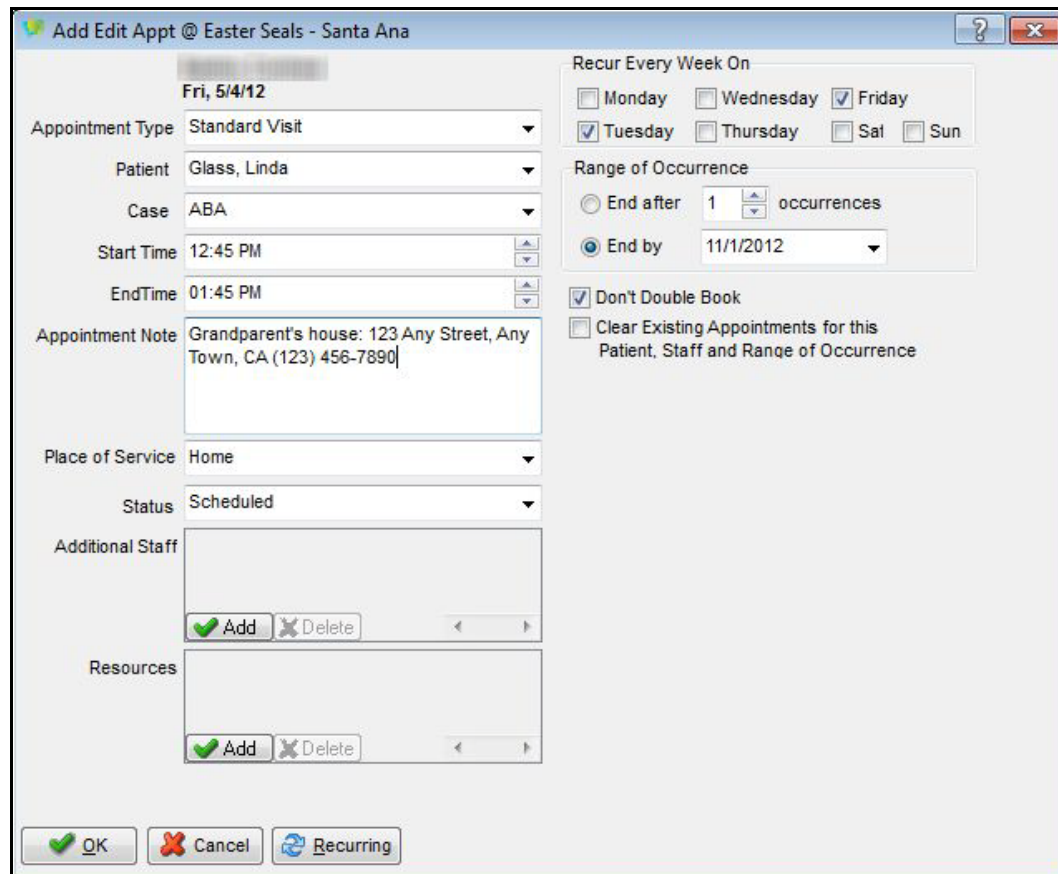
(The *By Staff* tab is used to select the clinic and staff members you want to view existing schedules for.)

Now that you can see the time slots that are available, you can schedule an appointment.

1. On the *Available Appts* tab, select the desired clinic and the staff member.
2. In the Schedule Display area, right-click the start time and day of the desired appointment, then click **New Appointment**. The *Add Edit Appt* dialog box opens.



3. Select the appointment type, patient, case, and place of service.
4. Click the **Show Detail** button (if the appointment details are not already displayed).
5. If necessary, adjust the start time and end time of the appointment.
6. In the Appointment Note field, enter the address where the appointment will be taking place.
7. If other staff members will be included in the appointment, use the **Additional Staff** drop-down to select the additional staff members.
8. If this is going to be a recurring appointment, click the **Recurring** button, then select the appointment details.



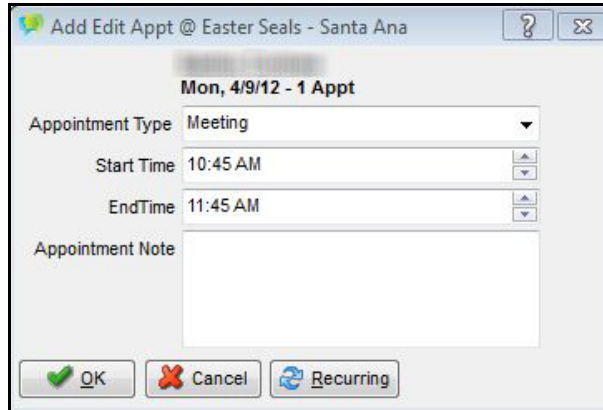
9. When you have finished making the appointment, click **OK**. The appointment displays in green.

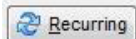
Schedule other reserved times

In addition to client appointments, Clinicient allows appointment blocks such as meetings, personal time, and out of office to be added to staff schedules.

To add this type of appointment block, do the following:

1. On the *By Staff* tab, select the desired clinic and staff member.
2. In the Schedule Display area, right-click the start time and day of the desired appointment, then click **Add "Other" Appointment**. The *Add Edit Appt* dialog box opens.



3. Make the following selections:
 - **Appointment Type:** Specify if this appointment block is being scheduled for a meeting or personal time, or if the staff member will be out of the office. The Block Type column designates if the appointment block will prevent a client appointment from being scheduled.
 - **Start Time/End Time:** Specify the start and end time for the appointment.
 - **Appointment Note:** If necessary, enter a note relating to this specific appointment.
4. If this is a recurring appointment, click the **Recurring**  button and specify the details.
5. When you have finished creating the appointment, click **OK**.



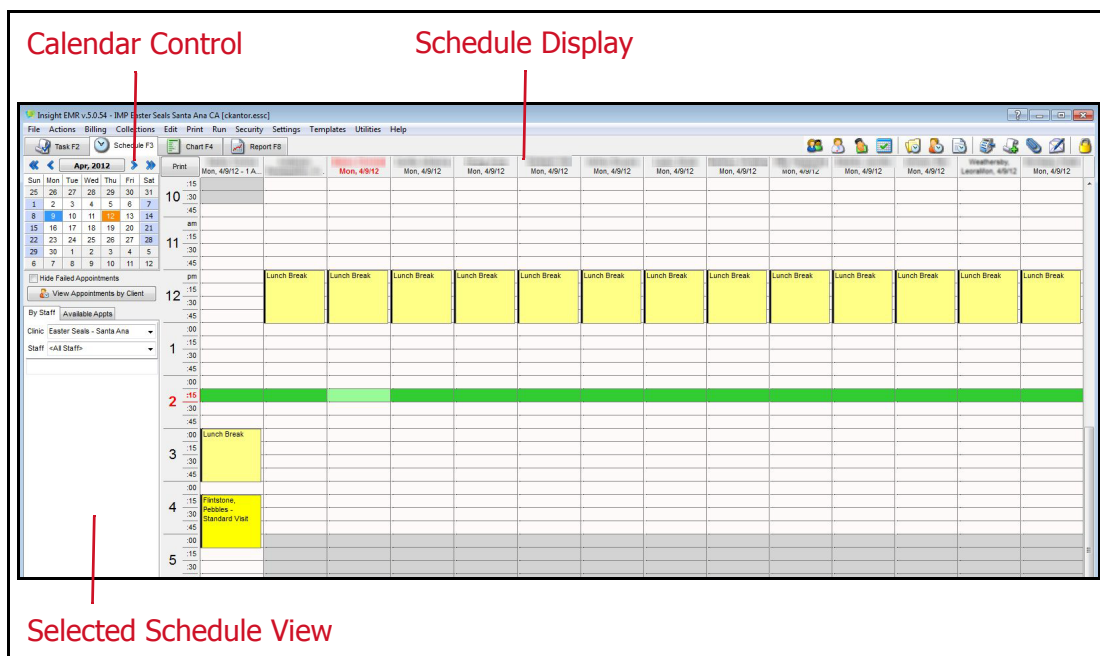
To schedule this appointment type for multiple staff members, schedule the appointment for one staff member, then copy the appointment by right-clicking the appointment and selecting **Copy**. You can then paste the appointment into other staff members schedules.

INTERVENTIONISTS

The Interventionist role consists of performing the following tasks:

- Viewing appointments
- Checking in clients for scheduled appointments
- Documenting SOAP notes and signing clients charts

The Schedule Tab



The *Schedule* tab contains the following areas:

- **Schedule Display** — displays all of the scheduled appointments for interventionists
- **Calendar Control** — select the days you wish to view appointments for
- **Selected Schedule View** — apply filters to the Schedule Display, display all of the appointments for a specific client, and display all of the available appointments for a clinic or an interventionist

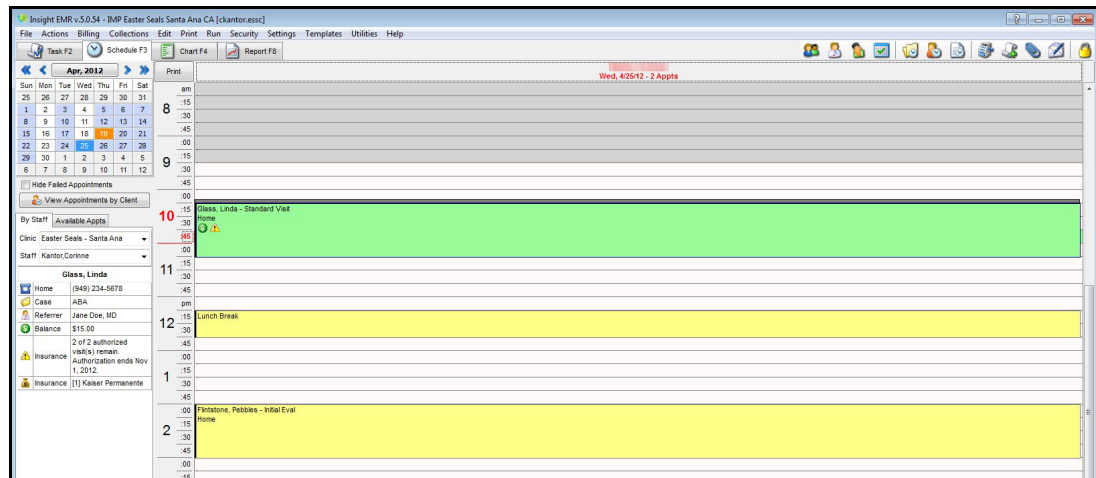
Viewing Appointments

It is important that interventionists check their appointment schedule on a regular basis to see what appointments have been scheduled for them, and if any changes have been made to their schedule.

To view your scheduled appointments, do the following:

1. Click the *Schedule* tab.
2. Click the *By Staff* tab on the left panel.
3. Use the *Clinic* drop-down arrow to select the clinic you are assigned to.
4. Use the *Staff* drop-down arrow to select your name.

5. Use the Calendar Control to select which days you wish to view your schedule. Your scheduled appointments now display.



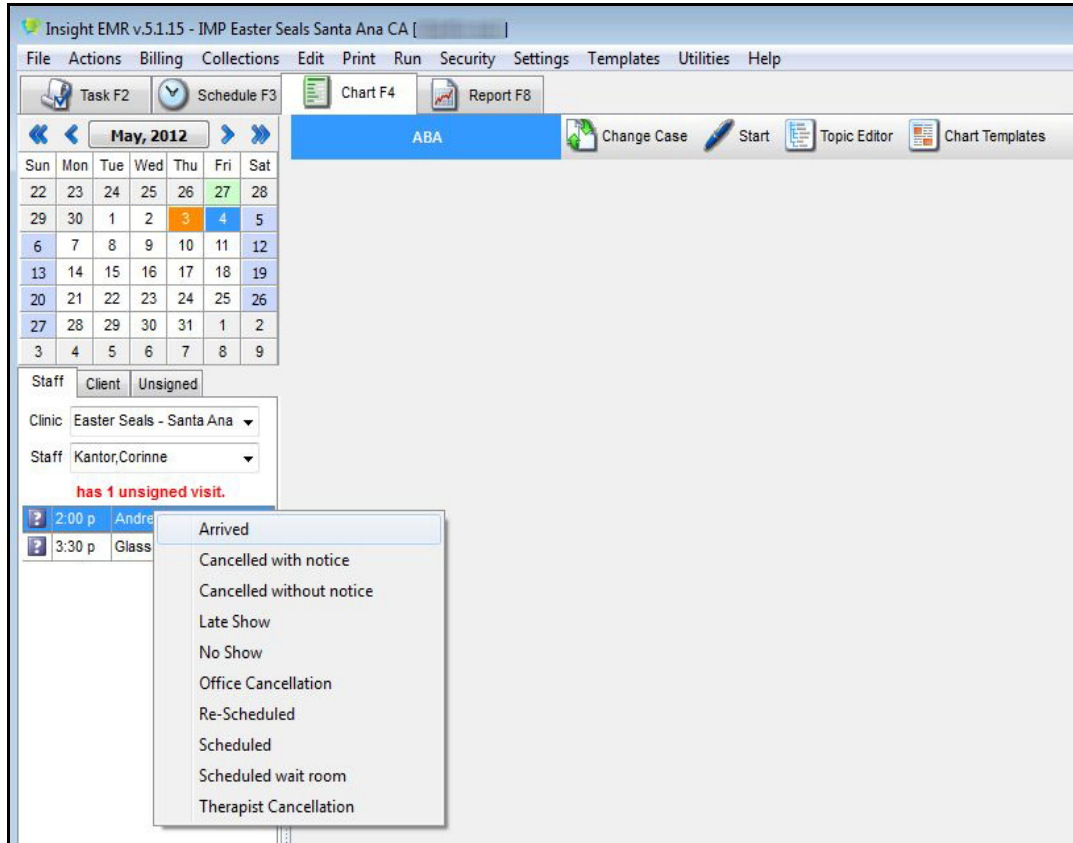
6. To view additional details for an appointment, simply click the appointment. The additional information displays in the left panel.

Checking in Clients

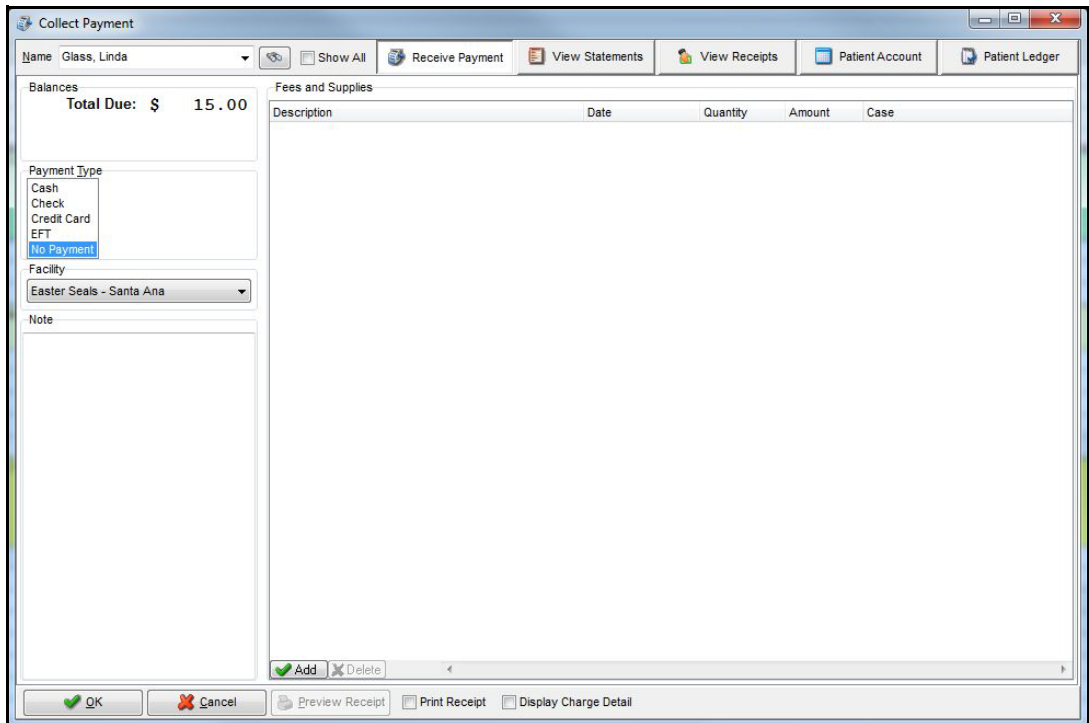
Upon arriving for a client's appointment, you must designate the client as having arrived for the appointment. This will generate the client's medical chart for the scheduled appointment.

To check in a client, do the following:

1. Select the current day in the Calendar Control.
2. Click the *Chart* tab, then click the *Staff* tab on the left side.
3. Right-click on the desired appointment, then select **Arrived**. (If the client is late, select **Late Show**.)



If the *Collect Payment* dialog box opens, select **No Payment** in the *Payment Type* list, then click **OK**.





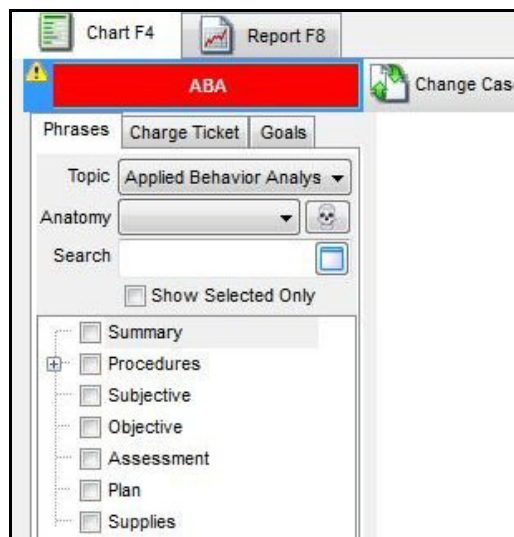
Interventionists will not be accepting co-payments from clients.

Entering SOAP Notes

After a client has been designated as “arrived” for an appointment, the SOAP notes can be entered for the client’s chart.

To enter SOAP notes, do the following:

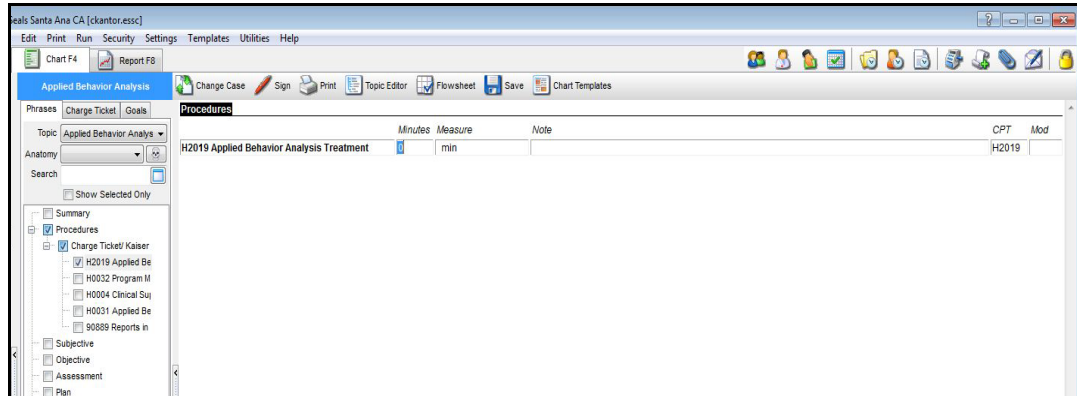
1. Make sure the client’s blank chart is displayed.
2. Click the *Phrases* tab.
3. If necessary, select the desired topic using the *Topic* drop-down arrow.



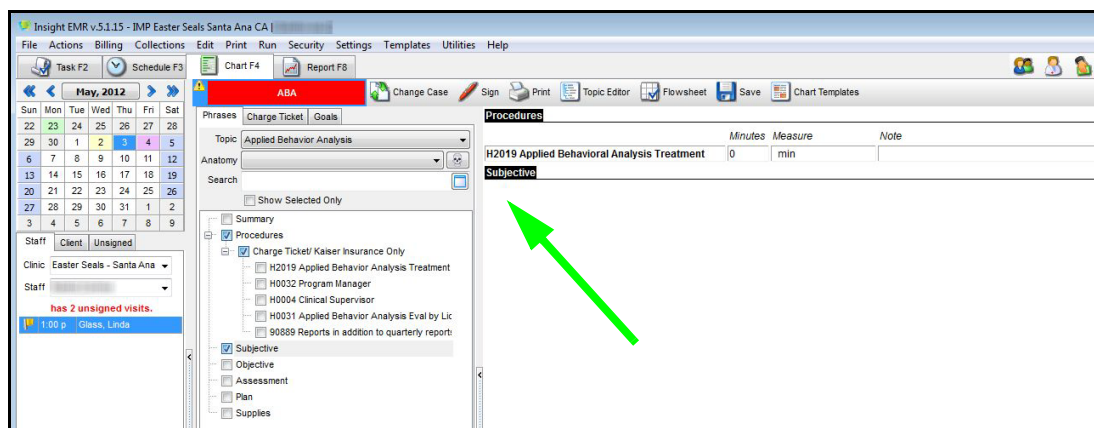
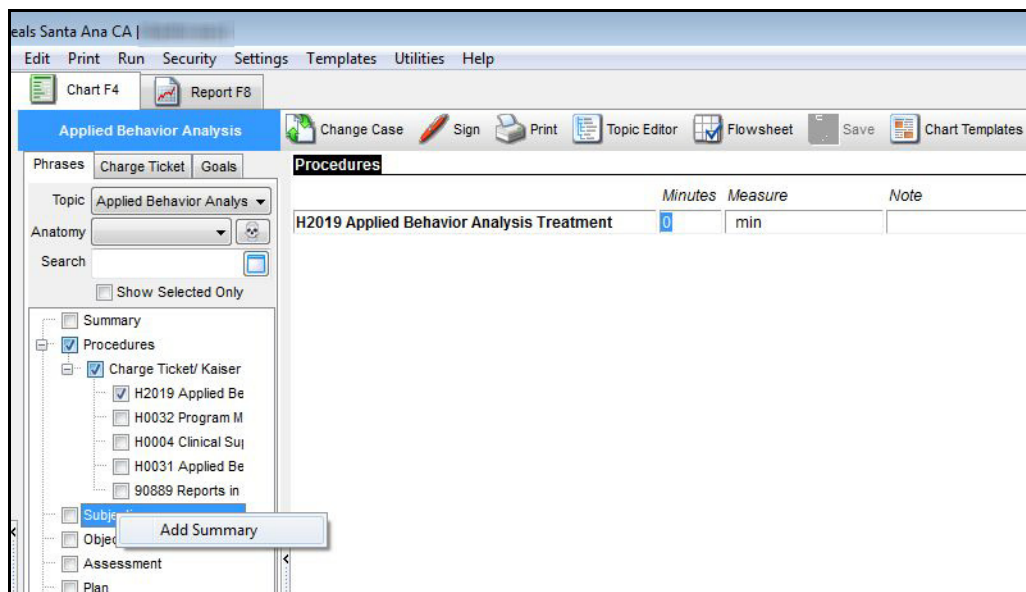
4. Click the **Procedures** plus sign to display the charge ticket for the selected topic.
5. Select the procedures that will be performed during the client’s appointment. Upon completion of the appointment, you will specify the amount of time spent for each procedure.


The following procedures are available:

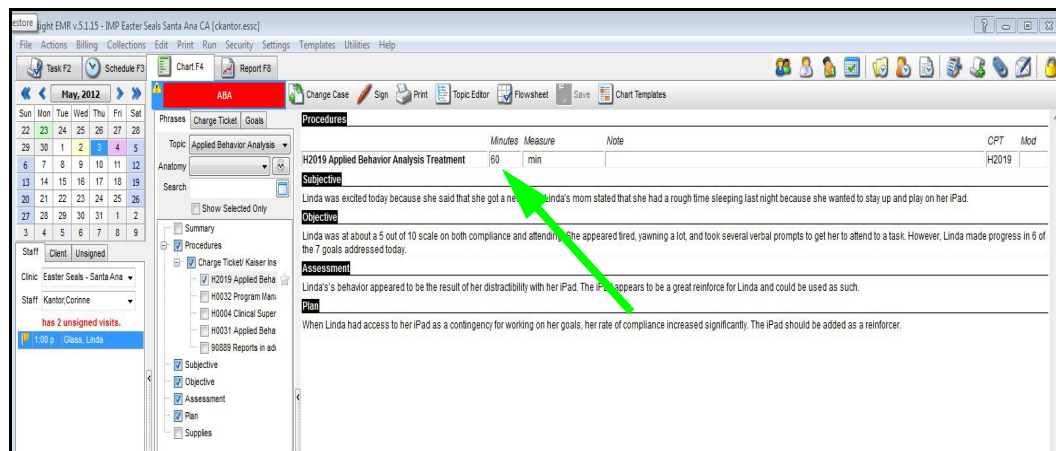
- **H2019:** Applied Behavior Analysis Treatment
- **H0032:** Program Manager
- **H0004:** Clinical Supervisor
- **H0031:** Applied Behavior Analysis Evaluation by a Board Certified Behavior Analyst (BCBA) or those with a state license
- **90889:** Reports in addition to quarterly reports for members under five years old and biannual reports for Member over six years old (if requested and authorized)




- To enter your SOAP notes, simply right-click on the type of note you wish to enter (Summary, Subjective, Objective, Assessment, Plan, Supplies), then click **Add Summary**. A new heading corresponding to the type of SOAP note you selected displays.



- To begin typing your SOAP note, simply start typing below the heading. Be sure to save your notes as you type them by clicking the **Save**  button.
- Specify the amount of time spent on each procedure in the Procedures section above the SOAP notes. If necessary, document any notes in the Note section.



- When you have finished documenting your SOAP notes and procedures, you are ready to sign the chart. To sign the chart, click the **Sign**  button. The *Sign Chart Notes* dialog box opens. Confirm that all of the information is accurate. If you need to make a change, click **Cancel**, then make the desired change.

Sign Chart Notes

Visit Time and Location

Time In: 12:15 PM Time Out: 01:15 PM 60 of 60 Minutes

Place of Service: Clinic

Charge Ticket

CPT	Mod1	Unit	Min
H0031		1	45
H2019		1	15

Actions

Issues

Routing

Supervisor: _____

Printing

Format: _____

Printer: HP LaserJet P2035n

Print after Signing

Electronic Signature for ckantor.essc

Password: _____

Sign Off Cancel New Task Edit Case Preview

10. Upon confirming that the information is accurate, sign the chart by typing your Clinicient password in the *Password* field, then click **Sign Off**. The chart is now signed.