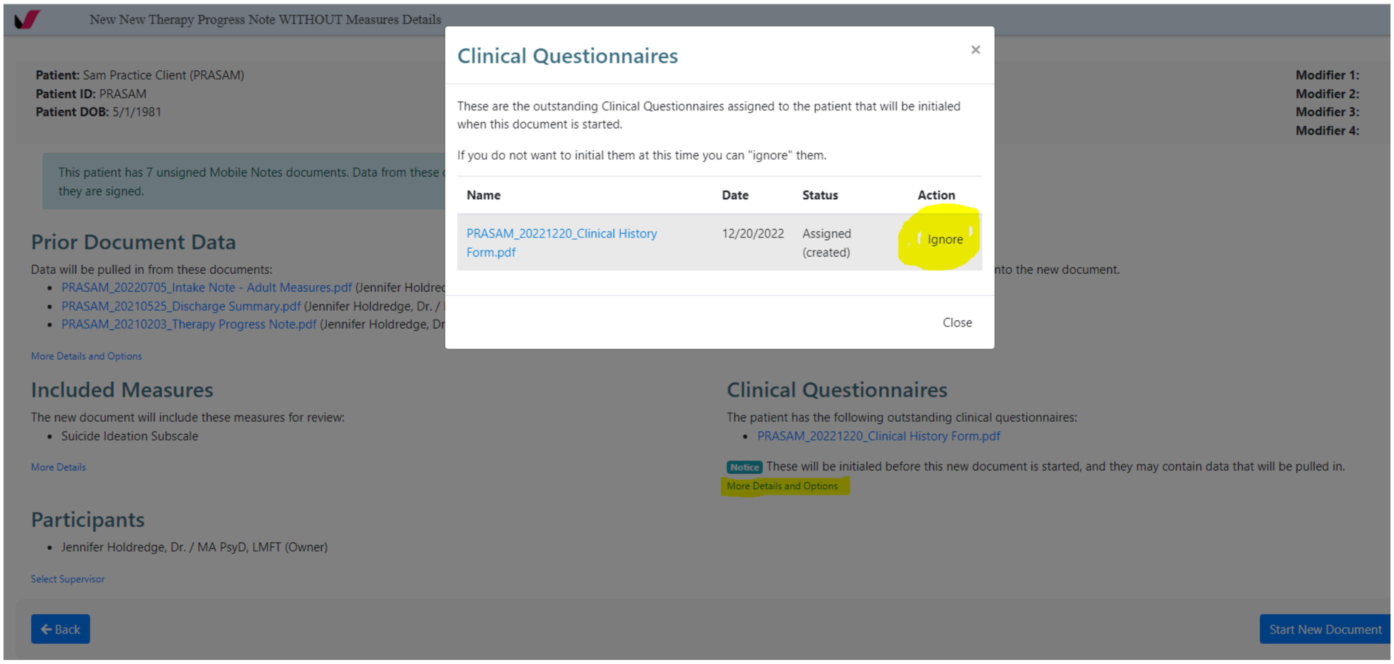
Client Portal & Measures: Important Information

Before Starting a Mobile Note:

Before starting ANY type of Mobile Note to document a Visit using the Measures, therapists must first look in the Uninitialed Documents tab to see if the Measures are there. If so, that means the Measures have been completed by the client.

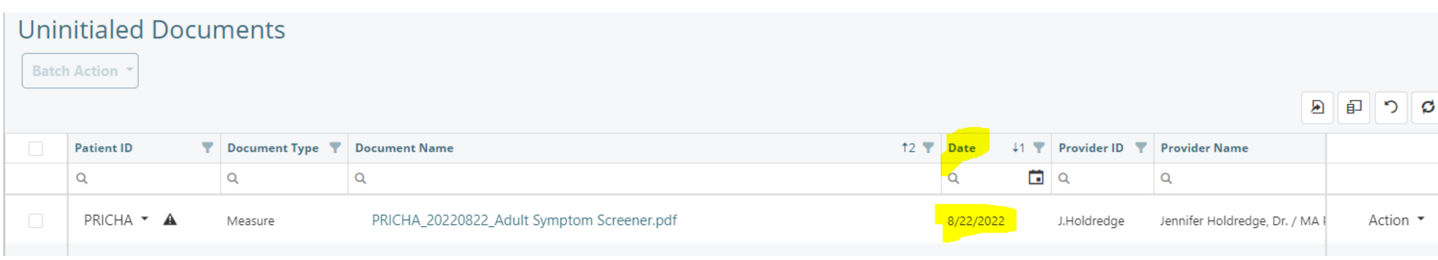
Measures NOT in Uninitialed Documents tab:

If the Measures are NOT in the Uninitialed Documents tab PRIOR to the start of the Visit that is being documented, then a Mobile Note Progress Note (without Measures) must be used AND the Clinical History form MUST be "Ignored" before clicking Start New Document. If both of these steps are not done, then the Measures will be pulled from the Portal and be blank. Using the Mobile Note Progress Note (without Measures) ensures that the Screening forms are not pulled and "Ignoring" the Clinical History form ensures that it is not pulled.



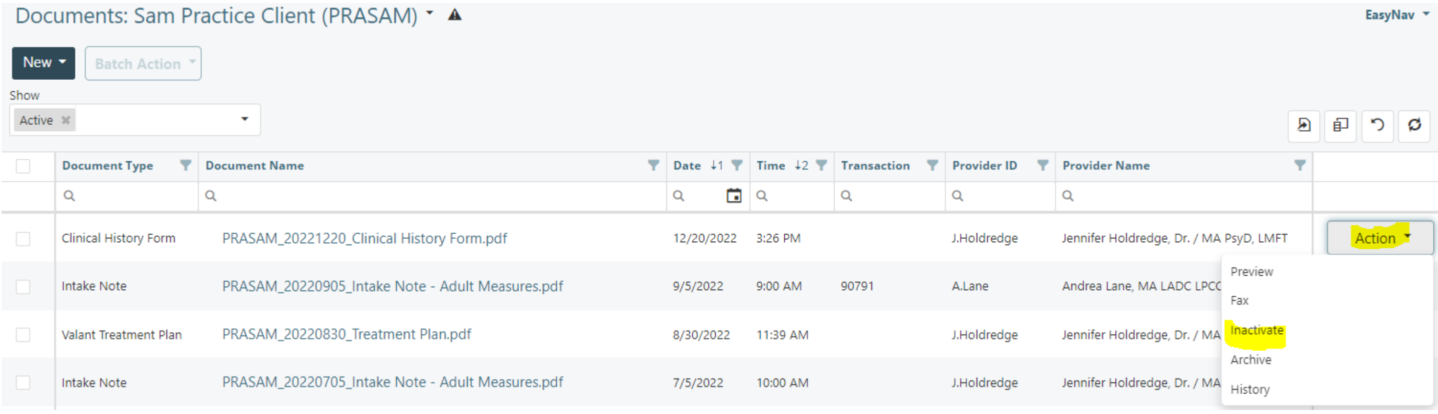
Measures cannot be pulled into a Mobile Note retroactively:

The Mobile Note for a Visit must be created AFTER the date that the Measure is completed. Notice the Date shown next to the Measure as it must be a date that is on or before the Visit that is being documented. If the date is after the Visit that is being documented, then that Visit cannot include the Measures and the Measures NOT in the Uninitialed Documents tab (see above) must be followed for that Visit.



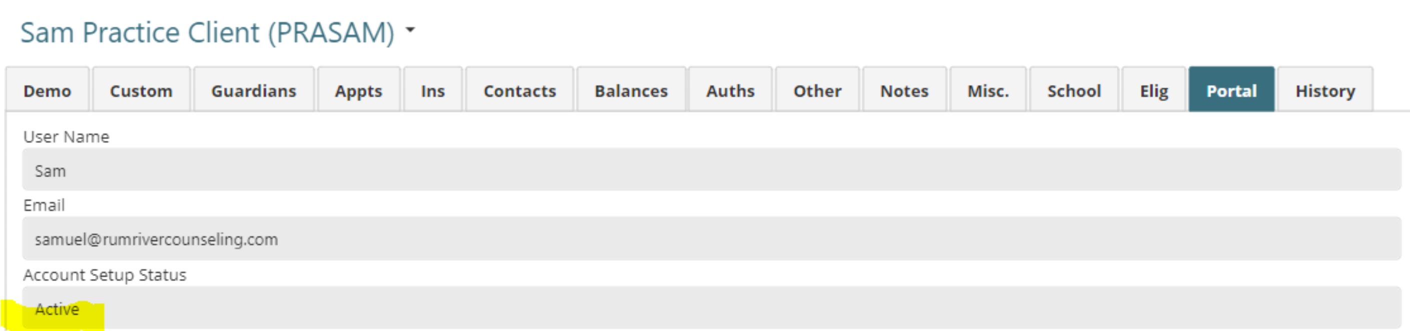
If a Measure is Pulled from the Portal:

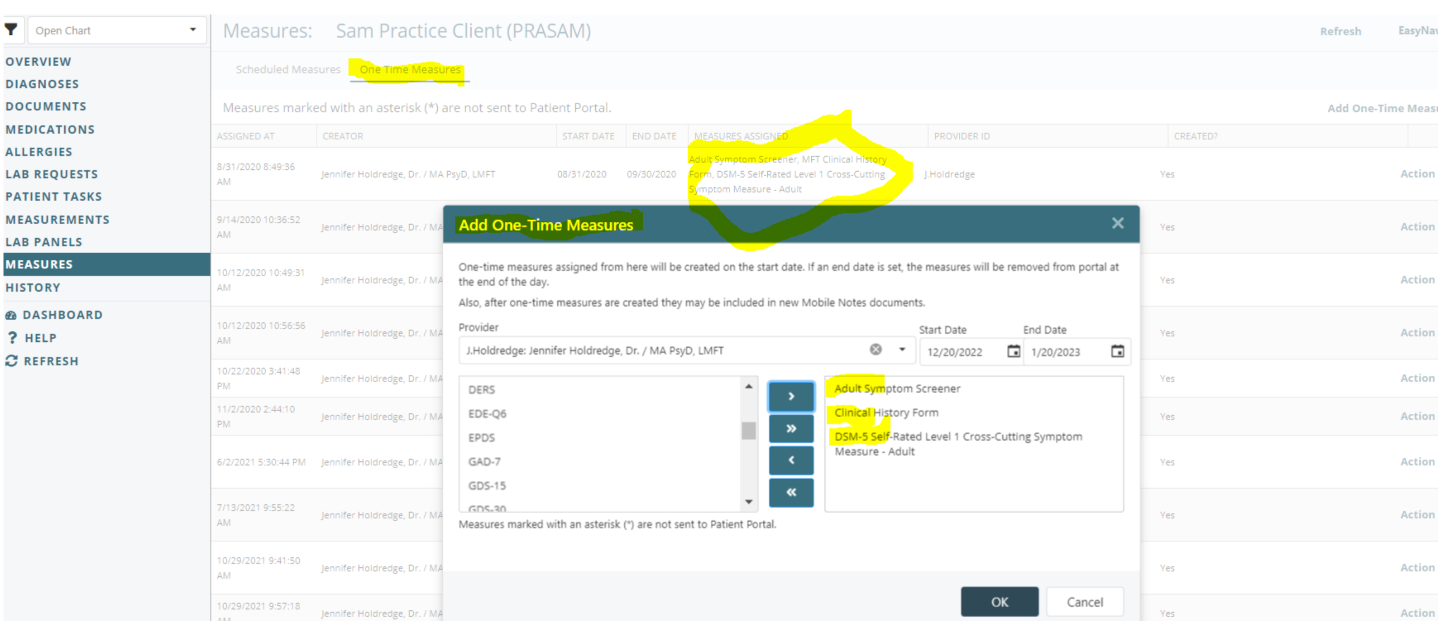
If a therapist pulls a Measure out of the Portal, go to Patient Chart – Documents, and click on the PDF of the Document to open/view it to ensure that it is blank. Then, click Action and Inactivate as we want to ensure that blank Measures are not Active or they can impact pulling new Measures into the note. New Measures must be sent to the Portal for the client to complete.



Portal must be Active:

The client Portal must be Active in order for the client to complete the Measures. Always look in Patients to see that the Portal is Active, then look in Uninitialed Documents for the completed Measures. If the Portal is active and the client does not see the Measures, you can resend the Measures by going to the Patient Chart – Measures – One Time Measure and assigning the same Measures that were previously sent. There is sometimes a delay from when the portal is Activated to when the Measures show up. Clients may also need to Refresh the Portal page or log out and back in to see the Measures.





Billing Codes

If the Measures are not completed prior to the Intake Appt visit, then you would NOT bill the visit as a 90791 Intake. Instead, you would select a follow up visit billing code (90834, 90837, 90847, 90846 and if you bill 90834 or 90837, you can add the complexity code 90785). Select a Diagnosis based on info received at the first visit and/or info from the Intake Email. Do not use Z or V codes (ever).

Once the Measures are completed, you may bill the subsequent session as 90791. If appropriate, you can edit/update the diagnosis with the new info received from the Measures.

If the Measures have expired (look in Patient Chart – Measures – One Time Measure) then alert admin to resend the Measures (reply all to the Intake Email).