

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.

The screenshot shows a web interface for creating a new therapy progress note. A modal window titled "Clinical Questionnaires" is open, displaying a table of assigned questionnaires. The table has columns for Name, Date, Status, and Action. One entry is highlighted with a yellow circle around the "Ignore" button in the Action column.

Name	Date	Status	Action
PRASAM_20221220_Clinical History Form.pdf	12/20/2022	Assigned (created)	Ignore

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.

The screenshot shows the "Uninitialed Documents" tab with a table of documents. The table has columns for Patient ID, Document Type, Document Name, Date, Provider ID, and Provider Name. One document is highlighted with a yellow box around the date.

Patient ID	Document Type	Document Name	Date	Provider ID	Provider Name
PRICHA	Measure	PRICHA_20220822_Adult Symptom Screener.pdf	8/22/2022	J.Holdredge	Jennifer Holdredge, Dr. / MA

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.

Documents: Sam Practice Client (PRASAM) EasyNav

New Batch Action

Show Active

<input type="checkbox"/>	Document Type	Document Name	Date	Time	Transaction	Provider ID	Provider Name	
<input type="checkbox"/>	Clinical History Form	PRASAM_20221220_Clinical History Form.pdf	12/20/2022	3:26 PM		J.Holdredge	Jennifer Holdredge, Dr. / MA PsyD, LMFT	Action
<input type="checkbox"/>	Intake Note	PRASAM_20220905_Intake Note - Adult Measures.pdf	9/5/2022	9:00 AM	90791	A.Lane	Andrea Lane, MA LADC LPC	Preview Fax Inactivate Archive History
<input type="checkbox"/>	Valant Treatment Plan	PRASAM_20220830_Treatment Plan.pdf	8/30/2022	11:39 AM		J.Holdredge	Jennifer Holdredge, Dr. / MA	
<input type="checkbox"/>	Intake Note	PRASAM_20220705_Intake Note - Adult Measures.pdf	7/5/2022	10:00 AM		J.Holdredge	Jennifer Holdredge, Dr. / MA	

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.

Sam Practice Client (PRASAM)

Demo	Custom	Guardians	Apts	Ins	Contacts	Balances	Auths	Other	Notes	Misc.	School	Elig	Portal	History
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User Name: Sam

Email: samuel@rumrivercounseling.com

Account Setup Status: Active

Measures: Sam Practice Client (PRASAM) Refresh EasyNav

Scheduled Measures One-Time Measures

Measures marked with an asterisk (*) are not sent to Patient Portal. Add One-Time Measure

ASSIGNED AT	CREATOR	START DATE	END DATE	MEASURES ASSIGNED	PROVIDER ID	CREATED?	
8/31/2020 8:49:36 AM	Jennifer Holdredge, Dr. / MA PsyD, LMFT	08/31/2020	09/30/2020	Adult Symptom Screener, MFT Clinical History Form, DSM-5 Self-Rated Level 1 Cross-Cutting Symptom Measure - Adult	J.Holdredge	Yes	Action
9/14/2020 10:36:52 AM	Jennifer Holdredge, Dr. / MA PsyD, LMFT					Yes	Action
10/12/2020 10:49:31 AM	Jennifer Holdredge, Dr. / MA PsyD, LMFT					Yes	Action
10/12/2020 10:56:56 AM	Jennifer Holdredge, Dr. / MA PsyD, LMFT					Yes	Action
10/22/2020 3:41:48 PM	Jennifer Holdredge, Dr. / MA PsyD, LMFT					Yes	Action
11/2/2020 2:44:10 PM	Jennifer Holdredge, Dr. / MA PsyD, LMFT					Yes	Action
6/2/2021 5:30:44 PM	Jennifer Holdredge, Dr. / MA PsyD, LMFT					Yes	Action
7/13/2021 9:55:22 AM	Jennifer Holdredge, Dr. / MA PsyD, LMFT					Yes	Action
10/29/2021 9:41:50 AM	Jennifer Holdredge, Dr. / MA PsyD, LMFT					Yes	Action
10/29/2021 9:57:18 AM	Jennifer Holdredge, Dr. / MA PsyD, LMFT					Yes	Action

Add One-Time Measures

One-time measures assigned from here will be created on the start date. If an end date is set, the measures will be removed from portal at the end of the day.

Also, after one-time measures are created they may be included in new Mobile Notes documents.

Provider: J.Holdredge: Jennifer Holdredge, Dr. / MA PsyD, LMFT Start Date: 12/20/2022 End Date: 1/20/2023

DERS

EDE-Q6

EPDS

GAD-7

GDS-15

PHQ-9

Adult Symptom Screener

Clinical History Form

DSM-5 Self-Rated Level 1 Cross-Cutting Symptom Measure - Adult

OK Cancel

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).