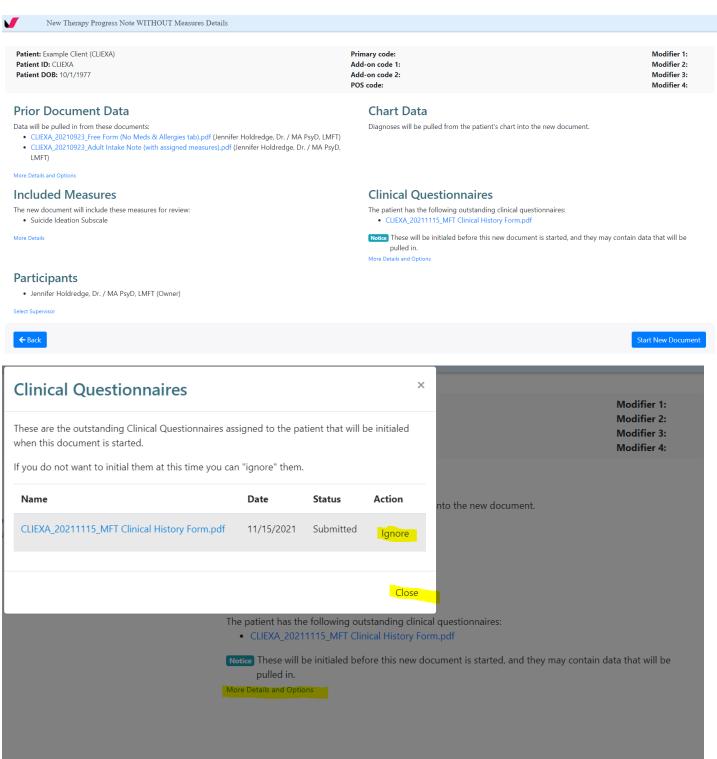# How do I complete a note if all or any of the Measures (including Clinical History form) are not showing up in the Uninitialed Documents tab?

In order to safely complete a note and not accidentally pull incomplete measures in form the Client Portal, you will want to view which Clinical Questionnaire or Measures will pull into the note and "Ignore" the ones that are NOT in the Uninitialed Documents tab.

New Therapy Progress Note WITHOUT Measures Details

Patient: Example Client (CLIEXA)	**Primary code:**	**Modifier 1:**
Patient ID: CLIEXA	**Add-on code 1:**	**Modifier 2:**
Patient DOB: 10/1/1977	**Add-on code 2:**	**Modifier 3:**
	POS code:	**Modifier 4:**

Prior Document Data

Data will be pulled in from these documents:
- CLIEXA_20210923_Free Form (No Meds & Allergies tab).pdf (Jennifer Holdredge, Dr. / MA PsyD, LMFT)
- CLIEXA_20210923_Adult Intake Note (with assigned measures).pdf (Jennifer Holdredge, Dr. / MA PsyD, LMFT)

More Details and Options

Chart Data

Diagnoses will be pulled from the patient's chart into the new document.

Included Measures

The new document will include these measures for review:
- Suicide Ideation Subscale

More Details

Clinical Questionnaires

The patient has the following outstanding clinical questionnaires:
- CLIEXA_20211115_MFT Clinical History Form.pdf

Notice These will be initialed before this new document is started, and they may contain data that will be pulled in.

More Details and Options

Participants

- Jennifer Holdredge, Dr. / MA PsyD, LMFT (Owner)

Select Supervisor

← Back   Start New Document

Clinical Questionnaires   ✕

These are the outstanding Clinical Questionnaires assigned to the patient that will be initialed when this document is started.

If you do not want to initial them at this time you can "ignore" them.

Name	Date	Status	Action
CLIEXA_20211115_MFT Clinical History Form.pdf	11/15/2021	Submitted	Ignore

Close

Modifier 1:
Modifier 2:
Modifier 3:
Modifier 4:

nto the new document.

The patient has the following outstanding clinical questionnaires:
- CLIEXA_20211115_MFT Clinical History Form.pdf

Notice These will be initialed before this new document is started, and they may contain data that will be pulled in.

More Details and Options

- ✓ Remember, prior to completing a Mobile Note for a new intake (or a returning client) who has Measures to complete, be sure to look in the Uninitialed Documents tab (under Documents) BEFORE you begin any Mobile Note.

- ✓ Once the client completes & submits the Measures, they will show up in the Uninitialed Documents tab.

- ✓ If the Measures (including the Clinical History form) are not submitted by the client, then opening a Mobile Note will pull empty or partially completed Measures from the Client Portal and they will be blank. The Measure(s) will have to be resent to the Client Portal if this happens.

- ✓ If you see all Measures in the Uninitialed Documents tab, then you can safely complete your Mobile Note.

- ✓ If any or all Measures are missing from the Uninitialed Documents tab, then you can do a regular Mobile Note Progress Note instead of the Mobile Note Intake Note, but you WILL need to follow the workaround to avoid pulling in any incomplete Measures. **SEE ATTACHMENT for more information regarding the workaround.**

- ✓ Next session, once Measures are completed and show up in the Uninitialed Documents, then you can complete the Mobile Note Intake Note.

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 the 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).