



MENTAL HEALTH MIS CRISIS HOUSE ASSESSMENTS



LIVE WELL
SAN DIEGO

**County of San Diego
Behavioral Health Services**



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This handout contains screen shots of confidential and proprietary information for view only. It shall not be copied or shared for anything other than its intended purpose as a training device for the County of San Diego, Mental Health management Information System.



CONFIDENTIALITY

HIPAA regulations mandate that all client information be treated confidentially.

Access to CCBH is based on your position and your job classification. You will have the access you need to complete your job duties. This can include access to clients in your Unit/SubUnit or may include full client look up. Remember – with more access comes greater responsibility regarding confidentiality!

You are not to share passwords with other staff. The Summary of Policy you signed before receiving your access to CCBH included your agreement to this directive. You are still responsible if someone with whom you have shared your password violates confidentiality!

The MIS unit investigates any suspicions regarding sharing of passwords. Consequences are up to, and may include termination.

Do not open any active client charts unless instructed to do so, or if it is required to complete your job duties. “Surfing” clients is a blatant breach of confidentiality.

Remember you are personally and legally responsible for maintaining confidentiality. Take it seriously.

Do not leave your computer unlocked with client data on the screen for others to access or view while you are away from your desk. Lock your CCBH session before leaving your computer.

When printing, make sure you are printing to a confidential printer, and pick up your paperwork quickly. Leaving printed Protected Health Information (PHI) out is also a confidentiality violation.

Play it safe – keep in mind how you would want your own PHI handled!





CLONED DOCUMENTATION

From the Compliance Bulletin # 30, October 17, 2011

“When documentation is worded exactly like or similar to previous entries, the documentation is referred to as cloned documentation.

“Whether the cloned documentation is handwritten, the result of pre-printed template, or use of Electronic Health Records, cloning of documentation will be considered misrepresentation of the medical necessity requirement for coverage of services. Identification of this type of documentation will lead to denial of services for lack of medical necessity and recoupment of all overpayments made.

“It would not be expected that every patient had the same exact problem, symptoms, and required the exact same treatment. Cloned documentation does not meet medical necessity requirements for coverage of services rendered due to the lack of specific, individual information for each unique patient.

“Documentation exactly the same from patient to patient is considered cloned and often occurs when services have a specific set of limited or select criteria. Cloned documentation lacks the patient specific information necessary to support services rendered to each individual patient.”

Bob Borntrager, CHC
Chief Compliance Officer
(619) 515-4246
Robert.Borntrager@sdcounty.ca.gov





CLINICAL STANDARD FOR ASSESSMENTS IN CCBH

The electronic health record (EHR) is a valuable resource for maintaining a centralized single medical record for all client clinical information. During the course of treatment, a client may accumulate multiple Behavioral Health Assessments (BHAs), Psychiatric Assessments, and/or Discharge Summaries. The system was designed to prepopulate or “pull-forward” information from certain fields in these assessment types from the most recent version into a newly opened version. This represents both an opportunity and a challenge.

Given that a client can have multiple historical assessments, it is helpful if the most current clinical information that prepopulates can be readily available for review when opening a new BHA, Psychiatric Assessment and/or Discharge Summary. Practically speaking, however, all information that prepopulates should not be summarily retained as portions of the assessments have become excessively long and have begun to lack clinical precision in describing the client’s current needs. Since all historical information that has been final approved in these assessment types in CCBH exists for review at any time (for those who have access to the client’s EHR), it is not necessary to retain all information that prepopulates in every section of an Assessment.

In 2011, the Clinical Standards Committee created standards addressing information that prepopulates into CCBH Assessments. In an effort to maintain the best clinical practice, these clinical standards have been revised by Quality Management to provide further direction on addressing information which prepopulates when adding new assessments in CCBH.

When a Client is New to Your Program

When adding a new assessment (BHA or Psychiatric Assessment) for a client that is new to your program and information has prepopulated from historical assessments, it is your responsibility to review each section in detail with the client for continued clinical relevance/accuracy. It is not required to keep all historical information in a section. Rather it is your responsibility to add, update, edit, correct, and/or retain appropriate clinical information that, in your professional opinion, is deemed relevant to the client’s current presentation/needs. You may delete information that has pre-populated for the purpose of greater accuracy in documentation of client’s current level of functioning and need. (Please note, this information will always exist in the final approved version of the Assessments previously conducted and documented in CCBH).

Standards for Specific Fields in the BHA and/or Psychiatric Assessment

- A. Presenting Problem: Information that pre-populates the Presenting Problem section should be reviewed and summarized, as appropriate, as your first entry in the Past Psychiatric History section. Once summarized, the Presenting Problem information that has prepopulated should be deleted so



- that the Presenting Problem information documented by you is specific to why the client is seeking services from your program at the time of the assessment.
- B. Clinical Formulation: The Clinical Formulation section should be reviewed and summarized with information added to the Past Psychiatric History section, as needed. Then any prepopulated information in this section should be deleted so that the documentation in that section can refer specifically to your program, documenting clearly your assessment of medical necessity and the client's need for services at your program.
 - C. The following additional fields have been identified as areas in which historical information should be evaluated for inclusion, revision or deletion (when it makes clinical sense to do so):
 - a. Past Psychiatric History
 - b. Family History
 - c. Educational/Employment History
 - d. Cultural Information
 - e. Social History
 - f. History of Violence
 - g. Trauma questions
 - h. Substance Use Information
 - i. Military History

Documentation Standards to Indicate Information in a Section of the BHA/Psychiatric Assessment is Being Retained or Edited

When adding to a text field, start your documentation at the beginning of the text window. Label the field with the unit/subunit number of your program to indicate which program is providing information. Additionally, add the date of your documentation. If the information that prepopulated is still current and well documented, and you are accepting the information without changes, type the heading "REVIEWED WITH NO CHANGES" at the top of the previous text. If you want to add to or edit the existing information, type the heading "REVIEWED WITH EDITS" on top of the previous text and then proceed with adding your new information. Please note: your signature on an assessment for a client that is new to your program indicates that you have reviewed all information, made the appropriate clinical revisions, additions and/or deletions, and are in agreement with the assessment.

When Adding Information to an Assessment for a Current Client:

Assessments are meant to be "living documents" in that new information may be added over the course of services as new information or clinical formulations



become available. If you have conducted the most recent assessment and are familiar with the client, it is not necessary to review each section in the entire Assessment. Rather, you may update just the sections for which you have knowledge of new information. Follow the documentation standards for labeling/dating the field you are changing as described in the paragraph above.

Concurrent Programs

There are times when a client is open to two programs at the same time. In this instance, it may be appropriate to leave relevant information from the other program in the Clinical Formulation section. If a provider decides to do this (and their BHA is completed subsequent to the other program) their portion of the Clinical Formulation should be documented at the top of the text box and begun by listing their unit/subunit. To delineate the concurrent program's Clinical Formulation information, their section should end with the following statement: "Information below is retained as the client is concurrently receiving services from another program."

Similarly, when adding information for a current client who is being seen in another program concurrently, a program may wish to retain information throughout the BHA without making changes to it. When this is the case, the program should delineate the other program's information by documenting "Concurrent program information reviewed with no edits."

Procedure: Documentation in Discharge Summaries

Documentation in Discharge Summaries should always be specific to your program and the services your program provided to the client. It is not necessary to retain any information in the narrative text fields of the Discharge Summary that have prepopulated. Delete information that has prepopulated and write only information specific to your program in each narrative section.

For questions about these documentation standards or the procedures outlined above, please email the QI Unit at QIMatters.hhsa@sdcounty.ca.gov



DIAGNOSIS PRACTICE GUIDELINES **FOR THE ELECTRONIC HEALTH RECORD (EHR)**

PURPOSE:

As part of the Cerner Community Behavioral Health CCBH electronic health record, each client has a single diagnostic profile that is utilized across the System of Care (SOC). With the implementation of ICD-10, the diagnostic profile contains relevant clinical information recorded in a non-axial format. This practice guideline establishes procedures for using the diagnostic profile in the EHR.

PRACTICE GUIDELINES:

Each program is responsible for ensuring that the client they are treating has the correct diagnosis included in the client's diagnostic profile (Diagnosis Form). All programs shall verify that the active diagnoses are in the EHR as per the following guidelines.

When multiple outpatient programs are concurrently serving a client, they shall coordinate care around diagnoses. A Single Accountable Individual (SAI) is automatically assigned for each client in CCBH based on the priority level of the program. The SAI shall communicate with concurrent providers, and will facilitate updating the EHR

I. EXTERNAL PROVIDER:

An External Provider is a licensed health care provider who has completed an assessment of the client within the past 12-months and who is outside the mental health Organizational Provider Network. Examples include a Fee-For-Service (FFS) providers or a provider outside of San Diego County.

- A. When it is not within a clinician's, or programs' scope of practice to enter a diagnosis, the clinician may use a diagnosis from an "External Provider". The begin date of a diagnosis from an external provider shall be the date of the assessment or referral. A diagnosis from an External Provider is only used when there is no other active diagnosis form in the client's EHR.
- B. The clinician shall complete the "External Provider" fields. The clinician shall enter the diagnostic information provided by the External Provider, the General Medical Conditions Summary Code, the diagnoses listed in order of priority, and the Trauma question.
- C. When the Administrative Services Organization (ASO) authorizes services for a FFS provider and there is no active Diagnosis Form in the client's EHR, the ASO shall complete the External Provider fields. ICD-10 Other specified, Unspecified codes or Z03.89 code may be used until a specific diagnosis is received from the FFS provider. The ASO shall also complete the General



Medical Condition Summary, and answer the Trauma Question.

II. ENTERING THE DIAGNOSIS:

When it is within their scope of practice, the clinician shall complete the Diagnosis Form. When it is not within a clinician's scope of practice to diagnose, a diagnosis may be used from an "External Provider."

- A. When an existing Diagnosis Form does not include the diagnoses for which a client is being treated at the program, that program shall add each diagnosis to the EHR with the date that the diagnosis was made.
- B. When there is no existing Diagnosis Form, the Diagnosis Form must be completed with a mental health diagnosis that has a begin date on or before the first date of service.
- C. There must be a SMHS reimbursable ICD-10 diagnosis listed as Priority 1 in order to claim for services.
- D. Diagnoses may not be ended unless all programs concurrently serving the client agree. Multiple programs serving a client must coordinate with each other regarding diagnoses.
- E. If a suspected mental health disorder is not yet diagnosed ICD-10 Other specified, Unspecified disorder codes or Z03.89 code may be entered until a specific diagnosis is determined.
- F. On the Diagnosis Form, the diagnosing clinician shall assign a priority to each diagnosis. When a diagnosis is being added to an existing form, it will be given the next priority (based on Begin Date). A diagnosis with a higher priority number does **not** indicate that the diagnosis is more clinically relevant than one with a lower priority number. The client treatment is not affected by the priority number given to a diagnosis. Please note, a substance use diagnosis cannot be priority one.

III. DIAGNOSIS BEGIN AND END DATES:

A. Changing a Begin Date

Staff may change the begin date of a diagnosis to an earlier date to cover services provided at the program. Never change a begin date to a later date.

B. Ending a Diagnosis

- a. If the client has only one open assignment (only open to one program)
Staff may end a diagnosis if the client is no longer being treated for that diagnosis. The end date must be on or after the last date of service for that diagnosis.



- b. If the client has multiple open assignments (open to multiple programs)
Staff may end a diagnosis if the client is no longer being treated for that diagnosis at the program and all programs concurrently serving the client have been contacted and all agree to end the diagnosis. The end date must be on or after the last date of service for that diagnosis. Please note: never delete a diagnosis, only end if appropriate.

C. Managing Diagnoses

It is important to note that processes differ when a client is receiving services from more than one provider and by level of care (emergency services vs. outpatient). Remember that the client's record is now a single record across all providers involved in the care of that individual.

IV. PRIORITIES FOR DIAGNOSES:

A SMHS reimbursable ICD-10 mental health diagnosis must be listed as Priority 1. The priority number in CCBH does not impact client treatment but does apply to claiming functions. When a diagnosis is added to an existing form, it is automatically given the next available priority number unless staff designate otherwise.

A. Outpatient Providers

- a. When the EHR does not list the client's treatment diagnosis
The outpatient provider shall add the treatment diagnosis and make it priority 1.
- b. When the EHR does list the client's treatment diagnosis
If the treatment diagnosis is listed, no action is required.

B. Emergency Psychiatric Unit (EPU) and Emergency Screening Unit (ESU)

- a. When the EHR does not include the client's treatment diagnosis
The EPU or ESU shall add the treatment diagnosis and make it Priority 1.
 - i. When the client leaves the EPU or ESU, the program shall end date the diagnosis that was added for that client. This will automatically return the existing diagnoses to their original priority.
- b. When the EHR does list the client's treatment diagnosis as Priority 1
If the treatment diagnosis is listed as Priority 1, no action is required.
- c. When the EHR does not list the existing client's treatment diagnosis as Priority 1
The EPU or ESU shall change the client's treatment diagnosis to Priority 1.
 - i. When the client leaves the EPU or ESU, no action is required.

V. DIAGNOSIS CLEANUP:

Programs are responsible for ensuring accuracy of diagnoses. Programs may "clean up" diagnoses that are no longer active.



- A. If client is **not** concurrently open to other programs, it is recommended to end the diagnosis that is no longer the focus of treatment. **DO NOT DELETE THE DIAGNOSIS; ONLY END THEM.** Use the final date of services with your program as the end date.
- B. If the client is concurrently open to other programs, collaboration between programs **must** occur before ending any diagnosis. It is not acceptable to end any diagnosis without coordination of care if there is more than one program providing services at the same time.

VI. SUSPENSE ITEMS A & B:

- A. An active diagnosis must be in place in order to claim for service. The date of diagnosis must cover all dates of service.
- B. The diagnosis listed as Priority 1 must be a SMHS reimbursable ICD-10 diagnosis. A Priority 1 diagnosis may never be a neurocognitive or substance use diagnosis.
- C. If there is an existing diagnosis listed that is the focus of treatment for the program, no action is required. Do not modify the existing begin date.

VII. GENERAL MEDICAL CONDITION:

The "General Medical Condition Summary Code" (GMC) field is a required field on the Diagnosis form. The GMC field is part of the CSI data that is reported to the State of California. The GMC field shall reflect any general medical condition which is impacting the client's mental health. The clinician shall complete the GMC field with any medical condition as reported by the client or obtained from another source (other medical record or report) and identify in the diagnosis "Comments" box the source of the medical condition.

If the client's general medical condition is not listed in the GMC table, then "Other" shall be selected and the general medical condition shall be recorded in the diagnosis "Comments" box.

NOTE: When a physical health diagnosis is given, it must also match the GMC.



CCBH SOFTWARE BASICS

- CCBH IS ACCESSED THROUGH CITRIX (Cerner):
Go to <https://cosdca.cernerworks.com>
(Save this to your favorites or create a shortcut for your desktop)
- “TAB TO TRAVEL”: Get in the habit of using your “Tab” key. Using the “Tab” assures that you are directed to all required fields and that the information you input is actually captured by the system.
- RIGHT CLICK: When there is no obvious way to add information into a field, right click in the space to view your options.
- FILTERS/RADIO BUTTONS: Check these first and make sure they are on “all” when searching the database.
- MAGNIFYING GLASS/ELLIPSES “BUTTONS”: When you see these at the end of a field, it means there is a “Search Screen” that you can pull up to find information for that field. You do not have to use them, but they are there if you need them.
- REQUIRED FIELDS are in red or blue: They must be filled-in to save and final approve information.
- OPTIONAL FIELDS are in white: Information may be added, but is not required to final approve the Assessment. ***Keep in mind – just because you have completed all the fields required to final approve the form, does not mean you have completed a thorough clinical assessment.*** Documentation standards have not changed.
- CLOSED FIELDS are in gray: Nothing can be added in these fields.
- CASE SENSITIVE:
 - Passwords – if you receive an error message for “Invalid Password”, check to make sure you are using the appropriate upper and lower case letters when typing. After a third attempt with an invalid password, the system will lock your session and will require contacting the Optum Support Desk (1-800-834-3792) to unlock it.
 - Table Searches – when searching within a table, be aware that descriptions or IDs are case sensitive. If you do not use the correct upper or upper and lower case entry, the search will not take you to the desired table value.
- MULTIPLE WAYS TO ACCESS INFORMATION: In CCBH, it is easy to access the same information in multiple ways. We have included screenshots and directions in this document to guide you through the system.



- **LOCKING YOUR SESSION:** For security purposes, you must lock your session any time you step away from your computer. This packet explains the various ways to lock your session.



Note: Locking your session is best used for short times away from your computer. CCBH will log you out after 60 minutes. There is a chance of losing work that has not been final approved or saved if CCBH logs you off.

- **WHEN YOU GO BACK TO YOUR PROGRAM:** You are learning how to enter assessments in the “**SDC Train CCBH**” environment during this training, which is for **practice purposes only**. It is important to enter all of your assessment information in the “**SDC Live CCBH**” environment when you return to your program.
- For password resets/menu issues: Call the Optum Support Desk. You may also call if you need your “SDC Live Anasazi Central” environment password or menu set up. Their contact information is:

Optum Support Desk
1-800-834-3792

Reminder:

Menu access is set according to job title/functions. The menus you have at your program may look different than menus shown in the screen shots in this packet.



CCBH SPEAK

Assessment	In CCBH, anything that is not a Client Plan or a Progress Note is considered an “Assessment.” So, in CCBH Speak, forms such as the Discharge Summary, Outcome Forms, and Demographic Form are considered “Assessments” as well as the actual clinical assessment forms.
Assignment	Opening/Closing a client to a specific program (Unit/SubUnit/s) and to a specific server.
Clinician's Homepage	A “page” that provides the Clinical servers at each open assignment to view client/s and client information for the identified caseload in one screen. This includes client look up, caseload listing, appointments, task/s to do, notifications, and other client information present in the EHR.
Collateral Server	Co-Staff providing a service (i.e. co-facilitator). Used when more than one staff is providing a service to the same client, on the same date and at the same time as server.
Demographic	A client is entered into the EHR by the completion and final approval of the demographic form. A client may not be opened to assignment/program unless the demographic form is entered, completed, and final approved.
Final Approve	Locks the completed assessment. Prevents editing/deletion of assessments.
SAI – Single Accountable Individual	Primary server identified based on primary unit program set up. This staff will be listed as the primary contact for the client in the system of care for purposes of coordination of care.
Scheduler	A program within the EHR that allows for scheduling of client service events and ongoing appointment/s. This information will populate to the Clinician's Homepage once entered into the EHR through the Scheduler menu.
Service Code	Procedure Code. The code data entered into the EHR for the purpose of claiming a service activity.
Server	Staff providing a service activity.
Unit	The Physical Location of a program, or legal entity.
Sub-Unit	The specialized set of services offered within a Unit (i.e. population, funding sources, etc.).



PASSWORD CHANGES

Citrix (Cerner) Password

The first Citrix (Cerner) password you ever receive is considered a temporary password. For security reasons, you will be prompted to change your password on your first log in. To do so after the initial login, click “Change Password” when first logging in to Citrix (Cerner).



Change Password

User name: COSD_CA\anasazigen10

Old password:

New password:

Confirm password:

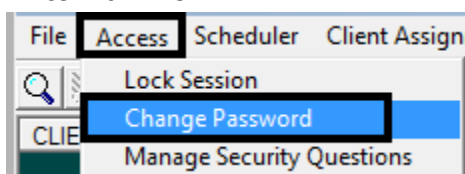
OK Cancel

Next, follow the prompts to change your password.

CCBH Password

You are prompted by the system to change your CCBH password every 90 days. However, if you feel that someone has learned your password, for security reasons you should change it immediately. There are two ways to do this:

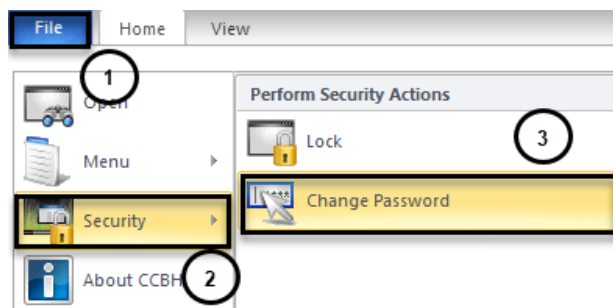
External View



From the External View, go to the “Access” tab and select the “Change Password” option. Follow the prompts to change your password.

Clinician's Homepage

From the Clinician's Homepage, go to the File Tab. Select the “Security” menu, and then select the “Change Password” option. Follow the prompts to change your password.



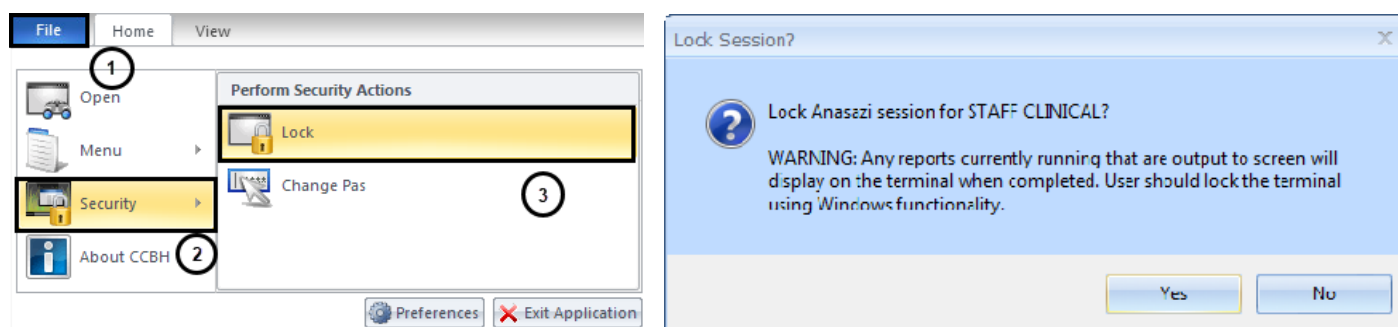


LOCK CCBH SESSION

For security reasons, the expectation is that you will lock your CCBH session any time you step away from your computer. There are two ways to do this.

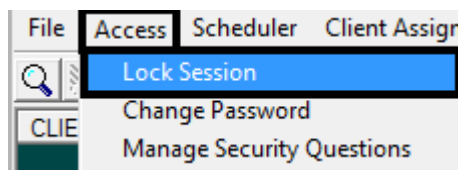
Clinician's Homepage

From the Clinician's Homepage, go to the "File Tab" and select the "Security" drop down menu, then select "Lock Session" button.

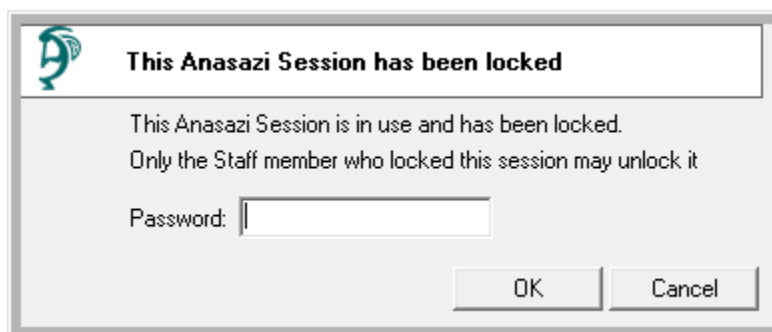


External View

From the External View, go to the "Access" tab and select the "Lock Session" option.



You will be prompted to enter your password to unlock the session.



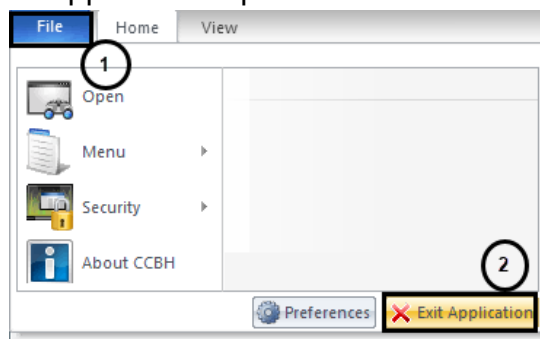


EXITING THE APPLICATION

EXITING CCBH: To make sure you do not accidentally create a “ghost session” and lock yourself out of accessing CCBH, you must exit in the following manner:

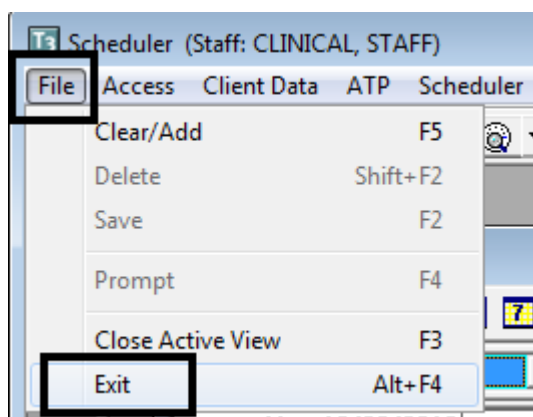
Clinician’s Homepage

- Go to the “File Tab” menu in the top left-hand corner of your screen.
- Select the “Exit Application” option.



External View

- Go to the “File” menu in the top left-hand corner of your screen.
- Select the “Exit” option.
- Repeat this step for any open external view window.



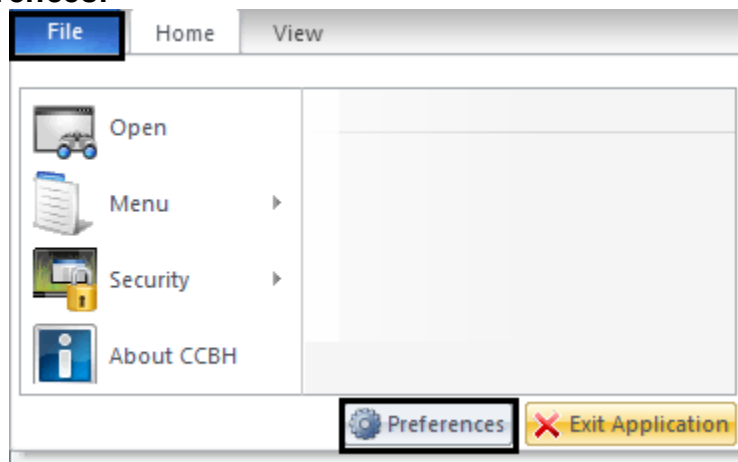
You risk being locked out of CCBH if you do not exit in the manner described above!



CLINICIAN'S HOMEPAGE PREFERENCES

How to setup and save preferences

Accessing Preferences:



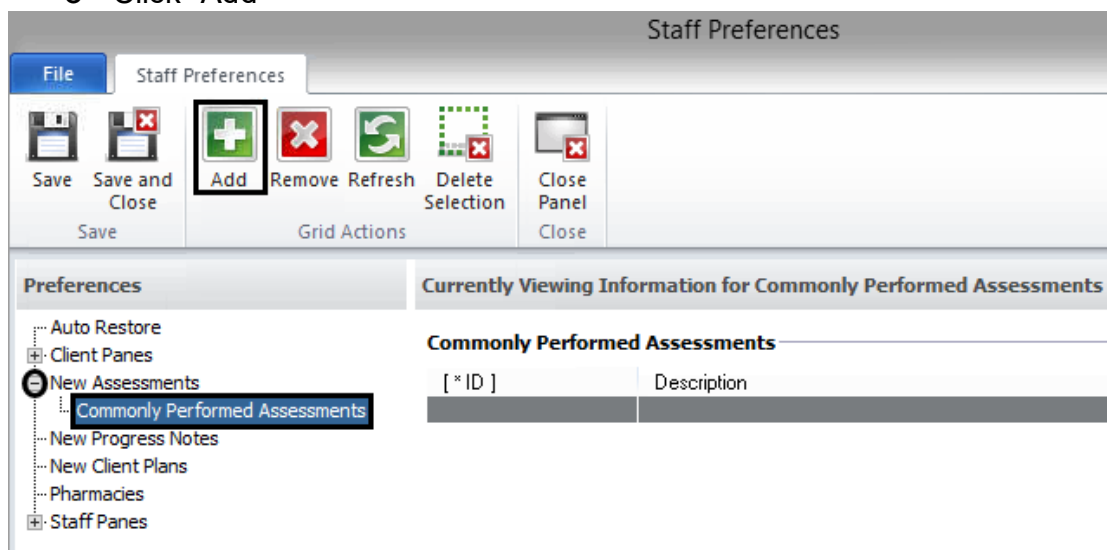
A- From the “File Tab”

B- Select the “Preferences” icon

This feature allows you to set the Assessments that you use most frequently as preferences for easy access.

Preferences for New Assessments:

- Select the plus sign next to “New Assessments.”
- Click “Commonly Performed Assessments”
- Click “Add”





- 1) Select the assessment(s) *you* commonly perform. To select multiple assessments, hold down the “control” key as you click with the mouse.
- 2) Once you have selected your preferred assessments, click the “Select” button.

Available Assessments (Filters Applied)

ID	Type	Active
AIMS	AIMS	<input checked="" type="checkbox"/>
ASOCA	ASO Clinical Addendum	<input checked="" type="checkbox"/>
BHAC05	BHA 0-5 Children	<input checked="" type="checkbox"/>
BHAA	BHA Adult	<input checked="" type="checkbox"/>
BHAC	BHA Children	<input checked="" type="checkbox"/>
BHACSU	BHA Crisis Stabilization Unit	<input checked="" type="checkbox"/>
BHADEC	BHA Dev Eval Clinic	<input checked="" type="checkbox"/>
BHAESU	BHA ESU	<input checked="" type="checkbox"/>
BHATBS	BHA TBS	<input checked="" type="checkbox"/>
CANS CONF	CANS Sharing Confirmation	<input checked="" type="checkbox"/>
CFARS	CFARS	<input checked="" type="checkbox"/>
CPCONP	Client Plan Confirmation Page	<input checked="" type="checkbox"/>
TFC	Daily TFC Progress Note	<input checked="" type="checkbox"/>
DEM	Demographics Form	<input checked="" type="checkbox"/>
DIAG	Diagnosis Form	<input checked="" type="checkbox"/>
SDIAGREC	Diagnostic Reconciliation	<input checked="" type="checkbox"/>
DCSUM	Discharge Summary	<input checked="" type="checkbox"/>
SDSM5RECON	DSM-5 Diagnosis Reconciliation	<input checked="" type="checkbox"/>
EATDISADM	Eating Disorder Admission	<input checked="" type="checkbox"/>

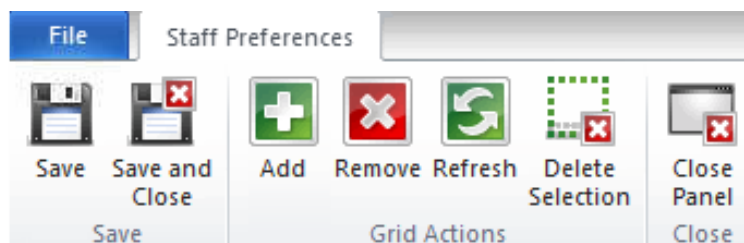
You will see your selections.

Commonly Performed Assessments

[* ID]	Description
BHAA	BHA Adult
DCSUM	Discharge Summary
DEM	Demographics Form
DIAG	Diagnosis Form



Saving Preferences:



You have 3 options:

Save:

- Click the “Save” icon. This will save settings only.

Save and Close:

- Click the “Save and Close” icon. This will save your selections and take you back to the Clinician’s Homepage.

Close Panel:

- **WARNING:** If you click the “Close Panel” icon without saving, all of your preferences will need to be reset.



Note: These preferences will not transfer from your TRAIN account to LIVE. They must be setup in LIVE too.



CLINICIAN'S HOMEPAGE TERMINOLOGY

Identifying Terms Used on the Clinician's Homepage

Clinician's Homepage:

The Clinician's Homepage is a real-time tool that provides up-to-the-minute client status at a glance.

File Tab:

It can be used to exit the application, set preferences, access the external view, or see recently opened views.



Tabs:

The "Tabs" listed below are displayed at the top of the Clinician's Homepage.

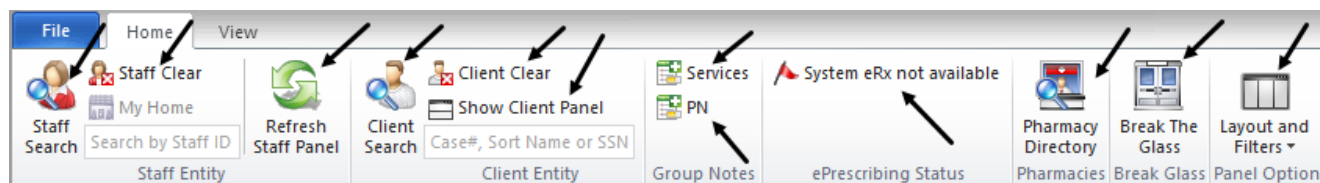
- There are four tabs: "File", "Home", "Client", and "View."



Note: The "Client" tab will only be available if a client has been selected.

Buttons:

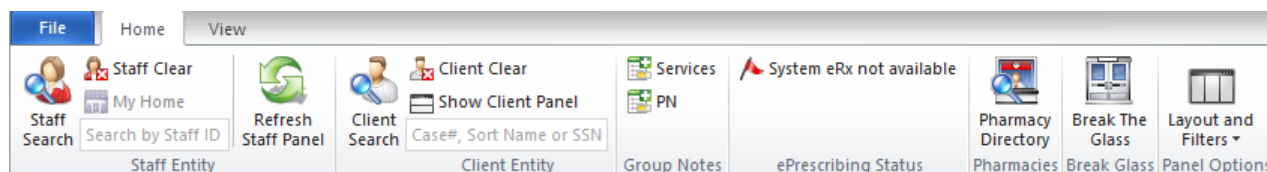
- The "Buttons" are individual selections that can be clicked on to perform various functions.





Ribbon:

- The “Ribbon” is an object that is comprised of various buttons.



Staff Panel:

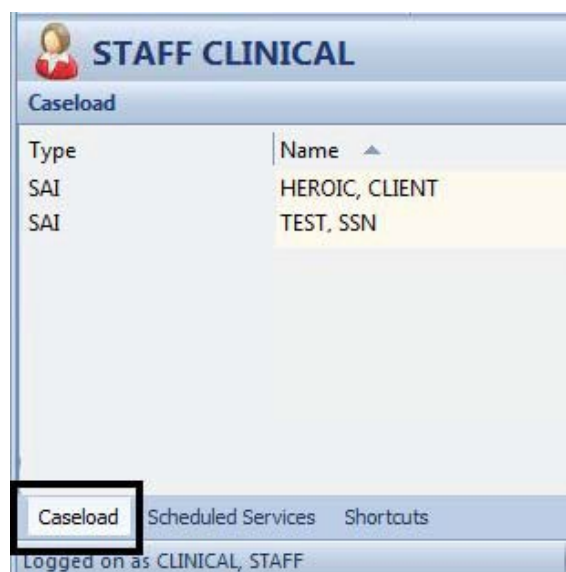
The Staff Panel automatically launches when the Clinician’s Homepage is opened.



You will see your name as well as your job title listed. If you believe that the job title is incorrect, you must complete a new ARF form and submit it to the MH MIS Unit for correction.

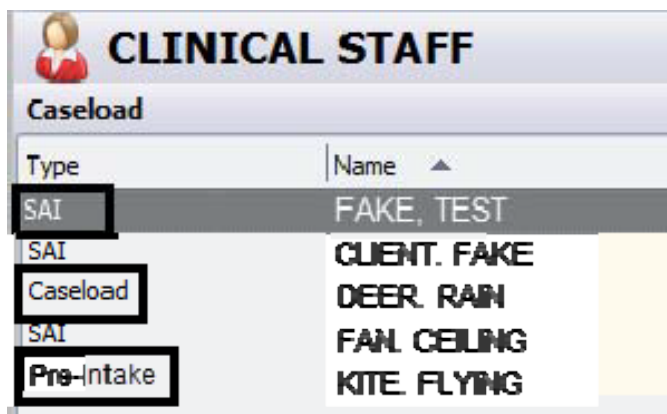
Caseload:

The Staff Panel defaults to show your caseload. These are the clients who have been assigned to you. You can always return to your caseload by selecting the Caseload pane at the bottom of the screen:





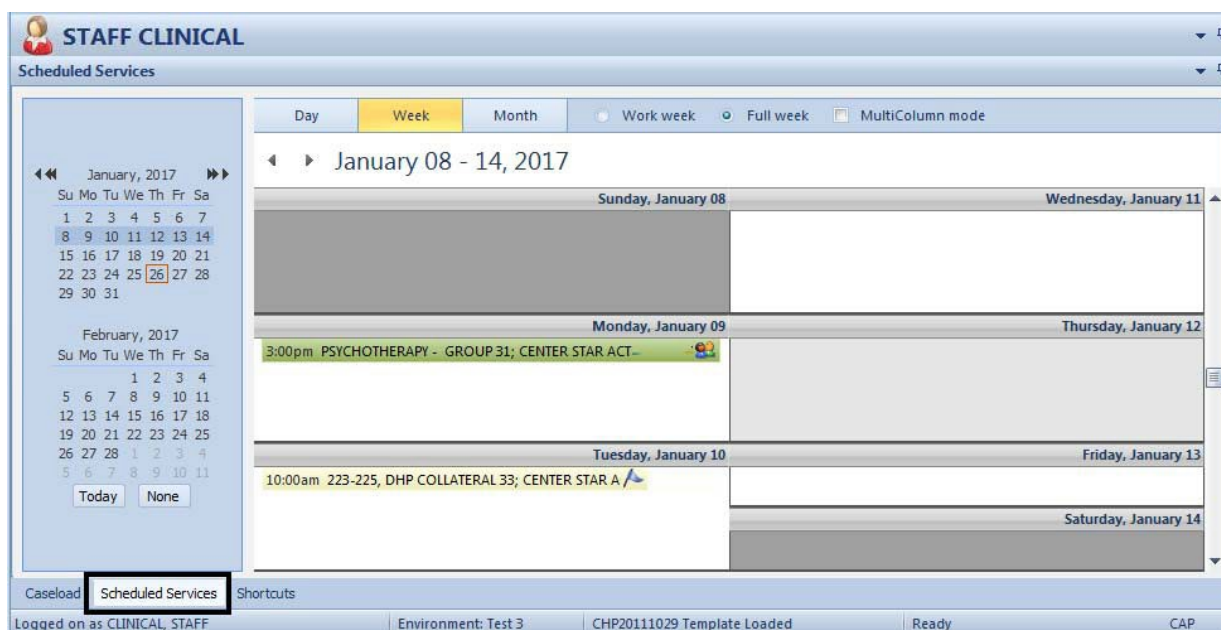
Identifying Client Type:



You can find the client designation under the “Type” heading on the “Caseload” pane of the staff panel. There are three client types that may appear on your caseload:

- **SAI**: this signifies that you are the Single Accountable Individual for the client listed.
- **Caseload**: this indicates that, in addition to your program, the client is being seen at another program. You are not the SAI for this client type – the other program staff would be the SAI.
- **Pre-Intake**: this indicates that the client is temporarily on your caseload as a pre-intake client. Pre-intake is intended for the purpose of allowing brief access by a clinician to the Client Chart for the process of screening before the client is assigned to a Unit/SubUnit.

Scheduled Services:





Client Panel:

- [Face Sheet](#)
[Assessments](#)
[Assignments](#)
[Diagnoses - Ass...](#)
[Substance Abuse](#)
[Client Plans](#)
[Progress Notes](#)
[Authorizations](#)
[Insurance Coverages](#)
[Services](#)
[Medical Conditions](#)
[Medications](#)
[Client Attachments](#)

This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.



CLIENT SEARCH

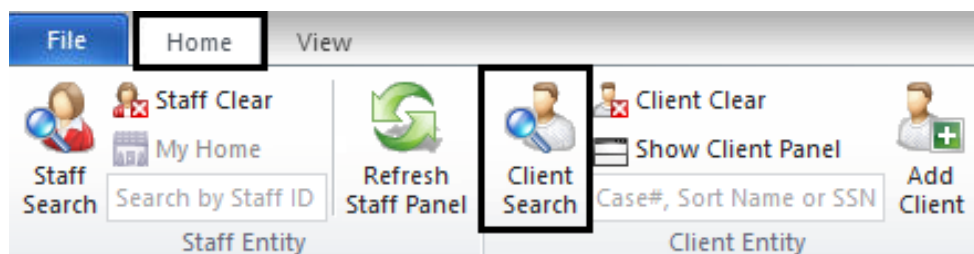
Searching for a Client Who Is In Your Caseload:

- On the Clinician's Homepage "Home" tab, under "Caseload", double click on the name of the client.
- This action opens up the "Client Panel" where you can find information about your client.



Searching for a Client Who Is Not In Your Caseload:

- Select the "Client Search" button



- The "Client Lookup" window will open

Click on the search button to perform a search for client records based on the criteria in the top section.

Client Search

Client Search Parameters

Case # Sort Name

Last First DOB Thru

Alias Last First Sex SSN

Client Search Results

Name	First	Last	Case#	S...	Eth...	DOB	SSN	Prim Unit ID	Prim Uni...	Prim SubUn...	Prim SubU...	External ...	SAI ID	SAI N...
There are no items to show.														



There are several different ways to search for a client from this window:

- By “Sort Name”: Enter the client’s sort name in the LAST NAME, FIRST NAME format, then select the “Search” button. (The “Sort Name” is the client’s name as formatted when first entered into the CCBH system):

Click on the search button to perform a search for client records based on the criteria in the top section.

Client Search

Client Search Parameters

Case # Sort Name

Last First DOB Thru

Alias Last First Sex SSN

Client Search Results

Name	First	Last	Case#	S...	Eth...	DOB	SSN	Prim Unit ID	Prim Uni...	Prim SubUn...	Prim SubU...	External ...	SAI ID	SAI N...
There are no items to show.														

- If the Sort Name you’ve entered is in the system, it will be displayed in the “Client Search Results” area, as in this screen shot which exemplifies a search done for fictional client sort name, “PIE, APPLE”:

Click on the search button to perform a search for client records based on the criteria in the top section.

Client Search

Client Search Parameters

Case # Sort Name

Last First DOB Thru

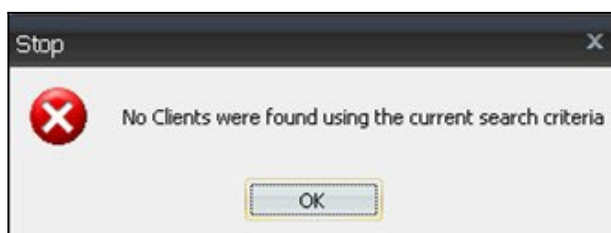
Alias Last First Sex SSN

Client Search Results

Name	First	Last	Case#	S...	Eth...	DOB	SSN	Prim Unit ID	Prim Uni...	Prim SubUn...	Prim SubU...	External ...	SAI ID	SAI N...
PIE, APPLE	APPLE	PIE		F	9		0						0	

Note: Double Clicking on the client's name will launch the Client Panel.

- If the Sort Name you entered is not in the system, you will receive the following stop message:



- This does not mean that the client is not in CCBH. Rather, you may not have entered the sort name exactly as it was formatted when the client’s information was first entered into the CCBH system. For this reason, you should search by other criteria such as:



Note: Before beginning another type of search, select the “Clear” button to reset the search criteria.



- In client search, enter LAST NAME, FIRST NAME, date of birth (check spelling and in ALL CAPS).
 - If client is found with that name, double check SSN.
- Search by SSN.
- Search by Alias.
 - If match found, open the Demographic form on client and double check DOB, address, SSN.
 - Check 3rd Party information to see if client has the same Medi-Cal (BIC, CIN) number.
- If it is unclear which is the first name or the last name, enter the other position of names in Alias – e.g., Bubble Gum entered into CCI as GUM, BUBBLE may be entered into Alias as BUBBLE, GUM.



Note: When searching use all capital letters, these fields are case sensitive.

- You can now search by one or more of the other criteria fields (Last, First, DOB, Alias Last, First, Sex, Case Number). Select the “Search” button.



Note: If you search by data that is common in the system (such as conducting a search only by a common first name) you will receive the following warning screen. This allows you the option to either continue with or cancel the search.



Additional Client Search Feature

- The “Thru” field, in conjunction with the “DOB” field allows you to search for clients within a particular date range. For example, if the DOB is approximately 3/10/1964 and you enter 3/08/1964 in the “DOB” field and 3/12/1964 in the “Thru” field, all clients in the system who have that dates of birth in that date range will be displayed in the “Client Search Results” window.



*Note: If the exact DOB is known ~ enter it in the ‘DOB’ **and** ‘Thru’ fields to find clients born only on that date.*

Click on the search button to perform a search for client records based on the criteria in the top section.

Client Search

Client Search Parameters

Case # Sort Name

Last First DOB Thru

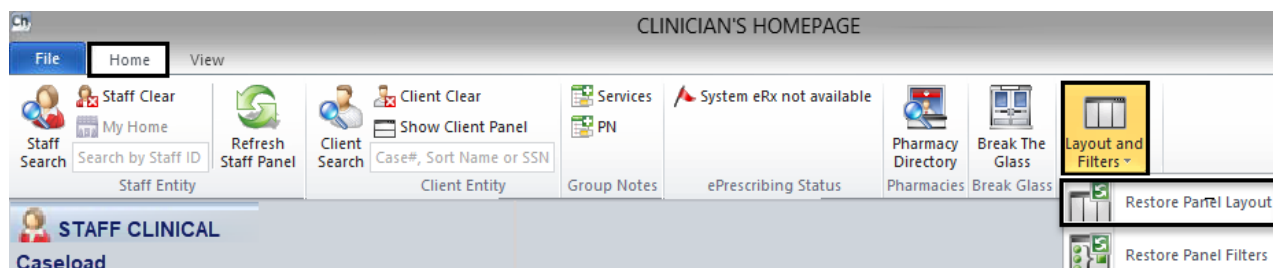
Alias Last First Sex SSN

NOTES

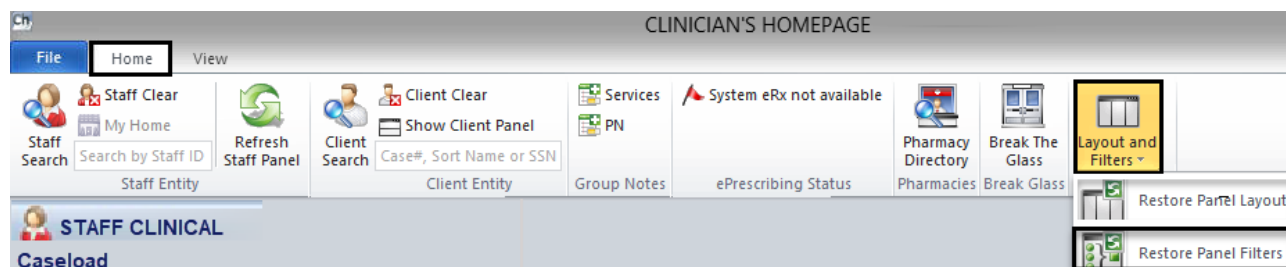


RESTORE SYSTEM DEFAULTS

If the layout becomes distorted, or the panes have *disappeared*, select “Restore Panel Layout” (under the Layout and Filters button on the Home tab). This will restore the layout to what it was when you first logged in.



Select “Restore Panel Filters” (under the Layout and Filters button on the Home tab) to bring all the Filters back to their default settings, if desired.



NOTES



CLIENT FACE SHEET

The Client Face Sheet will allow users to view any entered information from the client's most recent final approved Safety Alert, Demographic Form, and Diagnosis Form. The Client Face Sheet displays the Primary Unit, Subunit and SAI for the client. If the client information has not been entered on one of these forms, the corresponding information fields on the Face Sheet will be blank.

- After accessing a client, the Client Face Sheet can be viewed by clicking the "Face Sheet" pane in the client panel.



- The Client's Face Sheet cannot be edited from this view. To print click on the drop down arrow at the top right, and click "Print Face Sheet".

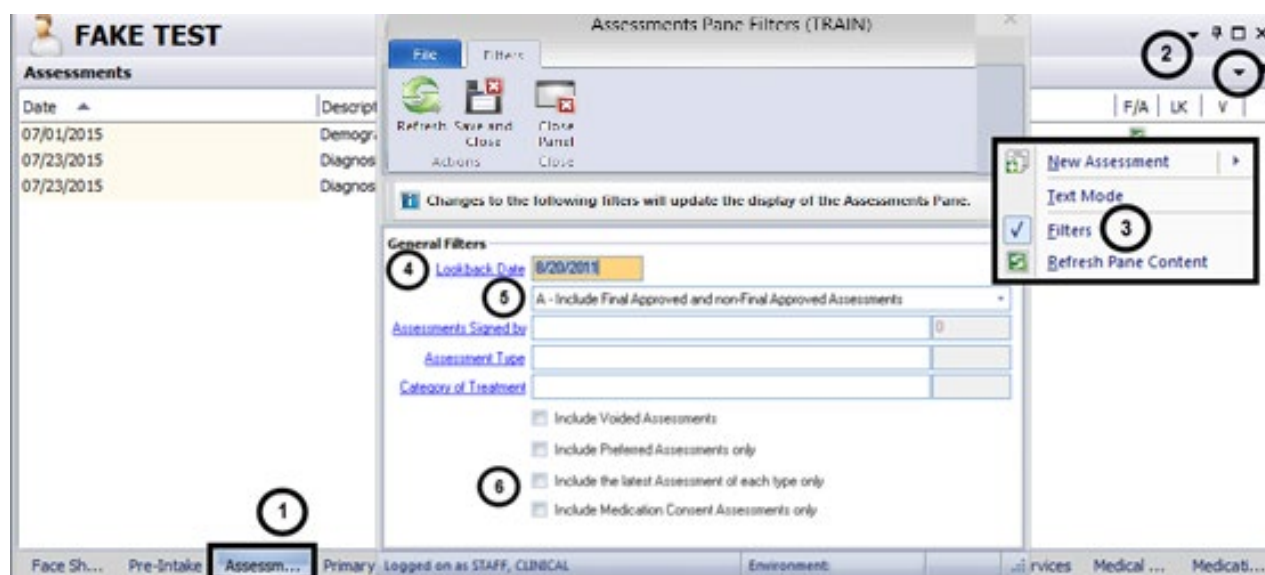


FILTER SETTINGS

Modifying filter settings to display historical assessments

Each user may personalize the way filters display information in his or her Clinician's Homepage. Any time you do not see the desired information, the first step is to check the filters to assure the correct parameters are selected for your search.

1. On the "Client Panel", click on the "Assessments" pane. The "Assessments" pane will open an expanded window.
2. Click the drop down arrow  on the "Assessments" bar that displays on the right.
3. A new window will display. Click on the check mark  or on the word "Filters".
4. The "Filters" window will display. There are three areas where you can make changes: Lookback Date: This date pre-populates back 48 months from the date you open the filter. If a desired assessment is before the date listed, and is not displaying on the "Assessments" tab; you can adjust the date manually.
5. From the drop down menu, you may choose A: "Include Final Approved and non-Final Approved Assessments", F: "Include Final Approved Assessments only" or N-"Include non-Final Approved Assessments only".
6. You may also place a checkmark by the "Include the latest Assessment of each type only" choice given.





Filters in Clinician's Homepage:



Note: Filters will vary based on which pane is selected on the client panel.

Several panes located within the Client Panel contain “Filters”. Below are some examples:

Assignments Pane Filters: updates the Assignments Pane to display Opened and Closed Assignments.

Services Pane Filter(s): updates the display of the Services Pane. The date field filters for services on or after the date entered. Check boxes further filter that data, for particular service types or services by specified staff, for example.



VIEWING CLIENT ASSIGNMENTS

Clinician's Homepage

Client "Assignments" refer to where the client has received, or is currently receiving, services. In the "Clinician's Homepage" you can view the Opening/Closing dates when a client was assigned to a specific program (Unit/SubUnit/s) and to a specific server.

- A. In the "Client Panel" click on the "Assignments" pane.
- B. It displays all the assignments attached to the client.

FAKE TEST								
Assignments								
Prm	Opened	Closed	Unit ID	Unit Name	SubUnit ID	SubUnit Name	Primary Serv...	Primary Server Name
✓	01/01/2015		9900	TRAINING UNIT	9901	TRAINING SUBUNIT	800009	STAFF, CLINICAL
	03/05/2015		1000	FAKE UNIT	1001	FAKE SUBUNIT		STAFF, FAKE

False Sheet Pre-Intake Assessments **Assignments** Primary Diagnosis - ... Primary Substance Abuse Current Client Plan Progress Notes Authorizations Primary Insurance

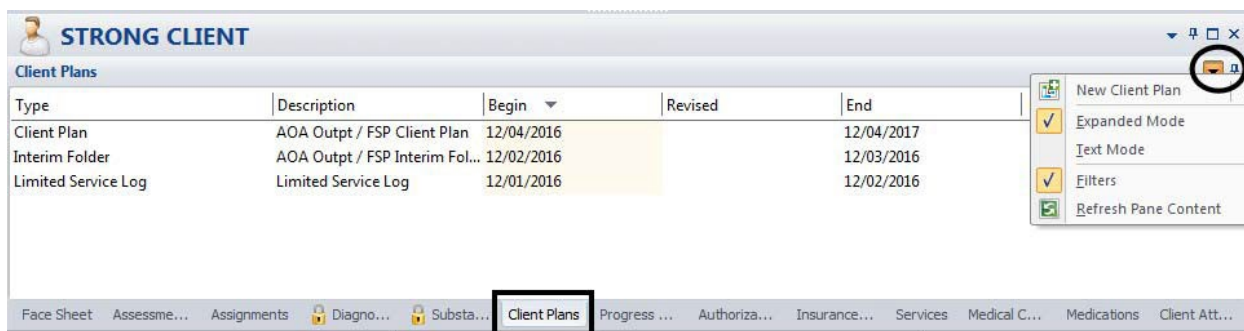
NOTES




VIEWING CLIENT PLANS

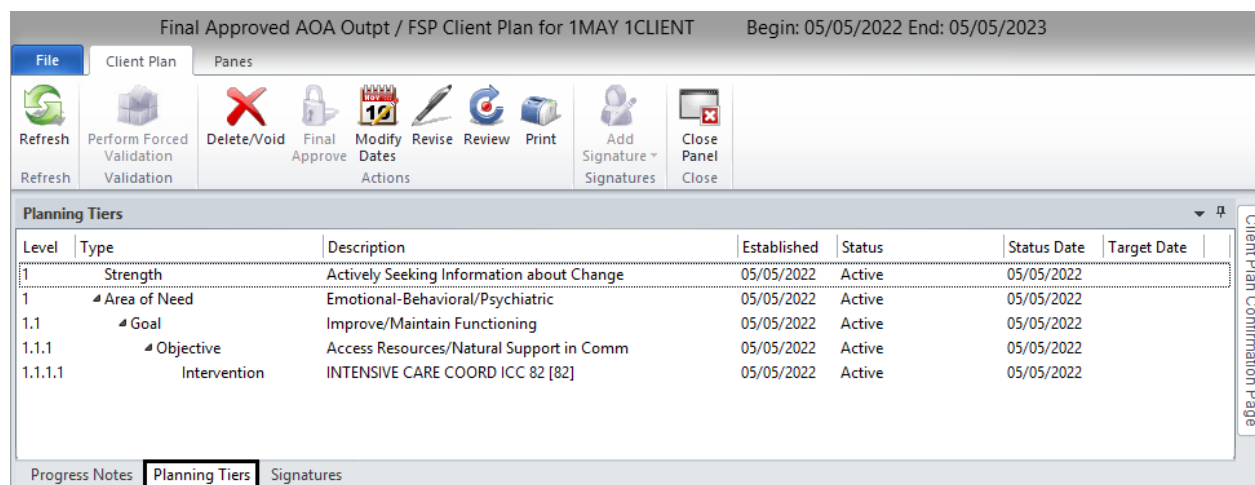
To View Existing Client Plans:

1. On the Client Panel, find the “Client Plans” pane and single click on it.



 **Note:** “Expanded Mode”- displays all Client Plans, regardless of the plan type, or dates. “Text Mode” displays the text associated with the Plan. “Filters” will allow you to adjust the dates or types of plans that display.

2. Double click on the client plan you wish to view.
3. To view all the planning tiers, click on the “Planning Tiers” pane. The client plan will appear.



4. To view the narrative for the planning tiers, click on the black drop down arrow, and select “Text mode.”



Final Approved AOA Outpt / FSP Client Plan for 1MAY 1CLIENT Begin: 05/05/2022 End: 05/05/2023

File Client Plan Panes

Refresh Perform Forced Validation Delete/Void Final Approve Modify Dates Revise Review Print Add Signature Signatures Close Panel Close

Planning Tiers

Level	Type	Description	Established	Status	Status Date	Target Date
1	Strength	Actively Seeking Information about Change	05/05/2022	Active	05/05/2022	
1	Area of Need	Emotional-Behavioral/Psychiatric	05/05/2022	Active	05/05/2022	
1.1	Goal	Improve/Maintain Functioning	05/05/2022	Active	05/05/2022	
1.1.1	Objective	Access Resources/Natural Support in Comm	05/05/2022	Active	05/05/2022	
1.1.1.1	Intervention	INTENSIVE CARE COORD ICC 82 [82]	05/05/2022	Active	05/05/2022	

Progress Notes Planning Tiers Signatures

Text Mode Detail Mode Refresh Pane Content

5. Planning tiers will display with the narrative portion listed below it.

Planning Tiers

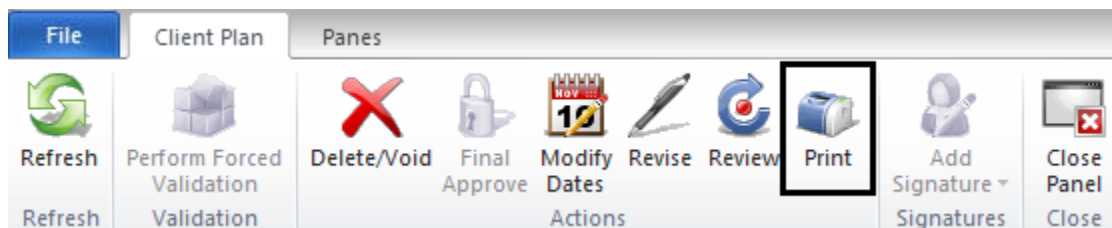
Level	Type	Description	Established	Status	Status Date	Target Date
1	Strength	Actively Seeking Information about Change UNIT/SUBUNIT: 9900/9901 DATE: 06/23/17 (DOCUMENT STRENGTHS AND HOW CLIENT WILL UTILIZE HIS / HER STRENGTHS TO MEET THE TREATMENT OBJECTIVES.) NARRATIVE: Sue says she's "so tired of being depressed," and she wants to learn skills so she can "have my life back."	12/04/2016	Active	12/04/2016	
2	Strength	Hobbies/Special Interests UNIT/SUBUNIT: 9900/9901 DATE: 06/23/17 (DOCUMENT STRENGTHS AND HOW CLIENT WILL UTILIZE HIS / HER STRENGTHS TO MEET THE TREATMENT OBJECTIVES.) NARRATIVE: Sue enjoys writing poetry and short stories. She has taken creative writing classes in the past that she liked.	12/04/2016	Active	12/04/2016	
1	Area of Need	Emotional-Behavioral/Psychiatric UNIT/SUBUNIT: 9900/9901 DATE: 12/04/16 (DOCUMENT THE CLIENT'S SPECIFIC EMOTIONAL / BEHAVIORAL / PSYCHIATRIC NEED FOR TREATMENT. USE CLIENT'S OWN WORDS TO INDIVIDUALIZE.) NARRATIVE: Client says that his symptoms of depression interfere with enjoying things that typically make him "happy" (writing, reading, being with friends). He says that "fatigue and sadness" lessen his motivation for work and he's afraid he'll lose his job "for calling in sick all the time." He says he avoids friends when he's depressed because "it takes too much energy" to be with them and he "doesn't want to bring them down all the time." He doesn't want to kill himself, but he says he "thinks about it a lot and it scares me." He says he wants therapy and is willing to try medications.	12/04/2016	Active	12/04/2016	
1.1	Goal	Improve/Maintain Functioning UNIT/SUBUNIT: 9900/9901 DATE: 12/04/16 SEE OBJECTIVE(S) PLANNING TIER.	12/04/2016	Active	12/04/2016	
1.1.1	Objective	Identify Irrational Thoughts UNIT/SUBUNIT: 9900/9901 DATE: 12/04/16	12/04/2016	Active	12/04/2016	

Client Plan Confirmation Page



PRINTING CLIENT PLANS

1. To print the client plan, select "Print."



2. Adjust your Print Management Panel accordingly, and select "Print."

Print Management Panel

File Print Client Plan

Refresh Print Close Panel

Actions Close

Select options related to the printing of the Client's AOA Output / FSP Client Plan Begin:

Printer

Printer: Default Printer

Assessments

☒ Print Assessment Pane(s)

Diagnoses to Print: - <Undefined>

Planning Tiers

☒ Print Planning Tiers Pane

- ☒ Print Planning Tier Narrative
- ☒ Print Active Planning Tiers
- ☒ Print Deferred Planning Tiers
- ☒ Print Inactive Planning Tiers
- ☒ Print Resolved Planning Tiers
- ☒ Print Referred Planning Tiers

Planning Tier Selection

ID	Description
A	Applied Strength
P	Area of Need
G	Goal
I	Intervention
O	Objective
S	Strength

Signatures

☒ Print Signatures Pane

Progress Notes

☒ Print Progress Notes Pane



PRINTING ALL PROGRESS NOTES ASSOCIATED WITH A CLIENT PLAN

1. Follow the previous steps for printing the client plan. Be sure to uncheck all of the check boxes except for “Print Progress Notes Pane.”

The screenshot shows a section of the software interface with two sub-panels. The first sub-panel is titled 'Signatures' and contains a checkbox labeled 'Print Signatures Pane' which is unchecked. The second sub-panel is titled 'Progress Notes' and contains a checkbox labeled 'Print Progress Notes Pane' which is checked. The 'Print Progress Notes Pane' checkbox and its label are highlighted with a yellow background.

2. Select “Print” once the selections have been made. All progress notes associated with it will print at one time.

The screenshot shows the 'Print Management Panel' window. It has a 'File' menu and a 'Print Client Plan' button. Below these are three icons: 'Refresh', 'Print', and 'Close Panel'. The 'Print' icon, which depicts a printer, is highlighted with a black rectangular box. Below the icons are the labels 'Actions' and 'Close'. At the bottom of the panel, there is a message: 'Select options related to the printing of the Client's AOA Output / FSP Client Plan Begin:'.

VIEWING PROGRESS NOTES

To View Existing Progress Notes:

1. On the Client Panel, find the “Progress Notes” pane and single click on it.

The screenshot shows the 'FAKE TEST' application window. The 'Progress Notes' pane is selected in the bottom menu, which is highlighted with a black rectangular box. The main area of the window displays a table of progress notes. The table has columns for 'Client Plan', 'Type', 'F/A', 'Date', 'Thru', 'Primary Signer', and 'Intervention'. There are two rows of data in the table.

Client Plan	Type	F/A	Date	Thru	Primary Signer	Intervention
IF Interim Fo...	Individual Progress Note	<input checked="" type="checkbox"/>	01/04/2017	01/04/2017	CLINICAL, STAFF	
IF Interim Fo...	Never-Billable Progres...	<input checked="" type="checkbox"/>	01/02/2017	01/02/2017	CLINICAL, STAFF	

The bottom status bar of the application shows: 'Logged on as CLINICAL, STAFF', 'Environment: Test 3', 'CHP20111029 Template Loaded', and 'Ready'.



2. Click on the black drop down arrow to open display options.

Client Plan	Type	F/A	Date	Thru	Primary Signer	Intervener
IF Interim Fo...	Individual Progress Note	<input checked="" type="checkbox"/>	01/04/2017	01/04/2017	CLINICAL, STAFF	
IF Interim Fo...	Never-Billable Progres...	<input checked="" type="checkbox"/>	01/02/2017	01/02/2017	CLINICAL, STAFF	



Note: “Filters” allows you to select how you want to view progress notes (in a particular date range, by Client Plan Type, by Progress Note Type, by a particular Intervention, Final Approved & Pending progress notes, and/or voided progress notes.)

3. Double click on any progress note you would like to see in its entirety.
4. Click on the “Client Narrative” line to read the narrative.

Lock	Va...	Type	Date	Owner
		Client Narrative	01/04/2017	CLINICAL, STAFF

5. To view encounter information select the “Encounter” pane, and double click on the encounter to open details.

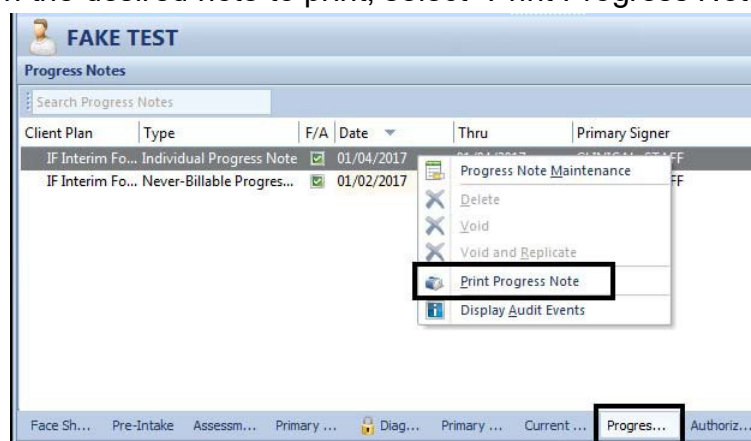
Encounter (U)	PSYCHOTHERAPY - INDIVIDUAL 30 (30)	01/04/2017
Staff - Lead	CLINICAL, STAFF (800001)	01/04/2017
Staff - Collateral	ONE, RN (800002)	01/04/2017
Client	TEST, FAKE	01/04/2017



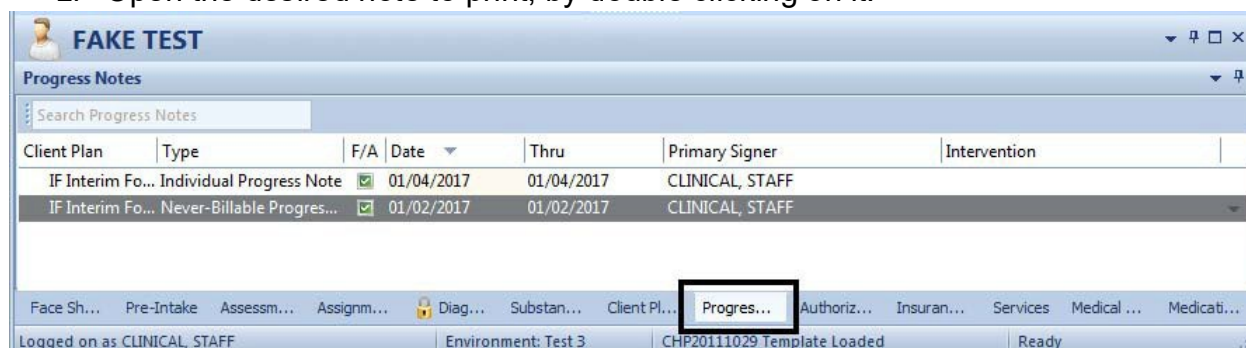
PRINTING INFORMATIONAL/INDIVIDUAL PROGRESS NOTES

There are two ways to print progress notes; the right click menu, or opening the note and selecting the print icon.

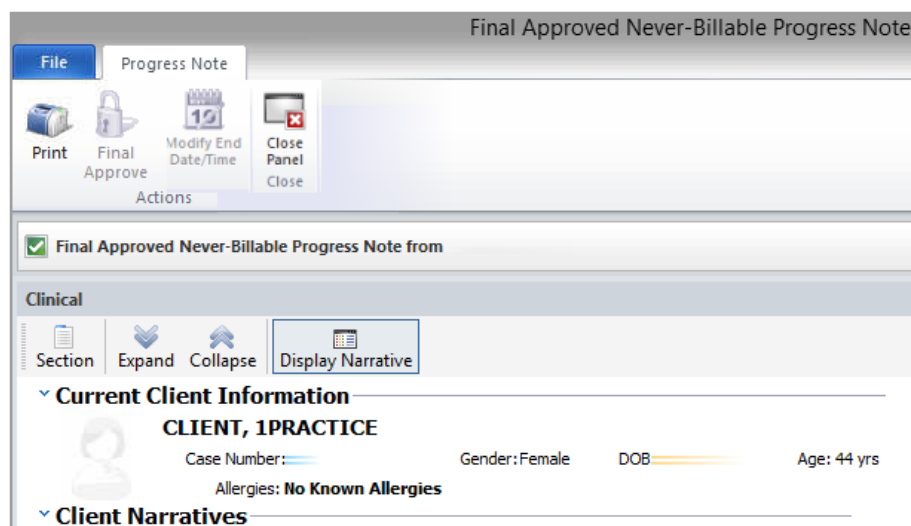
1. Right click on the desired note to print, select "Print Progress Note."



2. Open the desired note to print, by double clicking on it.



3. The progress note will display. Select "Print."





4. Select the print destination, and which aspects of the note you would like included. Select “Print” at the top of the screen.

The screenshot shows a window titled "Print Management Panel" with a red close button in the top right corner. Below the title bar is a "File" menu and a "Print Progress Note" tab. The main area contains a toolbar with "Refresh", "Print" (highlighted with a black box), and "Close Panel" buttons. Below the toolbar is a section titled "Select options related to the printing of the Never-Billable Progress Note". This section contains several categories of options:

- Printer:** A dropdown menu showing "Default Printer".
- Services:** A checkbox for "Print Services" (unchecked).
- Narratives:** Three checkboxes: "Print Overview Narratives" (unchecked), "Print Client Narratives" (checked), and "Print Narrative Signatures" (unchecked).
- Linked Objectives:** A checkbox for "Print Linked Objectives" (unchecked).
- Related Clinical Documents:** Five checkboxes: "Print Assessments" (unchecked), "Print Medical Conditions Reviews" (unchecked), "Print Medications" (unchecked), "Print Lab Orders" (unchecked), and "Print Immunizations" (unchecked).
- Progress Note Signatures:** A checkbox for "Print Progress Note Signatures" (checked).



NOTE: Only aspects included in the note selected will be available for printing. For instance, users will not be able to select “Print Services” on an informational note.

NOTES



PRINTING GROUP PROGRESS NOTES

1. Open the desired note to print, by double clicking on it.

Client Plan	Type	F/A	Date	Thru	Primary Signer	Intervention
CP Client PI...	Informational Note	<input checked="" type="checkbox"/>	10/06/2016	10/06/2016	CLINICAL STAFF	
CP Client PI...	Group Progress Note	<input checked="" type="checkbox"/>	09/29/2016 11:0...	09/29/2016 12:0...	CLINICAL STAFF	REHAB-GROUP 35
CP Client PI...	Individual Progress N...	<input checked="" type="checkbox"/>	09/29/2016	09/29/2016	PRO. PARA	CASE MGT / BROKERAGE 30
CP Client PI...	Individual Progress N...	<input checked="" type="checkbox"/>	09/28/2016	09/28/2016	CLINICAL STAFF	MEDS EM DETAILED MODERATE 27
CP Client PI...	Individual Progress N...	<input checked="" type="checkbox"/>	09/28/2016	09/28/2016	CLINICAL STAFF	CASE MGT / BROKERAGE 50

2. The Group progress note will display. Select the client for whom you wish to print a progress note. Select "Print" to print the progress note.

Final Approved Group Progress Note

File Progress Note

Print Final Approve Void Modify End Date/Time Close Panel Close

Final Approved Group Progress Note from 05/23/2022 03:30 PM

Clients

Add Client by Case#, Name or SSN

Case #	Client
3ALMOND, PUDDING	
GROUP, NOTES1	

Clinical

Section Expand Collapse Display Narrative

Current Client Information

GROUP, NOTES1

Case Number: Gender: Male DOB:

Allergies: No Known Allergies

Overview Narratives

Lock	Va...	Type	Date	Owner
		Overview Narrative	05/23/2022	

Client Narratives

Lock	Va...	Type	Date	Owner
		Client Narrative	05/23/2022	

Related Client Plan

Client Plan - AOA Outpt / FSP Client Plan

Revision: 1 Start: 10/01/2021 End: 10/01/2022

Intervention(s) **Objective(s)**

REHAB-GROUP 35 [35] Develop Coping Skill... Emotional-Be...

Client Narrative

9900/9901
CHIEF COMPLAINT: (Appearance and Cognitive capacity: Current impairment, symptoms/behavior affecting functioning): CLT appeared well groomed and dressed appropriately. CLT appeared overwhelmed and distracted. CLT has reported an increase in depression due to the stress and uncertainty of his living situation.

INTERVENTION: (Describe how skill building interventions are addressing the client's functional impairment(s). If collateral server, include individual contribution to intervention): Clinician demonstrated a brainstorming technique involving a diagram of the problem in the center and drawing lines in different solutions. Clinician explained how this method can bring up completely different perspectives for solutions to finding a new roommate.

RESPONSE (Offered feedback, opinions, suggestions etc.): CLT openly participated in the group. CLT shared with the group that losing his roommate has been financially stressful for him. CLT stated, "it was hard to make last month's rent and I have been feeling realing

Encounters

Void and Replicate Display Detail

✓ Encounter	REHAB-GROUP 35 (35)	05/23/2022	03:30 PM - 04:00 PM	0:30
Staff - Lead		05/23/2022	03:30 PM - 04:00 PM	0:30 0:19 (D)
Client	3ALMOND, PUDDING	05/23/2022	03:30 PM - 04:00 PM	0:30
Client	GROUP, NOTES1	05/23/2022	03:30 PM - 04:00 PM	0:30

Signatures Encounters



3. Select the print destination, and which aspects of the note you would like included. Select “Print” at the top of the screen.

The screenshot shows a window titled "Print Management Panel" with a red close button in the top right corner. Below the title bar is a "File" menu with a "Print Progress Note" option. Under the "File" menu, there are three icons: "Refresh" (a green circular arrow), "Print" (a printer icon, which is highlighted with a black box), and "Close Panel" (a window icon with a red X). Below these icons are the labels "Actions" and "Close".

Below the icons is a section titled "Select options related to the printing of the Group Progress Note 05/23/2022". This section contains several categories of options:

- Printer:** A dropdown menu labeled "Printer" with "Default Printer" selected.
- Services:** A checkbox labeled "Print Services" which is checked.
- Narratives:** Three checkboxes: "Print Overview Narratives" (checked), "Print Client Narratives" (checked), and "Print Narrative Signatures" (unchecked).
- Linked Objectives:** A checkbox labeled "Print Linked Objectives" which is checked.
- Related Clinical Documents:** Five checkboxes: "Print Assessments" (unchecked), "Print Medical Conditions Reviews" (unchecked), "Print Medications" (unchecked), "Print Lab Orders" (unchecked), and "Print Immunizations" (unchecked).
- Progress Note Signatures:** A checkbox labeled "Print Progress Note Signatures" which is checked.

4. To print a different client's progress note in the group, follow steps 2-3.



CORE CLIENT INFORMATION



Note: Before entering a new client, always search to ensure that the client is not already in the system. Refer to the “Client Search” tip sheet on the previous pages.

If you are sure that the client is not already in the system, click on the “Add Client” button in the “Client Lookup” window.

After you click on “Add Client”, the “Core Client Information Maintenance Panel” window will display.



Just start typing – **DO NOT** click into the Sort Name field. Doing so could add a space at the beginning of the field. If this happens, the client will not be found if searched for by Sort Name. Enter as much client information as you have into the CCI.

In the “Sort Name” field, enter the client’s name. Do not forget the comma and the space in between the last and first names. Verify that the spelling and format are correct, as this is how other staff members will be searching for the client’s name in the future.

Sort Name

-or-

Sort Name 

Note: If a client’s name, date of birth, or social security is incorrect, fill out form BHS-025 and contact Medical Records.

- Do not enter a suffix (i.e. Jr., Sr., II, III)
- Do not enter punctuation, apostrophe (') or hyphen (-)
- Do not enter spaces (i.e. if the client has 2 last names, run them together)
 - When names are hyphenated or have another prefix such as Super-Human, it is important to enter the names into the Alias section to help facilitate future searches – e.g., Awesome Super-Human should be entered as an alias as HUMAN, AWESOME and also as SUPER, AWESOME.
- Do not use non-English letters (i.e. ñ)
- Press the Tab key and the client’s Sort Name will populate the Last Name, First and Middle Name Fields

Sort Name Case Number (0 or blank for Auto Assign)
 Last Name First Middle Name

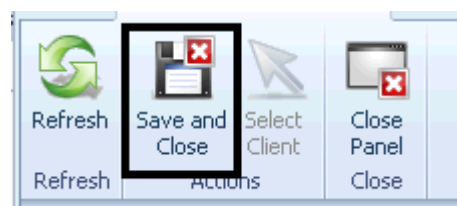
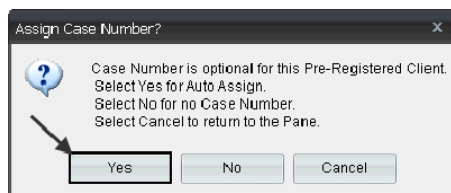
Enter the client’s DOB in the following format: MM/DD/YYYY.

DOB



Note: For the remaining optional fields, enter the client’s information. The information will populate to the Demographics form.

Click on the “Save and Close” button.



When asked about assigning a case number to this client, **Always** select “Yes.”

The client is now in the system as a new client.

**Entering John and Jane Doe Clients:**

When an unidentified client presents, use the following guidelines for entering the client into CCBH. *Note: Once the legal name is known, submit a BHS-025 with supporting documentation to medical records. The final page in this packet contains that information.*

For all programs (except ESU), enter:

Sort Name	DOE, JANE MM/DD/YY	Case Number (0 or blank for Auto Assign)	0
Last Name	DOE	First	JANE
		Middle Name	MM/DD/YY
DOB	01/01/1901	Soc Sec #	
		Ethnicity	
		Sex	

-Or-

Sort Name	DOE, JOHN MM/DD/YY	Case Number (0 or blank for Auto Assign)	0
Last Name	DOE	First	JOHN
		Middle Name	MM/DD/YY
DOB	01/01/1901	Soc Sec #	
		Ethnicity	
		Sex	

MM/DD/YY = date of client admission/contact. The date will default into the “Middle Name” field. **Delete the numbers in the “Middle Name” field before saving the record.**

If the client’s date of birth is unknown and cannot be estimated, enter 01/01/1901.

For the ESU, enter:

Sort Name	DOE, ESU1 MM/DD/YY	Case Number (0 or blank for Auto Assign)	0
Last Name	DOE	First	ESU1
		Middle Name	MM/DD/YY
DOB	01/01/1901	Soc Sec #	
		Ethnicity	
		Sex	

ESU1 = The first John/Jane DOE client of the day.

ESU2 = The second John/Jane DOE client of the day.

MM/DD/YY = date of client admission/contact. The date will default into the “Middle Name” field. **Delete the numbers in the “Middle Name” field before saving the record.**

If the client’s date of birth is unknown and cannot be estimated, enter 01/01/1901.

For John Doe’s, enter “M” as the sex, and for Jane Doe’s, enter “F” as the sex.



Entering Clients with Identical Sort Names:



If the above message appears when entering an index card, double check to ensure that the client is not already in the system. If the existing record is for a different client, adjust the client's sort name. This is accomplished by entering the second client's date of birth to the end of the client's name. Example:

Sort Name	LAST, FIRST MM/DD/YY	Case Number (0 or blank for Auto Assign)	0
Last Name	LAST	First	FIRST
		Middle Name	MM/DD/YY

The DOB will default into the “Middle Name” field. Delete the numbers in the “Middle Name” field, and enter the appropriate middle name/initial. However, **do not** change the “Sort Name” field. See the example below:

Sort Name	LAST, FIRST MM/DD/YY	Case Number (0 or blank for Auto Assign)	0
Last Name	LAST	First	FIRST
		Middle Name	MM/DD/YY

Sort Name	LAST, FIRST MM/DD/YY	Case Number (0 or blank for Auto Assign)	0
Last Name	LAST	First	FIRST
		Middle Name	MIDDLE

↓

Special considerations:

- *When available, the client's middle name should always be entered.*
- *In the case of identical first and last names, the middle name may be all that is needed to differentiate among clients. If that is not enough, then the DOB is added to the end of the sort name field.*
- *When a date is added to the end of the sort name field, it appears in the middle name field. Make sure to remove it before moving forward.*

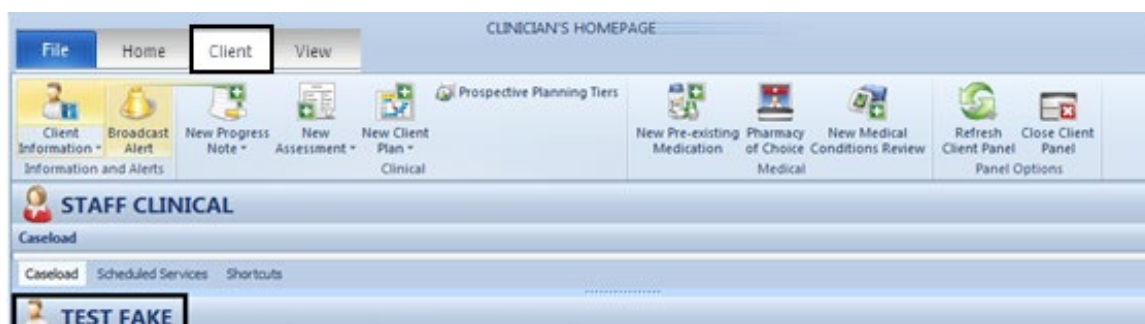


ADDING NEW ASSESSMENTS

- Access the desired client.
- A “Client” tab will open with additional buttons listed within the ribbon.
- The Client Panel will launch on the bottom portion of your screen. The name of the client will display in the client name box.

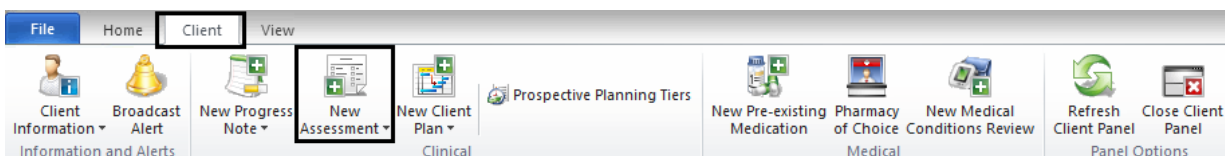


Note: A client name must be displayed in the “Client Panel” to have the “Client” tab accessible.



New Assessment Button:

- The New Assessment button will be displayed in the “Client” tab ribbon.



Note: The new assessment button is segmented in two parts. The upper portion of the button is a list of all assessments available for entry. The lower portion consists of assessments that have been established as “New Assessments” in your “Preferences”.

To see a complete list of assessments:

- Click on the top portion of the “New Assessments” button.
- The “New Assessment Lookup” window displays.



- Search for the desired assessment by using the scroll bar on the right side of the list.
- Highlight the assessment you wish to launch.
- Click “Select”.
- The system will open the external view and the selected assessment to begin data entry.



Note: Double clicking on the assessment will also launch the desired assessment.

Dating the Assessment:

- Place the desired date in the date field.
- Refer to the **“GUIDELINES FOR DATES IN CCBH”**.
- Press the “Save” button. This will launch the assessment for data entry.



Note: Correct entry of the date is essential. Once the date is entered in the above field, it cannot be altered.



DEMOGRAPHICS FORM OVERVIEW

- **For any address:**

By entering the “Zip Code” and then pressing the tab key on the keyboard, the city/state/county will populate.

City/State/Zip	<input type="text"/>	<input type="text"/>	<input type="text" value="91941"/>	<input type="text" value="..."/>	County	<input type="text"/>
City/State/Zip	LA MESA	CA	<input type="text" value="91941"/>	<input type="text" value="..."/>	County	San Diego

- **For Clients who are Homeless, Incarcerated, or Have No Reported Mailing Address:**

The physical address for a client who is **homeless** is entered with the word “homeless”, and a zip code.



Note: If you have additional information (i.e.- frequents Balboa Park), type it after the word “homeless” in the Physical Address field.

Physical Address	<input type="text" value="HOMELESS"/>					
City/State/Zip	SAN DIEGO	CA	<input type="text" value="92103"/>	<input type="text" value="..."/>	County	San Diego

In the zip code field, enter the zip code of the area where the client sleeps or frequents (if known).

If you do not know the zip code where the client frequents, enter the zip code of your program.

For individuals who are **incarcerated**, the jail’s address is entered as the physical address.

For individuals who have **no reporting address**, enter the address of the client’s primary subunit in both the physical and mailing address fields.



- **Phone**

If the paper demographic form does not include a home phone number, type “NONE”.

- **Religion**

If the paper demographic form lists a religion that is not included in the table, use your judgment to choose the most appropriate selection.

For example:

- 13 Atheist
- 12 No Religious Preference
- 98 Other
- 08 Other Christian
- 99 Unknown

Religion: 

- **Mother's First Name**





If the client's “Mother's First Name” is blank on the paper demographic form, type in “Unknown” instead of “None”.

Mother's First Name 

- **Alias/Contacts**

When adding/editing an Alias or Contact, right click into the box to view your menu options.

Alias(es)	
Last	First
There are no items to show.	

 Add New
 Edit
 Show
 Delete

LEGAL INFORMATION



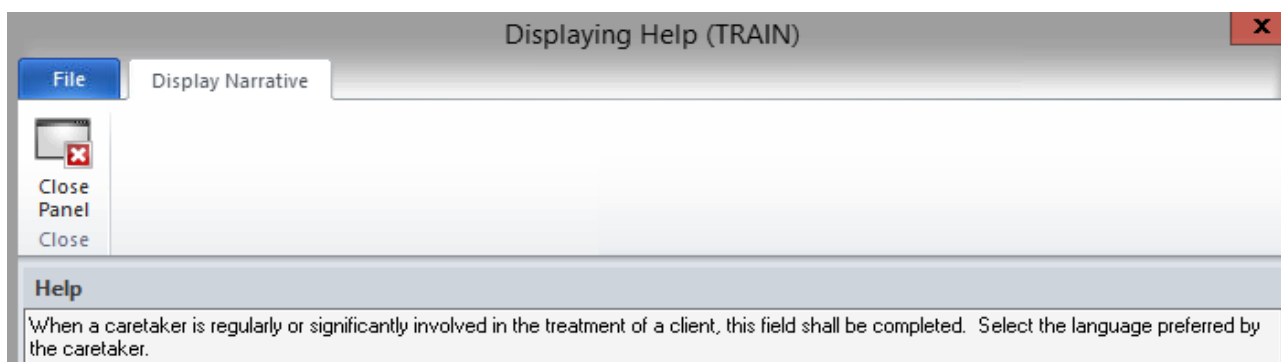
Help Text

Help Text is available for staff throughout the assessment. Help texts can be accessed by clicking on the question mark icon. For example, if you click on the “Preferred Language (Caretaker)” help text icon, the following help text appears:

[Preferred Language \(Individual\)](#) ?

[Preferred Language \(Caretaker\)](#) ?

Interpreter Needed? ? ☐ Yes ☐ No



NOTES



GUIDELINES FOR DATES IN CCBH

Assessment Date:

When adding an assessment, the system will require the entry of a date when opening the form for data entry. This is called the assessment date.

Adding Assessment for

File Assessment

Refresh Save Request Assessment Prospective Planning Tiers Progress Indicators Close Panel

Refresh Actions Clinical Close

Click Save to confirm selections and add a new Assessment

Assessment Type BHA Adult BHAΔ

Date 10/1/2014

The assessment date determines the date the assessment is sorted in the look up window. The assessment date must match the service date that is claimed in the system. Progress note documentation will need to support the service claimed. When an assessment service takes more than one session to complete, multiple service dates claimed must be indicated in each progress note for each service date. However, the assessment date entered in the MIS will remain the initial assessment service date.





Signature Date:

Signature dates may be different than the assessment date, which is necessary at times (i.e. when a co-signature is necessary but the staff is out of the office).

Final Approved BHA Adult for dated 03/15/2015

File **Assessment**

Refresh Perform Validation Check Validation Save and Close Save Final Approve Print Void Add Signature - Signatures Pre Plan

BHA Adult

Signatures

F/A Sig	Entity T...	Signature Line Heading	Name	Date	Time
Staff	Staff Requiring Co-Signature	TRAINEE CLINICAL	03/30/2016	02:55 PM	
Staff	Staff Comp/Accept Assessment	CREDENTIALLED STAFF	03/30/2016	02:56 PM	

County of San Diego Mental Health Services
BEHAVIORAL HEALTH ASSESSMENT - ADULT

Callouts:

- Date of Service or effective date. The system will sort the assessments in the lookup by this date.
- Date and time of documentation for the staff completing the assessment.
- Date the co-signature was obtained and completion date for the assessment. For reviewers, this is considered the date the assessment is complete.



Note: Co-signatures must be completed within timelines.

Final Approve Date:

The final approval date may be different than the assessment date and/or signature dates. The final approval date is the date that the assessment is considered active and complete. This date will also drive the timelines for documentation reviews.

Name: FAKE, TEST	Caso#:	Page: 1 of 3
Type: Demographics Form		Date: 10/01/2014
Printed on 10/17/2014 at 03:23 PM		(Final Approved on 10/17/2014 at 03:22 PM)

COUNTY OF SAN DIEGO MENTAL HEALTH SERVICES DEMOGRAPHIC FORM

Admission Status ☐ Pre-registered ☐ Registered ☒ Admit

CLIENT IDENTIFYING INFORMATION



ENTERING A DIAGNOSIS

1. To enter a diagnosis, locate the “Clinical Disorders/Conditions That May be A Focus of Clinical Attention” section on the form.
2. Right click in the white space to see the option “Add New.”
3. Click on “Add New.”

Clinical Disorders/Conditions That May Be a Focus of Clinical Attention | Active | Current Inactivations |

ID	Diagnosis	Priority
There are no items to show.		

2 Right click in the white space.

3 Select "Add New"

+ Add New

File Assessment

Save and Close Actions Close Panel Close

Client Disorders and Conditions

Enter ICD - 10 diagnosis code

Diagnosis F43.0

Priority

Begin Date

ID	ICD Code	Description
F43.0	F43.0	Acute stress reaction

☐ External Source

- Enter the ICD-10 diagnosis code, if known.

- If the ICD-10 diagnosis code is not known, click on the “Diagnosis” link and search for the diagnosis by entering a description.

File Assessment

Save and Close Actions Close Panel Close

Client Disorders and Conditions

Diagnosis

Priority 1

Begin Date // End Date //

☐ External Source



- Fill in the fields you want to address, then click the “Search” button.

Click on the search button to perform a search for diagnosis records based on the criteria in the top section.

Diagnosis Search Parameters

☒ Begins with ☐ Includes Description:

Diagnosis ID: Axis: Version: ICD-9: ICD-10:

Status: Program: Chapter: Blocks: Max Results:

Diagnosis Search Results (1 Total)

ID	Description	ICD-9 Code	ICD-10 C...	Vers...	Prog...	Act...	Chapter	Block	Axis	Type
F43.0	Acute stress reaction	308.9	F43.0	10	MH	<input checked="" type="checkbox"/>	5	F40-F48	1	ICD

- Your selection will appear in the “Diagnosis” field. Address the following the “Priority, Begin Date, and End Date” fields. When finished, click “Save and Close” button.

Note: Refer to the *Diagnosis Practice Guidelines* section of this manual for important information regarding the “Priority, Begin Date, and End Date” fields.

Client Disorders and Conditions

[Diagnosis](#):

[Priority](#):

[Begin Date](#): [End Date](#):

☐ External Source

- The diagnosis entered will now appear in the “Clinical Disorders/Conditions That May be A Focus of Clinical Attention” section.

Clinical Disorders/Conditions That May Be a Focus of Clinical Attention

ID	Diagnosis
F43.0	Acute stress reaction



ELECTRONIC SIGNATURE GUIDELINES

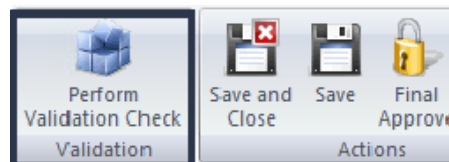
- Certain assessments in CCBH can be final approved by any clinical staff who have required system access, such as the Safety Alert or the Demographic Form. Anyone can complete the assessment and final approve as themselves, without a co-signature.
- To final approve the Safety Alerts and Demographic Form

- 1) Make sure all software required fields have been addressed.

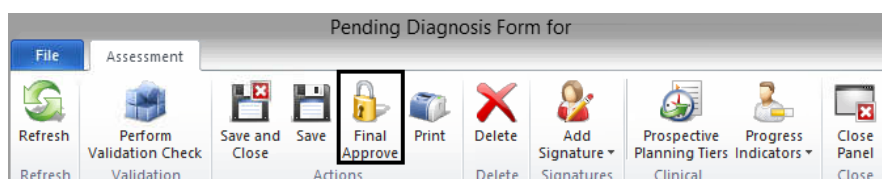
The screenshot shows a window titled "Validations" with a table containing the following information:

Severity	Validation	Description
Critical	Empty Required Fields	All required fields must be completed to be Final Approved.

- (a) To check, click the "Perform Validation Check" button at the top of the window. A screen will appear at the center of your screen with a list of fields to be addressed, if any. If all required fields have been addressed, you will not see a screen appear. When ready, proceed with the final approval step for the assessment.



- 2) Click the "Final Approve" button located at the top of the window.



- 3) Enter your CCBH password when prompted.

The screenshot shows a dialog box titled "Password - STAFF ADMIN". It has a text field labeled "Password" with a masked password "*****" and an "Ok" button.



- Some assessments contain credential restricted signatures. For instance, there are three credential restricted signature lines located in the “Validations” pane of the Diagnosis Form, and two signature lines on the BHAs.

Se...	Validation	Description
Crit...	Pending Staff Sig...	Must be electronically signed by at least one Staff Member to be Final Approved.
Crit...	Staff Signature R...	Sequence 1: Staff Requiring Co-Signature
Crit...	Staff Signature R...	Sequence 2: Staff Comp/Accept Assess...
Crit...	Staff Signature R...	Sequence 3: Staff Entering Information

Signatures Validations

- Your license type or credential will determine how you address each signature line.

Staff Who Do Not Require a Co-Signature:

- Sequence 1 (Staff Requiring Co-Signature) - Left click and select “Delete.”

Seve...	Validation	Description
Critical	Pending Staff Signature ...	Must be electronically signed by at least one Staff Member to be Final Approved.
Critical	Staff Signature Required	Sequence 1: Staff Requiring Co-Signature
Critical	Staff Signature Required	Sequence 2: Staff Comp/Accept Assessment
Critical	Staff Signature Required	Sequence 3: Staff Entering Information

Quick Add Signature

- Electronically Sign
- Assign Signatory
- Assign Signatory and Sign
- Document Signature on Hard Copy
- Clear Signature
- Delete**

- Sequence 2 (Staff Comp/Accept Assessment) – Left click and select “Electronically Sign.”

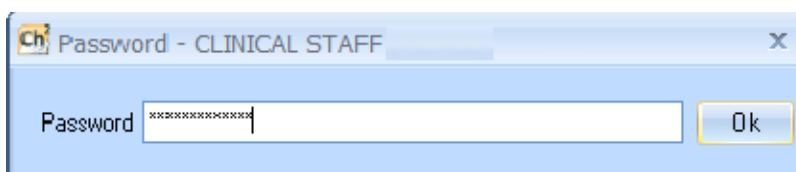
Seve...	Validation	Description
Critical	Pending Staff Signature ...	Must be electronically signed by at least one Staff Member to be Final Approved.
Critical	Staff Signature Required	Sequence 2: Staff Comp/Accept Assessment
Critical	Staff Signature Required	Sequence 3: Staff Entering Information

Quick Add Signature

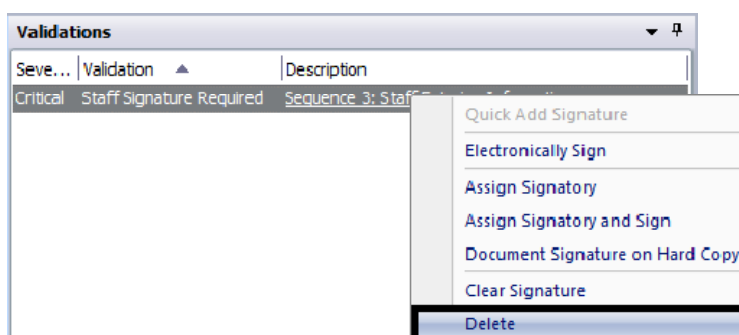
- Electronically Sign**
- Assign Signatory
- Assign Signatory and Sign
- Document Signature on Hard Copy
- Clear Signature
- Delete



3. Enter your CCBH password when prompted.

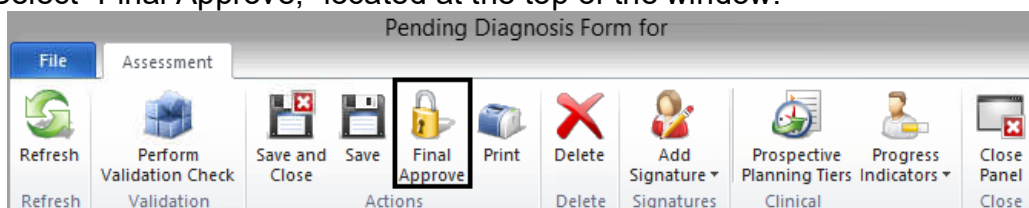


4. Sequence 3 (Staff Entering Information) – Left click and select “Delete.”



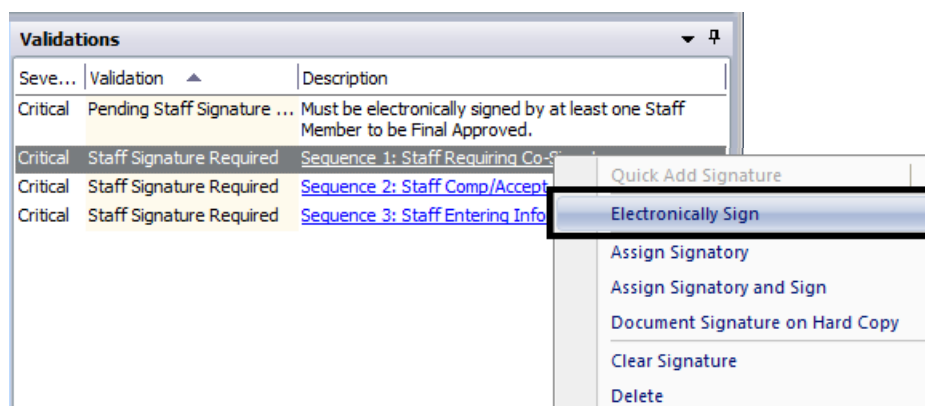
NOTE: Sequence 3 is for administrative staff, entering on your behalf. Most assessments will have only Sequence 1 and Sequence 2. Follow the same procedure as mentioned above.

5. Select “Final Approve,” located at the top of the window.



Staff Who Require a Co-Signature:

1. Sequence 1 (Staff Requiring Co-Signature) - Left click and select “Electronically Sign.”





2. Enter your CCBH password when prompted.

Ch Password - STAFF TRAINEE

Password: [masked] [Ok]

3. Sequence 2 (Staff Comp/Accept Assessment) – Left click and select “Assign Signatory.”

Validations

Seve...	Validation	Description
Critical	Staff Signature Required	Sequence 2: Staff Comp/Accept Assessment
Critical	Staff Signature Required	Sequence 3: Staff Entering...

- Quick Add Signature
- Electronically Sign
- Assign Signatory**
- Assign Signatory and Sign
- Document Signature on Hard Copy
- Clear Signature
- Delete

4. Find your supervisor by name or staff ID. Highlight their name and choose “Select” at the top.

Staff Lookup

File Lookup Panel

Select Close Panel

Actions Close

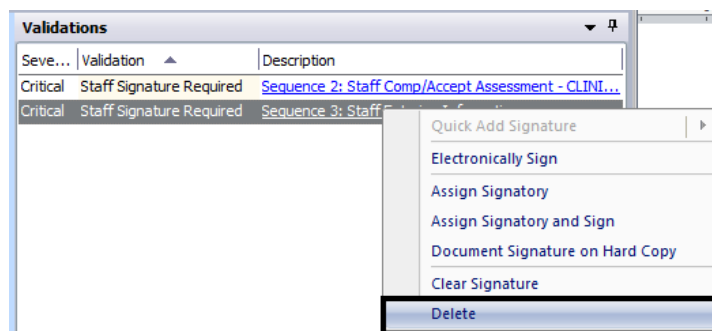
Select a Staff Member from the list.

Staff List

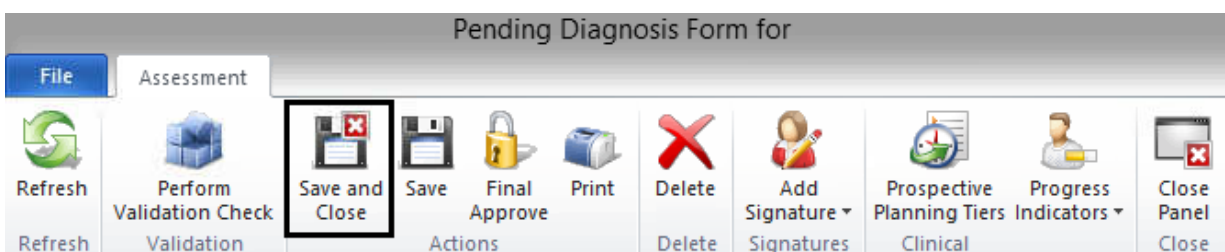
[ID]	Full Name
800018	PARAPRO, STAFF
800019	STAFF, TFC
800023	STAFF, PM
910001	RN1 DHP
910003	STAFF CLINICAL



5. Sequence 3 (Staff Entering Information) – Left click and select “Delete.”

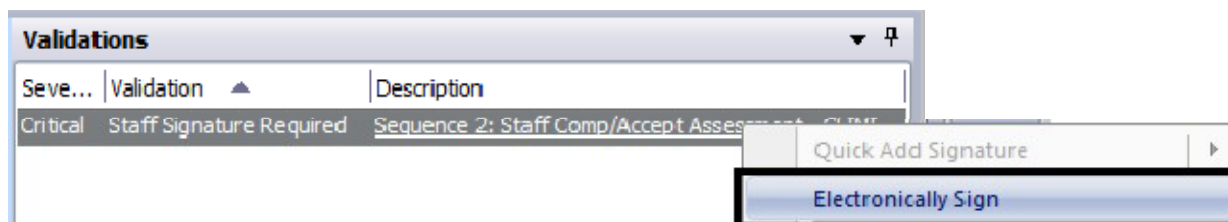


6. Click “Save and Close” located at the top of the window. After you click “Save and Close,” you return to the Clinician’s Homepage. The name of the client will display on the Notifications list on your Clinician’s Homepage and on the Homepage of the approved signer until the assessment is co-signed and final approved.



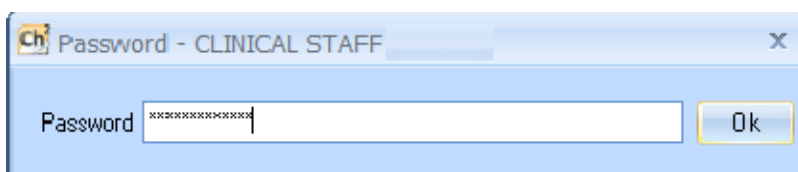
Staff Who Final Approve (or Co-Sign) Assessments For Others:

1. Find the client on your Notifications list on the Clinician’s Homepage.
2. Access the assessment and review. The person for whom you are co-signing should have already completed Sequence 1 signature line and deleted Sequence 3.
3. Sequence 2 (Staff Comp/Accept Assessment) – Left click and select “Electronically Sign.”

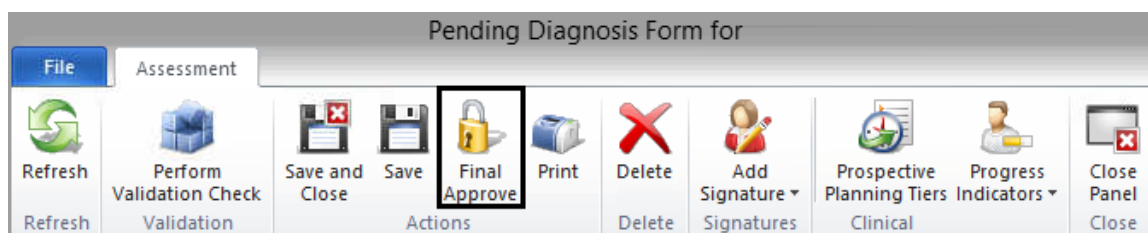




4. Enter your CCBH password when prompted.



5. Click “Final Approve” located at the top of the window.



REMINDER: Co-signatures and final approval of assessments should be done as soon as possible.

PLEASE REMEMBER:



Passwords may NEVER be shared as this constitutes a breach of security and HIPAA violation.

NOTES



VIEWING ASSESSMENTS

Saved forms:

- Are “saved” but not final approved.
- Can be edited or deleted by anyone who has access to that client’s forms.
- Will hold up the work flow as they prevent adding another form in which any fields are shared.

Lock it down by Final Approving to protect your work!!

How to open a saved assessment:

- Select a client and open the “Client Panel”. Next, click the “Assessments” pane.
- A list of assessments will display. The assessment that is not final approved will not have a check under the Final Approved status (F/A).
- Double click the assessment. The selected assessment will open for data entry and completion.

Date	Description	F/A	LK	V
07/01/2015	Demographics Form			
07/01/2015	Diagnosis Form	<input checked="" type="checkbox"/>		

VIEWING FINAL APPROVED ASSESSMENTS

- Select a client and open the “Client Panel”.
- Next, click the “Assessments” pane.
- A list of assessments will display. The assessments that are final approved will have a check under the Final approved status (F/A).
- Double click the assessment. The selected assessment will open for review.

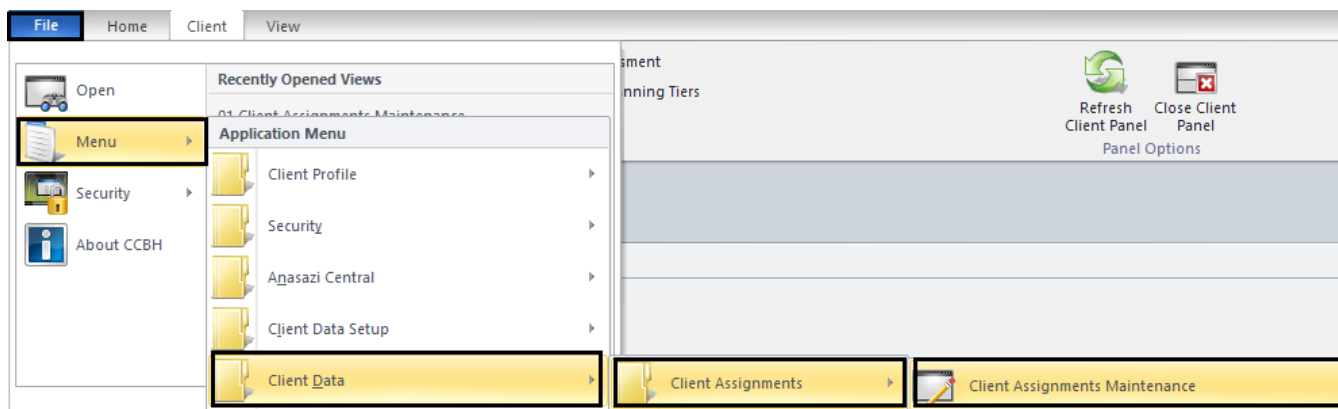
Date	Description	F/A	LK	V
07/01/2015	Demographics Form	<input checked="" type="checkbox"/>		
07/23/2015	Diagnosis Form	<input checked="" type="checkbox"/>		
07/23/2015	Diagnosis Form	<input checked="" type="checkbox"/>		
08/21/2015	Diagnosis Form	<input checked="" type="checkbox"/>		



ADDING CLIENT ASSIGNMENTS

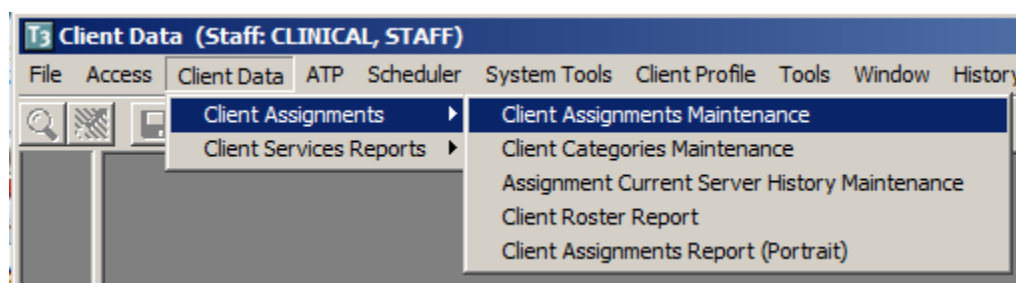
To get to the Client Assignment window:

1. Click on the File Tab
Click “Menu” → “Client Data” → “Client Assignments” → “Client Assignments Maintenance”



To access the Client Assignment Window from the external view:

1. Click on “Client Data” → “Client Assignments” → and from the drop down menu, select “Client Assignments Maintenance.”



The “Client Assignments Maintenance” window will display.

- In the blue field, enter the Client’s case number or the Client’s sort name (Last, First) in the “Client” and press the “Tab” key. (If the space is not blue, choose “Clear”)



- Click the “Add” button to begin the opening of the assignment process.

Unit	ID	SubUnit	ID	P	Server	Opened...	Closed	Status
------	----	---------	----	---	--------	-----------	--------	--------

Note: If you get an error message that reads, “Assignments may not be entered for pre-registered clients” this indicates that on the demographic form, the “Admit” radio button was not checked. This requires updating the demographic form and selecting the “Admit” radio button.

- From the “Assignment Form Entry” window, enter the effective date of the Client Assignment opening and your CCBH ID number.
- From the Form Type field, click on the arrow and from the drop down menu, select, “A-Admit” and click, “Ok”.

Effective Date: 08/18/2015

Form Completed By: GENERIC, ADMIN

Date Form Entered: 09/03/2015

Form Entered By:

Form Type: A - Admit

Forms Ok Clear Cancel



- A new Client Assignment window will appear:

Treatment Session: Leave this field blank.

Date Opened: This date pre-populates from the previous window.

Unit: Enter your program Unit in this field; hit the “Tab” key.

Sub Unit: Enter your programs SubUnit number in this field; hit the “Tab key.”

Treatment Team: Leave this field blank.

Current Server: Enter the Server’s CCBH ID number.

Note: The date from the “Date opened” field will auto populate from the previous window. If it’s not correct, select cancel and return to previous step.

- The final step is to click the “Save” button.
- After you have clicked “Save”, you are taken back to the “Client Assignment Maintenance” window.
- The Assignment Status for this client is now “Admitted.”



- The highlighted entry below represents the completed assignment opening effective 08/15/15.

Unit	ID	SubUnit	ID	P	Server	Opened...	Closed	Status
TRAINING UNIT	9900	TRAINING SUBUNIT	9901	Y	STAFF, CLINICAL	08/15/2015		Adm

How to Update a Server

- Open the “Client Assignments Maintenance” window.
- In the “Client” field, enter the Client’s case number or the Client’s name (Last, First) and press the “Tab” key on your keyboard.
- Select the assignment you want to update by clicking on the Unit name until it’s highlighted.
- Click the “Edit” Button.

Unit	ID	SubUnit	ID	P	Server	Opened...	Closed	Status
TRAINING UNIT	9900	TRAINING SUBUNIT	9901	Y	STAFF, CLINICAL	08/15/2015		Adm



- The “Assignment Form Entry” window will display.
- Enter the effective date of the Client Assignment update and your CCBH ID number.
- In the “Form Type” field, click on the drop down arrow, select, “U-Update” and click, “OK”.
- A new Client Assignment window will appear. The following fields will auto populate from the previous window: Date Opened, Unit & Sub-Unit, and Current Server.
- Delete the Current Server and Enter the New Server’s CCBH ID number and press the “Tab” key (*the start date to the right will update*).
- The last step is to click, “Save.”

T2 Client Assignments Maintenance (Administrative Access)

Client: TEST, FAKE Admitted
SAI: STAFF, CLINICAL
Treatment Session: 01/01/2015 — / / 1 - SAN DIEGO COUNTY MENTAL HEALTH

Assignments (1) | Server History (2) | Room/Bed History (3) | Home Provider History (4) | Absence History (5) | UB92 (6) | Family Members (7)

Main | RTF/RTC/Restorative | California Admissions | WA State Reporting | TX State Reporting

Treat. Session: 01/01/2015 — / / 1 - SAN DIEGO COUNTY MENTAL HEAL
Date Opened: 08/15/2015 Type: Admitted Time:
Unit: TRAINING UNIT 9900 ☒ Primary Unit
SubUnit: TRAINING SUBUNIT 9901 ☐ Lock Primary Unit
☐ Transition of Care
Treatment Team:
Current Server: **TRAINEE, STAFF** Start Date: 8/20/2015
Room: ☐ Single Parent Family
Assignment Cat:
Tran From Unit:
Tran From SubUnit:
Date Closed: / / Reas: Time:
☐ Transfer Transfer to Unit:
Transfer to SubUnit:

Treat Sess Print **Save** Clear Return Exit



- After you have clicked “Save”, you are taken back to “Client Assignment Maintenance” window.

Unit	ID	SubUnit	ID	P	Server	Opened...	Closed	Status
TRAINING UNIT	9900	TRAINING SUBUNIT	9901	Y	TRAINEE, STAFF	08/15/2015		Adm

- The highlighted entry above represents the completed Server update and reflects the new Server: TRAINEE, STAFF

How to Close a Client Assignment

- From “Client Assignments Maintenance” window; enter the Client’s case number or the Client’s SORT name (Last, First) and press the “Tab” key.
- From the display window, select the assignment you want to close by clicking on the Unit name until it’s highlighted.
- Click the “Edit” button to begin the opening of the assignment process.

Unit	ID	SubUnit	ID	P	Server	Opened...	Closed	Status
TRAINING UNIT	9900	TRAINING SUBUNIT	9901	Y	TRAINEE, STAFF	08/15/2015		Adm



- From the “Assignment Form Entry” window, enter the effective date of the Client Assignment closing and your CCBH ID number.
- From the Form Type field, click on the arrow and select, “C-Close” and click, “OK”.

Assignment Form Entry

Effective Date: 08/30/2015

Form Completed By: GENERIC, ADMIN

Date Form Entered: 08/30/2015

Form Entered By:

Form Type: C - Close

Forms OK Clear Cancel

- A new Client Assignment window will appear. The following fields will auto populate from the previous window: Date Opened Unit & Sub-Unit, Current Server and Date Closed.
- Closing Reason: Click on the magnifying glass to show the closing reasons

Client Assignments Maintenance (Administrative Access)

Client: TEST, FAKE Admitted

SAL: TRAINEE, STAFF

Treatment Session: 01/01/2015 1 - SAN DIEGO COUNTY MENTAL HEALTH

Assignments (1) | Server History (2) | Room/Bed History (3) | Home Provider History (4) | Absence History (5) | UB92 (6) | Family Members (7)

Main | RTF/RTC/Restorative | California Admissions | WA State Reporting | TX State Reporting

Treat. Session: 01/01/2015 1 - SAN DIEGO COUNTY MENTAL HEAL

Date Opened: 08/15/2015 Type: Admitted Time:

Unit: TRAINING UNIT 9900 ☒ Primary Unit

SubUnit: TRAINING SUBUNIT 9901 ☐ Lock Primary Unit

Treatment Team:

Current Server: TRAINEE, STAFF Start Date: 08/20/2015

Room: ☐ Single Parent Family

Assignment Cat:

Tran From Unit:

Tran From SubUnit:

Date Closed: 08/30/2015 Reas:

☐ Transfer Transfer to Unit: Transfer to SubUnit:

Treat Sess Print Save Clear Return Exit



- The “Assignment Close Dispositions Lookup” window will display.
- Select the applicable code and press “OK”.

ID...	Description...
AF	Another typeHealthCareFacility
B	Board & Care
AG	Cancer Center/Childrens Hosp
C	Crisis Residence
AL	Critical Access Hosp (CAH)
AQ	Custodial w/plan IPT readmit
D	Death/Expired
AM	Disaster Alternative Care Site
X	Do Not Use/Auto Close

☒ Active ☐ InActive ☐ All

OK Find Exit

- The last step is to click, “Save.”

Client: TEST, FAKE Admitted

SAI: TRAINEE, STAFF

Treatment Session: 01/01/2015 / / 1 - SAN DIEGO COUNTY MENTAL HEALTH

Assignments (1) | Server History (2) | Room/Bed History (3) | Home Provider History (4) | Absence History (5) | UB92 (6) | Family Members (7)

Main | RTF/RTC/Restorative | California Admissions | WA State Reporting | TX State Reporting

Treat. Session: 01/01/2015 / / 1 - SAN DIEGO COUNTY MENTAL HEAL

Date Opened: 08/15/2015 Type: Admitted Time:

Unit: TRAINING UNIT 9900 ☒ Primary Unit

SubUnit: TRAINING SUBUNIT 9901 ☐ Lock Primary Unit

Treatment Team: ☐ Transition of Care

Current Server: TRAINEE, STAFF Start Date: 08/20/2015

Room: ☐ Single Parent Family

Assignment Cat: Home/Shelter/Self

Tran From Unit: Tran From Sunt:

Date Closed: 08/30/2015 Reas: Home/Shelter/Self Time:

☐ Transfer Transfer to Unit: Transfer to SubUnit:

Treat Sess Print Save Clear Return Exit



- After you have clicked “Save”, you are taken back to “Client Assignment Maintenance” window.
- The Assignment Status for this client is now: “Closed-Adm.”
- The highlighted entry below represents the completed assignment closing effective 08/30/2015.

Unit	ID	SubUnit	ID	P	Server	Opened...	Closed	Status
TRAINING UNIT	9900	TRAINING SUBUNIT	9901	P	TRAINEE, STAFF	08/15/2015	08/30/2015	Adm

Adding MD or RN Unit/Sub-Unit (If Applicable):

NOTE: Billing cannot be entered for an MD or RN subunit, as is not setup for billing purposes. The purpose of adding the MD and RN subunit, is so they are able to see the client on their caseload in their Clinician's and Doctor's Homepage.

NOTES



CLIENT SEARCH External View

Client search:

- Click on the magnifying glass icon.

- The “Clients Lookup” window will display.

Sort Name	Case Number	S	E	DOB	SSN	Primary Unit	Primary Surt	Ext Case #	SAI
22215, TEST		M	2			9900	9901	REJIS #	
223-225, CPPN		F	5			9900	9901		
223-225, DHP		F	4			9900	9901		
223-225, MEDS		F	9			9900	9901		
2MARATHONS, RUN		F	9			6990	6991		
8DAYS, SUNNY		M	9			9900	9901		
8TREE, TALL		M	9			9900	9901		
9LIGHTS, HEAD		M	2			8050	8051		
9MAILING, ADDRESS		M	9			1320	1328		

MULTIPLE WAYS TO SEARCH

Searching by Sort Name:

- Before you begin your search, select the “All” radio button.
- To begin the search function, place your cursor in one of the boxes under the “Sort Name” column.
- You will see a dotted outline that appears around the box that you selected.
- Start typing the last name of the client that you are searching for in capital letters. The “Sort Name” box appears.

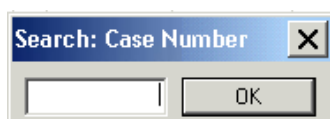
- Type LASTNAME comma space FIRSTNAME.



6. Click "OK".
7. After you locate your client click "OK" once more.

Searching by Case Number

1. Select the "All" radio button.
2. To begin the search function, place your cursor in one of the boxes under the "Case Number" column.
3. You will see a dotted outline that appears around the box that you selected.
4. Start typing the "Case Number" of the client you are searching for. The "Case Number" box appears.



5. Click "OK".
6. After you locate your client click "OK" once more.

Searching by Social Security Number

1. Select the "All" radio button.
2. To begin the search function, place your cursor in one of the boxes under the "SSN" column.
3. You will see a dotted outline that appears around the box that you selected.
4. Start typing the "SSN" with dashes of the client you are searching for. The "SSN" box appears.



5. Click "OK."
6. After you locate your client click "OK" once more.

NOTES



Searching by Alias

1. On the “Clients Lookup” window, click on the “Alias” button.

Sort Name	Case Number	S	E	DOB	SSN	Primary Unit	Primary Surt	Ext Case #	SAI
222-15, TEST		M	2			9900	9901	REJIS #	
223-225, CPPN		F	5			9900	9901		
223-225, DHP		F	4			9900	9901		
223-225, MEDS		F	9			9900	9901		
2MARATHONS, RUN		F	9			6990	6991		
8DAYS, SUNNY		M	9			9900	9901		
8TREE, TALL		M	9			9900	9901		
9LIGHTS, HEAD		M	2			8050	8051		
9MAILING, ADDRESS		M	9			1320	1328		

☐ Active
 ☐ Inactive
 ☒ All

Filters
 Alias
 Find
 OK
 Cancel

2. The “Client Aliases Lookup” window will appear.

Last Name	First Name	M.	Client Name	Case Number
TESTER	123		TESTING, 123	
TESTER	TEST	D	TEST, DHP	
TESTERS	215		215, TEST	
TESTING	CLIENT		CLIENT, PROMOTION	

Find...
 OK
 Cancel

Searching by Last Name:

1. To begin the search function, place your cursor in one of the boxes under the last name column.
2. You will see a dotted outline that appears around the box that you selected.
3. Either click “Find”, or just start typing the last name of the client that you are searching for in capital letters. The “Last Name” box appears.

Search: Last Name

OK

4. Click “OK”.
5. After you locate your client click “OK” once more.



Searching by First Name:

1. To begin the search function, place your cursor in one of the boxes under the **“First Name”** column.
2. You will see a dotted outline that appears around the box that you selected.
3. Start typing the last name of the client that you are searching for in capital letters. The “Last Name” box appears.



4. Click “OK”.
5. After you locate your client click “OK” once more.

If the client is not located after a thorough search, users may add that client to the MH MIS system (see the “Core Client Information” tip sheet).

Search reminders and things to keep in mind:

- Always select the “All” radio button when searching.
- Use CAPS when searching by name.
- Remember if you are searching by client’s name, enter it in the following way: LASTNAME comma space FIRSTNAME. (e.g. CAR, BLUE). Except Alias, which you search by LAST NAME and FIRST NAME separately.
- You must complete a thorough search before adding a new client. Search by Client Name, Social Security Number (SSN), Case Number, Date of Birth (DOB) and ALIAS.

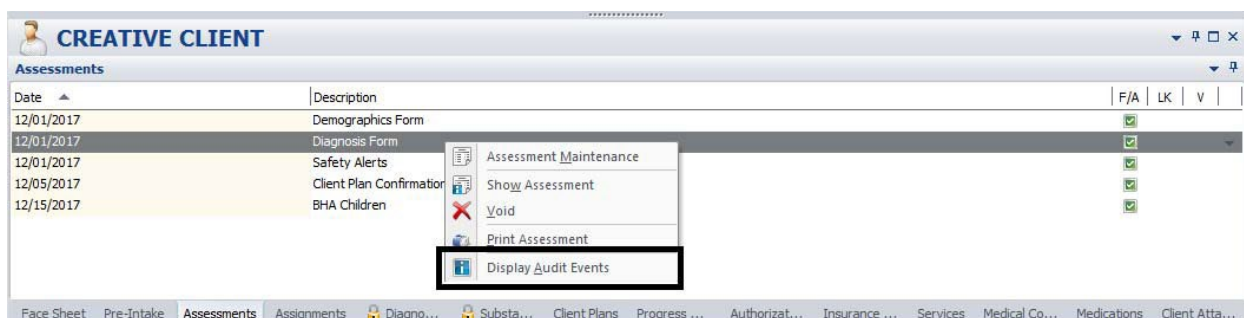
NOTES



DISPLAY AUDIT EVENTS

To see when an assessment was added, edited, final approved, viewed, or printed, utilize Display Audit Events. Display Audit Events will display who touched the assessment, when, and what action was completed.

1. Right click on the assessment details you wish to view. Select “Display Audit Events.”

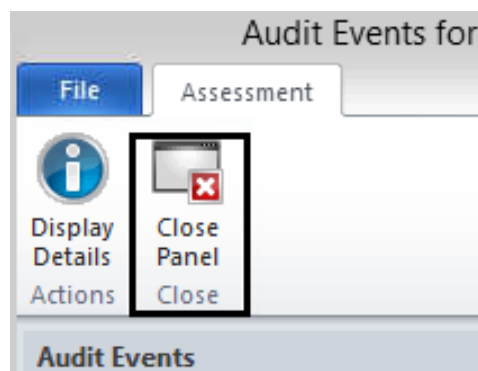


2. Each column in the window that appears can be sorted by clicking on the column header. The window will display a line for each separate action a staff takes (add, edit, sign, final approve, display, and print).

Audit Events for Diagnosis Form for CREATIVE CLIENT dated 12/01/2017

Event	Action	Date	Time	Staff ID	Staff	Windows ID
Assessment	Add	12/20/2017	07:15 AM	11001	ALLY, CLINICIAN	COSDCACTX03
Assessment	Edit	12/20/2017	07:15 AM	11001	ALLY, CLINICIAN	COSDCACTX03
Assessment	Electronic Signature	12/20/2017	07:15 AM	11001	ALLY, CLINICIAN	COSDCACTX03
Assessment	Display	2/20/2018	01:05 PM	2075	BLANCAS, ELSIE (00663)	COSDCACTX03
Assessment	Final Approved	2/20/2018	01:08 PM	2075	BLANCAS, ELSIE (00663)	COSDCACTX03

3. Select “Close Panel” to return to the Assessments Pane.

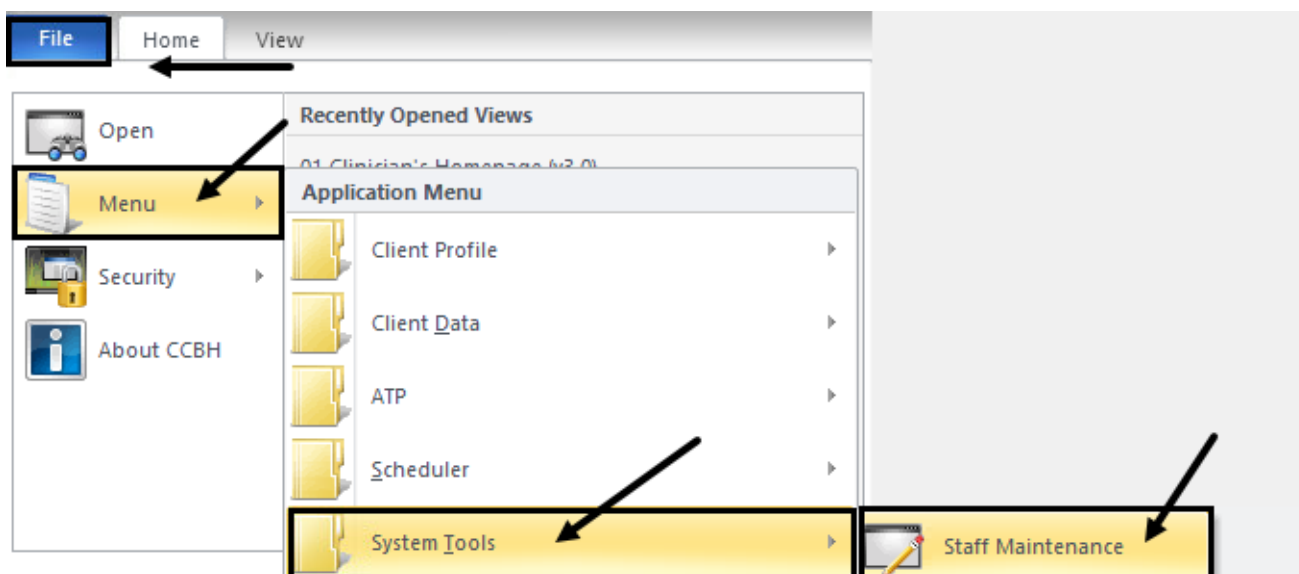




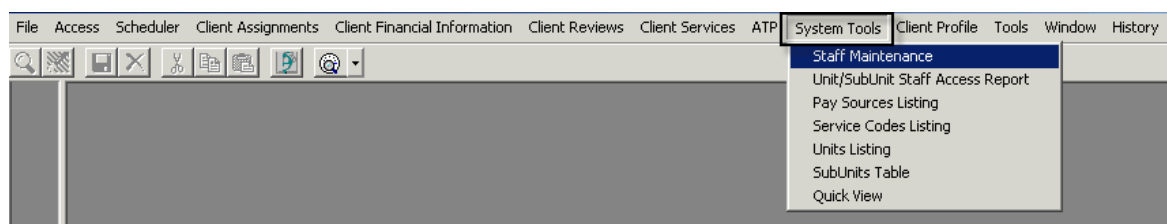
STAFF MAINTENANCE LOOKUP

How to Lookup a Staff for Contact Information

- From the CLINICIAN'S HOMEPAGE, click the File tab, click "Menu", click "System Tools", and click "Staff Maintenance".



- From the EXTERNAL VIEW, locate "Staff Maintenance" under "System Tools".



"Staff Maintenance" Menu:

When the "Staff Maintenance" Menu launches, your staff ID and name will be highlighted in blue as a default. Your current contact information on file will be listed in the "Main (1)" tab below.



Staff Maintenance (Administrative Access)

ID	Sort Name	Center Phone
98888	ASD CLINICAL, STAFF	
99999	ASD ATTENDING, STAFF	
114503	TEST, COT1	
114504	TEST, COT2	
114505	TEST, COT3	
114507	TEST, COT4	
114508	TEST, COT5	
114509	TEST, COT6	
114510	TEST, COT10	
115000	TEST, TEST	

Options

- Main
- Administrator
- Options
- Unit/SubUnit Access
- Credentials
- Languages
- Meaningful Use
- DR Prescription Information

Currently Viewing Information for Main

Staff ID: 98888 ☒ Active

Sort Name: ASD CLINICAL, STAFF

First Name: STAFF

Middle Name:

Last Name: ASD CLINICAL

Social Security Number:

Internal Phone:

Email Address:

Buttons: Reset, Import, Save, Delete, Restore, Find, Clear, Exit

To begin your search:

- Press the “Find” button at the bottom of the window.
- The “Search: Sort Name” box will launch.

NOTE: You may search by “ID” or “Sort Name” by clicking under the desired column before pressing “Find”. A red dotted box will display under the field you are searching.

ID	Sort Name	Center Phone
1	CLINICIAN, AWESOME	(619) 555-5555
2	CLINICIAN, AMAZING	(619) 555-5555
3	CLINICIAN, FANTASTIC	(619) 555-5555
4	CLINICIAN, SUPERB	(619) 555-5555
5	CLINICIAN, TEST	(619) 555-5555
6	CLINICIAN, MAGICAL	(619) 555-5555
7	CLINICIAN, EXTRAORDINAIRE	(619) 555-5555
8	CLINICIAN, INCREDIBLE	(619) 555-5555
9	CLINICIAN, WONDERFUL	(619) 555-5555
10	CLINICIAN, MAGNIFICENT	(619) 555-5555

ID	Sort Name	Center Phone
1	CLINICIAN, AWESOME	(619) 555-5555
2	CLINICIAN, AMAZING	(619) 555-5555
3	CLINICIAN, FANTASTIC	(619) 555-5555
4	CLINICIAN, SUPERB	(619) 555-5555
5	CLINICIAN, TEST	(619) 555-5555
6	CLINICIAN, MAGICAL	(619) 555-5555
7	CLINICIAN, EXTRAORDINAIRE	(619) 555-5555
8	CLINICIAN, INCREDIBLE	(619) 555-5555
9	CLINICIAN, WONDERFUL	(619) 555-5555
10	CLINICIAN, MAGNIFICENT	(619) 555-5555

Search Window:

Search: Sort Name

CLINICAL, STAFF

OK

- Type in the desired name of the staff you wish to find.



NOTE: The format must be last name, comma, then SPACE, and first name. For example, "CLINICAL, STAFF" would be the proper format.

- The contact information of the staff for which you have entered will display under "Main".
- The "Internal Phone" number as well as the "Email Address" will be listed when it is available.

NOTES

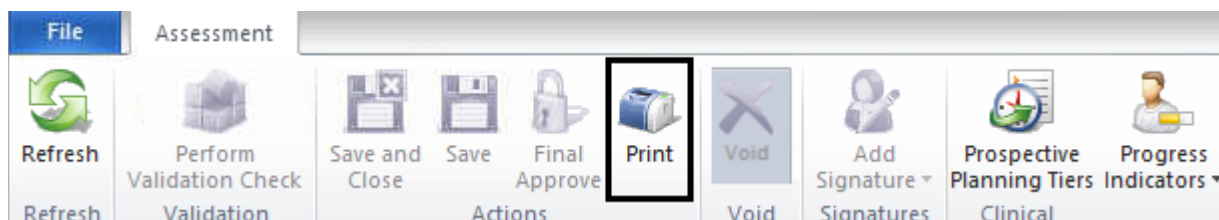


PRINT TO SCREEN

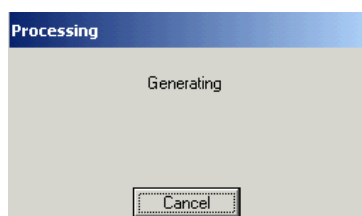
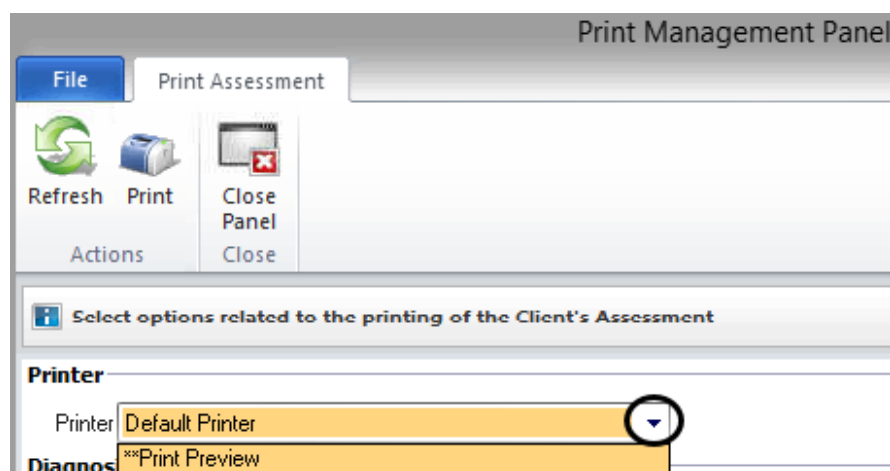


Note: Before printing a hard copy, always print to screen first to verify whether printing is truly necessary.

- Click the “Print” button.



- Click on the down arrow to the right of the “Printer” field, click “Print Preview”, and click the “Print” button.



It will take a few moments to process the command. Wait until the following message disappears.

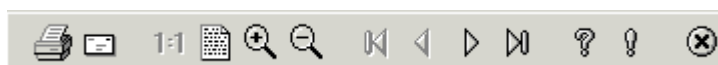
A copy displays on the screen. Pay attention to the total number of pages before deciding to print a physical copy.



Name: LAST, FIRST MIDDLE	Case#:	Page: 1 of 2
Type:		Date:
Printed on 09/01/2010 at 9:13 a.m.		(Crash)

Icons

You will find icons across the top of the print screen which will allow navigation through the copy.



Prints a physical copy.



Emails a copy. **DO NOT** use this feature, as it is a breach in confidentiality.



Displays the default size of the copy.



Shrinks the copy down to 25% of the default size.



Zooms in by 50% each time the icon is clicked.



Zooms out by 25% each time the icon is clicked.



Navigates directly to the first page.



Navigates back one page.



Navigates forward one page.



Navigates directly to the last page.



Displays keyboard commands for navigating through the copy.



Displays the details of the software product.

- Closes out of "Print to Screen" and returns to the original view.



CLINICIAN'S HOMEPAGE NOTIFICATIONS PANE

Managing Notifications and Timelines

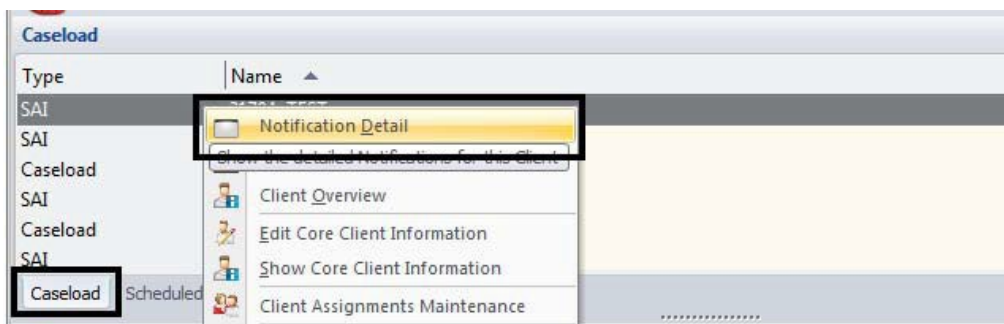
Client Action Schedules are notifications in the system which indicates when an assessment is due based on client activity in the County system of care. These notifications are intended to assist in managing tasks related to quality and coordination of care for each client. The primary server at each program continues to be responsible to manage and track all necessary actions required by the County system of care for each client.

Due to a shared electronic health record for each client, a complete and up-to-date behavioral health assessment must be present in each client record. There will no longer be multiple assessments for each program. Timelines for due dates may be impacted when a client is open to more than one program at one time (due dates will be driven by the most recent final approved BHA). The primary server at each program is responsible to coordinate due dates and clinical information between programs when this does occur.

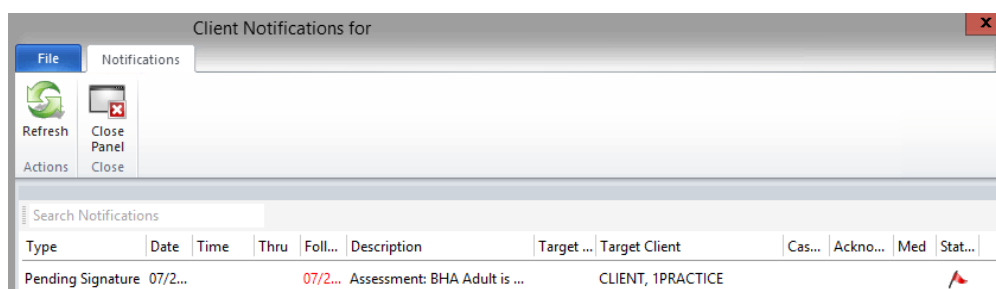
There are two ways to see the details of a “Notification”:

1st Way

- To display the action required for the client, right click anywhere on the line where the client's name displays. This will activate a drop down menu with several options. Select the “Notification Detail” option.

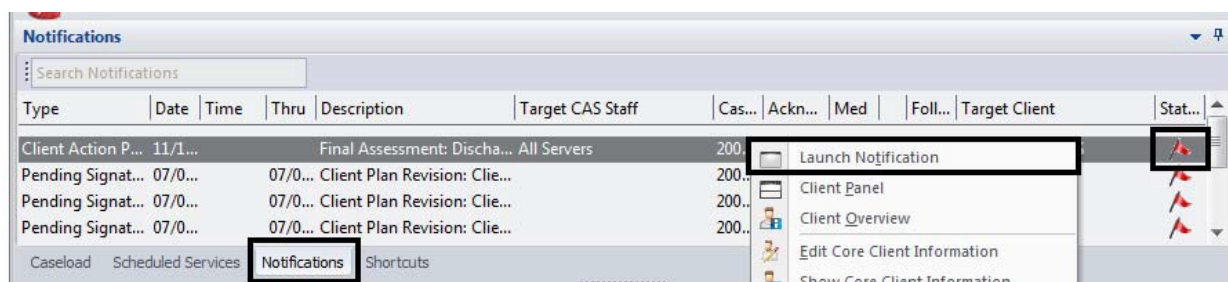


- When the “Notification Detail” option is selected, the “Client Notifications” window activates, displaying what action is required for the client. Double click on the line to open the Assessment.




**2nd Way**

- In the staff panel on the notifications pane, either right click on the line and choose “Launch Notification” or double click anywhere on the line.

**Timelines to Keep in Mind:**

- A Behavioral Health Assessment (BHA) must be completed within sixty days after the opening of a client assignment.
- A notification for a BHA will be listed and will remain on the Homepage for sixty days from the due date. Sixty days after the due date, the notification will ‘drop off’ of the Caseload “Notifications”.
- Note: just because a notification has ‘dropped off’ does not mean it is no longer required – the notification is intended as a reminder only. Remember, assessments not completed within the sixty day required time-frame are considered out of compliance per County QM documentation standards.
- A client’s annual review date is established by most recent final approved BHA (check the notification dates for details).
- A Discharge Summary must be completed within 7 days after a client’s assignment to your program is closed.

Example:

	Open Date	BHA Completed	BHA Update Due
Program A			
Program B			
Program A			



ENTERING A NEW PRE-EXISTING MEDICATION

- View the medications listed in the “Medications” pane.

The screenshot shows the 'FAKE TEST' application window. At the top, there's a title bar with 'FAKE TEST' and standard window controls. Below the title bar is a 'Medications' pane with a search bar and a list of columns: E..., P..., W..., T..., G..., Me..., Me..., Str..., Dos..., Route, Sig, Ad..., S..., D..., End, D..., E..., V..., D..., D..., S..., R..., R, D..., Is..., A..., S..., Sta..., Not..., Med..., E..., F/A. The main area of the pane is empty, displaying 'There are no items to show.' At the bottom, there's a navigation bar with tabs: Face Sheet, Pre-Intake, Assessm..., Primary A..., Primar..., Primary S..., Current..., Progress..., Authoriz..., Primary I..., Services, Medical C..., and Medications (which is highlighted).

- If the client reports taking a medication that is not listed, click the “New Pre-existing Medication” button.

The screenshot shows the application's ribbon with tabs: File, Home, Client, and View. The 'Client' tab is selected. Under the 'Client' tab, there are several groups of buttons. The 'New Pre-existing Medication' button is highlighted with a black box. Other buttons include Client Information, Broadcast Alert, New Progress Note, New Assessment, New Client Plan, Prospective Planning Tiers, Pharmacy of Choice, New Medical Conditions Review, Refresh Client Panel, and Close Client Panel.

- A new window launches. In the “Medication” field, type in the first few letters (at least three) of the medication, and click “Search”.

The screenshot shows the 'Medications for' window. At the top, there's a title bar with 'Medications for' and a close button. Below the title bar is a 'Medications Maintenance' pane with a search bar and a list of buttons: Add Pre-existing Medication, Discard Pre-Approved Changes, Pre-Approve Changes, Final Approve Changes, and Close Panel. The main area of the pane is titled 'Medication Details: New Pre-existing Medication'. It contains a 'Medication Search' section with a search bar and a 'Search' button. The search bar contains the text 'St. Johns'. Below the search bar are fields for Strength, Dose Form, and Route. There are also checkboxes for Generic, Dispense as Written, Discontinued, and Internal Formulary. The 'Search' button is highlighted with a black box.



- Locate the appropriate medication from the list, and double click on it, or click once and choose “Select” at the top.

The Medication Lookup window is a software interface for searching medications. It features a 'File' menu with 'Select', 'Close Panel', and 'Close' options. The main area is divided into sections: 'Medication Search' with radio buttons for 'Begins with' and 'Includes', a text field for 'Medication' (containing 'St. John'), and buttons for 'Search', 'Nickname', and 'Clear'. Below this is the 'Medication Query Filters' section with checkboxes for 'Include Herbs only', 'Include Vitamins only', 'Include IV Medications only', and 'Include Obsolete Medications'. To the right of these are 'Include Only' options: 'All' (selected), 'Generic Names', 'Brand Names', 'Generic Products', and 'Brand Products'. The 'Medication List' section displays a table of search results.

Medication	Type	Trans...	O...
St. John's wort	Generic Name		
St. John's Wort	Brand Name		
St. John's wort oral capsule	Generic Product	<input checked="" type="checkbox"/>	
St. John's Wort oral capsule	Brand Product	<input checked="" type="checkbox"/>	
St. John's wort oral tablet	Generic Product	<input checked="" type="checkbox"/>	
St. John's Wort oral tablet	Brand Product	<input checked="" type="checkbox"/>	

- Once you've chosen the medication of your choice, a new window launches. The only other “software required” field is “Start Date”; however, clinically, if you have additional information, enter it into the “Sig Builder” and “Sig Information” fields. If prescribed by an external provider, select the name of the physician in the “Prescribing Physician” field. When finished, select “Save”.

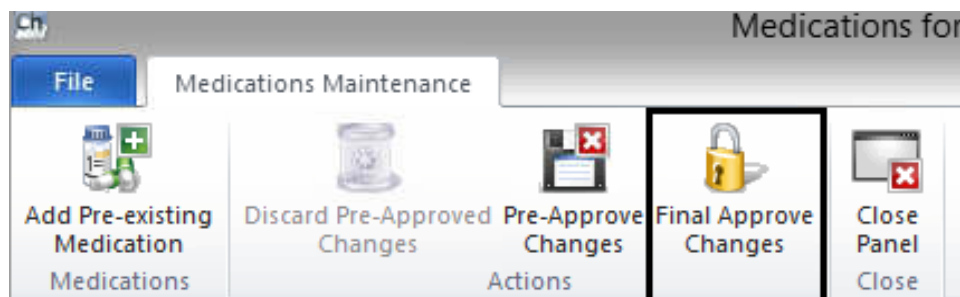


Note: If you do not have the exact start date, select the “Estimated Dates” box.

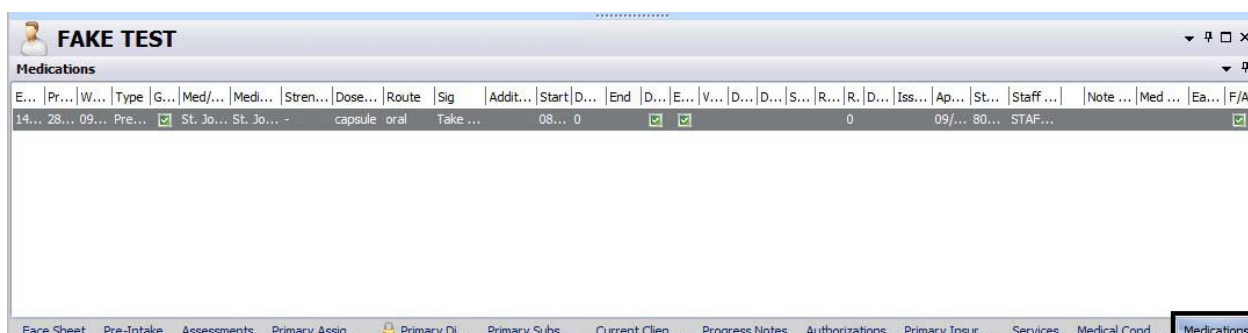
The Sig Builder and Sig Information window is a software interface for creating and managing medication orders. It is divided into two main sections: 'Sig Builder' and 'Sig Information'. The 'Sig Builder' section includes fields for 'Action' (Take), 'Dose Qty' (1), 'Unit' (capsule(s)), 'Route' (by mouth), and 'Frequency'. The 'Sig Information' section includes fields for 'Sig' (Take 1 capsule(s) by mouth), 'Days Supply', 'Qty To Dispense', 'Unit', 'Start Date' (08/01/2014), 'End Date' (//), 'Earliest Fill Date' (//), 'Refills', and a checkbox for 'Estimated Dates' (checked). It also includes a section for 'Add Instructions' with a checkbox for 'External' and a field for 'Prescribing Physician' (Dr. MD). At the bottom, there is a 'Written Date' field (09/03/2015), an 'Issue Method' field (Do Not Send: N/A), and 'Save' and 'Cancel' buttons.



- Click the “Final Approve Changes” button.



- The medication then displays in the “Medications” pane of the client panel.

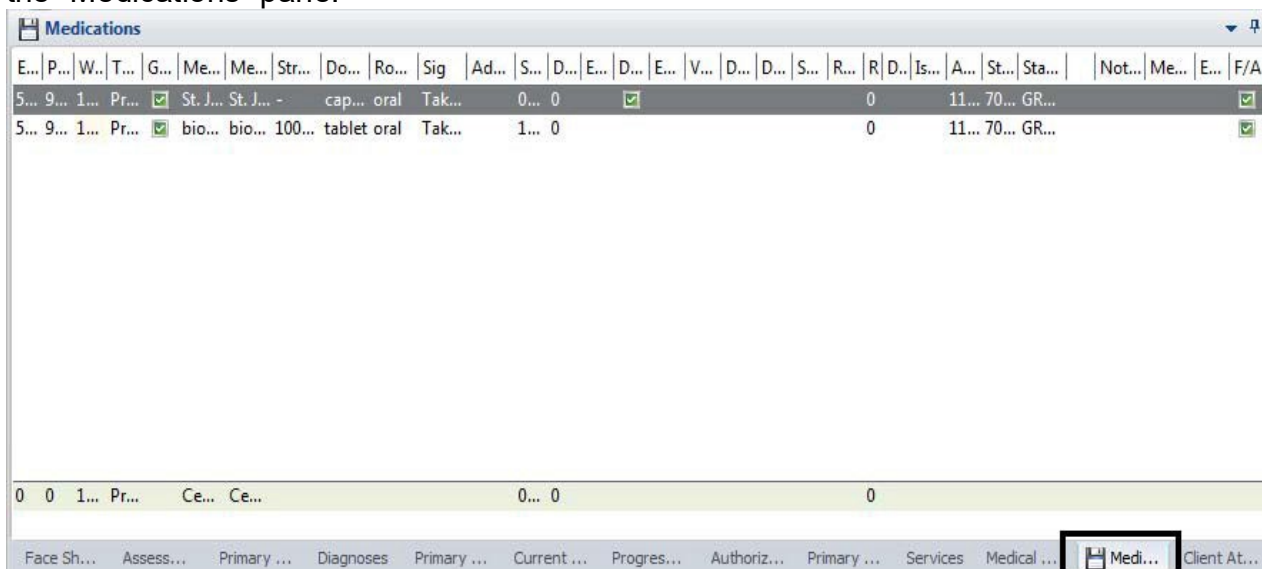


EDITING A PRE-EXISTING MEDICATION



*Note: The “Edit” option will only show for **Non-Final Approved Pre-Existing Medications**. Otherwise, the menu will be greyed out.*

- Select the appropriate client, and double click on the medication you wish to edit in the “Medications” pane.





- The client's medications appear in a new window. Right click on the medication you wish to edit. A drop down menu appears. Select "Edit".

The screenshot shows a window titled "Medication List" with a table of medication entries. A right-click context menu is open over the first entry, which is highlighted in grey. The menu options are: Renew, Discontinue, Edit (highlighted with a black box), Edit this new Medication, Delete, Copy Centrum Adults, Query this Medication, and Infobutton.

E...	Pr...	W...	Type	Med/...	Medic...	Stren...	Dose ...	Route	Sig	Note ...	Start	Da...	End	D...	D...	R...	Di..
53...	94...	11...	Pre...	St. Jo...	St. Jo...	-	capsule	oral	Take ...		08...	0				0	
53...	94...	11...	Pre...	biotin ...	biotin	1000 ...	tablet	oral	Take ...		12...	0				0	
0	0	11...	Pre...	Cent							01...	0				0	

- The "Medication Details: Edit Prescription" window launches. Make the appropriate change in the "Sig Builder" portion of the window. In this example we will change the frequency from 3 times a day to 2 times a day. In the "Internal Notes" section, enter what change was made and when it was made. Then, select the "Save Medication".

The screenshot shows the "Medication Details: Edit Prescription" window. The "Sig Builder" section is highlighted with a black box. It contains fields for Action (Take), Dose Qty (1), Unit (tablet(s)), Route (by mouth), and Frequency (2 times a day, highlighted with a black box). Below this is the "Sig Information" section, which includes a "Sig" field (Take 1 tablet(s) by mouth 2 times a day), "Days Supply", "Qty To Dispense", "Unit", "Start Date" (12/12/14), "End Date" (/ /), "Earliest Fill Date" (/ /), "Refills", and "Estimated Dates". The "Internal Notes" section is also highlighted with a black box and contains the text: "9900/9901 Changed frequency from 3 times a day to 2 times a day." At the bottom right, the "Save" button is highlighted with a black box.

Sig Builder

Free Text ☐ Action: Take Dose Qty: 1 Unit: tablet(s) Route: by mouth Frequency: 2 times a day

Modifiers:

Sig Information

Sig: Take 1 tablet(s) by mouth 2 times a day

Days Supply: Qty To Dispense: Unit:

Start Date: 12/12/14 End Date: / / Earliest Fill Date: / / Refills: Estimated Dates: ☐

Add Instructions:

External Prescribing Physician:

Internal Notes: 9900/9901 Changed frequency from 3 times a day to 2 times a day.

Written Date: 11/16/2016

Issue Method: Do Not Send: N/A

Save Cancel

Medication List Medication Details: New Pre-existing Medication



4. Click the “Final Approve Changes” button.

Ev...	Pr...	Wr...	Type	Med/...	Medic...	Stren...	Dose ...	Route	Sig	Note t...	Start	Da...	End	D...	D...	R...	Di...	Staff ...	Status	Super...	Prescr...	Earl...	F/A
1640	2120	09/...	Pre-...	Glucu...	Glucu...	500 mg	tablet	oral	Take 1...		01/...	0				0		STAFF...			Dr. Pe...		<input checked="" type="checkbox"/>
1640	2121	09/...	Pre-...	Motri...	Motrin	300 mg	tablet	oral	Take 1...		01/...	0				0		STAFF...			Dr. Oc...		<input checked="" type="checkbox"/>
1921	2534	11/...	Pres...	Latud...	Latuda	20 mg	tablet	oral	Take t...		11/...	0				0	30 ...	TERRE...					<input checked="" type="checkbox"/>

5. The edited prescription then displays in the “Medications” pane of the client panel. The change that was just made can now be observed in the “Sig” column.

DISCONTINUING A PRE-EXISTING MEDICATION

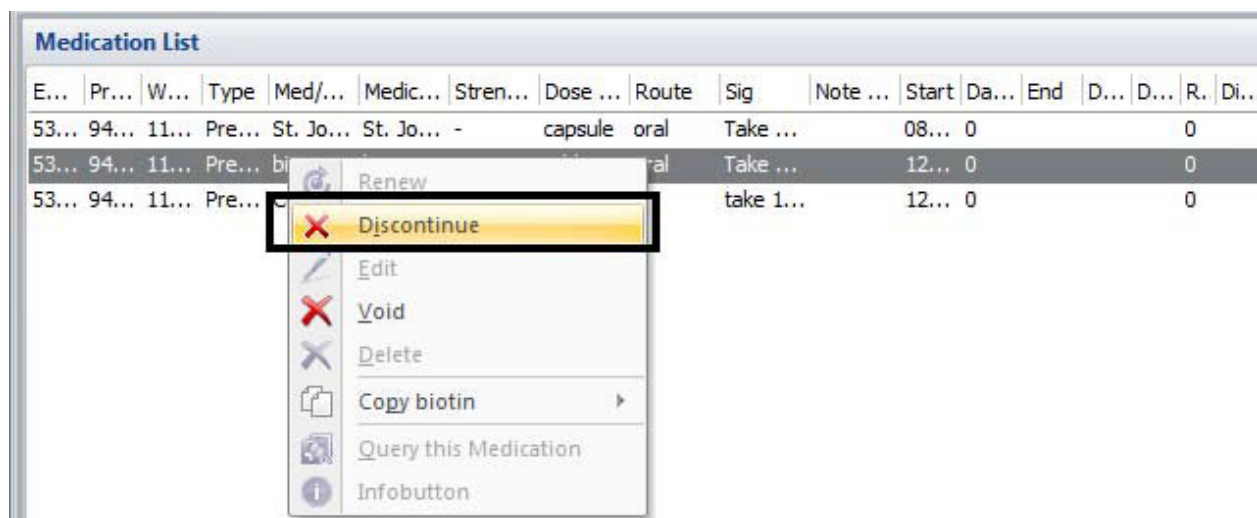
Prescriptions are automatically discontinued in DHP if there is an end date in the Sig Builder and the end date has passed. However, there may be time when you want to discontinue a medication in the client's record (for example, you find out that the pre-existing medication that was prescribed by another Prescriber has been terminated, or you learn the client has stopped taking a medication). Discontinuing a medication does NOT alert the pharmacy- you must contact the pharmacy directly to let them know. Unless you are a medical staff with access to Doctor's Homepage you will only have access to discontinue pre-existing medications, not prescriptions.

1. Select the appropriate client, and double click on the medication you wish to discontinue in the “Medications” pane.

E...	P...	W...	T...	G...	Me...	Me...	Str...	Do...	Ro...	Sig	Ad...	S...	D...	E...	D...	E...	V...	D...	D...	S...	R...	R...	D...	Is...	A...	St...	Sta...	Not...	Me...	E...	F/A
5...	9...	1...	Pr...	<input checked="" type="checkbox"/>	St. J...	St. J...	-	cap...	oral	Tak...		0...	0	<input checked="" type="checkbox"/>										0		11...	70...	GR...			<input checked="" type="checkbox"/>
5...	9...	1...	Pr...	<input checked="" type="checkbox"/>	bio...	bio...	100...	tablet	oral	Tak...		1...	0											0		11...	70...	GR...			<input checked="" type="checkbox"/>
5...	9...	1...	Pr...		Ce...	Ce...				tak...		1...	0											0		11...	70...	GR...			<input checked="" type="checkbox"/>



- The “Medications List” for that client will launch. Right click on the medication you wish you discontinue. A drop down menu will launch. Click on “discontinue”.



- The “Medication Details: Discontinue Prescription” window launches. The end date will default to the current date (but may be changed). Click “Save Medication”.

The screenshot shows the "Medication Details: Discontinue Prescription" window. The "End Date" field is highlighted with a red box and contains the date 11/16/2016. The "Save" button is also highlighted with a red box.

Sig Information

Sig: Take 1 capsule(s) by mouth

Days Supply: [] Qty To Dispense: [] Unit: []

Start Date: 08/01/2014 **End Date: 11/16/2016** Earliest Fill Date: / / Refills: [] ☒ Estimated Dates

Add Instructions: []

☐ External Prescribing Physician: []

Internal Notes: []

Written Date: 11/16/2016

Issue Method: [Select Issue Method](#)

Save Cancel

Medication List: Medication Details: Discontinue Pre-existing Medication



- You are returned to the “Medications Maintenance” window. A green check now appears in the “Discontinued” column for this medication. Click the “Final Approve Changes” button.

Ev...	Pr...	Wr...	Type	Med/...	Medi...	Stren...	Dose ...	Route	Sig	Note t...	Start	Da...	End	Discontinued	D...	R...	D...	Staff...	Status	Supe...	Presc...	Ear...	F/A
1640	2121	09/...	Pre...	Motri...	Motrin	300 mg	tablet	oral	Take 1...		01/...	0	12/...	<input checked="" type="checkbox"/>	0			STAF...	Discon...		Dr. O...		<input checked="" type="checkbox"/>
1921	2534	11/...	Pres...	Latud...	Latuda	20 mg	tablet	oral	Take t...		11/...	0			0	3...	TERR...						<input checked="" type="checkbox"/>

- The discontinued prescription then displays in the “Medications” pane of the client panel with a green check-mark in the “Discontinued” column.

E...	P...	W...	T...	G...	Me...	Me...	Str...	Do...	Ro...	Sig	Ad...	S...	D...	E...	D...	E...	V...	Discontinued	S...	R...	F	D	I...	A...	S...	St...	N...	M...	E...	F/A
5...	9...	1...	Pr...	<input checked="" type="checkbox"/>	St. J...	St. J...	-	cap...	oral	Tak...		0...	0	1...	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	0					1...	7...	G...			<input checked="" type="checkbox"/>	
5...	9...	1...	Pr...	<input checked="" type="checkbox"/>	bio...	bio...	100...	tablet	oral	Tak...		1...	0						0				1...	7...	G...			<input checked="" type="checkbox"/>		
5...	9...	1...	Pr...		Ce...	Ce...				tak...		1...	0						0				1...	7...	G...			<input checked="" type="checkbox"/>		

VOIDING A PRE-EXISTING MEDICATION

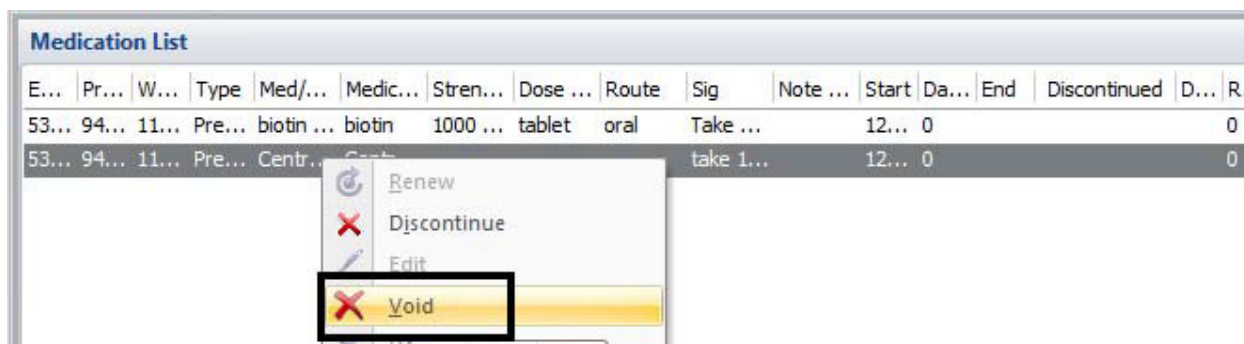
The use of “Void” is only completed on medications that have been Final Approved in error (such as accidentally entering a medication for the wrong client). Unless you are a medical staff with access to Doctor’s Homepage you will only have access to void pre-existing medications, not prescriptions.

- Select the appropriate client, and double click on the medication you wish to void in the “Medications” pane.

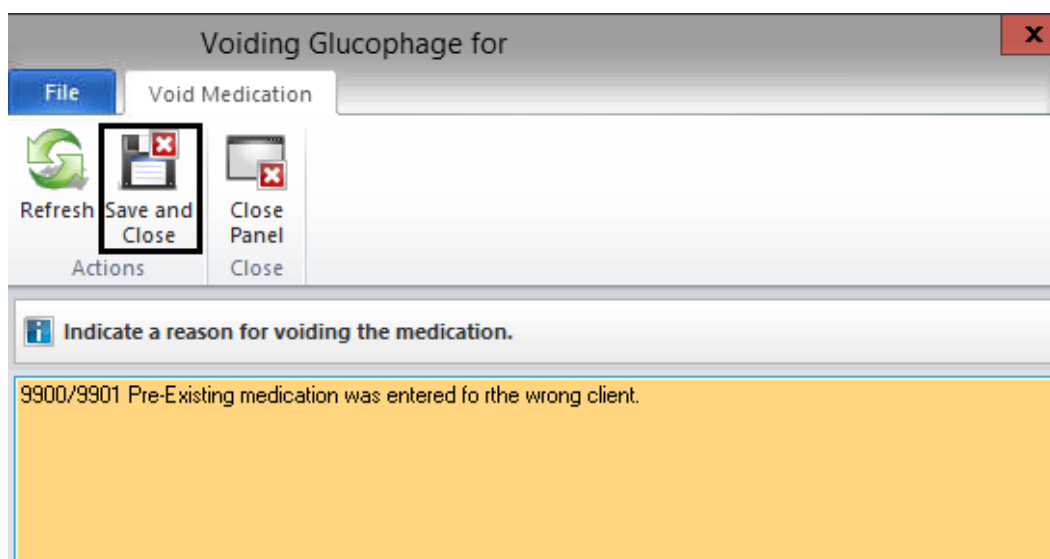
E...	P...	W...	T...	G...	Me...	Me...	Str...	Do...	Ro...	Sig	Ad...	S...	D...	E...	D...	E...	V...	D...	D...	S...	R...	R...	D...	Is...	A...	St...	Sta...	Not...	Me...	E...	F/A
5...	9...	1...	Pr...	<input checked="" type="checkbox"/>	St. J...	St. J...	-	cap...	oral	Tak...		0...	0	<input checked="" type="checkbox"/>						0						11...	70...	GR...			<input checked="" type="checkbox"/>
5...	9...	1...	Pr...	<input checked="" type="checkbox"/>	bio...	bio...	100...	tablet	oral	Tak...		1...	0						0						11...	70...	GR...			<input checked="" type="checkbox"/>	
5...	9...	1...	Pr...		Ce...	Ce...				tak...		1...	0						0						11...	70...	GR...			<input checked="" type="checkbox"/>	



2. The "Medication List" for the client launches. Right click on the medication you wish to void and click, "Void".

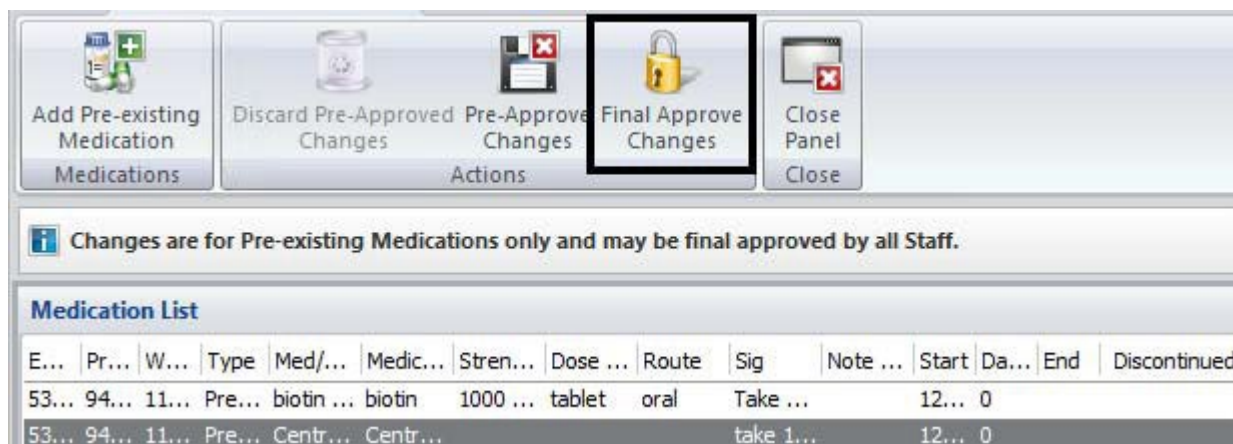


3. A new window launches which allows narrative text to be entered. Document the reason for voiding, and click "Save and Close".

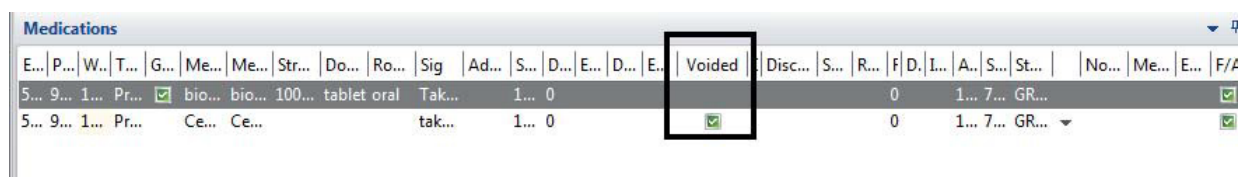




- The “Medication Maintenance” window is launched. Click the “Final Approve Changes” button.



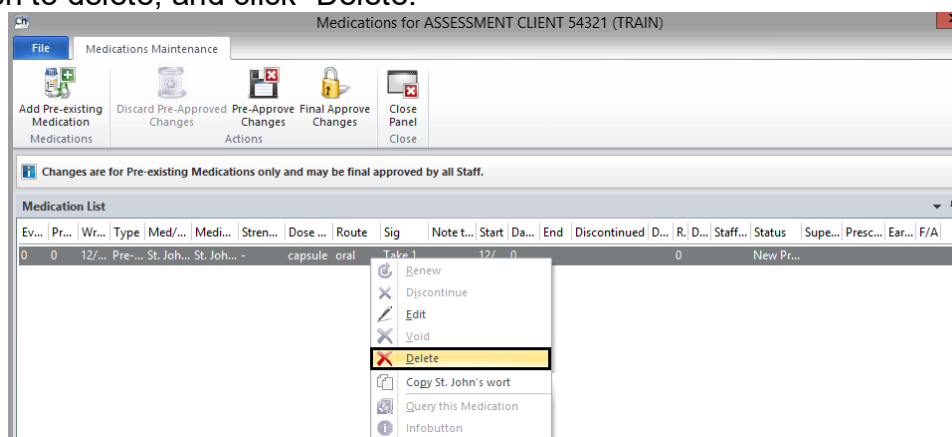
- The voided prescription then displays in the “Medications” pane of the client panel with a check mark in the “Voided” column.



DELETING A PRE-EXISTING MEDICATION

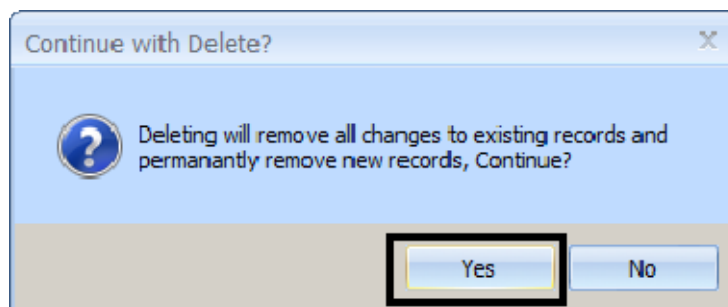
A medication can only be deleted BEFORE it has been final approved. You would do this, for example, if you are in the middle of a prescription and realize you’ve made an error. Unless you are a medical staff with access to Doctor’s Homepage you will only have access to delete pre-existing medications, not prescriptions.

- In the “Medication Maintenance” window, right click on the medication you wish to delete, and click “Delete.”

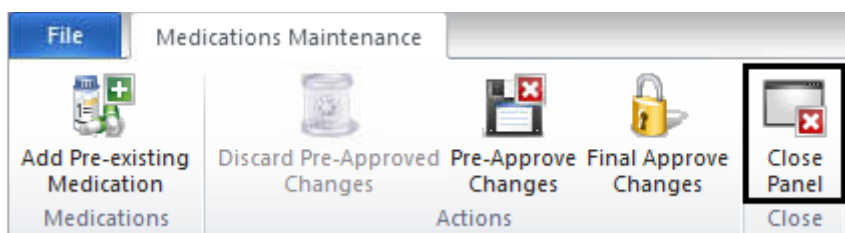




2. The following message will appear. Click “Yes.”



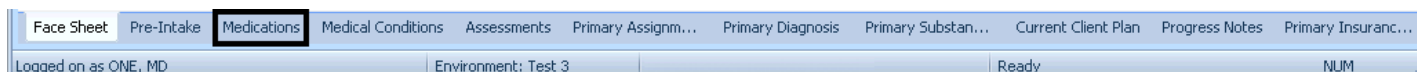
3. The medication is removed from the “Medication Maintenance” window. Click “Close Panel.”



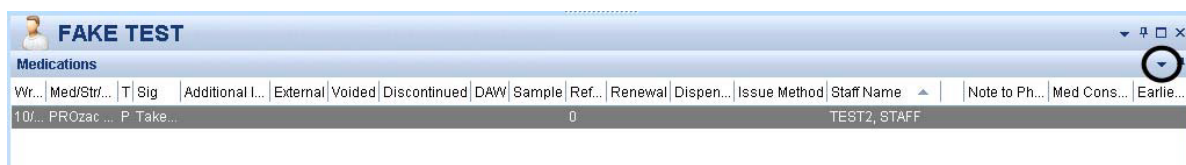
PRINTING CLIENT MEDICATIONS

A list of the client’s medications can be printed from the Medications Pane.

1. With the Client panel open, select the “Medications” pane at the bottom of the screen.



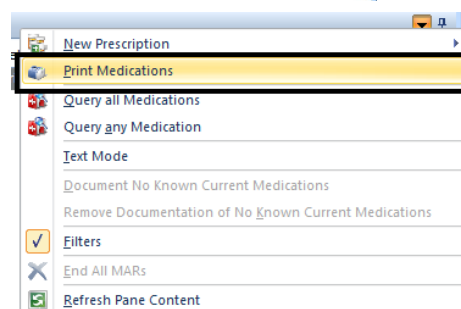
2. On the right top portion of the Client panel, select the down arrow.



3. A drop down menu will launch. Select the “Print Medications” option.



Note: This menu will also appear when right clicking in the white space within the client panel.





4. Adjust the printing options to what is needed. Users can choose to print only a certain medication type, to include pre-approved or discontinued medications, and/or to include all medications or only current medications.
5. When finished adjusting the filters, select "Print."

SUPPLEMENTAL REPORTS

The reports listed below may be utilized for monitoring and maintenance of Assessments. Only designated staff in each program will have access to the reports that they are authorized to use. For additional assistance with approved template reports, please contact the Optum Support Desk at 1-800-834-3792.

ASSESSMENT REPORTS



Assessments Final Approved by Primary Signer:

Used to determine who has entered Assessments in to CCBH during a specified timeframe. Can be used to determine who is actively entering in Assessments based on the timeframe entered and can indicate if a staff needs a re-training prior to registration for the Client Plan and Progress Notes training.

1. Click on the “ATP” menu
2. Click on “ATP Reports” submenu
3. Select “Assessment and Treatment Plan Listing”
4. Select “Load” and click on “Assessments Final Approved by Primary Server” and select “Load” again
5. On “Selections1” enter in your Primary Unit
6. On “Selections2” enter in the “Final Approved Dates” and “thru” (recommendation is to run for a two to four week duration)
7. Select “Print”

Assessments Not Final Approved:

Used to determine who has entered and not final approved Assessments in to CCBH during a specified timeframe. Can be used to assure co-signatures are occurring within timelines, to determine if staff is completing assessments correctly, and determine if assessment/s are outstanding in the client chart.

1. Click on the “ATP” menu
2. Click on “ATP Reports” submenu
3. Select “Assessment and Treatment Plan Listing”
4. Select “Load” and click on “Assessments Not Final Approved” and select “Load” again
5. On “Selections1” enter in your Primary Unit
6. On “Selections2” enter in the “Final Approved Dates” and “thru” (recommendation is to run for a two to four week duration)
7. Select “Print”

NOTES



BHS-025 CLIENT CHANGE REQUESTS

- Login to the Optum website with your username and password
- Click on BHS Provider Resources → MHP Provider Documents → Forms
- Download the form fills needed

Please note these forms **MUST be typed.*

BHS-025 FORM A AND B JOB AID

Form A- to be used to request changes to the following*:

1. **Name** (Sort name, Last Name, First, Middle Name)
2. **DOB** (date-of-birth)
3. **SSN** (social security number)
4. **Sex** (Gender)
5. **Medi-Cal Policy Number /Effective Date**

*Users should **NOT** make changes to Name, DOB, SSN, and Sex when creating a Demographic Form.

Form B- to be used to request two medical record numbers, for the same person, to be combined.

How to Find Core Client Information (CCI):

1. Search for desired client in CCBH.
2. Once in the client's chart RIGHT click on clients DOB, a small window will pop up.
3. Select "Show Core Client Information."

CLIENT TEST Female Born: 01/01/1999

Face Sheet

County of San Diego Mental Health Services

FACE SHEET

SAFETY ALERTS

Allergies and Adverse Medication Reactions: ☐ No ☐ Unknown/Not Reported ☐ Yes

Client Search
Client Clear
Case#, Sort Name or SSN
Add Client
Edit Core Client Information
Show Core Client Information
Refresh Pane Content



4. The CCI will display.

Core Client Information Maintenance Panel

File Core Client Information

Refresh Save and Close Close Panel

Refresh Actions Close

Core Client Information

Sort Name CLIENT, 1PRACTICE Case Number (0 or blank for Auto Assign) 117

Last Name CLIENT First 1PRACTICE Middle Name

DOB 01/01/1978 Soc Sec # Ethnicity Not Hispanic Sex F

Address 1 Home Phone

City SAN DIEGO CA 92108 Work Phone

Address County San Diego Residence County San Diego

Client Type ☒ Client ☐ Non-Client ☐ Generic

How to Complete BHS-025 Forms:

1. **Section #1-Requester Information:** Should be completed for BOTH forms. All sections should be completed. The Requester is the person completing the form.
2. **Section #2-Client Information:**
For **Form A** "Client Record" column should be completed as data appears in Core Client Information (CCI). In "Change Client Record TO" column ONLY fill in the sections that need to be changed.
For **Form B** "Client Record A" and "Client Record B" columns should both be completed as data appears in CCI.

To find Medi-Cal Policy # and effective date click on "Insurance Coverages" tab on bottom of page.

Columns should be completed using the CCI (See How to Find CCI instructions above). Columns are completed from TOP to BOTTOM. **DO NOT USE DEMOGRAPHIC FORM OR FACE SHEET.**



Live Well, San Diego!



County of San Diego-HHSA-Behavioral Health Services

CHANGE/ADDITION of Client Information Form

Form

A

Fax Form to Health Information Management Services (HIMS) @ (619) 399-3503

For assistance call: Optum Help Desk (800) 834-3792 or HIMS (619) 692-5700 x3

REQUESTER:

- Use Form A to request CHANGES/CORRECTIONS to the Core Client Information (CCI), DEMOGRAPHIC FORM, and/or CLIENTS 3RD PARTY COVERAGES only.
 - Only TYPED Forms will be accepted effective 05/15/2019.
 - Complete fields in each column as instructed.
 - Fax this form along with any supporting documents e.g. ID, Medi-Cal card, Immigration, Adoption.
- *Medical Policy & Effective date can be found in *Clinicians Homepage "Insurance Coverage" Tab*

Section #1 - REQUESTER INFORMATION

Date of Request	<input type="text"/> / <input type="text"/> / <input type="text"/>	Form completed by:	<input type="text"/>
Program Name	<input type="text"/>	Your Phone #	(<input type="text"/>) <input type="text"/> - <input type="text"/> Ext # <input type="text"/>
Unit/SubUnit #	<input type="text"/> / <input type="text"/>	Your Fax #	(<input type="text"/>) <input type="text"/> - <input type="text"/>

Section #2 - CLIENT INFORMATION

CCI Data Fields- To find CCI - Right click on patient name, select "Show Core Client Information"	Client Record As Data CURRENTLY APPEARS in the Core Client Information (CCI) window Leave field blank if data not available	Change Client Record TO: Complete ONLY fields that need to be changed (Exactly as it should be entered in CCI)
Case Number	<input type="text"/>	
Sort Name	<input type="text"/>	<input type="text"/>
Client Name	<input type="text"/>	<input type="text"/>
Date of Birth (mm/dd/yyyy)	<input type="text"/> / <input type="text"/> / <input type="text"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>
Sex/Gender	<input type="checkbox"/> Female <input type="checkbox"/> Male <input type="checkbox"/> Other <input type="checkbox"/> Unknown	<input type="checkbox"/> Female <input type="checkbox"/> Male
Social Security #	<input type="text"/> - <input type="text"/> - <input type="text"/>	<input type="text"/> - <input type="text"/> - <input type="text"/>
*Medi-Cal Policy #/eff date (mm/dd/yyyy)	<input type="text"/> / <input type="text"/> / <input type="text"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>
Remarks / Additional Information	<input type="text"/>	

STOP - DO NOT ENTER INFORMATION BELOW THIS LINE. HIMS USE ONLY.

<input type="checkbox"/> NOTICE TO REQUESTER: Unable to confirm change should be made	Reason: <input type="text"/>
--	------------------------------

CLIENT INFORMATION TO BE KEPT IN CCBH

Case Number	<input type="text"/>	Date of Birth (mm/dd/yyyy)	<input type="text"/> / <input type="text"/> / <input type="text"/>
CCBH Sort Name	<input type="text"/>	Social Security #	<input type="text"/> - <input type="text"/> - <input type="text"/>
Client Name	<input type="text"/>	Medi-Cal Policy # /eff date	<input type="text"/> / <input type="text"/> / <input type="text"/>
Date completed by HIMS	<input type="text"/> / <input type="text"/> / <input type="text"/>	HIMS Staff CCBH ID # and Name	<input type="text"/>



Live Well, San Diego!



County of San Diego-HHSA-Behavioral Health Services

DUPLICATE CLIENT CASE NUMBER

Fax Form to Health Information Management Services (HIMS) @ (619) 399-3503

For assistance call: Help Desk (800) 834-3792 or HIMS (619) 692-5700 x3

Form

B**REQUESTER:**

- Use Form B to request duplicate client case numbers to be combined.
- Only TYPED Forms will be accepted effective 05/15/2019.
- Complete fields in each column as instructed.
- Fax this form along with any supporting documents e.g. ID, Medi-Cal card, Immigration, Adoption.

*Medical Policy & Effective date can be found in *Clinicians Homepage "Insurance Coverage" Tab***Section #1 - REQUESTER INFORMATION**

Date of Request	■ / ■ / ■	Form completed by:	■
Program Name	■	Your Phone #	(■) ■ - ■ Ext # ■
Unit/SubUnit #	■ / ■	Your Fax #	(■) ■ - ■

Section #2 - CLIENT INFORMATION

CCI Data Fields- To find CCI - Right click on patient name, select "Show Core Client Information")	Client Record A As Data CURRENTLY APPEARS in the Core Client Information (CCI) window Leave field blank if data not available	Client Record B As Data CURRENTLY APPEARS in the Core Client Information (CCI) window Leave field blank if data not available
Case Number	■	■
Sort Name	■	■
Client Name	■	■
Date of Birth (mm/dd/yyyy)	■ / ■ / ■	■ / ■ / ■
Social Security #	■ - ■ - ■	■ - ■ - ■
*Medi-Cal Policy #/eff date (mm/dd/yyyy)	■ / ■ / ■	■ / ■ / ■
Remarks/ Add'l Information	■	

STOP - DO NOT ENTER INFORMATION BELOW THIS LINE. HIMS USE ONLY.

<input type="checkbox"/> NOTICE TO REQUESTER: Unable to Combine Clients	Reason: ■		
CLIENT INFORMATION TO BE KEPT IN CCBH			
Case Number	■	Date of Birth	■ / ■ / ■
Sort Name	■	Social Security #	■ - ■ - ■
Client Name	■	Medi-Cal Policy #/eff date	■ / ■ / ■
Date completed by HIMS	■ / ■ / ■	HIMS Staff CCBH ID # and Name	■
<input type="checkbox"/> Sent to ASO	<input type="checkbox"/> Sent to MHB	<input type="checkbox"/> N/A	

The section below to be completed by the Administrative Services Organization (ASO) staff only.

Date ASO Combined Clients	■ / ■ / ■	ASO Staff who Combined Clients	■
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TRAINING TIP SHEET

1. **WHEN YOU GO BACK TO YOUR PROGRAM:**

You are learning how to enter assessments in the “SDC Train CCBH” environment during this training, which is for **practice purposes only**. It is important to enter all of your assessment information in the “SDC Live CCBH” environment when you return to your program.

2. **SUPPORT DESK – IMPORTANT!:**

Please do not try to solve issues by “working around” the system. You are to enter data as required and you must call the Support Desk for any questions.

The Support Desk contact information is:

Optum Support Desk Contact Information

800-834-3792

sdhelpdesk@optum.com

3. **FOR ONLINE USER MANUALS AND FORMS:** (including forms and form-fill versions of assessments for “emergency” situations) go to the Optum website below and follow these instructions:

<https://www.optumsandiego.com>

Click "Register" to get an on-line form for your personal login.

Confirm your email address.

When you have access, click “Login”.

Login with your User Name and Password.

Go to "Secure Documents".

Select CCBH (formerly Anasazi) Secure Documents

Click "Forms" or "Manuals".

4. **TO REGISTER FOR ADDITIONAL TRAINING:**

www.regpack.com/reg/optum

5. **HIPAA REGULATIONS FOR TRAINING:** There is actual client data (names, etc.) in the training environment. HIPAA regulations mandate this information be treated confidentially.

6. **NON-USE OF CCBH ACCOUNT:** Inactive accounts pose a security risk by allowing an opportunity for unauthorized access. Therefore, in order to safeguard protected health information, inactive accounts will be closely monitored. Users who have not used CCBH in 90 days will have their account deactivated.



Support Desk Contact Information

sdhelpdesk@optum.com
1-800-834-3792

Monday through Friday (E-mail)

Hours	Services
6:00 am to 6:00 pm	All services except password resets or any service involving PHI

Monday through Friday (Telephone)

Hours	Services
4:30 am to 6:00 am	Resetting passwords (24 hour programs) and reporting system outages*
6:00 am to 6:00 pm	All services
6:00 pm to 11:00 pm	Resetting passwords (24 hour programs) and reporting system outages*
11:00 pm to 4:30 am	Reporting system outages*

Weekends (Telephone)

Hours	Services
4:30 am to 11:00 pm	Resetting passwords (24 hour programs) and reporting system outages*
11:00 pm to 4:30 am	Reporting system outages*

* By definition, a system outage affects multiple users. Examples include when:

- The system does not respond and appears to be frozen
- No data can be entered or viewed

Support Desk Suggestions

- Please consult with your program manager and your resource packet prior to contacting the Support Desk.
- When calling for a password reset on weekdays between 4:30-6a or 6-11p, or calling weekends between 4:30a-11p, you must leave a message. Include your name, CCBH staff ID, phone number and the reason for your call.
- You may be given a ticket/tracking number if you call between 6:00a and 6:00p Monday through Friday. Remember to keep this number for future reference.

Additional Contacts

Questions	Where To Go
Clinical Documentation Questions	Documentation Manual/Your Program Manager
Duplicate Clients and Name/DOB/Gender/SSN Changes	Complete Form BHS-025 and Call Medical Records: 619-692-5700 x 3
Financial Questions (UMDAP/Insurance)	Billing Unit: 619-338-2612 Fax- 858-467-9682
Online User Manuals and Forms	www.optumsandiego.com
Service Codes	CCBH (Anasazi) User Manual/QM Unit