New Employee Training Manual

ACUITY:

1. Go to Login
2. acuityscheduling.com and enter username (work email) and password, (MFT123)
3. Click on name and then click the arrow drop down
4. Click on availability under business settings
5. Click on edit availability/limits
6. Scroll down to the second calendar
7. Click on start date you plan to start seeing clients
8. Click on "until end date" and set it for 1 year out.
9. Type in the box the start time you will arrive at the office, until the time you are leaving
   a. If you only put specific hours you will get a rejection for a "blocked event" in chart caddy, when doing your progress note. See Blocked events
10. Do this for every day that you will be seeing MFT clients
11. You can customize acuity to sink to your phone calendar and many other things if you prefer

Chart Caddy

12. Go to chartcaddy.com
13. Click on log in and enter username (1st initial last name) temporary password (Password1)
14. **CLIENT ROSTER**
15. Click clients
16. Scroll down and select clear
17. Once clear go to lead provider drops down, select your name, click search
18. Scroll down and you will see a list of clients
19. Double click clients name, view demographical information in this page in order to call and schedule client for first appointment.

20. **SCHEDULE CLIENT AND BOOK A ROOM**
21. Scroll to the bottom
22. Go to "view date" drop down and pick the week you want to schedule the client
23. Select "contact" drop down and choose your name as the provider
24. Select update
25. Select date/time you are trying to schedule
26. Type clients name in box
27. Click on new chart item
28. Select MH-Moderate **Assessment FOR MEDICAID** (supervised if under supervision) OR MH-LOW COMPLEXITY ASSESSMENT FOR PRIVATE INURANCE
29. Choose facility- metro
30. Provider- Select yourself

31. Select Venue and choose the room you want to book.
32. Click save
33. **BEFORE APPOINTMENT COMPLETE THE FIRST TAB OF THE ASSESSMENT**
34. Complete the entire first tab by filling every box (not just red) and saving it. Make sure you can get to the second tab at the top before your appointment.
35. **WHEN CLIENT SHOWS UP FOR FIRST APPOINTMENT**
36. Click **CALENDAR**
37. Click on the purple box in accordance to date and time
38. Go to the second tab of the assessment and complete assessment
39. Click **SAVE** in between every tab.
40. When completed go to “status” drop down on first tab bring it to completed, click save, then type password in the box click sign (do not click send for sigs)
41. **AT THE END OF SESSION** As. (Ask when do you want to come back?) **We do not guarantee or recommend reoccurring appointments**
42. **Click CALENDAR**
43. Scroll to the bottom
44. Go to “view date” drop down and pick the week you want to schedule the client
45. Select “contact” drop down and choose your name as the provider
46. Select update
47. Select date/time you are trying to schedule for the following session
48. Type clients name in box
49. Click on new chart item
50. Select MH-Psychotherapy preauth (under supervision if necessary)(or corresponding service)
51. Select Start time (date of service and time appointment is planned to start)
52. Select Stop time (time appointment is expected to end)
53. Select provider (choose your name)
54. Select Venue (choose preferred room)
55. Select Save
56. Check to make sure it appears on calendar
57. **Open acuity For private insurance/pay only**
58. Select “Appointment Calendar”
59. Click on yellow box with clients name corresponding date/time
60. Select “make payment”
61. Select “credit card”
62. “amount box” type in copay amount (found on client file tab)
63. Click “pay”

<u>MEDICAID CLIENTS ONLY</u>

COMPLETE TREATMENT PLAN BEFORE THE NEXT SESSION

1. Select Clients

2. Scroll down and select clear
3. Go to "lead provider" drop down box and choose your name
4. Select search
5. Under "client search results" select the appropriate client
6. Go to **view chart**
7. Select "add chart item"
8. Select Service plan moderate complexity preuath (supervised if under supervision)
9. Complete all red fields and select save
10. Then go through each additional tab complete **all** boxes and save between each tab
11. Go to "status" on first tab
12. Change draft to complete
13. Click save
14. Type your password in the box and click "sign" DO NOT CLICK SEND FOR SIGS
15. Then have client sign treatment plan signature page found under "org files" in chart caddy. Put this page in addies box. Once you do, she will approve it.
16. This will create an additional authorization for you to see your clients up to twice a week. If the treatment plan is not completed before 3 months, or after the first 3 sessions, all of the following sessions will deny and will not pay. **Do not schedule additional sessions until the treatment plan is completed.**

<u>All subsequent sessions after assessment/treatment plan</u>

<u>Scheduling for Individual/Family Psychotherapy</u>

1. Schedule session by going to calendar
2. Complete appropriate Date/Time
3. Select "contact" and choose yourself
4. Select update
5. Choose desired Date/time box
6. Type in clients name
7. Select New Chart item
8. Select appropriate chart item (ex MH-Individual)
9. Complete the following boxes
   a. Start time
   b. Stop time
   c. Provider
   d. Setting
   e. Venue
10. Save
11. Make sure it appears on calendar

In the last 10 minutes of session complete **Progress note**
(you can have the client do this with you)

1. Go to **Calendar**
2. Select purple box with corresponding date/time
3. Select Progress
4. Select Next Date and time (ask the client when they would like to return) **We do not guarantee reoccurring appointments**
5. Select venue for next appointment
6. Select Objective
7. Select attendees (who was there)
8. Select at least one emotional level
9. Select at least one behavior
10. Complete intervention box – This box is about you and what you did (ex: MHP met with Cx to Facilitate exploration of (What is in your Objectives) triggers for anger). MHP used CBT to counteract clients "negative thinking patterns" This should be 1-2 sentences long. Ask your clients "What do you think the focus of todays session was."
11. Complete progress details. Ask you clients, "do you think you have made progress today." Make sure to evidence their progress by saying, Cx showed slight progress as evidenced by clients ability to verbalize…. (triggers for anger such as when I'm running late) This needs to be specific to the client. You should be able to read this portion knowing exactly which client it is without seeing the client's name. This should be about 4 sentences long
12. In "new problems" box, add a new problem if it applies, if not, add client denied new problem, do not put N/A.
13. Complete "client response" by adding a direct quote that correlates with the progress section of the note.
14. Click Save
15. Go to the status at the top and click " Complete"
16. Type in your password in the box
17. Click sign (not send for sigs)

For private insurance

1. **Open acuity For private insurance/pay only**
2. Select "Appointment Calendar"
3. Click on yellow box with clients name corresponding date/time
4. Select "make payment"
5. Select "credit card"
6. "amount box" type in copay amount (found on client file tab)
7. Click "pay"

<u>COPAYS</u>

1. A credit card authorization is REQUIRED
2. If a card declines, clients will be made inactive until an updated CC Authorization is completed, and payment is caught up
3. Please run copays with client at the end of every session, incase the card does not work.

4. Addie checks payments every night to make sure they are all ran, if a client cancels please be sure to cancel it in acuity or a payment will be ran
5. A copay must have been collected for the claim to be submitted, if I am unable to collect payment the payment the claim will not be billed. I will then send an invoice to the client, therapist, and addie so that everyone knows a payment is needed. After the second reminder, Addie will begin to follow up with client and no future sessions will be permitted until payment is collected.

CANCELLATIONS

If a client cancels their session

1. Go to acuity
2. Calendar
3. Click on the event
4. Click on the settings wheel in the top corner
5. Choose cancel appointment or reschedule

Or you can go to Chart Caddy

1. Go to calendar
2. Click on the event/chart item
3. Scroll down and click change service
4. Select encounter cancelled, which will then change the chart item to a “for information only” note.

DELETING CHART ITEMS

1. On the cart item near the bottom of the note next to “set flag” there is a drop down box where you can choose “set delete” type something in the box (such as bye) and click set flag. You can also do this from the line item. Highlight the line item, select set delete, type bye in the box and select set flag. It should disappear.
2. To make it reappear, open the chart, select history, click on the chart item that was deleted, go back to the box that you deleted it from and set the flag to “unset delete” type oops in the box and select “set flag.”

CONTACTS

ADD NEW REFERRALS-

1. Select contacts
2. Select new
3. Complete all the boxes in red and don’t forget the phone number and email box
4. Choose preferred provider if there is one.

5. Ask us to send electronic intake if desiered.
6. Click save
7. We check draft contacts daily. We will know to verify benefits and move them to reviewed when they are ready to be scheduled.

If looking for new clients/referrals

1. Contacts
2. Go to status and click “reviewed”
3. Search
4. These are all the clients on the waiting list
5. Click on the client’s name to see all the clients, call and get the scheduled.
6. You can also filter specific insurance types by selecting it in the “pri payer” box.

<u>MESSAGES</u>

ALL NON TIME SESITIVE MESSAGES SHOULD BE DONE THROUGH CHART CADDIES SECURE MESSAGING SYSTEM. PLEASE DO NOT TEXT ADMIN FOR TROUBLESHOOTING. SEND A MESSAGE ON CHART CADDY

1. Go to messages (there will be a star next to messages for unread messages)
2. To **read** a message go to the line item and select it by double clicking
3. “has file” means there is an attachment, to open it, double click on the line item and click download
4. To respond, type in the “new post” box and click save

To **send** a message go to

1. Messages
2. New
3. Click on the receiver’s name
4. Click message selected
5. Type new post
6. Select save

SEND NEW INTAKE PAPERWORK

You can also **upload documents** such as **new intake paperwork** by selecting choose file.
Or you can upload it to a clients chart by going to their chart

1. Add new
2. MH- clients file
3. Choose provider under “contacts”
4. Type in the box “description”
5. Save

6. Select choose file
7. Save

ORG FILES

On the left hand planel click “org files” to view any paper documents we have. All paper documents are under org files.

1. Org Files
2. Search
3. Select the appropriate one
4. Download
5. Double click on the download line item

PAYMENTS

TO VIEW A CLIENT’S CREDIT OR PAYMENTS

1. Select Payments
2. Hit clear
3. Type in client’s name
4. Select search
5. Anything in the unapplied column will indicate a credit.
6. To **print** an **invoice**
    a. Select page either print list, if you want to print what you see, or print selected if you want to print what encounter the copay was applied to

CHART ITEMS BILLED

To view the **BILLING** AND **PAYED OUT CLAIMS**

1. Go to **CHART ITMES BILLED** (UNDER THE REPORTS DROP DOWN ARROW)
2. Select clear
3. Type in clients name
4. Search
5. Scroll to the right
6. The payroll number is on the right, you can check this by going to payroll (see payroll) and putting in the corresponding payroll number
7. To view the **claim** click on the line item
8. Select view claim item

PAYROLL

1. Select the arrow next to reports

2. Click payroll
3. Clear
4. Type in payroll number and select search for a particular payroll
5. Or search to view all the payrolls
6. Click the line item to view what was on the payroll

TO UNBLOCK AN EVENT

1. Click the drop down arrow next to reports
2. Select events
3. Select clear
4. Type in the blocked event number
5. Select the line item
6. Changed “is blocking” to no

Functions

Calendar- create appointments, book rooms, complete progress notes

Charts- Will take you directly to a client’s chart

Clients- You can view your roster and find clients demographical information

Contacts- New referrals

Messages- send paperwork or communication between MFT

Org File- find documents such as intake paperwork, paper assessments and treatment plans, signature pages, crisis forms, policy manual

Payments- view payments clients have made or credits

Reports- many reports such as claims, events, payrolls, all chart items (draft, completed, signed, final).