# Configuring Group Settings

In this section, we will review each of the tabs which appear under "**Shared by All Staff**" in **Settings & Directories**. These tabs allow you to configure your group's ICANotes settings. ***You MUST be a Group Administrator in order to make any changes to Shared by All Staff settings.*** To get started, click on the Setting and Directories drawer in the Chart Room, then on "Shared by All Staff:"

**, then**



## Sites/Letterheads Tab:

This first area stores some basic information about your practice which will be used in your notes and by the billing portion of ICANotes. You will find a list of sites (if you have set any up yet) immediately on the left.

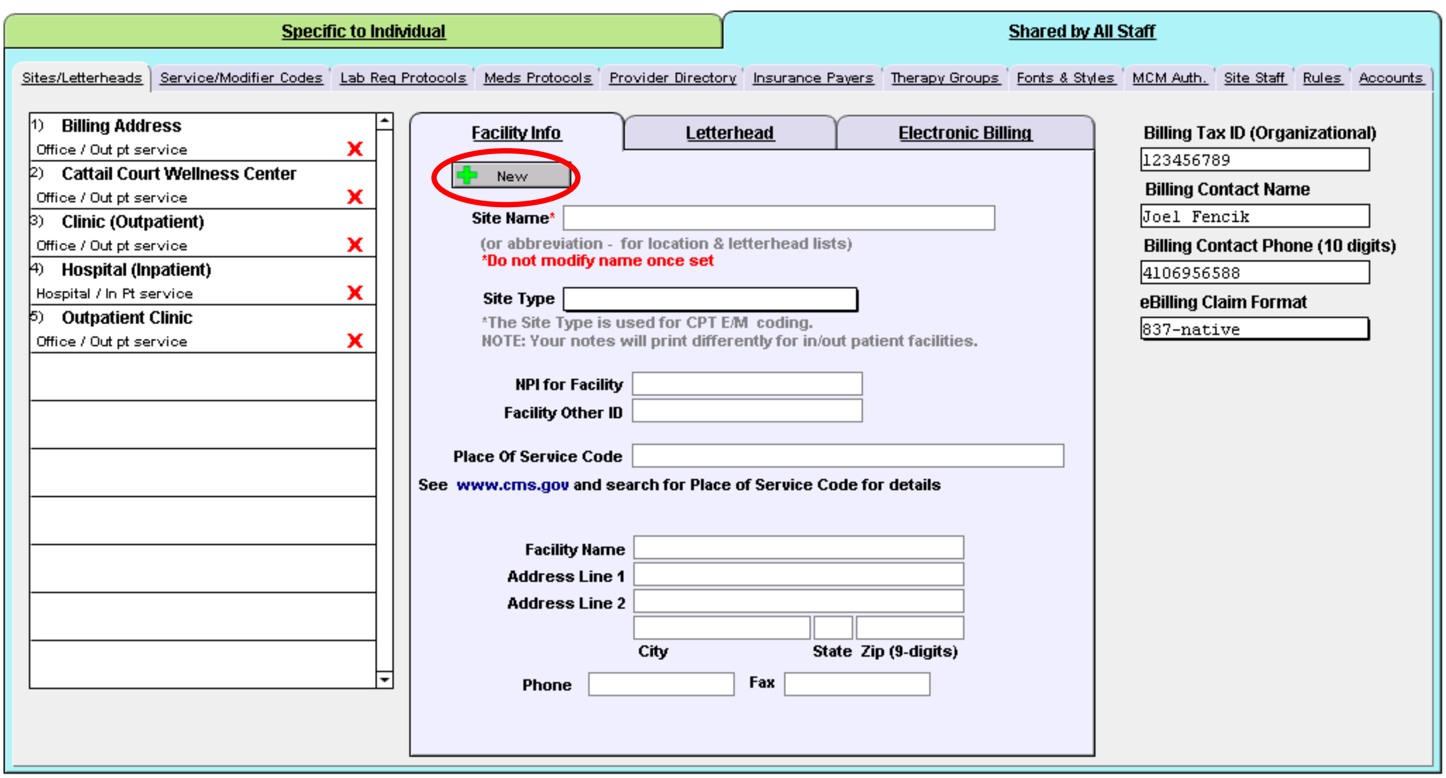
Let's talk about the three tabs you see in the center, under the Sites/Letterheads tab:


### *Facility Info Tab*

Under the 

tab, you may create a new site, if you haven't yet, by clicking on the 

button.



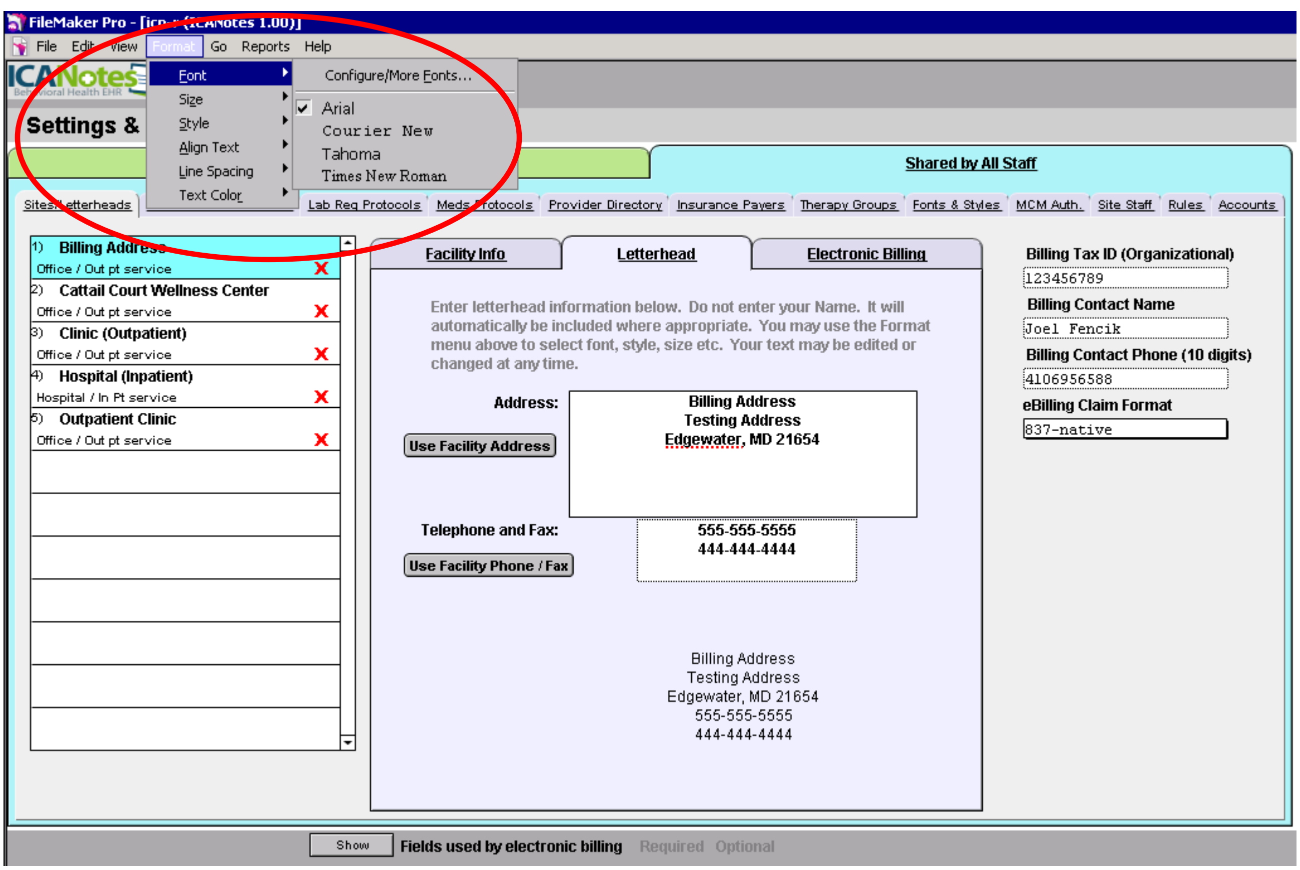
A **New Site Name** dialog box will open.

- Enter a name for this location. NOTE*: Once entered, the name cannot be modified.* Once you have entered a name, press Continue. The site name is automatically entered into the record on the Facility Info tab.
- Click on the field next to **Site Type** and select the type of location from the dropdown list.
- Enter the **NPI for this facility** and any other **Facility Other ID** you would like to record in the next field.
- Choose your **Point of Service code** by clicking on the field and selecting from the dropdown list.
- Enter your full **Facility Name** as you want it to appear on your letterhead.
- Enter the Address, Phone and Fax Number for this facility.

You may add other locations under the Facility Info tab as needed, if your group operates multiple locations, or for billing purposes.

### *Letterhead Tab*

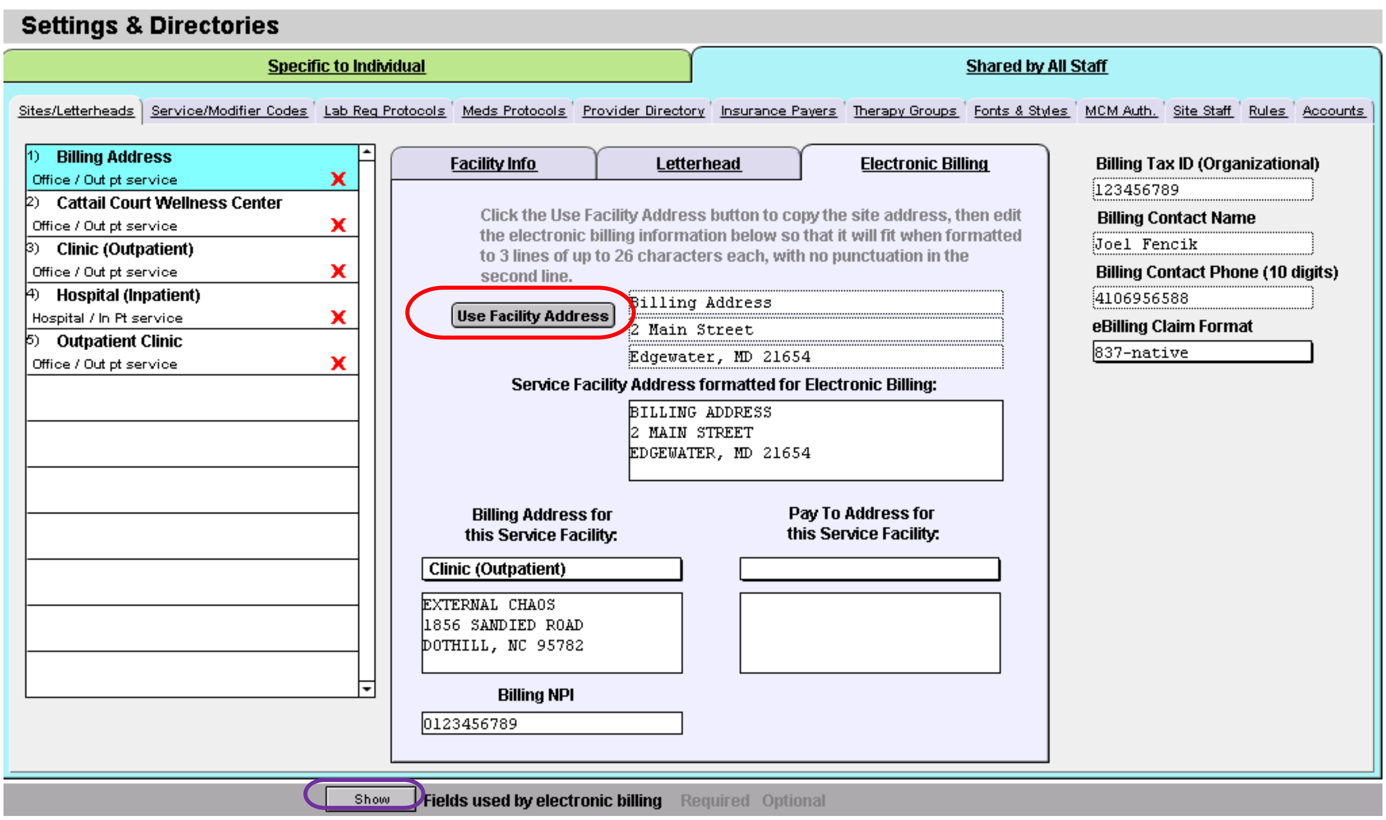
- Click on the Letterhead tab to the right of **Facility Info**.
- Press the **Use Facility Address** and the **Use Facility Phone/Fax** buttons to automatically populate the data entered in **Facility Info**.
- If you need to, use the **Format** option on the toolbar (circled in red on the screenshot below) to select a different font for your letterhead than the default, which is Arial. Position your cursor in the address box or telephone/fax box first if you want to change the font. Alternately, you can highlight the existing text you want to change, then right click and use the pop-up menu box to change the font, size, style, and color of your highlighted text.



*Electronic Billing Tab*

The **Electronic Billing** tab may be found to the right of the **Letterhead** tab. If you will be sending your claims electronically through a clearinghouse, or printing CMS/1500 forms, enter your billing address and NPI information on this tab (see instructions for **Facility Info**).

- Click on each **Site Name** that you would like to set up for electronic billing using the list on the left. You will need to set up billing addresses for each site that you will use for billing.
- Press the **Use Facility Address** button (circled in red on the screenshot below) and the address you entered from **Facility Info** for that Site will appear in the address fields.
- Click in the box below the field labeled: **Select a billing address to use for this Service Facility**. Select the site from which you send your electronic claims or if the billing address is different than the facility address where services were rendered.
- The **Billing NPI #** and the billing address will populate based on the service facility you choose for your billing address.
- You may choose to highlight fields that are required in Settings and Directories for Electronic Billing using the Show button (circled in purple in the screenshot below).



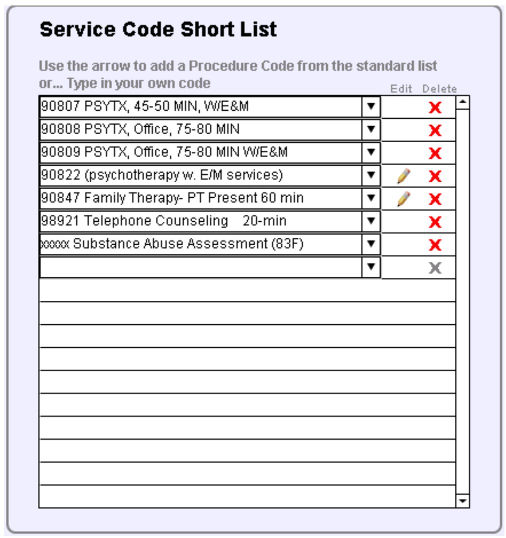

Click the Video Tutorial button for a brief video demonstration of how to configure all settings under Sites/Letterheads.

## Service/Modifier Codes Tab

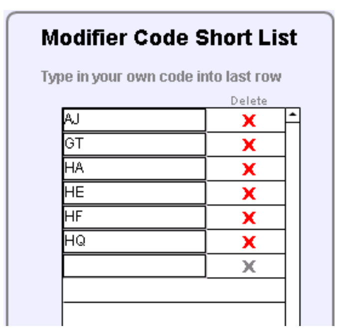
The Service/Modifier Codes tab is used to create your group's Service Code short list.

This short list of codes will be required when you create your individual billing rates under the **Specific to Individual** tab. This short list of billing codes is a time saver, as only the codes you typically use will appear on the dropdown list in the Progress Note and Initial Evaluation work areas.

- In the left column, click on the down arrow next to the field to open the full list of available Service Codes If you do not find a code that you need, please email Support at [ticket@icanotes.com](mailto:ticket@icanotes.com) to request that we add the code.

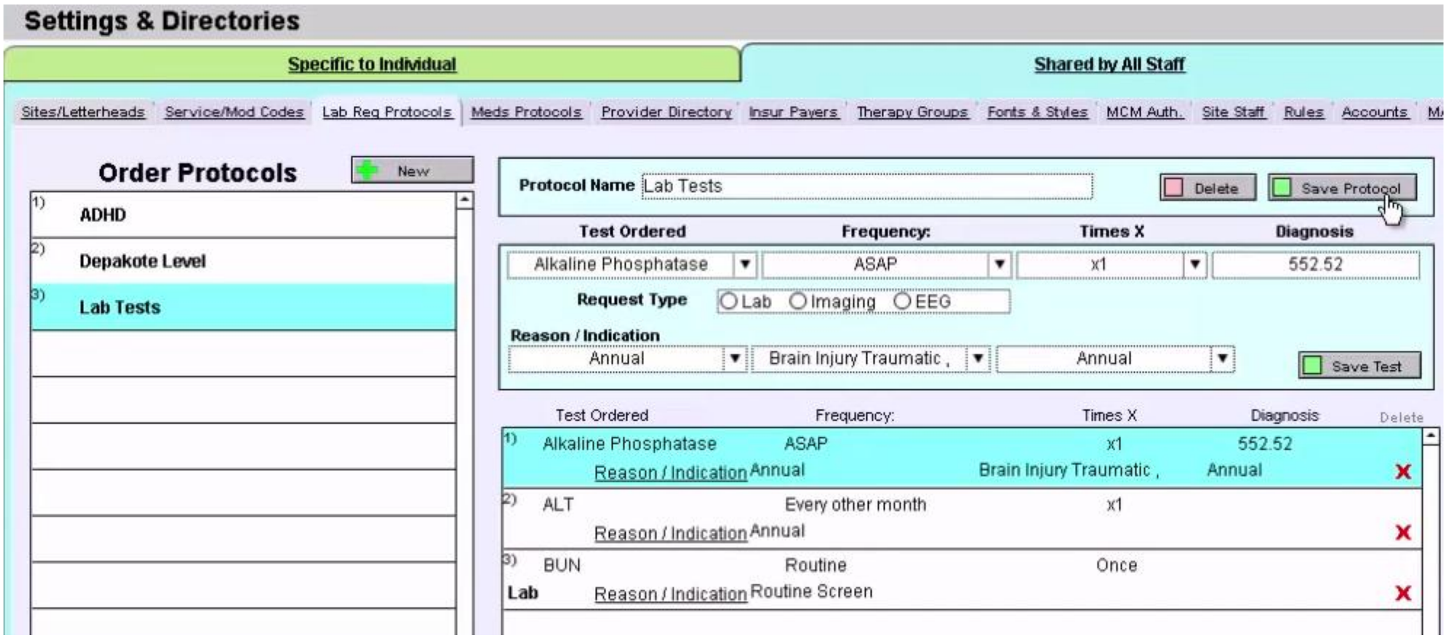



- If you would like to use Modifier Codes, you may click on the field in the right column and type in your own codes to create a Modifier Code Short List.



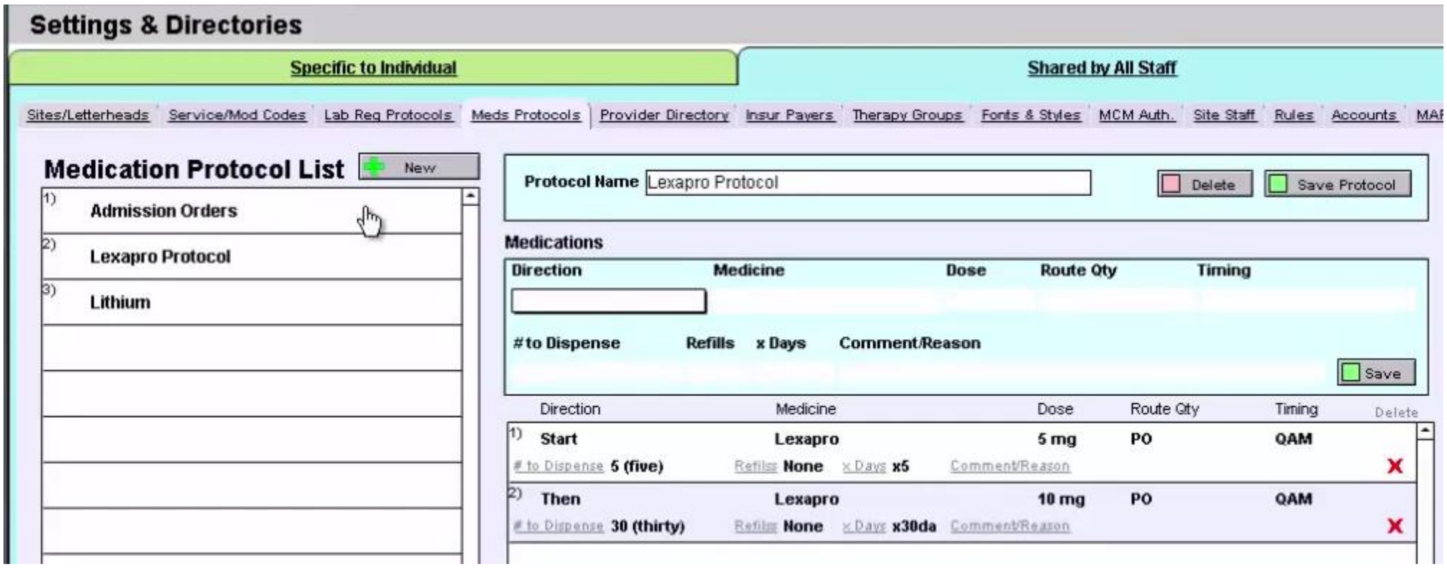

## Lab Requisition Protocols Tab

The **Lab Req Protocols** tab can be used to configure a group of lab tests for easier ordering on the Clinical Order Sheet. Please click the Video Tutorial button below for a quick demonstration of how to setup up a lab protocol.




## Medication Protocols Tab

The **Medication Protocols** tab can be used to configure a list of medication protocols that will automatically populate a group of medications into the medication list in a clinician's note. Please click the Video Tutorial button below for a quick demonstration of how to setup up a medication protocol.

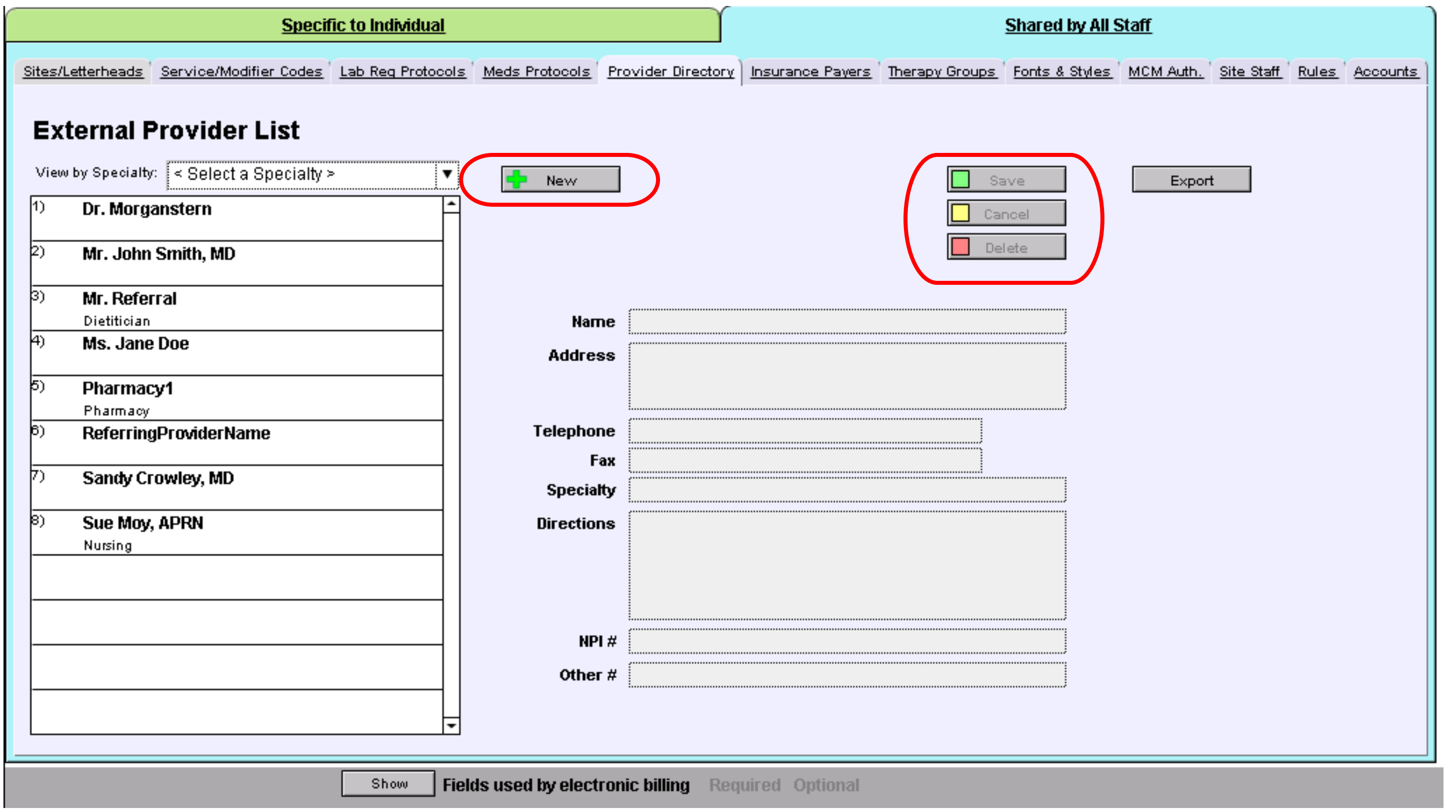



## Provider Directory Tab

Use the Provider Directory tab to create a list of providers that you communicate with outside of your practice's ICANotes group. These providers may be Primary Care Physicians, referring providers, or any other providers you may want to have in a central directory. This list is especially useful for making referrals, as you can store contact data as well as directions for the patient.

Click on the New button. From there:

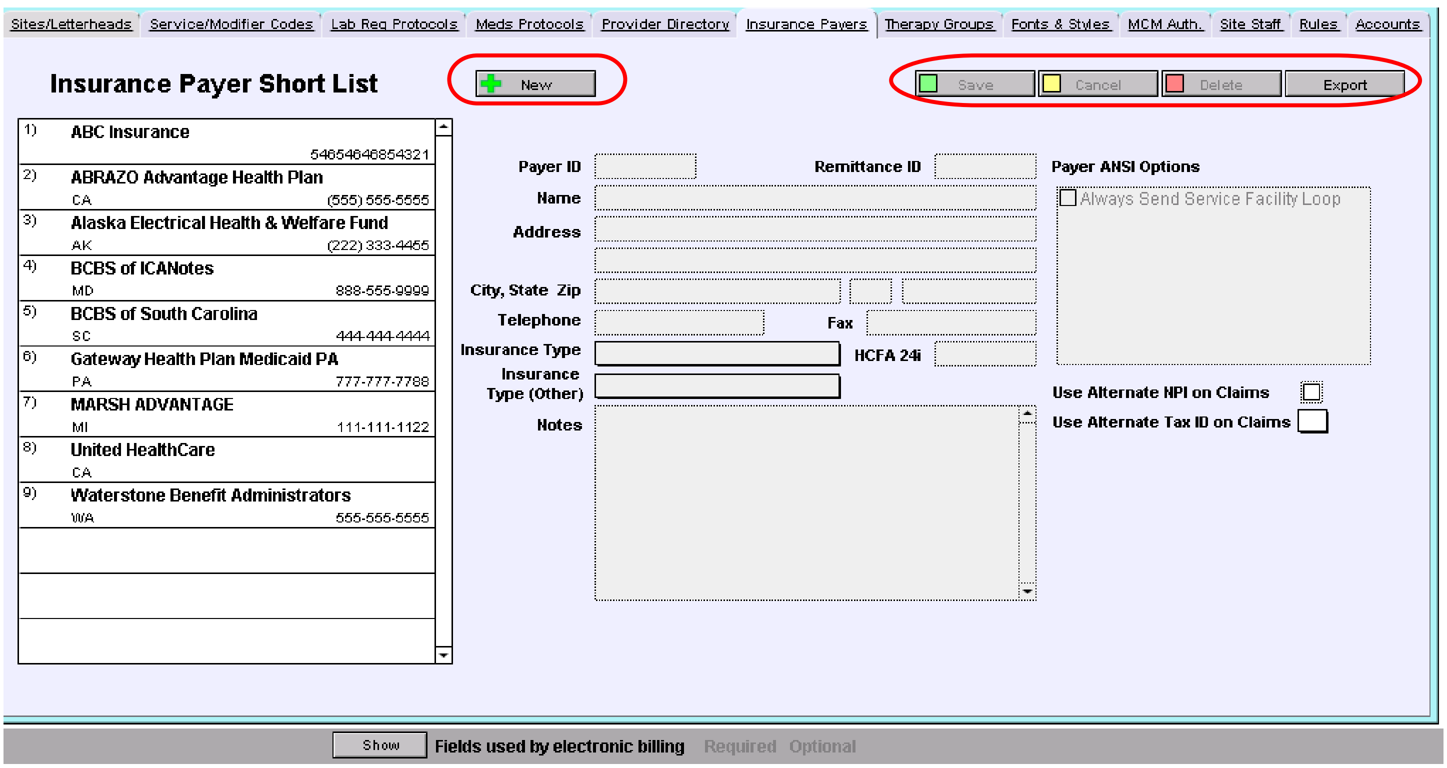
- The cursor will move to the **Name** field. Enter the provider's information, then press Save.
- You may export this directory if you ever need to print it or send it electronically.




## Insurance Payers Tab

The Insurance Payers tab is used to enter the insurance payers your patients use most frequently and save them to a short list which can be used when entering a patient's demographic information.

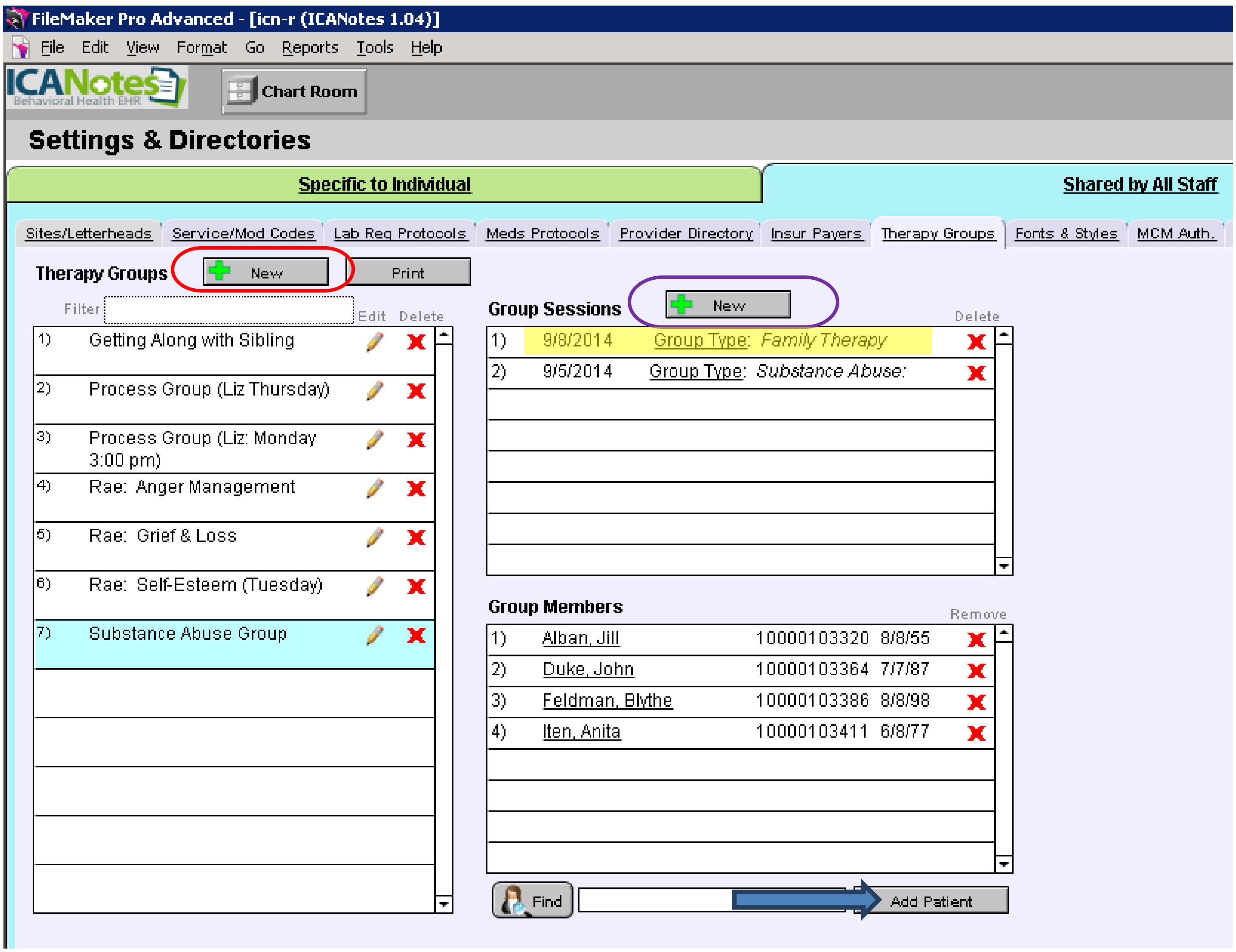
- Click on the New button to enter an Insurance company name (circled on the screenshot below).
- Enter the insurance company's name, address, and all subsequent data fields.
- Designate the **Insurance Type** by clicking on the field and selecting from the dropdown menu. If one of those options is not what you need, click on Insurance Type (Other) field and choose one of the options in that dropdown list.
- If you would like to use the Alternate NPI # entered under the **Specific to Individual** tab (located on the *Personal Info/Identity* tabs) when you send claims to this insurance company, check the box labeled ***Use Alt NPI on claims***.
- Click on the box labeled ***Use Alt Tax ID on claims*** if you would like to use either the Alt #1 or Alt #2 Tax ID entered under the **Specific to Individual** tab (again located under the *Personal Info/Identity* tabs).
- Enter the **Taxonomy Code,** if applicable. This is an optional code for electronic billing.
- Click Save to store this Insurance Company entry.
- If you later want to delete this or another Insurance Company from your short list, return to this screen, click on it from the list in the left column, and click Delete to remove it.
- You may export this short list for printing or electronic transmission by clicking on Export.



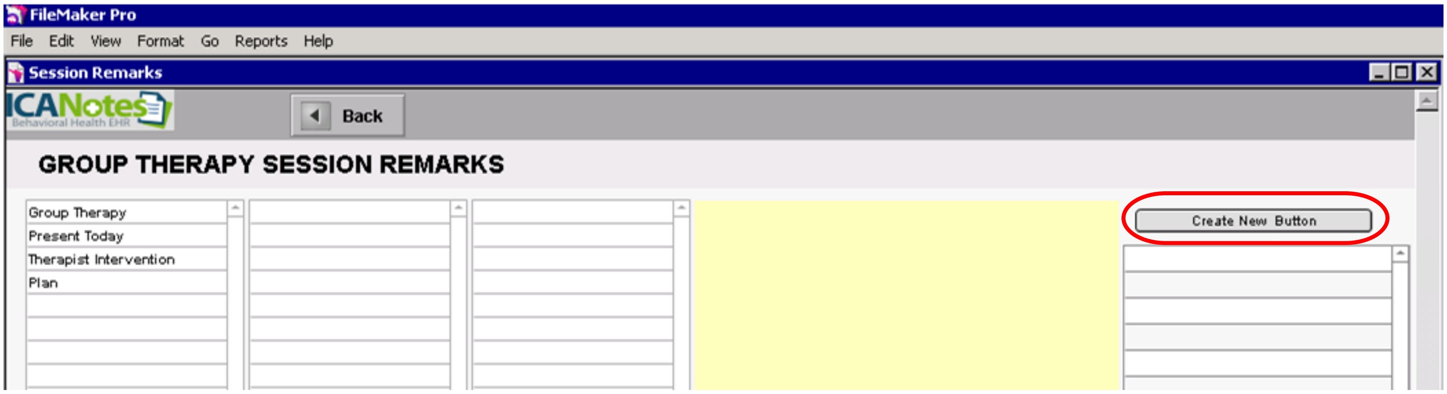

## Therapy Groups Tab

Use the Therapy Groups tab to create patient therapy groups, and to create Group Therapy Remarks which will be included in each individual participating patient's chart.

- Click on the New button (circled on screenshot below) to start a new therapy group.
- Click on the Find button at the bottom of the screen, and enter the patient ID or name to select a patient to be added. Click on the Add Patient button (see blue arrow below). Add as many patients to the group as you wish following the same steps.
- When you have a therapy group created, click on the New button (circled in purple below, above the group sessions field) to enter your group session remarks (see screenshot on next page). You will be given the option to have the program open a new group therapy progress note for each member of the group and to have your session remarks automatically inserted into those progress notes.



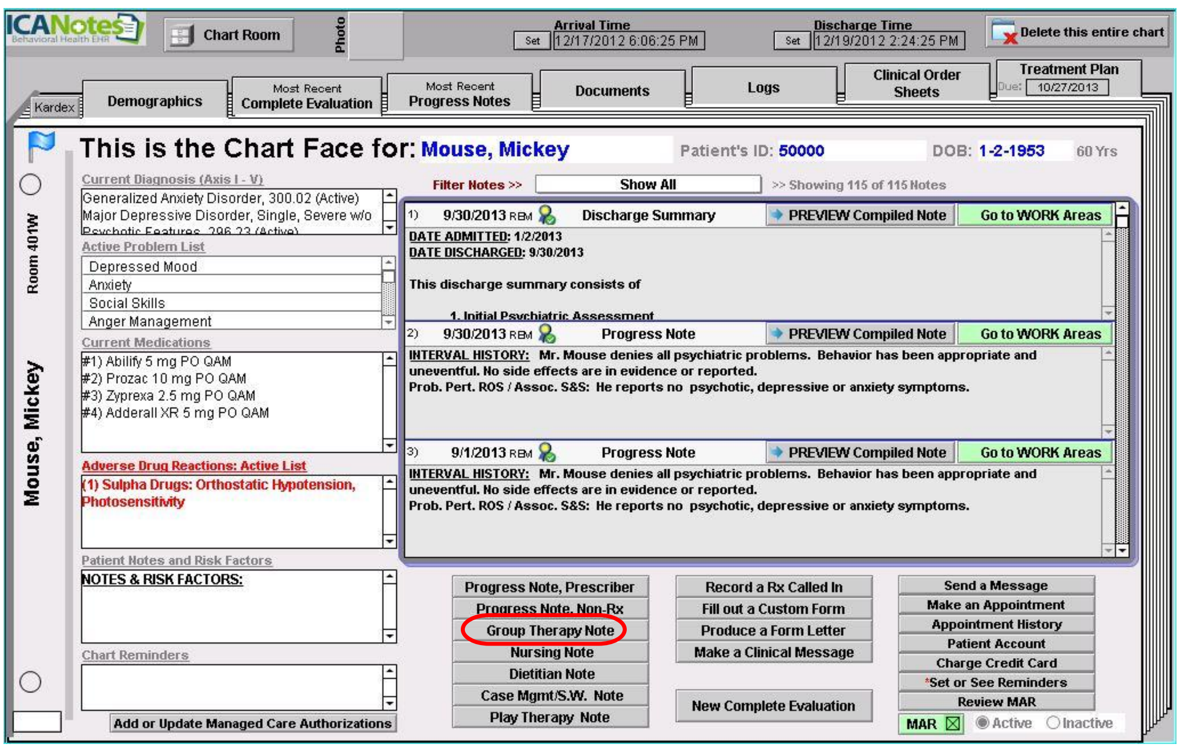

You may add custom buttons to the **Group Therapy Session Remarks** screen, in the same way you add custom buttons to other note screens, by clicking on Create New Button (circled on screenshot on the next page). You may also share these custom buttons with other clinicians in your practice.




After you have finished entering your group session remarks, click on the Back button to return to the **Therapy Groups** tab.

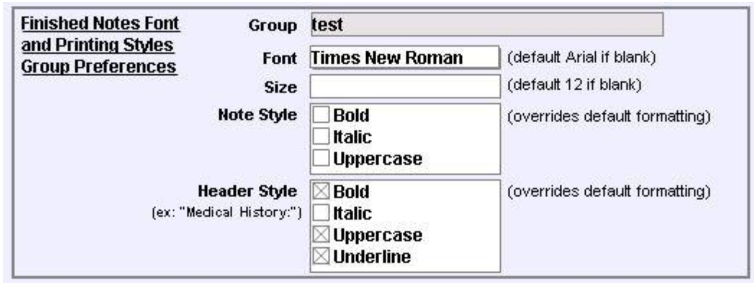
You will see that the current date is shown above the group therapy session remarks you entered (highlighted in yellow on screenshot on the previous page). Click on the date field to change the date to your encounter date, if needed. Then click in the **Group Session Remarks** field to see the date update on the **Group Sessions** list in the center of the screen. If you ever need to delete your Group Session note, click on the red **X** next to the date of the note you want to delete.

***Tip:*** To insert the group session remarks into an individual clinical record, select the Group Therapy Note button on the patient's Chart Face (circled on screenshot below). At the top of the Group Therapy Progress Note screen, look for Go to Therapy Groups. Select a therapy group from the list on the left (or add one as needed), then add your session remarks by clicking on Make a NEW GROUP SESSION REMARK for Today.




## Fonts & Styles Tab

Use the Fonts & Styles tab to change the look of finished notes for all users in your practice.



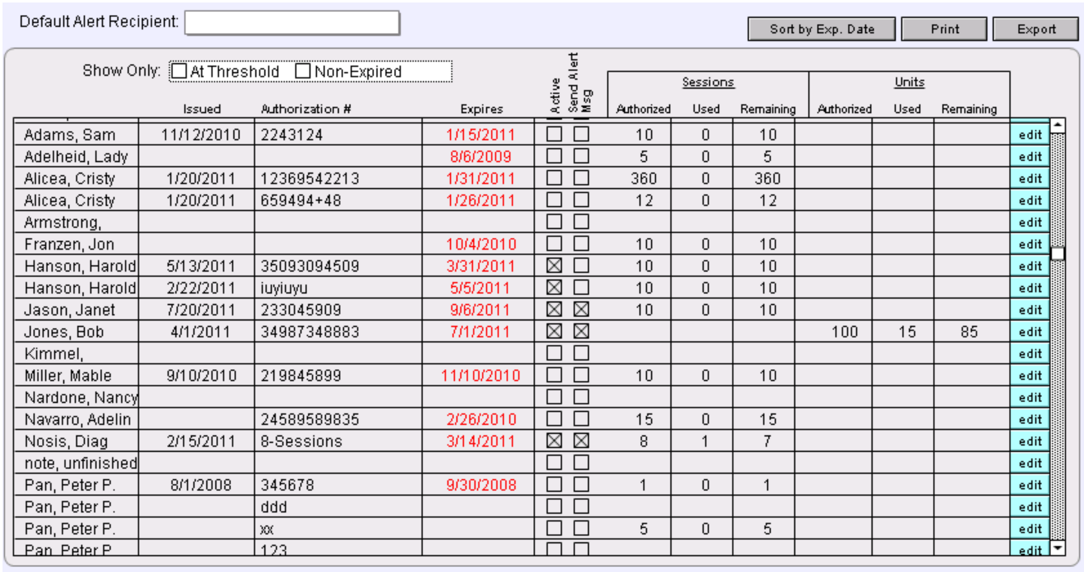

- Click on the **Font** field to open the dropdown list of available fonts (default is Arial).
- Click on the **Size** field to enter a new size (default/blank is 12 pt.).
- Click the appropriate checkbox for **Note Style** to change the look of the body of your note text.
- Click on the appropriate checkbox for **Header Style** to change the look of headers within your note (e.g., *Medical History* header).

  ***NOTE:*** *Any changes you make here will only affect notes created after you have saved your change. Notes previously compiled will not be affected.*

## Managed Care Authorizations Tab

The **Managed Care Authorizations** MCM Auth. tab offers you a quick look at all of the Managed Care Authorizations your group has entered into the program (see screenshot below).

The Show Only checkboxes labeled **At Threshold** and **Non-Expired** allow you to show only those patients that are at or past the threshold or those that are non-expired and active respectively. Alternately, any listing in **red** needs attention because one of the two alert thresholds set on the patient's chart for managed care authorizations has been reached, either for number of sessions/units or expiration date.




| | Issued | Authorization # | Expires | Active | Send Alert Msg | Sessions Authorized | Sessions Used | Sessions Remaining | Units Authorized | Units Used | Units Remaining | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Adams, Sam | 11/12/2010 | 2243124 | 1/15/2011 | ☐ | ☐ | 10 | 0 | 10 | | | | edit |
| Adelheid, Lady | | | 8/6/2009 | ☐ | ☐ | 5 | 0 | 5 | | | | edit |
| Alicea, Cristy | 1/20/2011 | 12369542213 | 1/31/2011 | ☐ | ☐ | 360 | 0 | 360 | | | | edit |
| Alicea, Cristy | 1/20/2011 | 659494+48 | 1/26/2011 | ☐ | ☐ | 12 | 0 | 12 | | | | edit |
| Armstrong, | | | | ☐ | ☐ | | | | | | | edit |
| Franzen, Jon | | | 10/4/2010 | ☐ | ☐ | 10 | 0 | 10 | | | | edit |
| Hanson, Harold | 5/13/2011 | 35093094509 | 3/31/2011 | ☒ | ☐ | 10 | 0 | 10 | | | | edit |
| Hanson, Harold | 2/22/2011 | iuyiuyu | 5/5/2011 | ☒ | ☐ | 10 | 0 | 10 | | | | edit |
| Jason, Janet | 7/20/2011 | 233045909 | 9/6/2011 | ☒ | ☒ | 10 | 0 | 10 | | | | edit |
| Jones, Bob | 4/1/2011 | 34987348883 | 7/1/2011 | ☒ | ☒ | | | | 100 | 15 | 85 | edit |
| Kimmel, | | | | ☐ | ☐ | | | | | | | edit |
| Miller, Mable | 9/10/2010 | 219845899 | 11/10/2010 | ☐ | ☐ | 10 | 0 | 10 | | | | edit |
| Nardone, Nancy | | | | ☐ | ☐ | | | | | | | edit |
| Navarro, Adelin | | 24589589835 | 2/26/2010 | ☐ | ☐ | 15 | 0 | 15 | | | | edit |
| Nosis, Diag | 2/15/2011 | 8-Sessions | 3/14/2011 | ☒ | ☒ | 8 | 1 | 7 | | | | edit |
| note, unfinished | | | | ☐ | ☐ | | | | | | | edit |
| Pan, Peter P. | 8/1/2008 | 345678 | 9/30/2008 | ☐ | ☐ | 1 | 0 | 1 | | | | edit |
| Pan, Peter P. | | ddd | | ☐ | ☐ | | | | | | | edit |
| Pan, Peter P. | | xx | | ☐ | ☐ | 5 | 0 | 5 | | | | edit |
| Pan, Peter P. | | 123 | | ☐ | ☐ | | | | | | | edit |

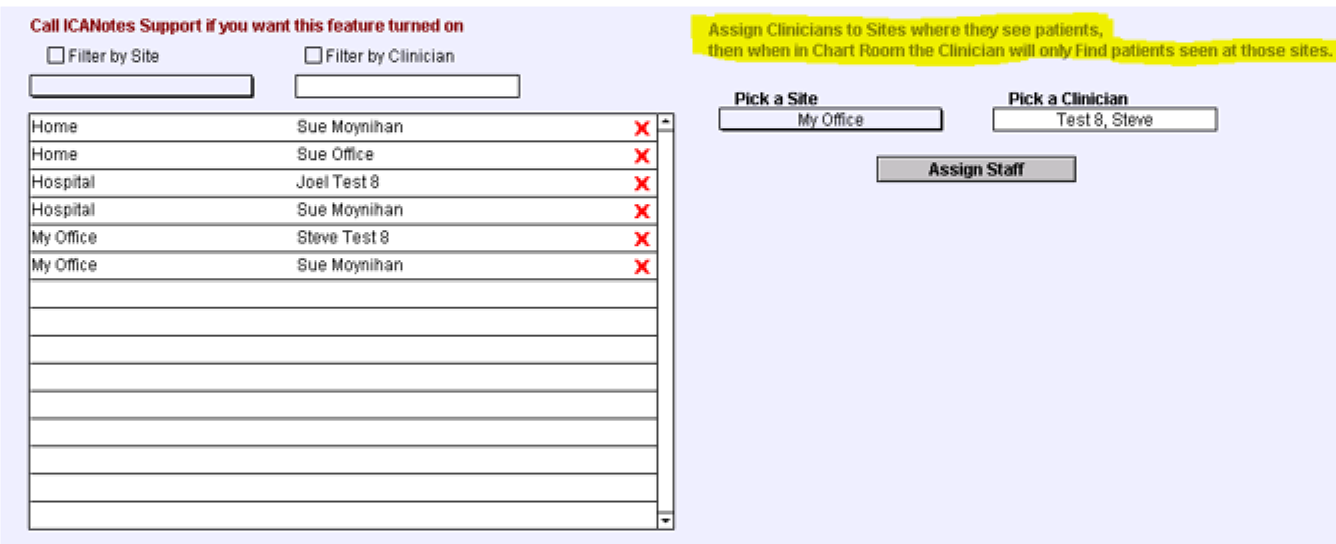
If you need to update the thresholds for a patient, you may do so in that patient's Chart Face. Just look for the **Add or Update Managed Care Authorizations** button in the lower-left hand corner.

## Site Staff Tab

The Site Staff tab is useful for organizations with multiple locations. Use this tab to assign clinicians to a site. When assigned to a site, clinicians will only be able to retrieve charts for patients being seen at that site when they type in a name and click **Find** in the Chart Room. *NOTE: You must contact ICANotes Support to have this feature activated for your group.*

Click on the **Pick a Site** menu and choose the site you want to assign a clinician to in order to restrict their view of patient charts in the Chart Room.

- Click on the **Pick a Clinician** button and select the clinician you are assigning from the dropdown list.
- Click on the Assign Staff button to save the assignment.

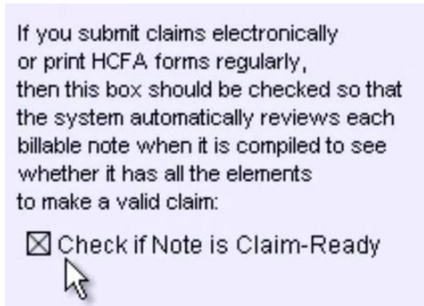



VIDEO TUTORIAL

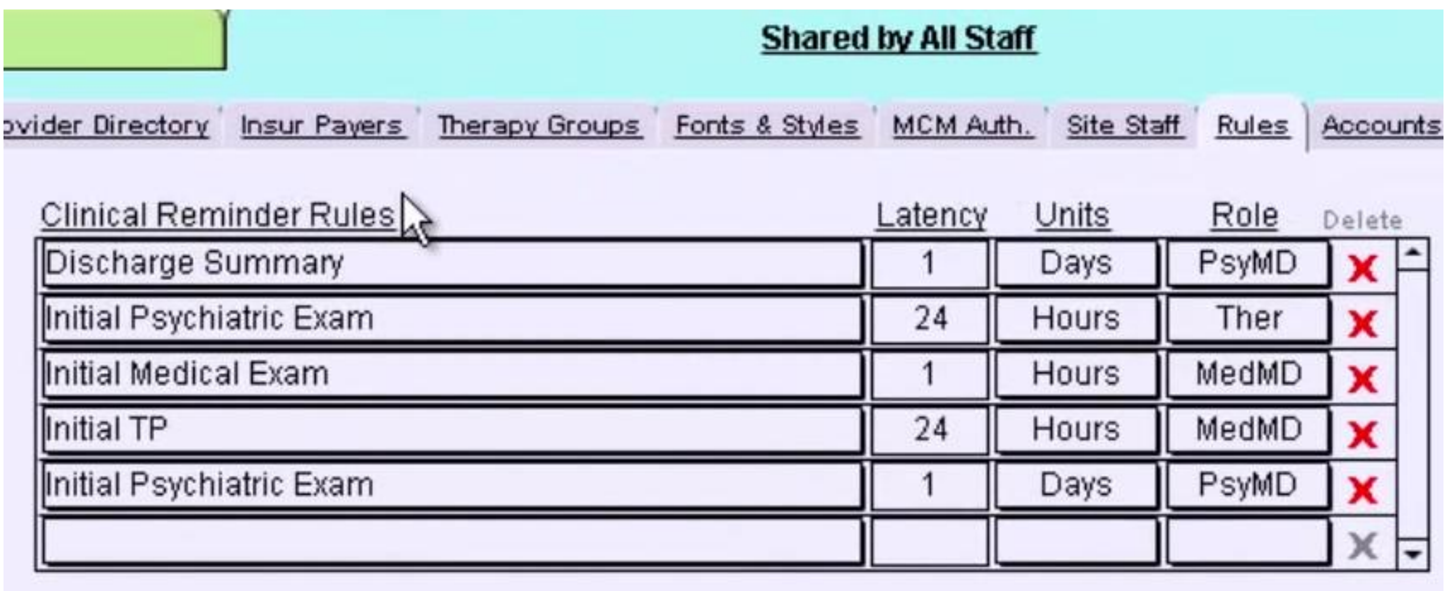
## Rules Tab

The **Rules** tab has several features that you may want to enable for your group.

On the left, you will see the following checkbox option. If you check the box, each time a note is compiled ICANotes will automatically check to ensure that all fields required to submit an electronic claim have been populated.



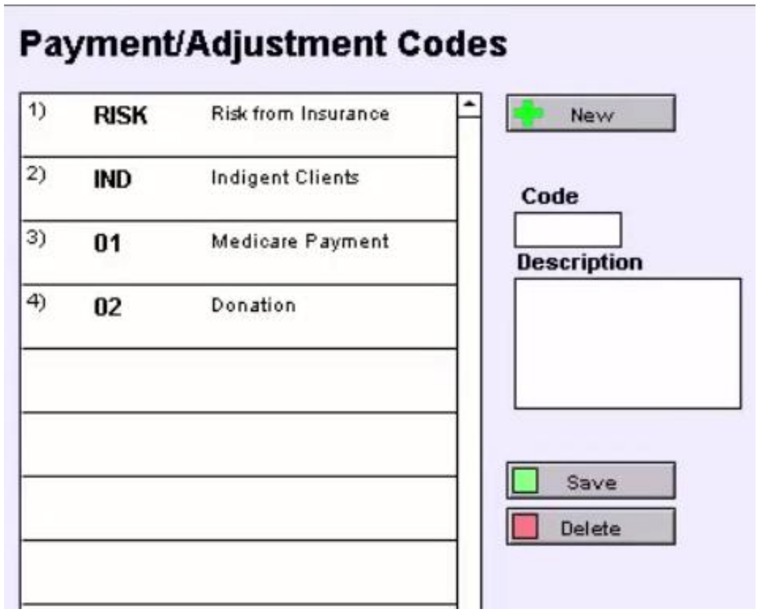

On the right, there a number of rules that can be configured to control the timing of due dates for various documents for a patient from the time of admission to an inpatient setting. Once these time intervals have been established, overdue documents will appear on each clinician's Clinician Reminder Sheet for easy visibility into items which need their attention. To use this feature, ICANotes Support must activate a rule for your group on the backend. Please call 443-569-8778 or email ticket@icanotes.com to have this enabled.



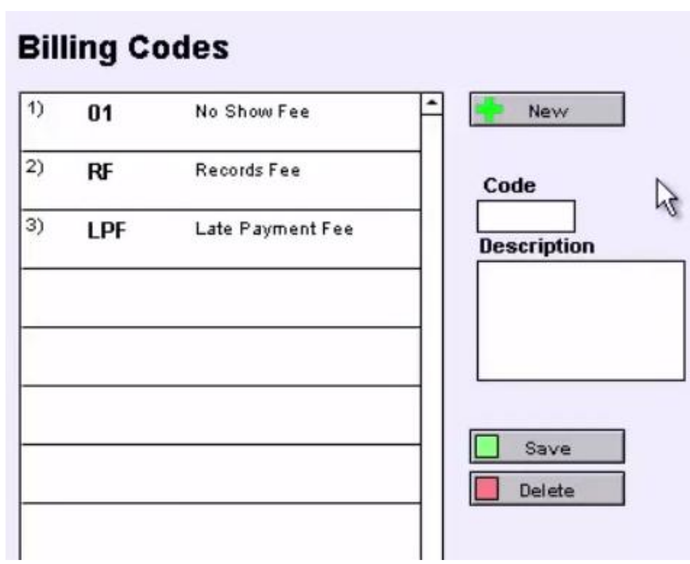

## Accounts Tab

If you're using Patient Accounts to keep track of charges and payments, you can set up codes under the **Accounts** tab to link to a patient or a charge in order to report on any of the codes that you create.

On the left, the Payment/Adjustment Codes section can be used to set up a payment code. When you go to post a payment in Patient Accounts, you can link these codes to a payment in order to report on them at a later time. The codes must be linked to a payment in order to report on them.




On the right, a Billing Codes list can be set up in a similar fashion. You can report on these codes as well. They are linked to charges recorded in ICANotes so that you can run reports on these codes.




## MAR Tab

The Medication Administration Record (MAR) is frequently used by inpatient facilities. If your facility intends to use the electronic MAR in ICANotes, you can configure specific times of day to be associated with the Medication Timing options used for the dispensing of medication. Once configured, the administration times will be automatically pushed onto the MAR.