

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 **Shared by All Staff**


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 **Facility Info** tab, you may create a new site, if you haven’t yet, by clicking on the  button.

The screenshot shows the ICANotes Settings & Directories interface. The top navigation bar is split into two sections: "Specific to Individual" (green) and "Shared by All Staff" (light blue). The "Shared by All Staff" section is active, showing a list of tabs: Sites/Letterheads, Service/Modifier Codes, Lab Req Protocols, Meds Protocols, Provider Directory, Insurance Payers, Therapy Groups, Fonts & Styles, MCM Auth., Site Staff, Rules, and Accounts. The "Sites/Letterheads" tab is selected, and the "Facility Info" sub-tab is active. On the left, a list of existing sites is shown with red 'X' marks next to each entry: 1) Billing Address (Office / Out pt service), 2) Cattail Court Wellness Center (Office / Out pt service), 3) Clinic (Outpatient) (Office / Out pt service), 4) Hospital (Inpatient) (Hospital / In Pt service), and 5) Outpatient Clinic (Office / Out pt service). The main content area for the "Facility Info" tab contains a "New" button (circled in red), a "Site Name*" field, a "Site Type" field, and various other fields for NPI, Facility ID, Place of Service Code, Facility Name, Address Lines, City, State, Zip, Phone, and Fax. A note states: "NOTE: Your notes will print differently for in/out patient facilities." On the right side, there are fields for Billing Tax ID (Organizational), Billing Contact Name, Billing Contact Phone (10 digits), and eBilling Claim Format.

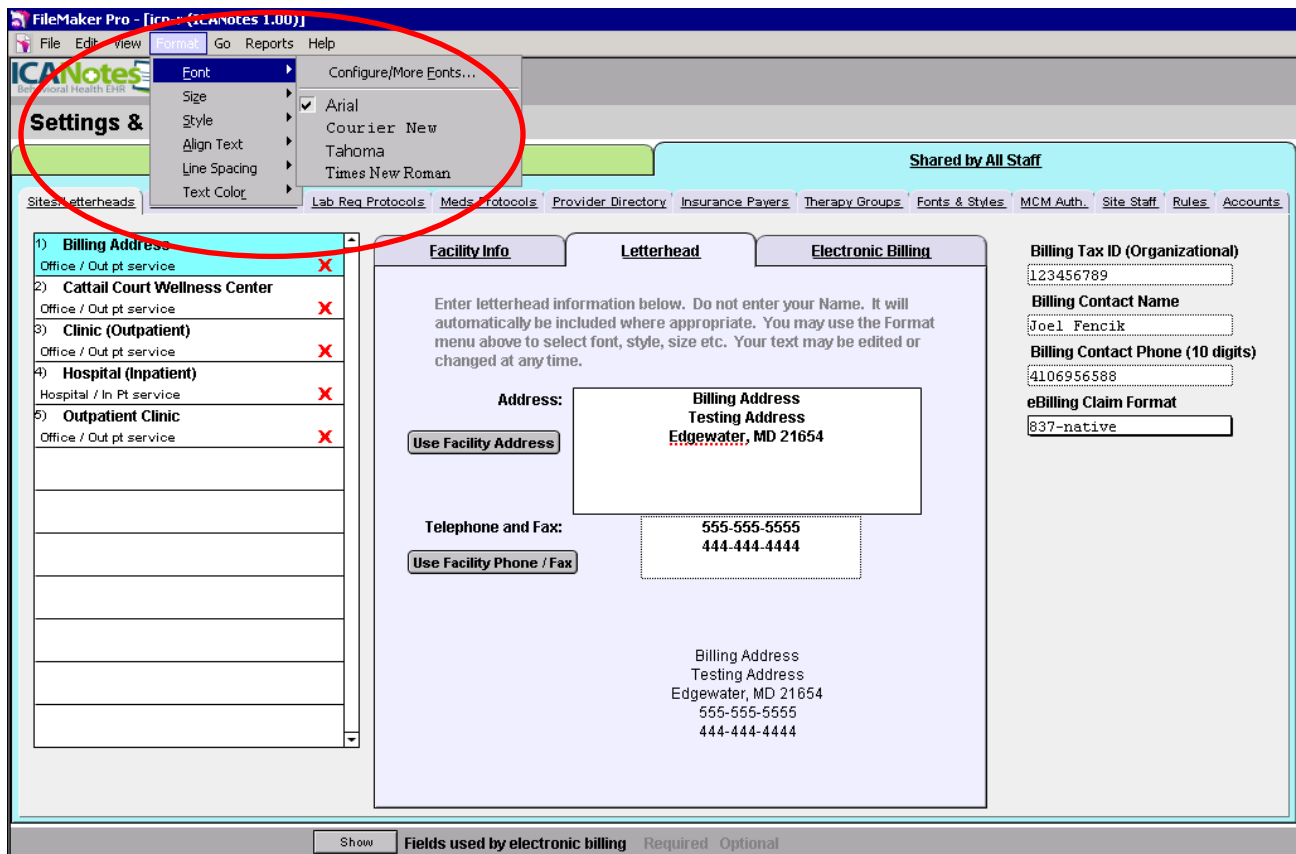
A **New Site Name** dialog box will open.

- 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).

The screenshot displays the 'Settings & Directories' interface. On the left, a list of sites is shown under the 'Specific to Individual' tab, with the 'Billing Address' site selected. The main area is divided into 'Facility Info', 'Letterhead', and 'Electronic Billing' tabs. The 'Electronic Billing' tab is active, showing instructions to use the 'Use Facility Address' button (circled in red) to copy the facility address. Below this, the 'Billing Address' field is populated with '2 Main Street, Edgewater, MD 21654'. A 'Service Facility Address formatted for Electronic Billing' box shows the address formatted as 'BILLING ADDRESS', '2 MAIN STREET', and 'EDGEWATER, MD 21654'. There are also fields for 'Billing Address for this Service Facility' (populated with 'Clinic (Outpatient)', 'EXTERNAL CHAOS', '1856 SANDIED ROAD', 'DOTHILL, NC 95782') and 'Pay To Address for this Service Facility'. The 'Billing NPI' field is populated with '0123456789'. On the right, there are fields for 'Billing Tax ID (Organizational)' (123456789), 'Billing Contact Name' (Joel Fencik), 'Billing Contact Phone (10 digits)' (4106956588), and 'eBilling Claim Format' (837-native). At the bottom, a 'Show' button (circled in purple) is used to toggle 'Fields used by electronic billing' (Required/Optional).

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



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.

Settings & Directories

Specific to Individual | Shared by All Staff

Sites/Letterheads | Service/Mod Codes | **Lab Req Protocols** | Meds Protocols | Provider Directory | Insur Payers | Therapy Groups | Fonts & Styles | MCM Auth. | Site Staff | Rules | Accounts | M

Order Protocols

1)	ADHD
2)	Depakote Level
3)	Lab Tests

Protocol Name: Lab Tests

Test Ordered	Frequency:	Times X	Diagnosis
Alkaline Phosphatase	ASAP	x1	552.52

Request Type: Lab Imaging EEG

Reason / Indication: Annual Brain Injury Traumatic , Annual

Test Ordered	Frequency:	Times X	Diagnosis	Delete
1) Alkaline Phosphatase	ASAP	x1	552.52	
<u>Reason / Indication</u>	Annual	Brain Injury Traumatic ,	Annual	X
2) ALT	Every other month	x1		
<u>Reason / Indication</u>	Annual			X
3) BUN	Routine	Once		
Lab <u>Reason / Indication</u>	Routine Screen			X

VIDEO TUTORIAL

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.

Settings & Directories

Specific to Individual | Shared by All Staff

Sites/Letterheads | Service/Mod Codes | Lab Req Protocols | **Meds Protocols** | Provider Directory | Insur Payers | Therapy Groups | Fonts & Styles | MCM Auth. | Site Staff | Rules | Accounts | MAI

Medication Protocol List

- 1) Admission Orders
- 2) Lexapro Protocol
- 3) Lithium

Protocol Name:

Medications

Direction	Medicine	Dose	Route Qty	Timing
# to Dispense	Refills	x Days	Comment/Reason	


Direction	Medicine	Dose	Route Qty	Timing	Delete
1) Start	Lexapro	5 mg	PO	QAM	
<u># to Dispense</u> 5 (five)	<u>Refills</u> None	<u>x Days</u> x5	<u>Comment/Reason</u>		X
2) Then	Lexapro	10 mg	PO	QAM	
<u># to Dispense</u> 30 (thirty)	<u>Refills</u> None	<u>x Days</u> x30da	<u>Comment/Reason</u>		X

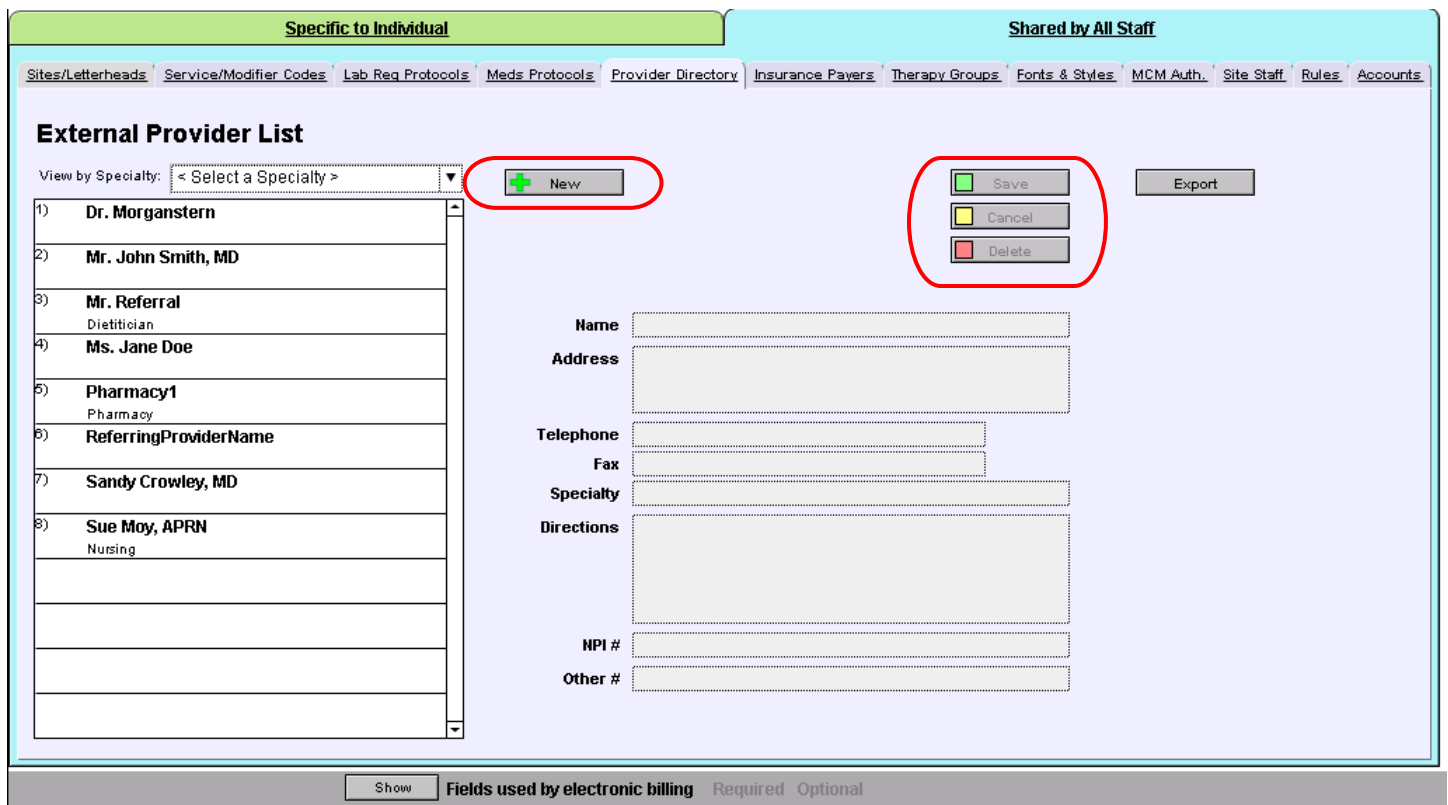
VIDEO TUTORIAL

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  button. From there:

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



The screenshot shows the 'External Provider List' interface. At the top, there are two tabs: 'Specific to Individual' (selected) and 'Shared by All Staff'. Below the tabs is a navigation menu with items like 'Sites/Letterheads', 'Service/Modifier Codes', 'Lab Req Protocols', 'Meds Protocols', 'Provider Directory', 'Insurance Payers', 'Therapy Groups', 'Fonts & Styles', 'MCM Auth.', 'Site Staff', 'Rules', and 'Accounts'. The main area is titled 'External Provider List' and features a 'View by Specialty' dropdown menu set to '< Select a Specialty >'. To the right of this menu are three buttons: 'New' (with a green plus icon), 'Save' (with a green square icon), and 'Export'. Below these buttons is a list of providers, each with a number and name, and a 'Show' button at the bottom. The 'Show' button is labeled 'Fields used by electronic billing' and has 'Required' and 'Optional' options. The list of providers includes: 1) Dr. Morganstern, 2) Mr. John Smith, MD, 3) Mr. Referral (Dietitian), 4) Ms. Jane Doe, 5) Pharmacy1 (Pharmacy), 6) ReferringProviderName, 7) Sandy Crowley, MD, and 8) Sue Moy, APRN (Nursing). To the right of the list is a form with fields for Name, Address, Telephone, Fax, Specialty, Directions, NPI #, and Other #. The 'New', 'Save', and 'Delete' buttons are circled in red.

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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**.

The screenshot shows the 'Insurance Payer Short List' interface. The 'New' button is circled in red. The 'Save', 'Cancel', 'Delete', and 'Export' buttons are also circled in red. The interface shows a list of insurance payers on the left and a form for entering details on the right.

1)	ABC Insurance	54654646854321
2)	ABRAZO Advantage Health Plan	CA (555) 555-5555
3)	Alaska Electrical Health & Welfare Fund	AK (222) 333-4455
4)	BCBS of ICANotes	MD 888-555-9999
5)	BCBS of South Carolina	SC 444-444-4444
6)	Gateway Health Plan Medicaid PA	PA 777-777-7788
7)	MARSH ADVANTAGE	MI 111-111-1122
8)	United HealthCare	CA
9)	Waterstone Benefit Administrators	WA 555-555-5555

Form Fields:





- Payer ID: []
- Remittance ID: []
- Name: []
- Address: []
- City, State Zip: []
- Telephone: []
- Fax: []
- Insurance Type: []
- Insurance Type (Other): []
- Notes: []
- HCFA 24i: []
- Payer ANSI Options: Always Send Service Facility Loop
- Use Alternate NPI on Claims:
- Use Alternate Tax ID on Claims:

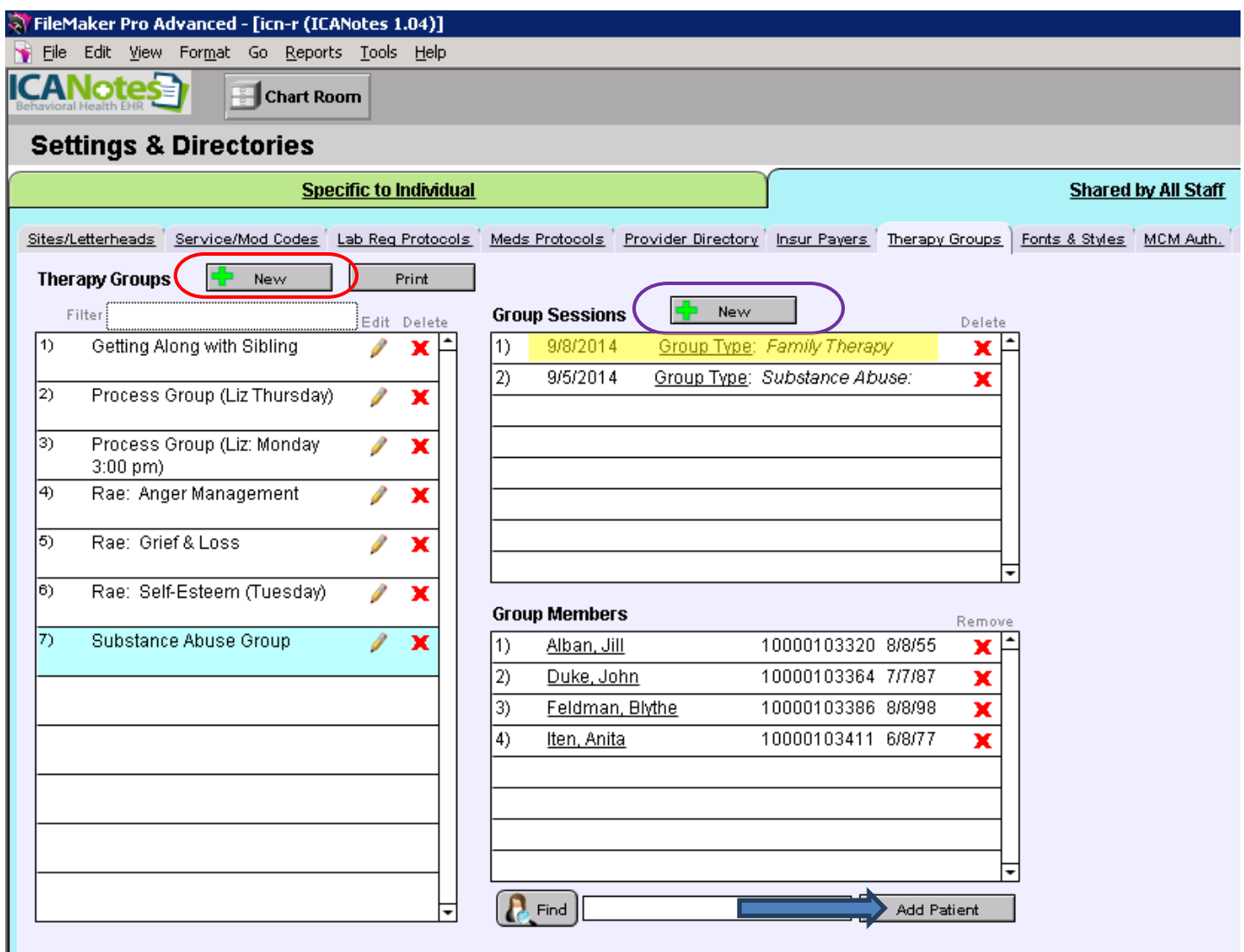
Buttons: Show, Fields used by electronic billing, Required, Optional



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  button (circled on screenshot below) to start a new therapy group.
- Click on the  button at the bottom of the screen, and enter the patient ID or name to select a patient to be added. Click on the  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  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.



FileMaker Pro Advanced - [icn-r (ICANotes 1.04)]


File Edit View Format Go Reports Tools Help

ICANotes Behavioral Health EHR Chart Room

Settings & Directories


Specific to Individual Shared by All Staff

Sites/Letterheads Service/Mod Codes Lab Req Protocols Meds Protocols Provider Directory Insur Payers Therapy Groups Fonts & Styles MCM Auth.

Therapy Groups  Print

Filter: Edit Delete



ID	Group Name	Edit	Delete
1)	Getting Along with Sibling		
2)	Process Group (Liz Thursday)		
3)	Process Group (Liz Monday 3:00 pm)		
4)	Rae: Anger Management		
5)	Rae: Grief & Loss		
6)	Rae: Self-Esteem (Tuesday)		
7)	Substance Abuse Group		


Group Sessions  Delete

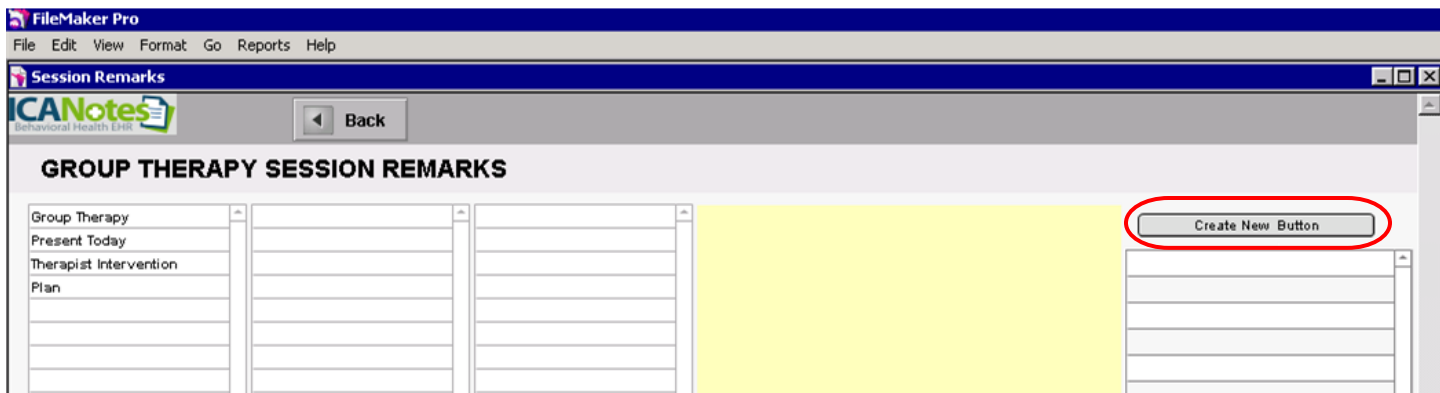
ID	Date	Group Type	Delete
1)	9/8/2014	Group Type: Family Therapy	
2)	9/5/2014	Group Type: Substance Abuse:	


Group Members Remove

ID	Name	ID Number	Date	Remove
1)	Alban, Jill	10000103320	8/8/55	
2)	Duke, John	10000103364	7/7/87	
3)	Feldman, Blythe	10000103386	8/8/98	
4)	Iten, Anita	10000103411	6/8/77	

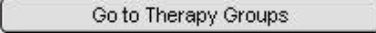
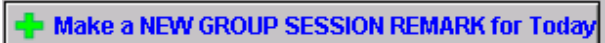
 

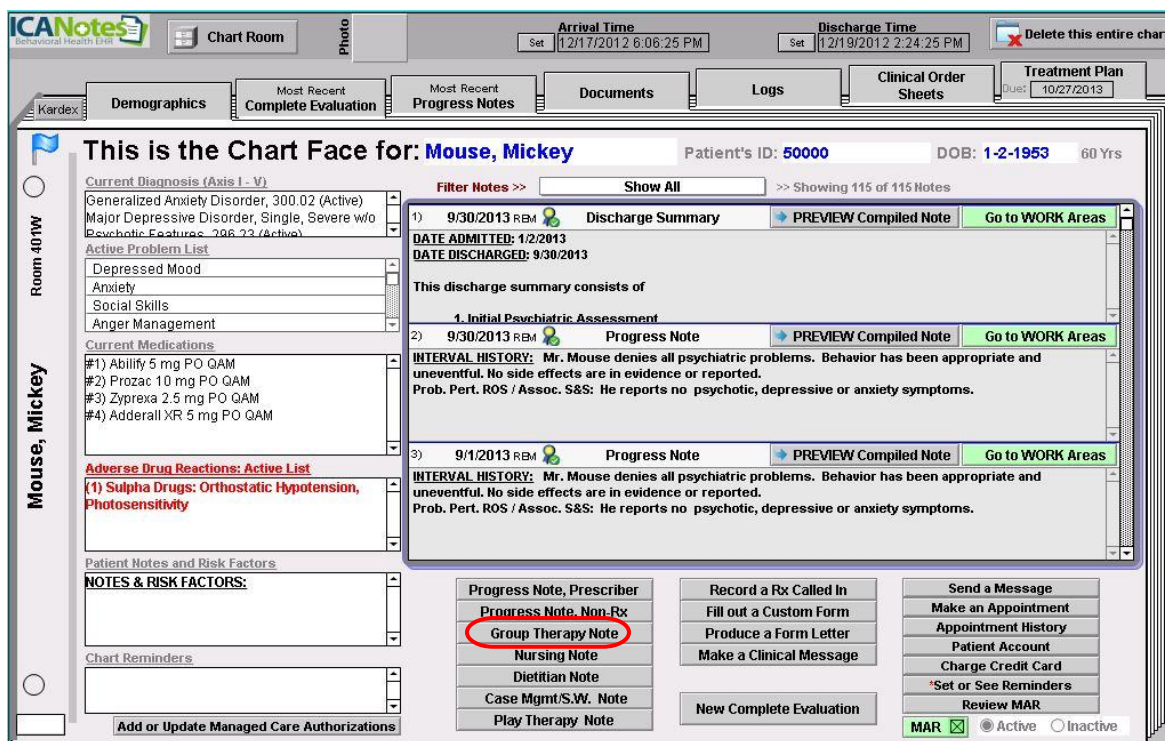
You may add custom buttons to the **Group Therapy Session Remarks** screen, in the same way you add custom buttons to other note screens, by clicking on  (circled on screenshot on the next page). You may also share these custom buttons with other clinicians in your practice.



After you have finished entering your group session remarks, click on the  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 . Select a therapy group from the list on the left (or add one as needed), then add your session remarks by clicking on .



VIDEO TUTORIAL

Fonts & Styles Tab

Use the [Fonts & Styles](#) tab to change the look of finished notes for all users in your practice.

Finished Notes Font and Printing Styles Group Preferences	Group	test
	Font	Times New Roman (default Arial if blank)
	Size	(default 12 if blank)
	Note Style	<input type="checkbox"/> Bold (overrides default formatting) <input type="checkbox"/> Italic <input type="checkbox"/> Uppercase
	Header Style (ex: "Medical History:")	<input checked="" type="checkbox"/> Bold (overrides default formatting) <input type="checkbox"/> Italic <input checked="" type="checkbox"/> Uppercase <input checked="" type="checkbox"/> Underline

- 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.

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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.

Default Alert Recipient:

Sort by Exp. Date Print Export

Show Only: At Threshold Non-Expired

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

Call ICANotes Support if you want this feature turned on

Filter by Site Filter by Clinician

Home	Sue Moynihan	X
Home	Sue Office	X
Hospital	Joel Test 8	X
Hospital	Sue Moynihan	X
My Office	Steve Test 8	X
My Office	Sue Moynihan	X

Assign Clinicians to Sites where they see patients, then when in Chart Room the Clinician will only Find patients seen at those sites.

Pick a Site
My Office

Pick a Clinician
Test 8, Steve

Assign Staff

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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.

If you submit claims electronically or print HCFA forms regularly, then this box should be checked so that the system automatically reviews each billable note when it is compiled to see whether it has all the elements to make a valid claim:

Check if Note is Claim-Ready

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.

Shared by All Staff

Provider Directory | Insur Payers | Therapy Groups | Fonts & Styles | MCM Auth. | Site Staff | **Rules** | Accounts

Clinical Reminder Rules	Latency	Units	Role	Delete
Discharge Summary	1	Days	PsyMD	X
Initial Psychiatric Exam	24	Hours	Ther	X
Initial Medical Exam	1	Hours	MedMD	X
Initial TP	24	Hours	MedMD	X
Initial Psychiatric Exam	1	Days	PsyMD	X
				X

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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.

	Code	Description
1)	RISK	Risk from Insurance
2)	IND	Indigent Clients
3)	01	Medicare Payment
4)	02	Donation

Payment/Adjustment Codes

Code

Description

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.

	Code	Description
1)	01	No Show Fee
2)	RF	Records Fee
3)	LPF	Late Payment Fee

Billing Codes

Code

Description

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