

Configuring Individual Settings

In this section, we will review each of the tabs which appear under “**Specific to Individual**” in **Settings + Directories**. Click on the **Settings + Directories** drawer in the Chart Room to begin configuring your personal settings.



Click on the **Specific to Individual** tab. In this area, group administrators will see a list of everyone in their group on the left, and may configure settings for each user. Non-administrators will only be able to see and modify their own account.

Personal Info Tab

The settings in this portion of the program pertain to your identity and personal preferences. When you first enter Settings + Directories, you will be looking at the **Identity** area under **Personal Info**.

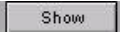
The screenshot shows the ICA Notes 'Settings & Directories' interface. On the left is a list of users, with 'Joel Test 4' selected. The main area is divided into 'Specific to Individual' and 'Shared by All Staff' sections. The 'Personal Info' tab is active, showing the 'Identity' section with fields for Name (Joel Test 4), National Provider ID, Medical License Number (NJ55478232), DEA Number, Federal Tax Id (SSN selected), and Taxonomy Code. The 'Options' section includes Supervisor(s) (Billing Demo), Supervisee(s) (Mark Test 4, Steve Test 4, Wesley Test 4), and a 'Temporarily Switch User Type' dropdown set to Psychiatrist. A 'For Gov't claims' section has 'Accept Assignment' set to No and 'Rendering Status' set to Sole Practitioner. A 'Please Note' warning is displayed at the bottom right.

On the **Identity** tab you can enter:

- **Name**
- **National Provider ID** – This is a unique 10-digit identification number issued to health care providers in the United States by the Centers for Medicare and Medicaid Services (CMS).

- **Alternative National Provider ID** – This field is used when a provider has another identifier, such as a State License.
- **Medical License Number**
- **DEA Number** – A number assigned to a healthcare provider by the U.S. Drug Enforcement Administration. It allows them to write prescriptions for controlled substances.
- **Federal Tax ID**
- **Taxonomy Code** – A unique 10-character alphanumeric code that enables providers to identify their specialty at the claim level. Please note that the field here is a relic.
- **Bill Under Supervisor** – In some cases, a provider will need to bill under another supervising provider in the group, either because of credentials, or because of insurance payer requirements.
- **Medicaid ID#**
- **CLIA#** - A Clinical Laboratory Improvement Amendment number is given to any facility that performs lab tests on humans, such as drug tests.
- **Email Address**

Additionally, you may choose to fill out the following fields:

- **Initials** - Your initials will be shown on the Chart Face next to notes you have written for that patient to provide a quick visual cue for your notes if this patient is seen by multiple clinicians in your group.
- **Supervisors** – This is where an administrator can grant access to the work areas to another user. This is helpful for billers, who often need to add diagnoses or service codes to other users’ notes.
- **Temporarily Switch User Type** – This is a custom feature that allows a user to switch disciplines. This is used in settings where there are different fields that are required to be entered depending on the role that the user is performing, such as when nurses fill in for intake coordinators on weekends.
- **Accept Assignment** – This means that the provider accepts Medicare payments, as determined by the payer.
- **Rendering Status** – This essentially specifies the tax status of the provider. If they are an employee and submit claims under the practice, then they are a group member. Otherwise, if they bill claims in their own name, they are a sole practitioner.
- **Security Center** – Designated Security Administrators for a group can enter this password-protected area (using their same ICANotes password) to update user accounts. They can reset passwords, add/delete users, and change permissions.
- **Fix My Clipboard** – This button corrects a problem that sometimes occurs when attempting to copy and paste to and from the program.
- **Show fields used by electronic billing** – This feature is helpful for groups that transmit claims electronically. Press the  button and all fields **required** for electronic billing will display in yellow, while **optional** fields will display in pink.

The following fields are populated by ICANotes, and cannot be changed by the user:

- **User Type**
- **User Name**
- **User ID**
- **Group Name**
- **Group Administrator**

Now, click on the **Options** tab, to the right of **Identity**. Your screen will look like this:

Specific to Individual **Shared by All Staff**

You are allowed to see all group members because you are a Group Administrator.

36) **Richard EPrescribe, MD**
User Name: richrx

37) **Richard Morgenstern, M.D.**
User Name: richm

38) **Richard Test**
User Name: iratest

39) **Sandy Crowley**
User Name: scrowley

40) **Septimus Bean**
User Name: septimus

41) **Stephen Skalamara**
User Name: stephentest

42) **Steve Signorelli**
User Name: stevesig

43) **Stevesig Dev**
User Name: stevesigdev

44) **Susan E. Moynihan**
User Name: smoynihan

45) **T. Ryan Lane**
User Name: trigando

46) **Test Admin**
User Name: testadmin

47) **Test User**
User Name: test133

48) **Trey TestingPW1**
User Name: treytestpw1

49) **Trey Wildey**
User Name: treytest

Personal Info | **Caseload** | **Billing Rates & Taxonomy Codes** | **Custom Buttons** | **Reminders** | **Restore Deleted**

Identify

Options when compiling notes:

Show Clinical Decision Support Rules

Show Patient Education Material

Yes Use Military Time

Include Medical History in PN? Yes No

Include Notes/Risk Factors in PN? Yes No

Signature At End Of Note

Trey Wildey

Finished Note Header Name

Default Site/Letterhead Name Use

Asbury

Use Custom Rx Letterhead?

Options

Options at Logon:

Show Clinician Reminder Sheet

Default Title for Notes:

Progress Note, non-Rx: Progress Note

Case Mgmt/SW Rx: Case Mgmt/SW Note

Group Therapy: Group Therapy Note

Nursing: Nursing Note

Default Discipline when Changing Note Title

[None]

Timezone (Relative to GMT)

Eastern: -5
Central: -6
Mountain: -7
Pacific: -8

Timezone:

Show Clock at startup? Yes

Show Clock Now

Please Note: Passwords must have 8 characters and at least one letter and one number. One of the letters must be capitalized. The password should not include the user name and should not be the same as the previous password.

Show Fields used by electronic billing Required Optional

Under **Options**, you can enter the following information:

- **Clinical Decision Support Rules:** Check the **Show** box if you want the option to see clinical decision support rules when you compile a note. ***This must be checked if you intend to attest for meaningful use incentives.***
- **Patient Education Material:** Check the **Show** box if you want ICANotes to prompt you to offer patient education materials. ***This must be checked if you intend to attest for meaningful use incentives.***
- **Signature at End of Note:** Enter your signature information as you would like it to appear at the bottom of your notes.
- **Finished Note Header Name:** Enter your name or practice name here as you would like it to display at the top of each note, above the letterhead.
- **Default Site/Letterhead Name:** Choose your default letterhead from a dropdown list of all sites/letterheads that have been created in the **Shared by All Staff** tab.
- **Use Custom Rx Letterhead:** If you want to use a different letterhead for your prescriptions, enter the custom letterhead information in the field, and check the box.
- **Default Title for Progress Note, non-Rx:** There are two standard options listed in the dropdown: Progress Note or Counseling Note. If you prefer another title, double click in the field and enter the title you want to appear on your notes.
- **Default Discipline when Changing Note Title:** If you want your credentials to be included in the Note Title should you decide to change the Note Title while compiling a note, enter your credentials here and you will not have to enter them manually each time you change the title of a note.
- **Timezone (Relative to GMT):** Please enter the number which corresponds to your local time zone in this field. Changing this number will only change the time on notes and other timestamps going forward.
- **Show Clock at Startup:** When maximized, ICANotes may block the view of the clock on your local desktop. We offer a small clock that will display on the lower right of your screen. You can check the box to have the clock start automatically when you log in, or you can come to this screen and press the button to display the clock.

Click this button to view a video tutorial on configuring the Personal Info Tab:



Caseload Tab

The **Caseload** area shows the caseload of the clinician selected on the list in the left column. If you have the Group Administrator permission, you will see all clinicians in your group listed. If you are not a Group Administrator, you will see only your account listed.

Specific to Individual | **Shared by All Staff**

You are allowed to see all group members because you are a Group Administrator.

Personal Info | **Caseload** | **Billing Rates & Taxonomy Codes** | **Custom Buttons** | **Reminders** | **Restore Deleted**

The following patients have been assigned to Mark Conrad, MS

1)	Adams, Sam	1/1/2001	12312312123
2)	Arenas, Pablo	10-29-2003	ID4194330
3)	Billing, Electronic	1/1/1001	eBillingClaims
4)	Copperfield, David	9/20/1973	TESTabf
5)	Cross, David	9/10/1972	ABCTest
6)	Gerry, Rig	4/14/1984	Rig
7)	Johnson, Eve	8/4/1968	
8)	new, all	2/1/1956	
9)	Nosis, Diag	1/1/1971	337282929
10)	Start, Fresh	2/23/1967	FS65823
11)	Test, Bum	3/6/1956	100001020764
12)	Test, Dam	4/7/1989	100001020763
13)	Twixt, Mark	5-5-1955	ID4004224360
14)	Visit, Ed1	7/5/1926	100001064704
15)	Visit, Ed2	8/9/1978	100001064704

The following clinicians can sign notes for Adams, Sam

Richard Morganstern, M.D.	X	Principal
Stevesig Dev	X	Principal
Mark Conrad, MS	X	Principal

Print | **Show Inactive Charts** | **Assign Provider** | **< Select a Clinician >**

Security Center | **Change My Password** | **Fix My Clipboard**

Please Note: Passwords must have 8 characters and at least one letter and one number. One of the letters must be capitalized. The password should not include the user name and should not be the same as the previous password.

Show | **Fields used by electronic billing** | Required | Optional

The column in the middle is labeled “**The following patients have been assigned to:**”. All charts that have the highlighted clinician assigned as their provider are shown here, and numbered. If you need to know the total number of assigned patients, scroll to the bottom of the list and make note of the line number.

The column on the right is labeled, “**The following clinicians can sign notes for:**”. This area lists any clinician able to sign notes for the patient chart highlighted on the clinician’s numbered caseload list in the middle column. If you assigned this privilege to a clinician on the Demographics tab of the patient chart, the clinician’s name will display here. If you assign a clinician here, the clinician name will not display on the Demographics tab of the patient chart.



Billing Rates and Payer Rules Tab

The **Billing Rates** tab is where the amount charged by the provider for each type of service is entered. A different amount can be charged per service code when a modifier is used. Some insurance payers require these 2-digit codes.

Different rates can also be set per payer. This is usually not necessary, however, as payers generally have a pre-determined amount that they will pay per service, regardless of what amount is billed. When setting up the rates for a new group, it is helpful to copy and paste the rates from one provider to the others, then just modify the amounts accordingly.

The short list is a list of CPT codes used most often. A group administrator can create a group's short list by going to the **Shared by All Staff** tab at the top of the screen and then selecting the **Service/Modifier Codes** tab.

To enter billing rates, select a code using the dropdown arrow in the left column. You can then enter a Modifier and an Insurance Carrier if you want to assign a specific billing rate to a specific insurance carrier. If not, you can just select the CPT code and enter the billing rate for that service in the last column on the right. To delete a CPT code/billing rate, just press the red **X** to the right of the code.

Settings & Directories

Specific to Individual | **Shared by All Staff**

You are allowed to see all group members because you are a Group Administrator.

1) **Anthony Test 4**
User Name: anthonytest4

2) **Billing Demo**
User Name: billingdemo

3) **Brian Test 4**
User Name: brianrest4

4) **Courtney**
User Name: courtneyqatest

5) **Courtney**
User Name: ctest4

6) **Dave Fencik**
User Name: djf

7) **Dave Test 4**
User Name: dtest4

8) **Don Test 4**
User Name: dontest4

9) **Eric Test 4**
User Name: ericrest4

10) **Gary Isaac**
User Name: gisaac

11) **iTap Test, RN**
User Name: itaptest

12) **Joel Test 4**
User Name: jtest4

13) **John Test 4**
User Name: johntest4

14) **Jordan Test 4**
User Name: jordantest4

Billing Rates & Payer Rules

Billing Rates | **Provider Payer Rules**

Billing Rates for Services (for jtest4)

Full List | **Short List**

Select services provided

Procedure Code	+/- Modifier	+/- Insurance Payer	Enter billing rate	
90801 PSYTX, Interview-60min			\$150.00	X
90801 PSYTX, Interview-60min	MO		\$100.00	X
12345 Whatever		BCBS of South Carolina	\$100.00	X
99213 (Office Pt, Established)			\$195.00	X
99214 (Office Pt, Established)		ABC Insurance	\$500.00	X
90807 (psychotherapy w. E/M services)				X
22222 Cancellation/No Show			\$1000.00	X
90814 Interactive therapy 75 – 80 min			\$175.00	X
90837 Psychotherapy 60 min.			\$150.00	X
90833 Psychotherapy 30 min. with EM services			\$65.98	X

Security Center | Change My Password | Please Note: Passwords must have 8 characters and at least one letter and one number. One of the letters must be capitalized. The password should not include the user name and should not be the same as the previous password. | Fix My Clipboard

Show | Fields used by electronic billing | Required | Optional

The **Provider Payer Rules** tab defines what information will be added to an insurance claim, per insurance payer. Since all fields except for the “Bill Under Supervisor” are blank in the example below, Don is the default supervisor for Joel, meaning that Don’s billing information will be present on all claims if no other supervisors are defined. But Justin’s information will be present on claims when ABC Insurance is the payer, and the taxonomy code and modifier specified in that row will also be on the claim.

The screenshot shows the ICANotes Behavioral Health EHR interface. The main window is titled "Settings & Directories" and is divided into two tabs: "Specific to Individual" (active) and "Shared by All Staff". Under "Specific to Individual", there is a list of users on the left and a main content area on the right. The main content area has several sub-tabs: "Personal Info", "Caseload", "Billing Rates & Payer Rules" (active), "Custom Buttons", "Reminders", and "Restore Deleted".

Under the "Billing Rates & Payer Rules" tab, there are two sub-sections: "Billing Rates" and "Provider Payer Rules". The "Provider Payer Rules" section is titled "Payer Rule(s) (for jtest4)" and includes a note: "Leave Insurance Payer blank to define the default rule." Below this is a table with the following columns: "Insurance Payer", "Taxonomy Code", "Modifier", and "Bill Under Supervisor".

Insurance Payer	Taxonomy Code	Modifier	Bill Under Supervisor	
(Leave blank for default)			Don Test 4	X
ABC Insurance	P123456789	AB	Justin Test 4	X
				X

At the bottom of the interface, there are buttons for "Security Center", "Change My Password", and "Fix My Clipboard". A note states: "Please Note: Passwords must have 8 characters and at least one letter and one number. One of the letters must be capitalized. The password should not include the user name and should not be the same as the previous password." At the very bottom, there is a "Show" button and a legend for "Fields used by electronic billing" with categories "Required" and "Optional".

VIDEO TUTORIAL

Custom Buttons Tab

The **Custom Buttons** tab allows you to view and manage the custom buttons you have created in ICANotes. When you first click on this tab, the system will automatically show custom buttons from all over the system.

Button Name	Shared w/Group	Highlight	Context	Print
1) Insurance ID and Copay	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Custom Statement Entry 2.0	edit
2) NUC	<input type="checkbox"/>	<input type="checkbox"/>	FN2	edit
3) Patient Name	<input type="checkbox"/>	<input type="checkbox"/>	Group Therapy Session Remarks	edit
4) Fax Log	<input type="checkbox"/>	<input type="checkbox"/>	Message	edit

You can display a subset of your custom buttons by selecting a particular area of the program from the dropdown menu on the left:

Custom Buttons (for test133)

- All
- addiction
- ADHD
- ADHD sxs
- Admission Orders
- Affect
- All
- Anger
- Anxiety: See List
- Autism
- Behavior In
- Behavior Out
- Case Mgmt

You may choose to highlight a button on the list with a color, or share it with your entire group, by checking the boxes next a custom button on the list:

Button Name	Shared	Highlight	Context
1) initial insomnia	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Behavior Out

By clicking the “edit” button next to a custom button, you can edit the name and content of a button, share it with just specific users in your group, or delete the button.

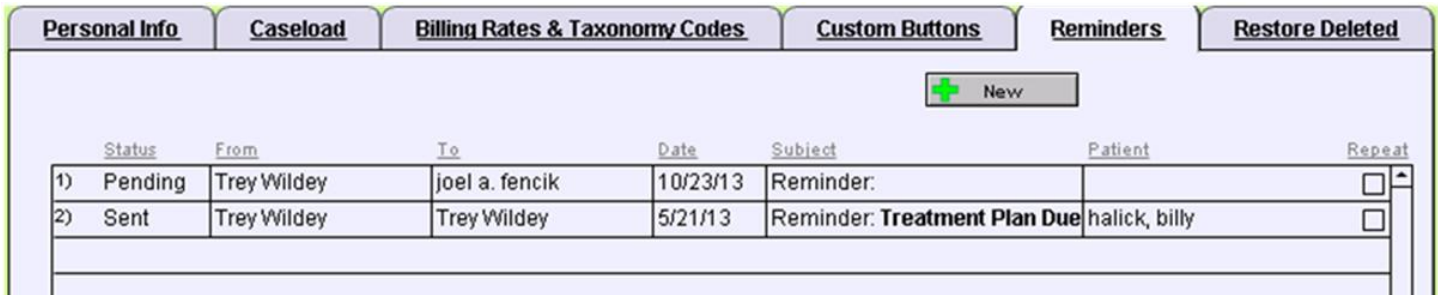
If you want to review the list of all shared buttons in your group, click **Show All Shared Buttons** at the upper right.

Please note that if you are a Security Administrator, you can review custom buttons created by other users which have not been shared with the group.



Reminders Tab

The **Reminders** tab, to the right of **Billing Rates**, allows you to configure alerts that will be sent to you or to your colleagues via the **Messaging Center**.

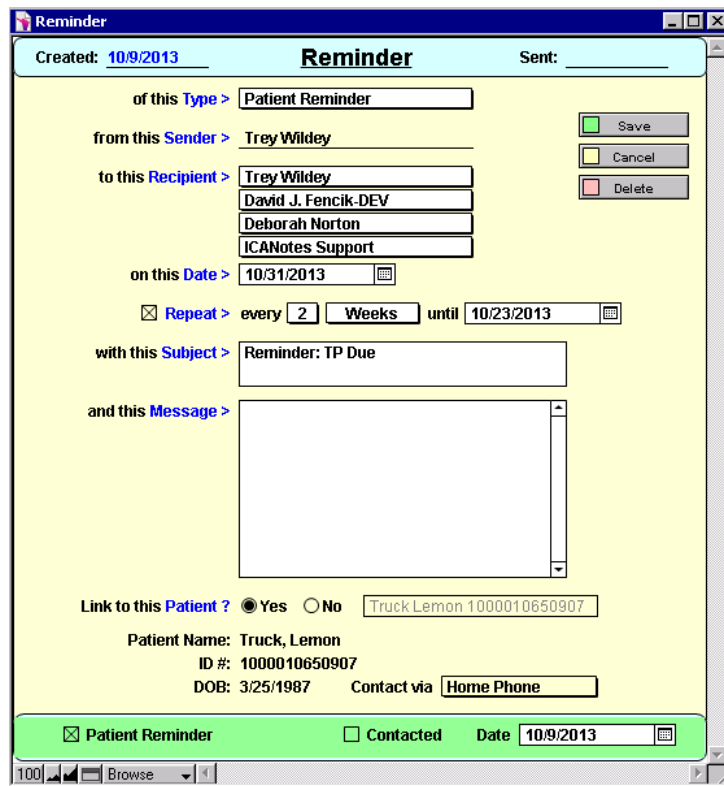


The screenshot shows the 'Reminders' tab in a software interface. At the top, there are several tabs: 'Personal Info', 'Caseload', 'Billing Rates & Taxonomy Codes', 'Custom Buttons', 'Reminders', and 'Restore Deleted'. Below these tabs is a 'New' button with a green plus icon. Underneath is a table with the following columns: Status, From, To, Date, Subject, Patient, and Repeat. The table contains two rows of data:

	Status	From	To	Date	Subject	Patient	Repeat
1)	Pending	Trey Wildey	joel a. fencik	10/23/13	Reminder:		<input type="checkbox"/>
2)	Sent	Trey Wildey	Trey Wildey	5/21/13	Reminder: Treatment Plan Due	halick, billy	<input type="checkbox"/>

You may start a new Reminder by pressing the **New** button. This will bring up a new window that will allow you to customize it before saving:

You can select from 4 preset reminder types by clicking on the Type field (see Reminder dialog window below) and selecting from the dropdown list: Clinician Reminder, Staff Reminder, Patient Reminder, or Perform AIMS Exam.



The screenshot shows the 'Reminder' dialog window. It has a title bar with 'Reminder' and standard window controls. The main area is yellow and contains the following fields and options:

- Created: 10/9/2013
- Sent: _____
- of this Type > Patient Reminder (dropdown)
- from this Sender > Trey Wildey
- to this Recipient > Trey Wildey (dropdown list with options: David J. Fencik-DEV, Deborah Norton, ICANotes Support)
- on this Date > 10/31/2013 (calendar icon)
- Repeat > every 2 Weeks until 10/23/2013 (calendar icon)
- with this Subject > Reminder: TP Due
- and this Message > (text area)
- Link to this Patient ? Yes No (Truck Lemon 1000010650907)
- Patient Name: Truck, Lemon
ID #: 1000010650907
DOB: 3/25/1987 Contact via Home Phone
- Patient Reminder Contacted Date 10/9/2013 (calendar icon)

At the bottom, there is a 'Browse' button and a status bar showing '100%'.

For a Clinician Reminder:

Select the clinician you want the reminder sent to (**Recipient**).

Select the **date** it should be sent, and whether the reminder should be repeated and at what interval.

Enter a **subject** for the reminder.

Type your **message**.

Link to a patient? Check yes or no.

- If yes, click on the <Type Last Name to Select> field and select which patient you want linked to the reminder. After you select a patient, their ID# and DOB will appear. You will then have the option of clicking on the field labeled **Contact via** to select how the patient wants to be contacted.
- When you link to a patient, an icon will appear in the reminder message (highlighted on Message dialog window on next page). If you click on the icon in the message, you will be able to open the patient's chart.

For a Staff Reminder:

Follow the same steps listed above for a Clinician Reminder.

For a Patient Reminder:

Select the clinician or staff person who will receive the reminder to contact the patient (**Recipient**).


Select the **date** the reminder should be sent and whether it should be repeated and at what interval.

Enter a **subject** for the reminder and type your reminder **message**.

Link to a patient? Select yes or no.

- If yes, click on the <Type Last Name to Select> field and select which patient you want linked to the reminder. After you select a patient, their ID# and DOB will appear. You will then have the option of clicking on the field labeled **Contact via** to select how the patient wants to be contacted.
- When you link to a patient, an icon will appear in the reminder message (see highlighted icon on screenshot below). If you click on the icon in the message, you will be able to open the patient's chart.

You will notice that the Patient Reminder box is now checked at the bottom of the Reminder dialog box.

After the patient has been contacted, go to the patient's Chart Face and select the  button. Select the reminder you wish to view, and the reminder dialog box will open. Check the "**contacted**" box and enter the date of the contact. This checkbox is also available when accessing the Reminders list from Settings and Directories.

Perform AIMS Exam:

To set up a reminder to perform an AIMS Exam, follow the steps used to create a Clinician Reminder.



