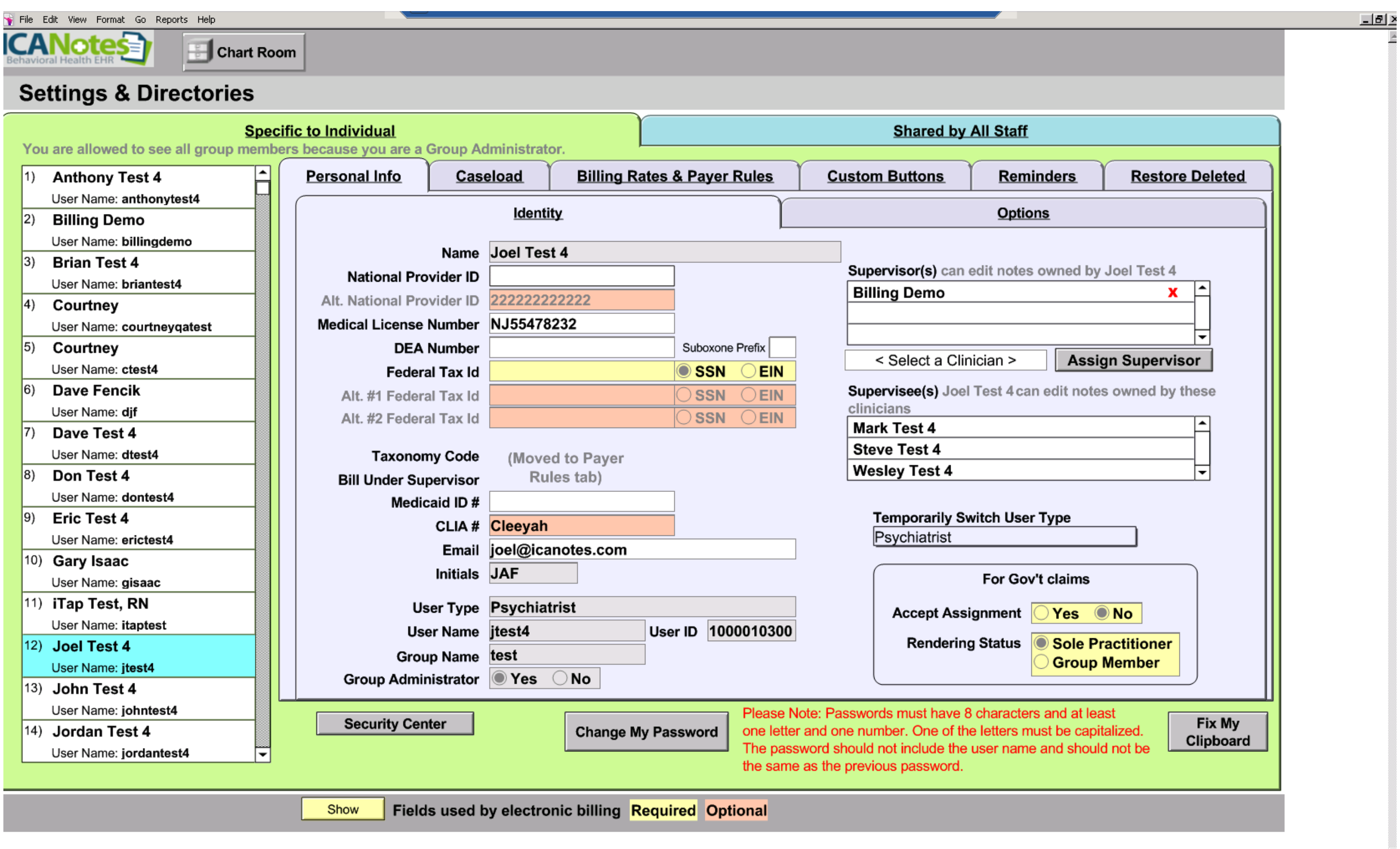
Configuring Individual Settings

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**.



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:

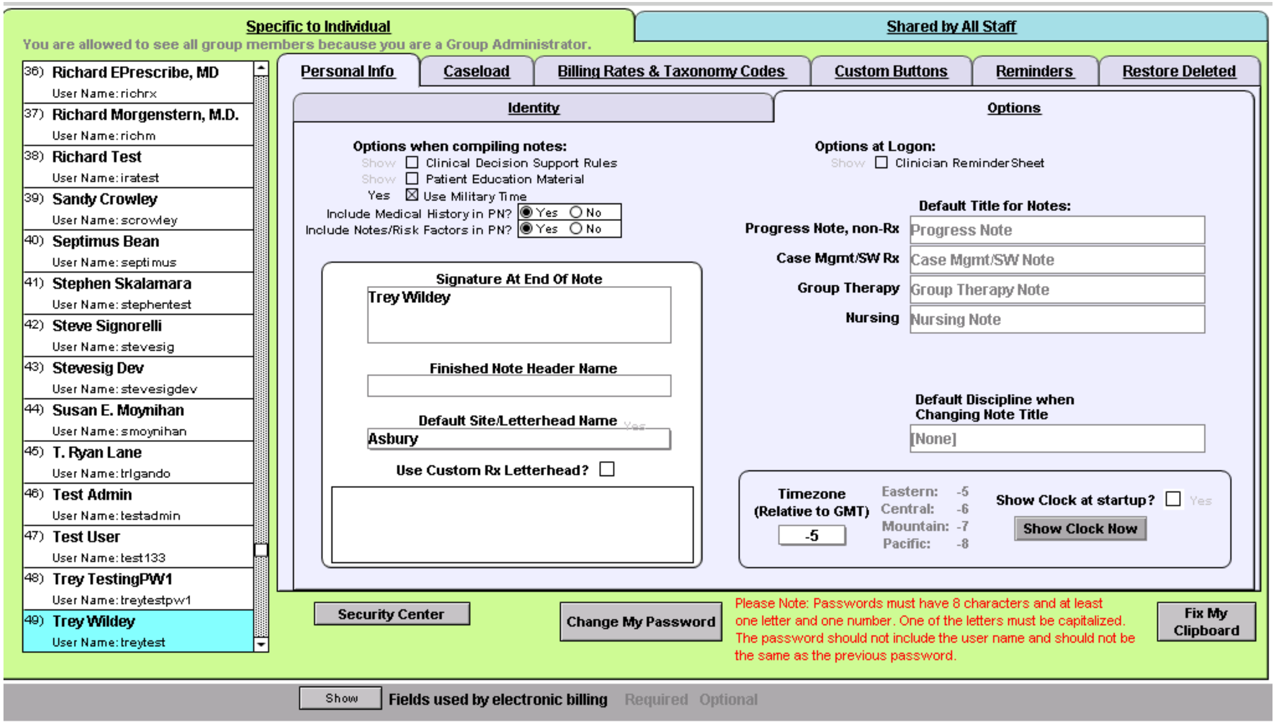
- **Initials** - Your initials will be shown on the Chart Face next to notes you have written for that patient to provide a quick visual cue for your notes if this patient is seen by multiple clinicians in your group.
- **Supervisors** – This is where an administrator can grant access to the work areas 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 pin**k.**

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:



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

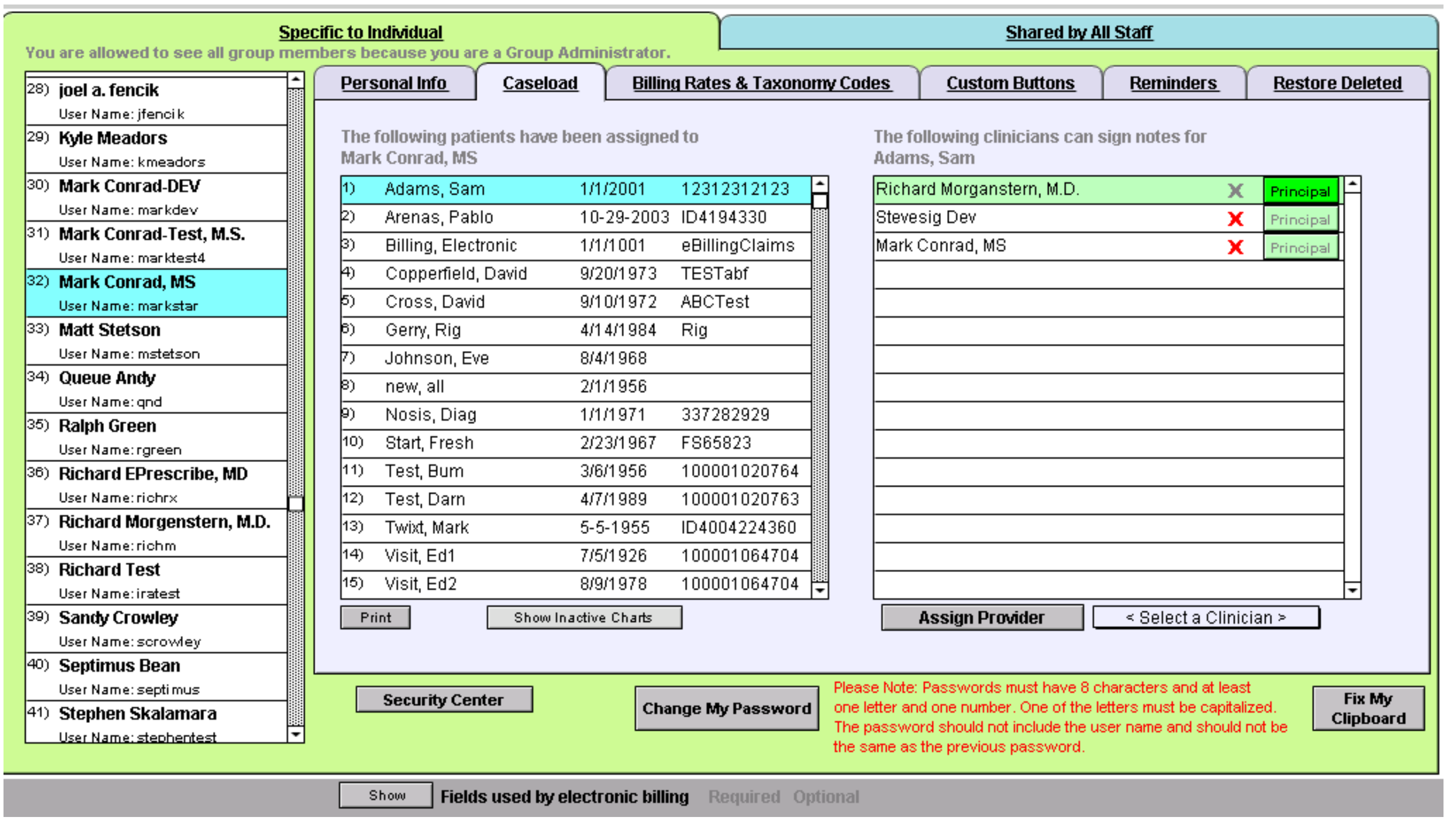
- **Clinical Decision Support Rules:** Check the **Show** box if you want the option to see clinical decision support rules when you compile a note. ***This must be checked if you intend to attest for meaningful use incentives.***
- **Patient Education Material:** Check the **Show** box if you want ICANotes 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.



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.

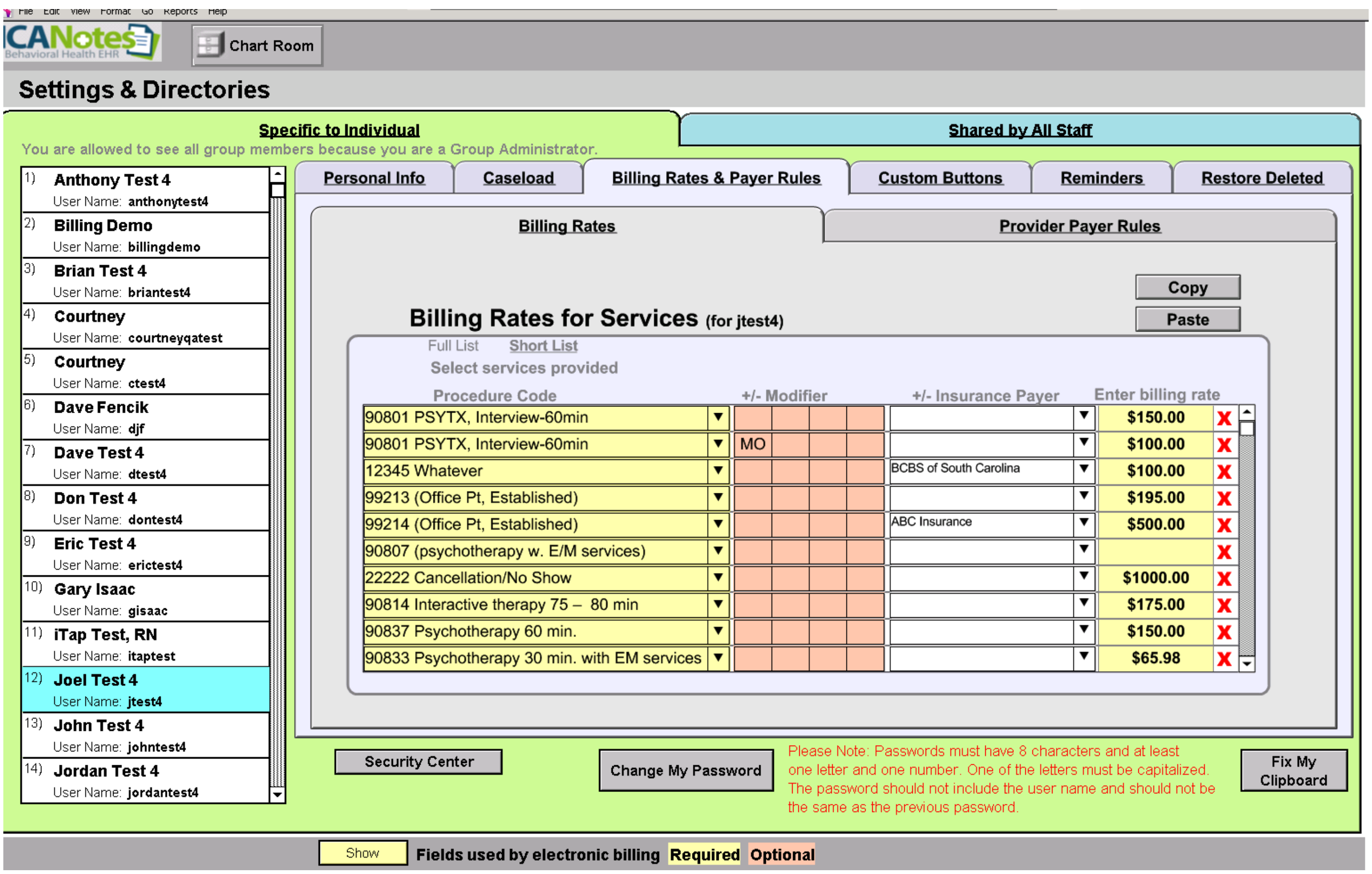
Billing Rates and Payer Rules Tab

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.

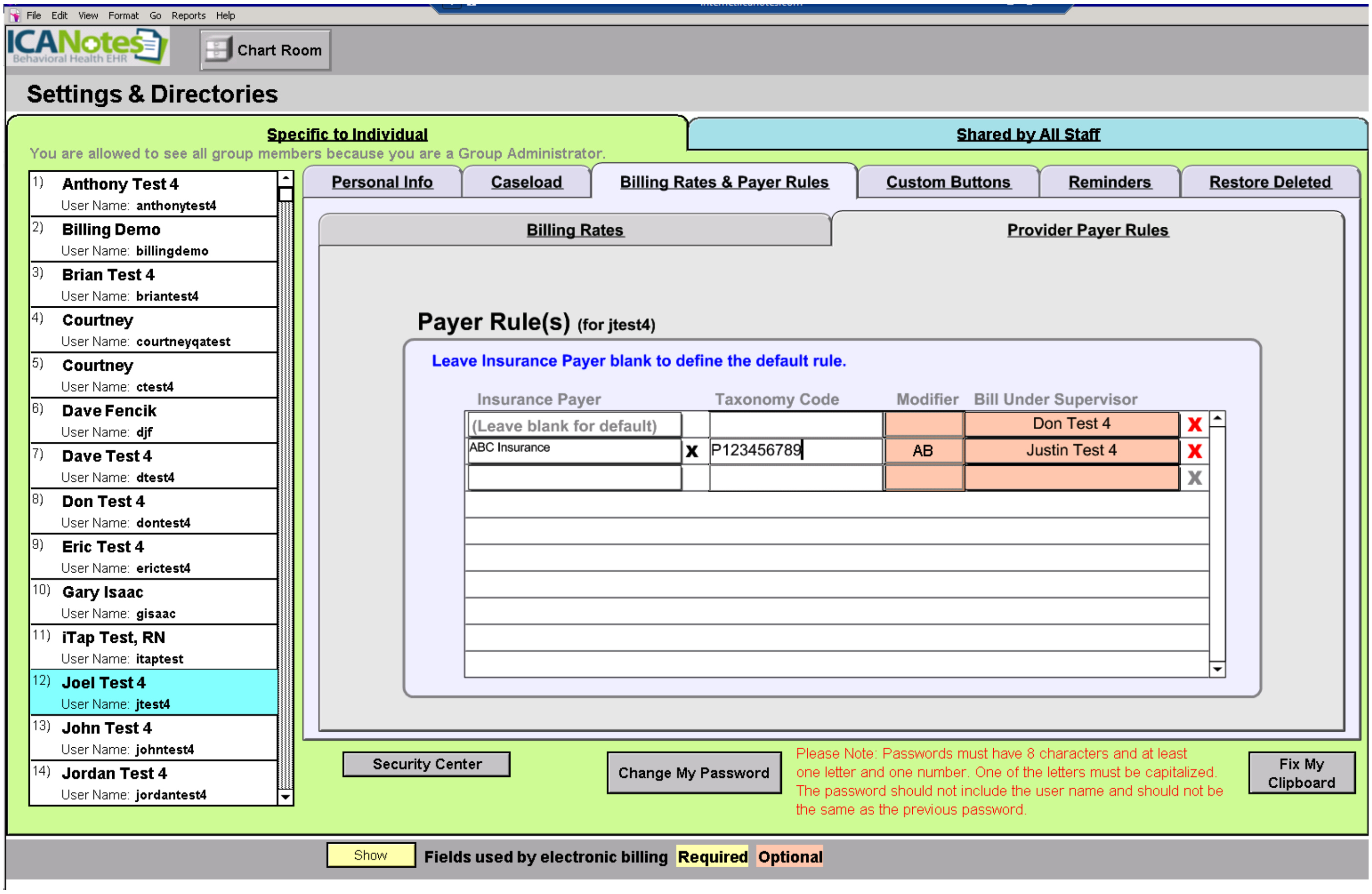
Different rates can also be set per payer. This is usually not necessary, however, as payers generally have a pre-determined amount that they will pay per service, regardless of what amount is billed. When setting up the rates for a new group, it is helpful to copy and paste the rates from one provider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



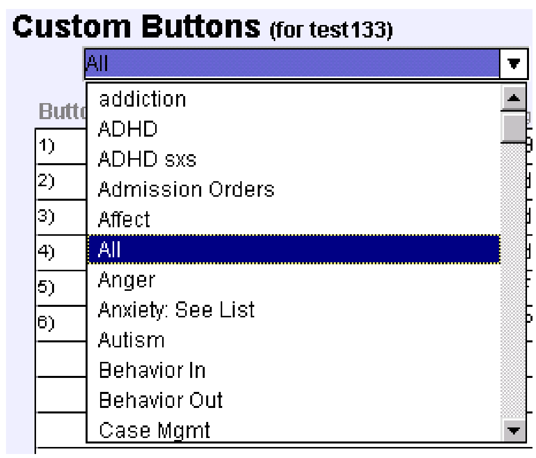
The **Provider Payer Rules** tab defines what information will be added to an insurance claim, per insurance payer. Since all fields except for the “Bill Under Supervisor” are blank in the example below, Don is the default supervisor for Joel, meaning that Don’s billing information will be present on 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.



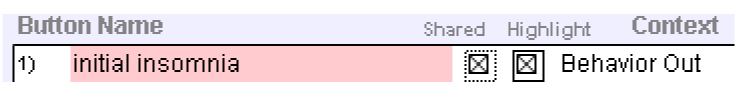
Custom Buttons Tab

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.

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



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:



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.

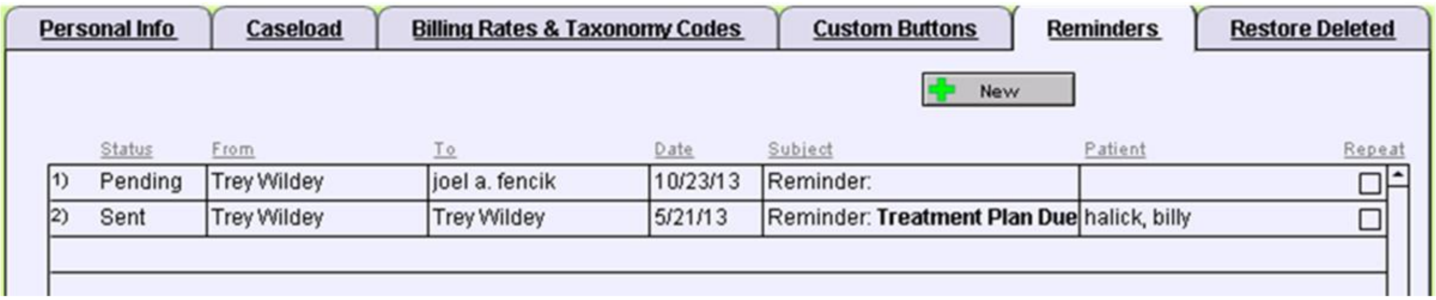
If you want to review the list of all shared buttons in your group, click Show All Shared Buttons at the upper right.

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 

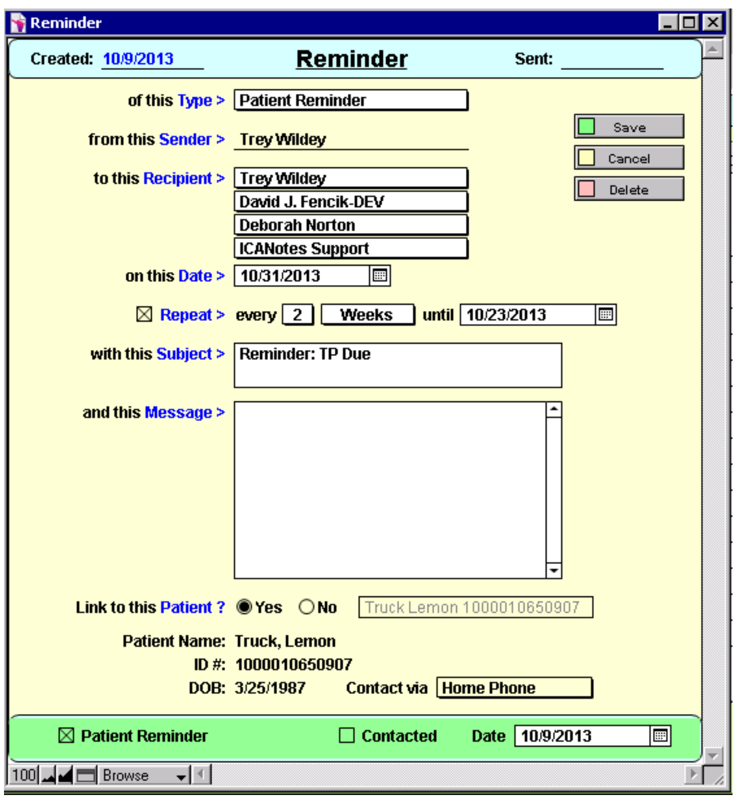
tab, to the right of **Billing Rates,** allows you to configure alerts that will be sent to you or to your colleagues via the **Messaging Center**.



You may start a new Reminder by pressing the 

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.



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 *Set or See Reminders 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.

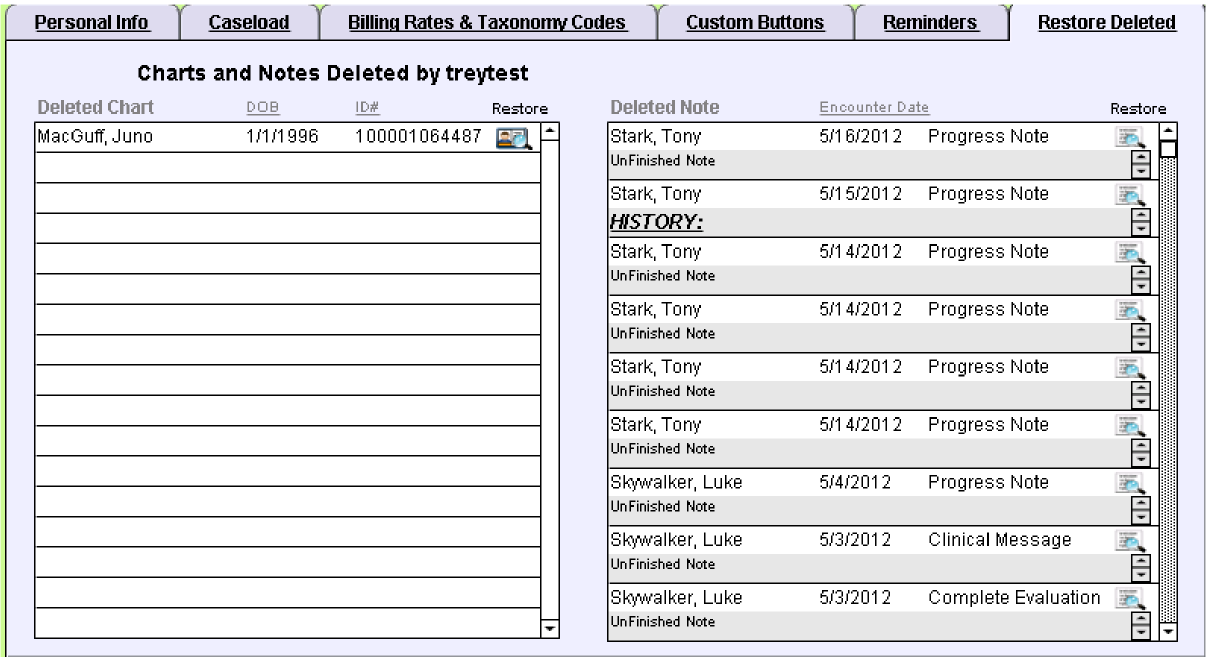
Perform AIMS Exam:

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

VIDEO TUTORIAL

Restore Deleted Tab

The Restore Deleted tab is to the right of the **Reminders** tab. Use this feature to restore any notes or charts you may have deleted and now wish to have restored. Group Administrators may navigate to other users in the group (using the list on the left) to restore charts and notes deleted by others. In the actual tab, deleted charts are listed on the left, while deleted notes are listed on the right (see screenshot below).



To restore a chart or note, simply click on the  (Restore) icon to the right of the note or chart.