ICANotes
Behavioral Health EHR

QuickStart User Guide

TSPlus
ICANotes QuickStart User Guide

TABLE OF CONTENTS

CONTACTING ICANOTES SUPPORT

Our support team is available to assist you Monday through Friday from 8:00 am to 9:00 pm Eastern time (5:00 am to 6:00 pm Pacific). Whether you need assistance with troubleshooting or training, our friendly support experts are waiting to answer your call and respond quickly to address your request. We also have someone on call after hours to assist customers who are unable to access the program.

By Phone: 443-569-8778

By E-Mail: ticket@icanotes.com

By Live Chat: Visit our website for live chat assistance with a member of our Support Team.

Submit a Support Ticket: Click here to submit a ticket to our Support Portal, no login required!

Access our Support Portal: Click here to log in to the ICANotes Support Portal, where you can create new tickets, view ticket status, and peruse the knowledge base for quick answers to your questions.

In addition to this user guide, we have a library of on-demand video tutorials available on our website:

Video Tutorials

REFERRALS

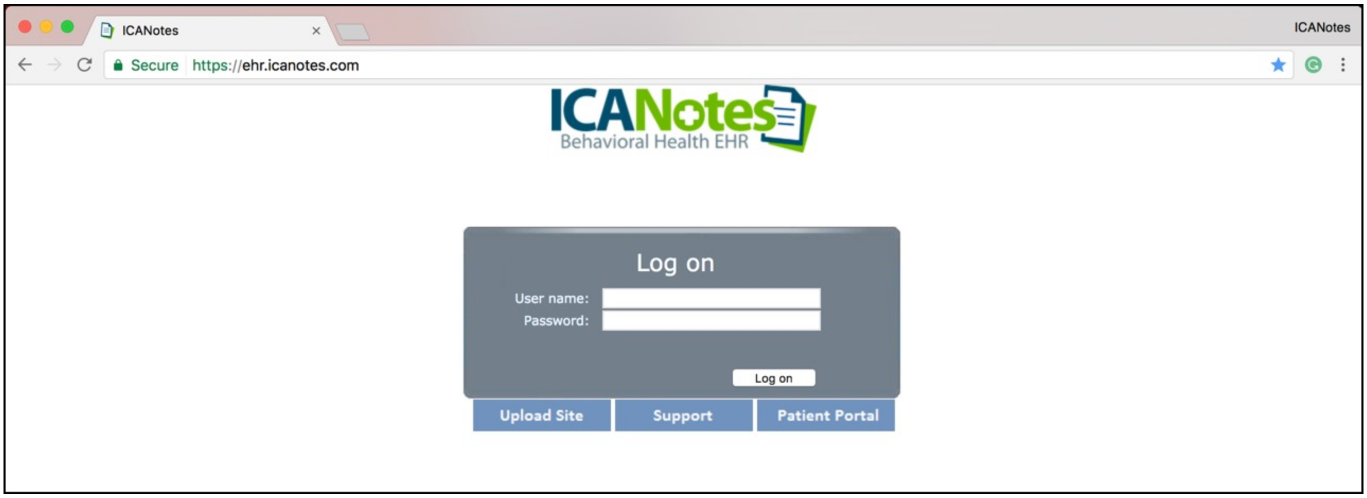
We offer our customers a referral rewards program. If you refer a colleague from another practice, you are eligible to receive a $100 account credit as a reward if that colleague becomes a customer of ours for at least 90 days. To qualify for a referral reward, submit your colleague's information to sales@icanotes.com.

CHANGES TO YOUR ACCOUNT

If you want to:	Go to or Contact:
Add more users to your Group	Knowledge Base Article
Remove users from your Group	Knowledge Base Article
Add electronic signature to your account	Knowledge Base Article
Add e-prescribing to your account	ICANotes Website (at the bottom)
Set up electronic billing via a clearinghouse	ICANotes Website Partners
Inquire about your ICANotes bill	Billing – 866-847-3590 or billing@icanotes.com
Set up credit card processing	ICANotes Website

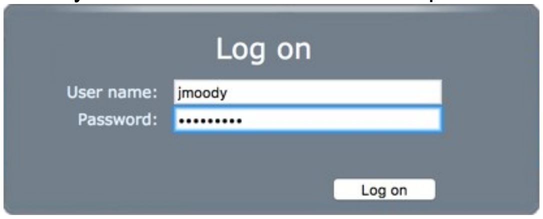
LOGGING INTO ICANOTES

- Go to https://ehr.icanotes.com from any browser (Chrome browser works the best). This will bring you to the Log on screen.

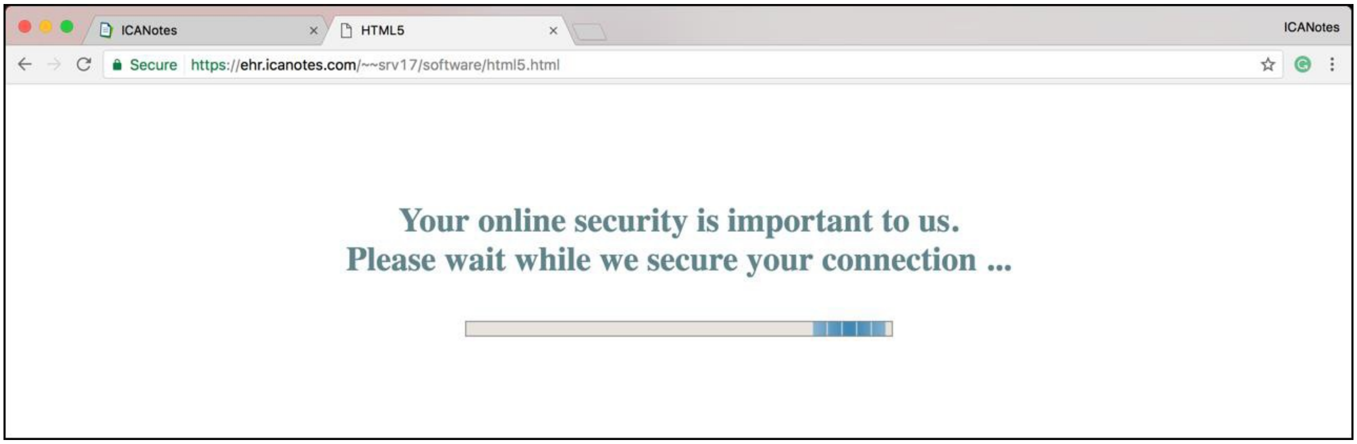


- From the Log on screen, you can:
  - Log into ICANotes.
  - Access the Upload Site by clicking the Upload Site button.
  - Go to the ICANotes support website by clicking the Support button.
  - Visit the Patient Portal by clicking the Patient Portal button.

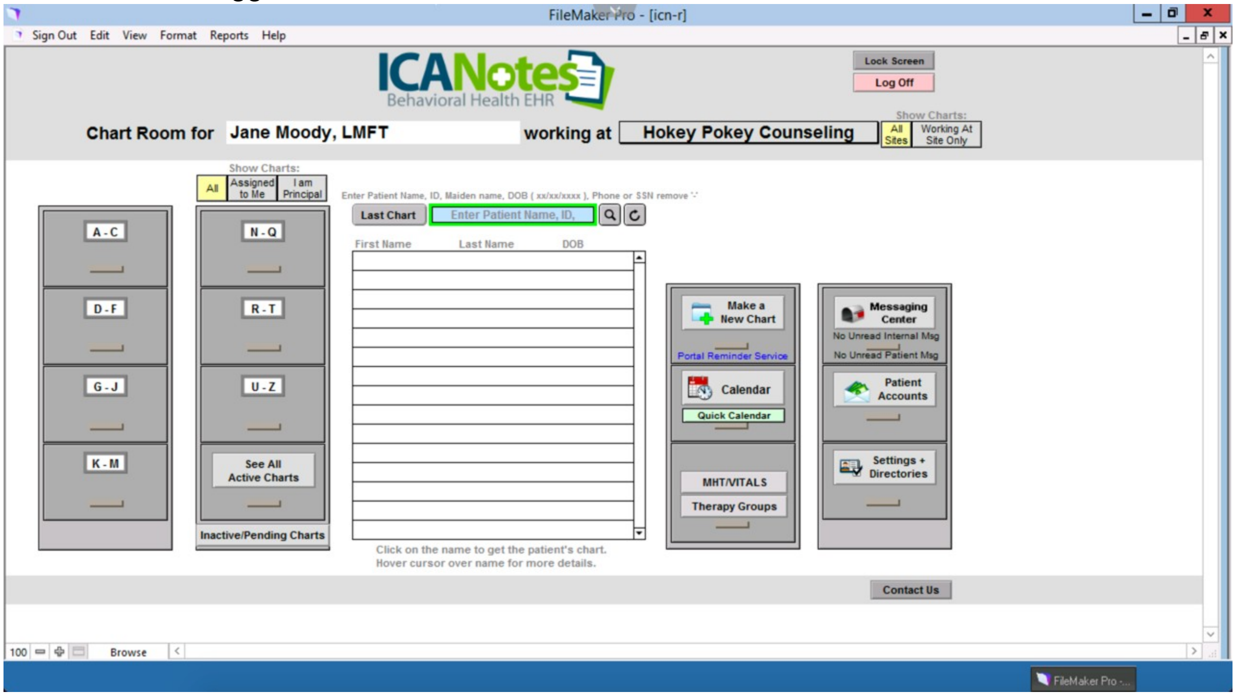
- Enter your ICANotes username and password. Click Log on.



- A second browser tab will open and you will see this screen as a stable, secure connection is established with the ICANotes servers.



- You will now be logged into ICANotes.



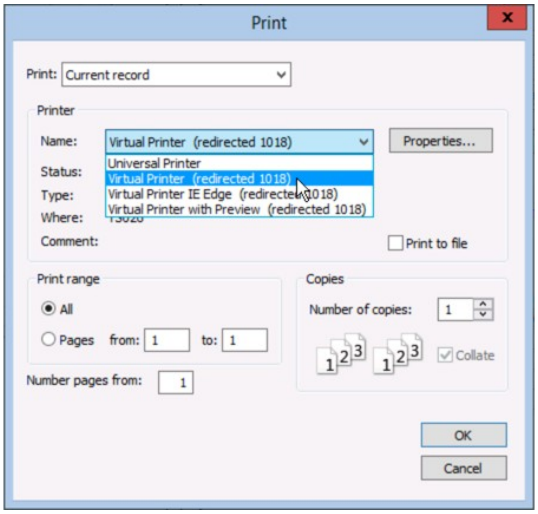
If you use a Topaz Pad for signature capture on a PC or are trying to export a very large amount of data from ICANotes, please review this Knowledge Base article.

Forgot your password? Locked out? If the wrong username/password combination is entered three times in a row, ICANotes will prevent further login attempts for 20 minutes. If this happens, or if you cannot remember your password, contact your group's security administrator or call ICANotes Support at 443-569-8778 to have your password reset or your account unlocked. **Please note: Due to security protocols, all password resets issued by ICANotes Support must be done over the phone.**

PRINTING

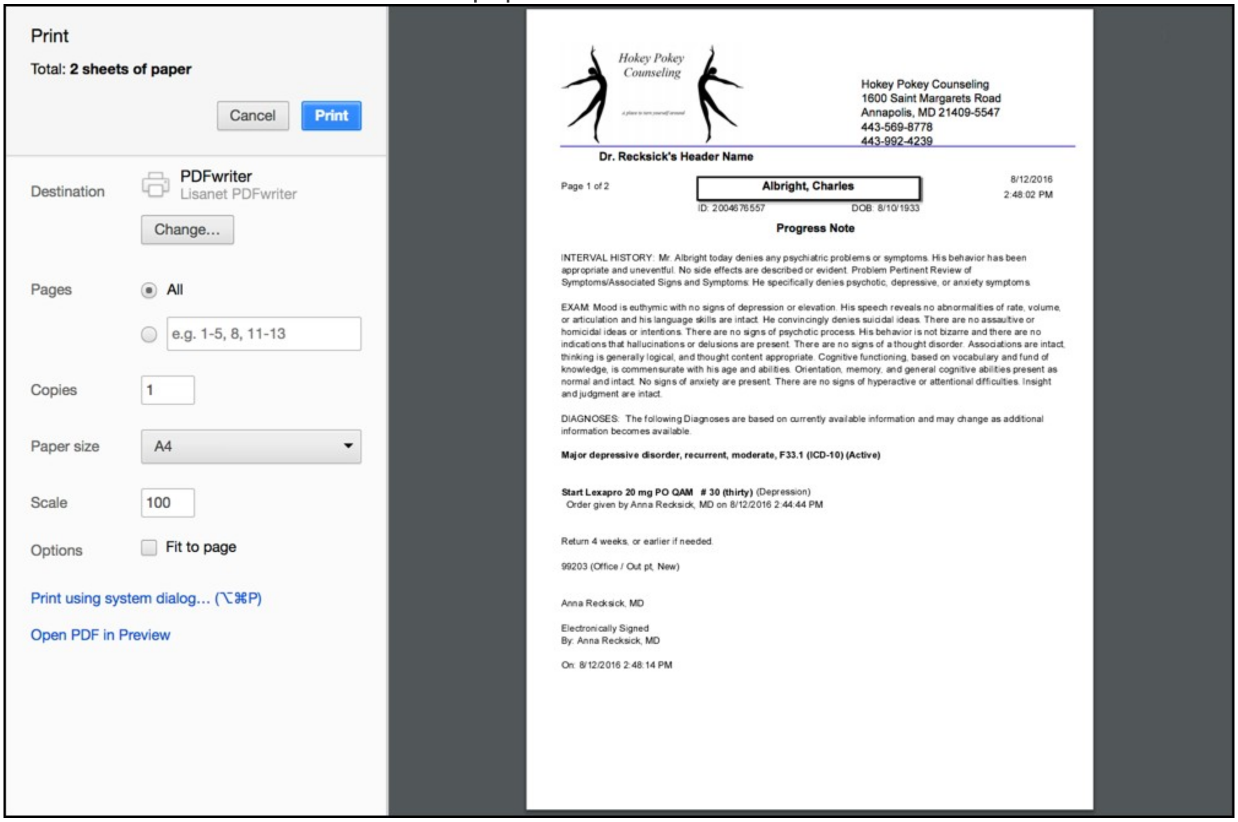
- Click the Print key within ICANotes of the document/report that you would like to print.

- Make sure that Virtual Printer is selected as the name of the printer (the Safari browser uses a different process).



- Click 

. This window will populate.



- By clicking the 

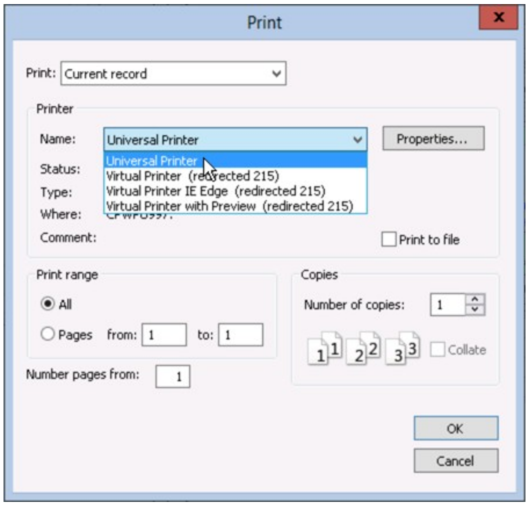
button in the top left under Destination you can change what printer the document will print from.

- Once you have made your selection(s), click 

in the top left.

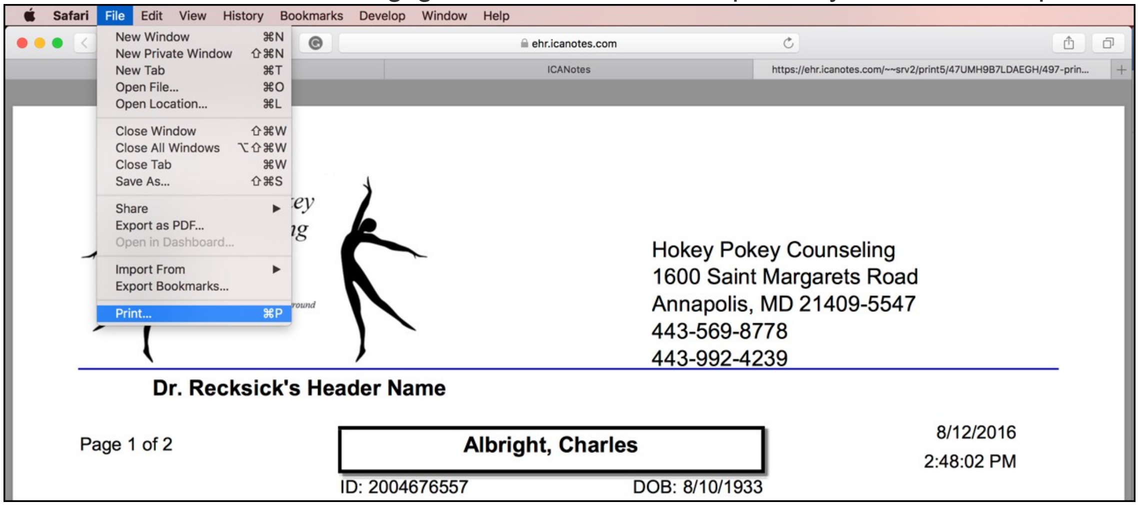
SAFARI BROWSER PRINTING

- Click the Print key within ICANotes of the document/report that you would like to print.
- Make sure that Universal Printer is selected as the name of the printer.

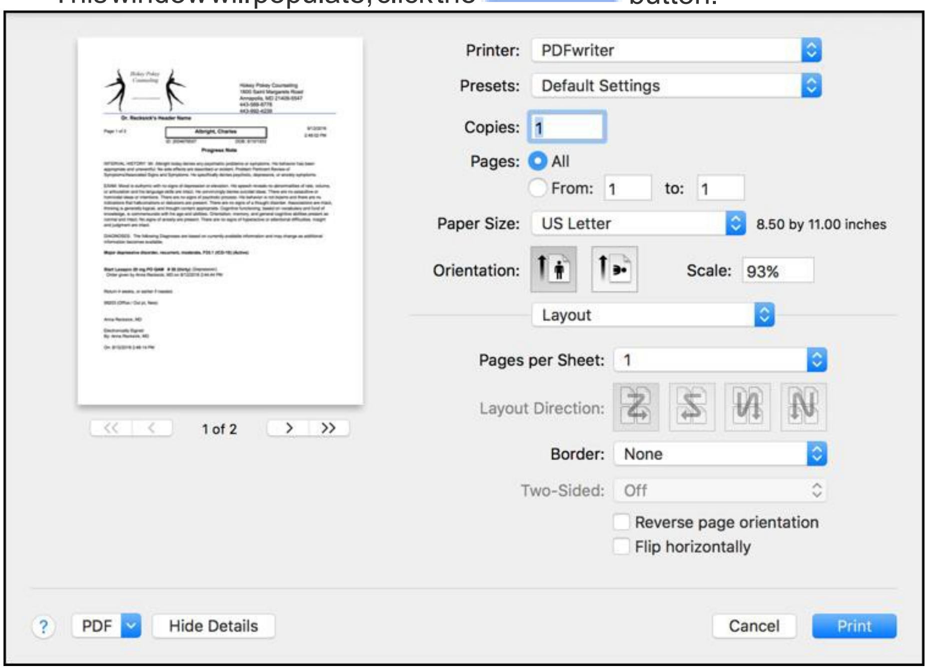


- When this message **Action complete - click to view PDF** appears in the middle of the window, click to view the PDF. This will open another tab in your web browser.

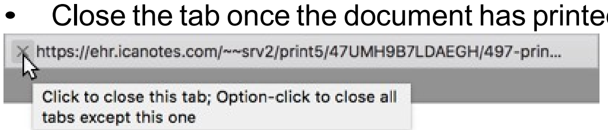
- With the document showing, go the File menu in the top left of your Mac desktop and select Print.



- This window will populate, click the **Print** button.



- Close the tab once the document has printed.



CHANGING YOUR PASSWORD

From within ICANotes:

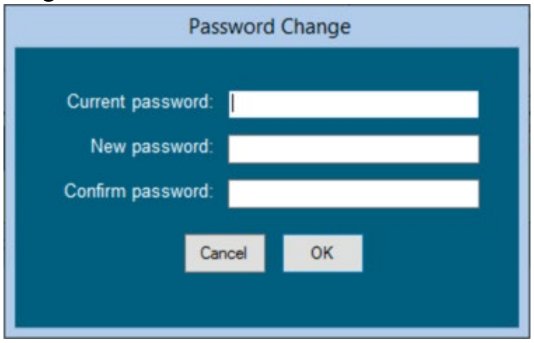
- In the main ICANotes Chart Room, click on the 

drawer in the lower right-hand corner of the screen.

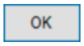
- Click on the 

button in the bottom middle of this screen.

- Enter your current password in the first field. In the second field, enter your desired new password and then enter it again in the "Confirm Password field"

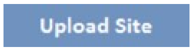


Note: Passwords must be a minimum of eight characters, including at least one uppercase letter, at least one lowercase letter, and at least one number.

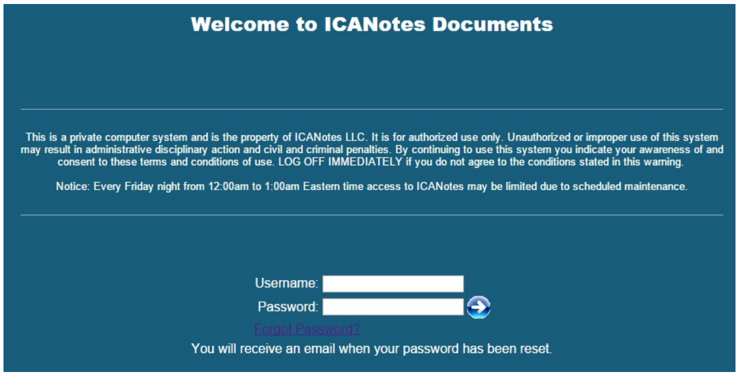
- Click the 

button to proceed. You will receive a confirmation message if successful.

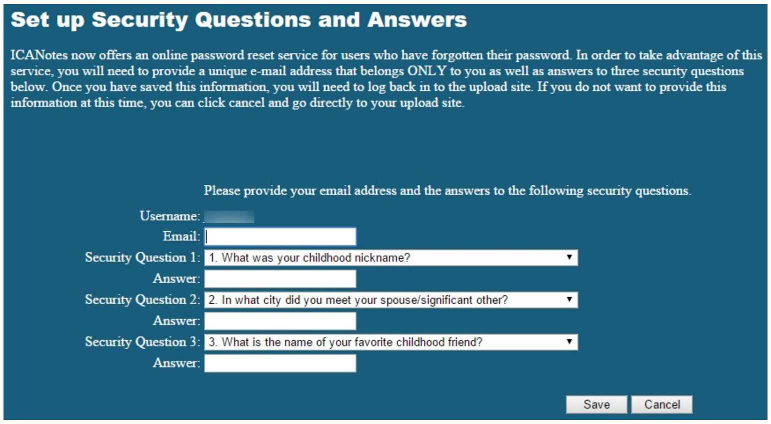
From the Upload Site:

- You can access the upload site by going to https://upload.icanotes.com or clicking the 

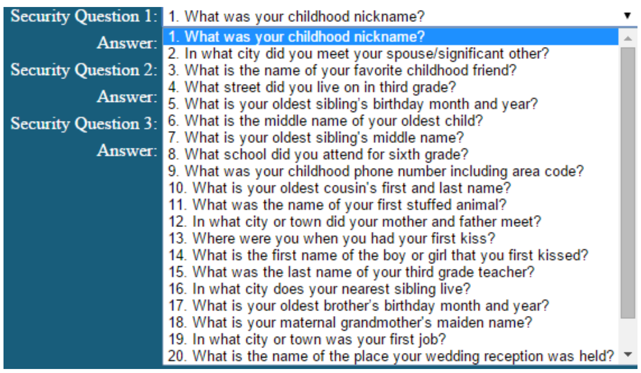
button from the Log on screen.



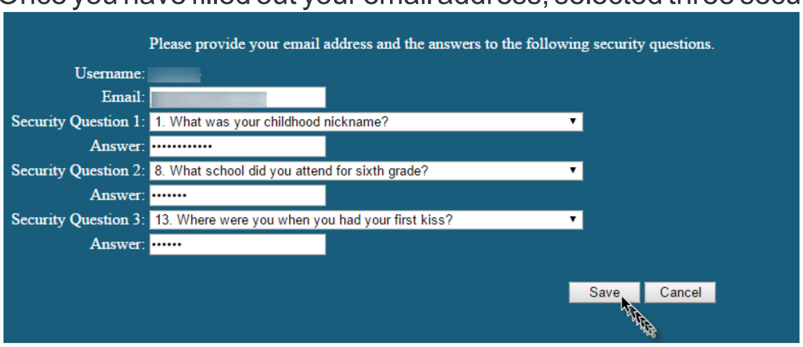
- The first time you log into the ICANotes Upload Site, you will be prompted to fill out the email used with your ICANotes account and three security questions.



- There are a wide variety of questions that you can choose for your security questions. Hit the down arrow to the right of the field to get the full list of security questions.

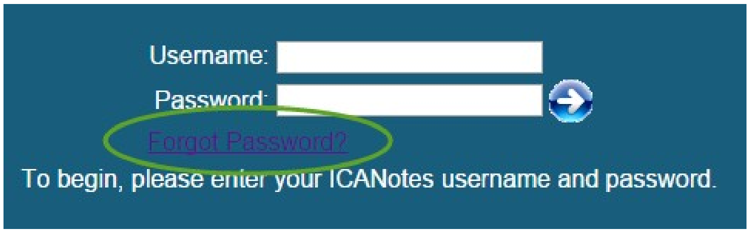


- Once you have filled out your email address, selected three security questions and answers, click Save.

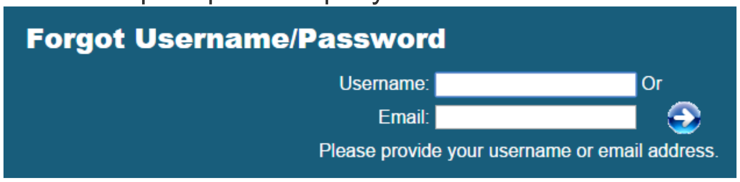


- You will know that you were successful when you receive this message.

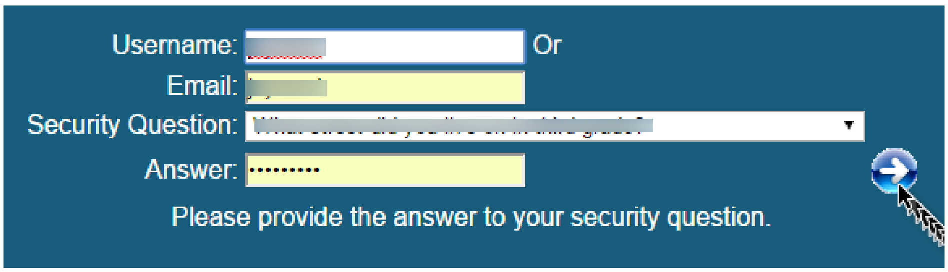
- Next time that you have forgotten your password to ICANotes, go to the upload site and select the Forgot Password? link.



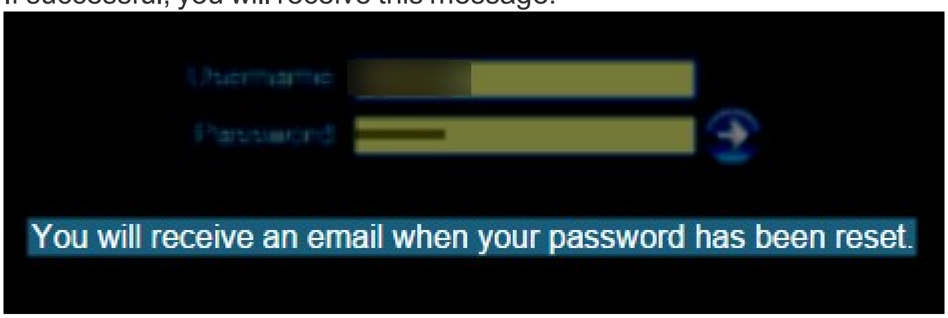
- You will be prompted to input your username or email. Click the blue arrow.



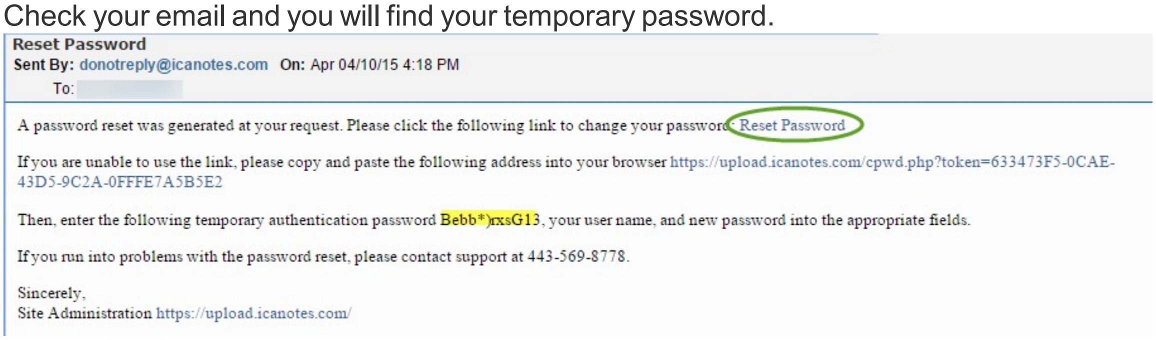
- After clicking the blue arrow, you will be brought to the verification page. Please note that you can use the dropdown arrow in the Security Question field to answer any of the three security questions. Click the blue arrow.



- If successful, you will receive this message:



- Check your email and you will find your temporary password.


Reset Password
Sent By: donotreply@icanotes.com **On:** Apr 04/10/15 4:18 PM
To:

A password reset was generated at your request. Please click the following link to change your password: Reset Password

If you are unable to use the link, please copy and paste the following address into your browser https://upload.icanotes.com/cpwd.php?token=633473F5-0CAE-43D5-9C2A-0FFFE7A5B5E2

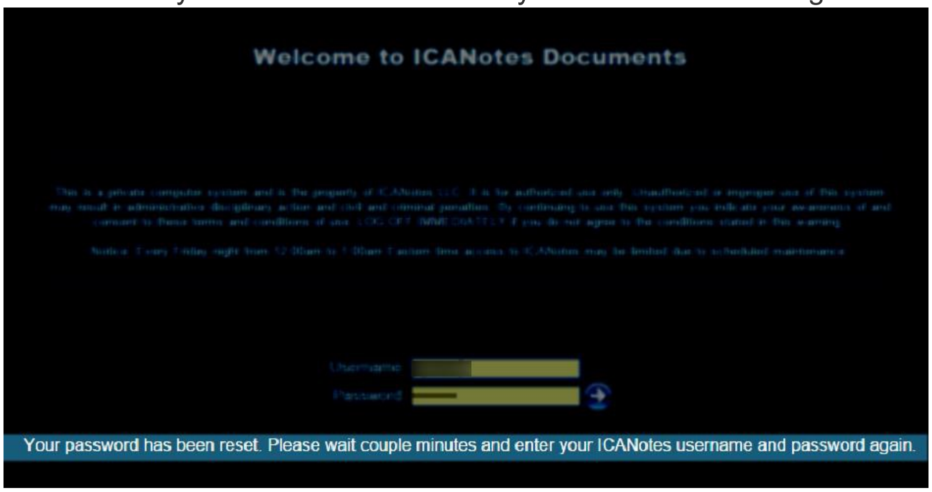
Then, enter the following temporary authentication password Bebb*)rxsG13, your user name, and new password into the appropriate fields.

If you run into problems with the password reset, please contact support at 443-569-8778.

Sincerely,
Site Administration https://upload.icanotes.com/

- Follow the Reset Password link to reset your password. If you used the Reset Password link (instead of typing the address into the browser), your username and the temporary password will populate in the fields. Type in your new password and confirm. Click the blue arrow.

- You will know you were successful when you receive this message.



Forgot your password? Locked out? If the wrong username/password combination is entered three times in a row, ICANotes will prevent further login attempts for 20 minutes. If this happens, or if you cannot remember your password, contact your group's security administrator or call ICANotes Support at 443-569-8778 to have your password reset or your account unlocked. **Please note: Due to security protocols, all password resets issued by ICANotes Support must be done over the phone.**

IMPORTING PATIENT DEMOGRAPHICS

If you currently have your patient demographics in electronic form, we can import the data into ICANotes for you at no extra charge. Please make every effort to ensure that your import file follows these instructions exactly as this will enable us to perform your data import more quickly. Files which do not follow these instructions will require more time to import.

First, follow this link to save the demographic import template to your computer:

https://upload.icanotes.com/files/Patient%20Demographics_GroupName.xls

Important Note: ICANotes cannot be held responsible for the accuracy of the data you provide. Please ensure that all records are 100% accurate before submitting the file to ICANotes or be prepared to have your staff adjust the information record by record within the ICANotes system. Do not include any field you do not see listed below – doing so will dramatically increase the time required to import your data.

Once you have the template installed on your computer, open it and resave it with the following convention, where "username" is your ICANotes username: "PatientDemographics_username.xls".

After your Excel file has been saved according to the following instructions, either fill out the spreadsheet template appropriately or copy and paste the information from another spreadsheet. Many times, your previous software will provide a demographics export for this purpose. Please note that the ICANotes template formatting is required per our import process. Please see the list of required fields below.

Once your file has been populated with accurate patient information, save your file (being sure to follow the instructions mentioned above regarding the file name), and submit your file by uploading it to https://upload.icanotes.com/filedrop/. After you have uploaded your file via the secure Dropbox link, please send an email to ticket@icanotes.com to notify us of your file upload.

The following fields are **REQUIRED** in your spreadsheet. Please ensure the column names match **EXACTLY** as you see them below:

FirstName	should not contain salutation or initials
LastName	should not contain title or initials
PatientID	can be any format as long as it is unique
Gender	M, F, O or Male, Female, Other or Man, Woman or Boy, Girl, Person
DOB	1/31/2001 or 1/31/01 or 1/31/2001 or 01/31/01 (if this isn't provided, we'll fill in an arbitrary value)

The following fields are optional and may also be imported. There are no restrictions unless otherwise noted. Once again, make sure to title your columns exactly as you see them listed:

MiddleName
SocialSecurityNumber
DateEntered 1/31/2001 or 1/31/01 or 01/31/2001 or 01/31/01
Address
City
State
Zip
HomePhone
WorkPhone
CellPhone
Pager
EmailAddress
SchoolOrEmployer
SchoolGrade
MaritalStatus
Ethnicity
Religion
AdditionalNotes
PrimaryCarePhysicianName
ReferredByName
EmergencyContact
EmergencyContactNotes
InsuranceCompany1
PolicyNumber1
GroupNumber1
InsuranceCompanyTelephoneNumber1
InsuredFirstName1
InsuredLastName1
InsuredMiddleName1
InsuredDOB1
InsuranceCompany2
PolicyNumber2
GroupNumber2
InsuranceCompanyTelephoneNumber2
InsuredFirstName2

InsuredLastName2
InsuredMiddleName2
InsuredDOB2
PharmacyName
PharmacyPhone
PharmacyFax
GuarantorName
GuarantorPhone
GuarantorAddress
GuarantorCity
GuarantorState
GuarantorZip

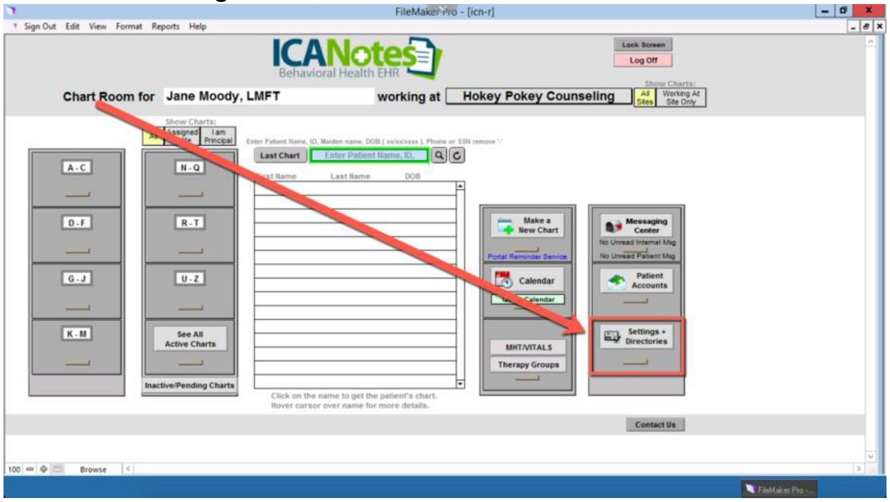
Note: Any field not listed above may be included in the "AdditionalNotes" field by naming your desired data to be imported as "AdditionalNotes_YourFieldName", e.g., AdditionalNotes_BalanceDue. When imported, all the fields you name in that fashion will be merged and will be available in the Miscellaneous Notes section of the Demographics page on the patient chart.

Please note that all imports are final.

CONFIGURING GROUP SETTINGS

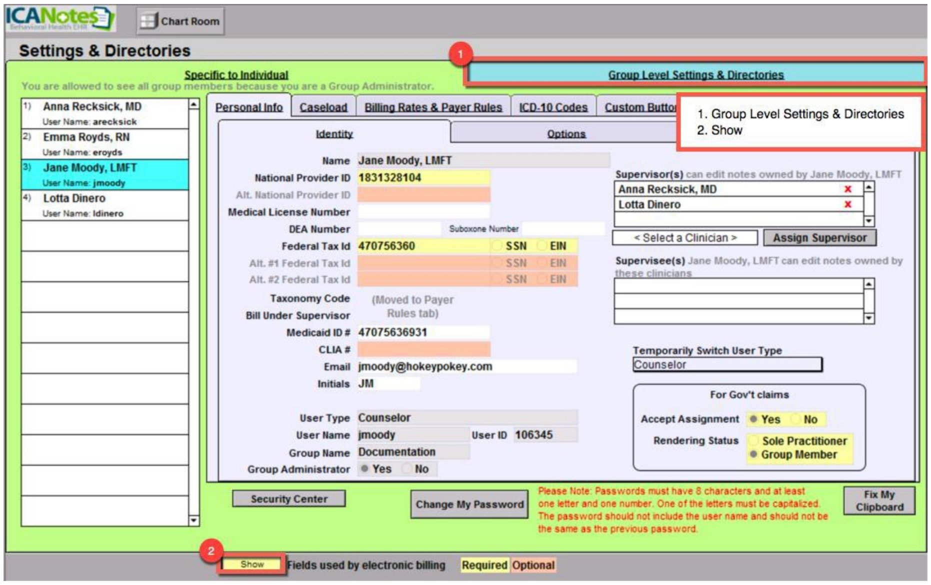
In this section, we will review each of the tabs which appear under 'Group Level Settings & Directories' in Settings + Directories. You must be a Group Administrator in order to make changes on these tabs. These tabs allow you to configure your group's ICANotes settings.

- To get started, click on the Settings + Directories drawer in the Chart Room, as shown below:



- Click on the '**Group Level Settings & Directories**' tab.

- Clicking the Show button at the bottom of the screen will highlight in yellow those fields that are required for electronic billing. Fields highlighted in pink are optional.



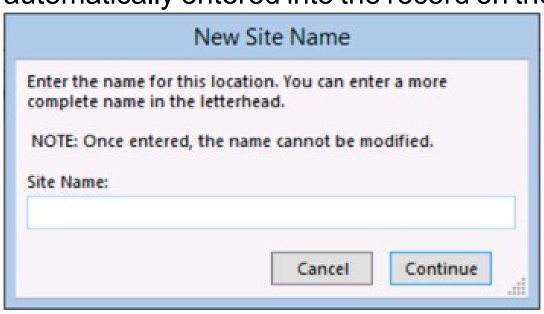
SITES/LETTERHEADS TAB

This first area stores some basic information about your organization which will be used in your notes and by the billing portion of ICANotes. Your office sites and letterheads will be listed on the left as you create them. For each site/letterhead, there are three tabs in the center of the screen pertinent information:

Facility Info	Letterhead	Electronic Billing	Calendar Options

FACILITY INFO TAB

- Under the **Facility Info** tab, you create a new site by clicking on the New button.
- A box will appear prompting you to specify a name for the site. Click the Continue button. The site name is automatically entered into the record on the **Facility Info** tab.

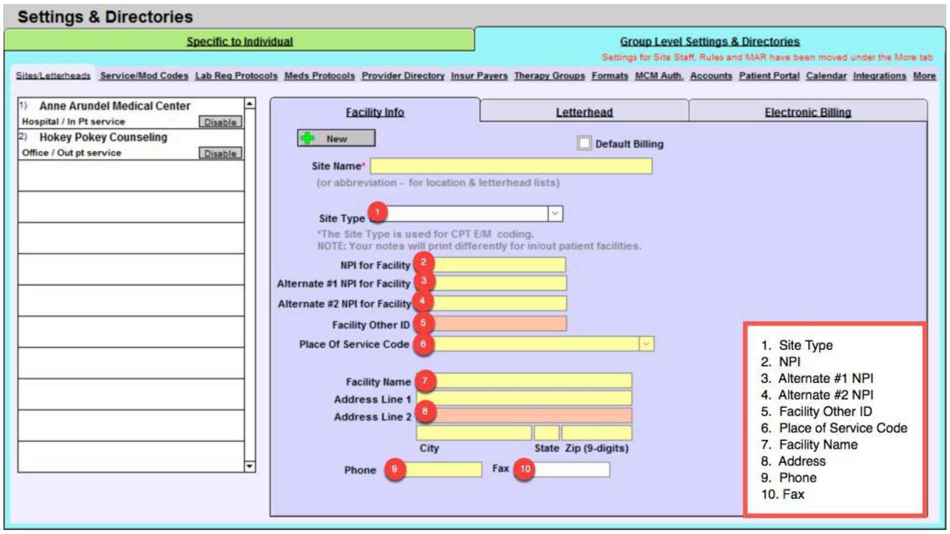


Note that after create a site name, it **should not** be changed for any reason.

1. Click on the field next to **Site Type** and select the type of location from the drop-down list.
2. Enter the **NPI** for this facility.
3. (Optional) enter the **Alternate #1 NPI for Facility**.
4. (Optional) enter the Alternate #2 NPI for Facility.
5. (Optional) **Facility Other ID** you would like to record.
6. Choose your **Place of Service Code** by clicking on the field and selecting from the drop-down list.
7. Enter your full **Facility Name** as you want it to appear on your letterhead.
8. Enter the facility address.

9. Phone number of facility.

10. Fax number of facility.

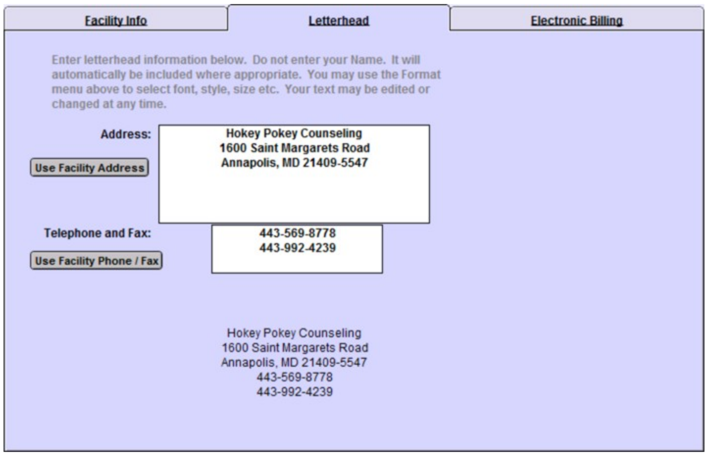


You may add other locations under the **Facility Info** tab as needed if your group operates multiple locations. You may also need to set up facilities specifically for billing purposes.

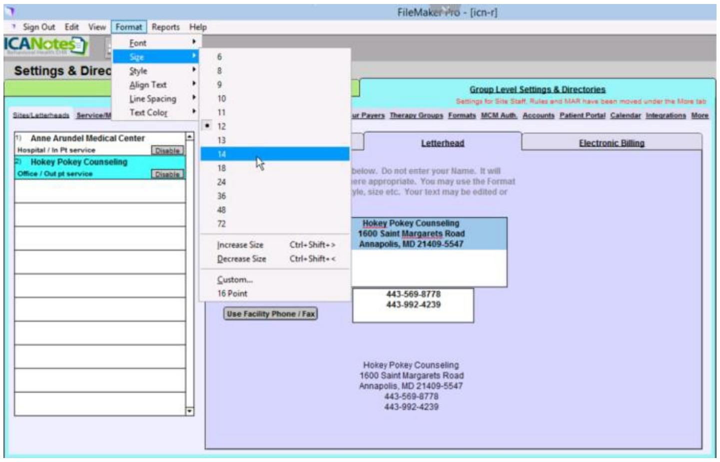
LETTERHEAD TAB

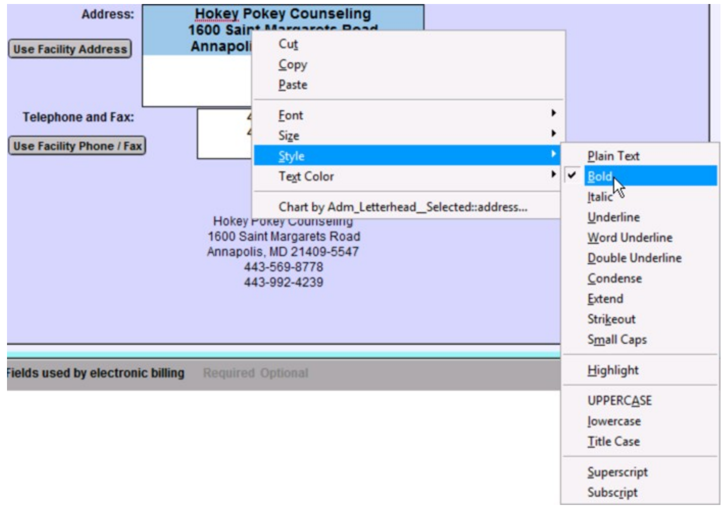
- Click on the **Letterhead** tab to the right of Facility Info.

- Click the **Use Facility Address** button and the **Use Facility Phone / Fax** button to automatically populate the data entered in Facility Info. A preview of the letterhead will appear below these fields – you may edit inside these boxes as desired.



- You may format the letterhead font in a variety of ways by highlighting the information in either box and selecting "**Format**" from the toolbar above or right-clicking to get a dropdown menu. You can change the font, size, style, alignment, line spacing, and text color of your site's letterhead.

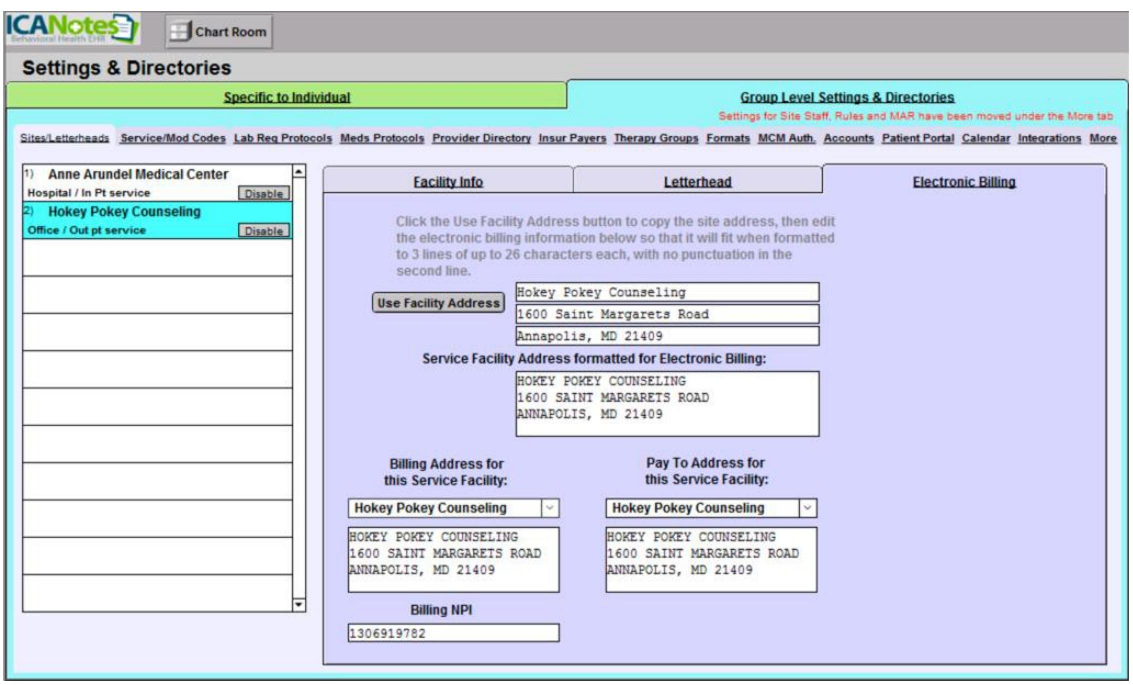




ELECTRONIC BILLING TAB

The **Electronic Billing** tab may be found to the right of the Letterhead tab. You need to enter information on this tab for each site listed on the left that will be used to submit claims (either electronically or by printing CMS1500 forms).

- Click on the first **Site Name** in the left column that you want to configure.
- Press the Use Facility Address button and the address you entered from Facility Info for that site will appear in the address field.
- Click in the box below the field labeled: **Billing Address for this Service Facility**. Select the site from which you send your electronic claims 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 & Directories for electronic billing using the Show button.

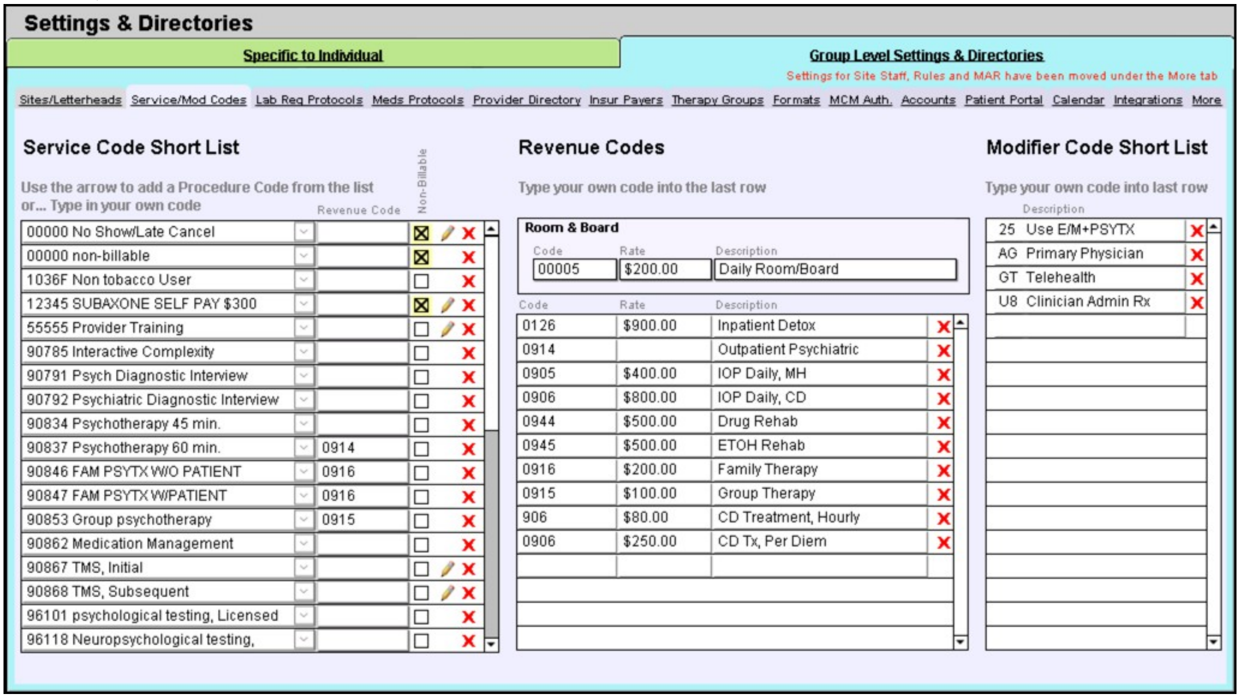


Click the button below to watch a brief video demonstration of how to configure all settings under **Sites/Letterheads** tab.

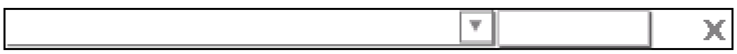
Video Tutorial
Sites/Letterheads

SERVICE/MODIFIER CODES TAB

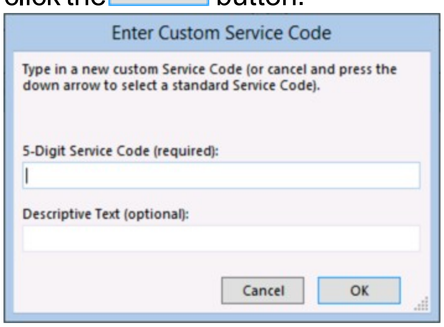
Click on the **Service/Modifier Codes** tab to the right of the Sites/Letterheads tab. You will be able to create your group's service, revenue, and modifier code lists here.



The **Service Code Short List** will be required when you create your individual billing rates under Specific to Individual tab. Setting up a short list will save you time as you will have the option to choose from your short list of billing codes (set up here) rather than a longer full list of all available billing codes.

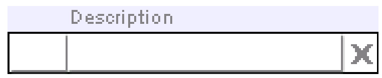


- In the left column, click on the down arrow next to the field to open the full list of available service codes.
- If you do not find a code that you need, you can simply click within the field and begin typing – a box will open asking for the information for your custom service code. Enter the 5-digit code and the descriptive text, and then click the OK button.



Revenue Codes can be created from the middle column. These codes are used mostly in inpatient settings. Simply click the next open row and add the code, rate, and description.

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**.



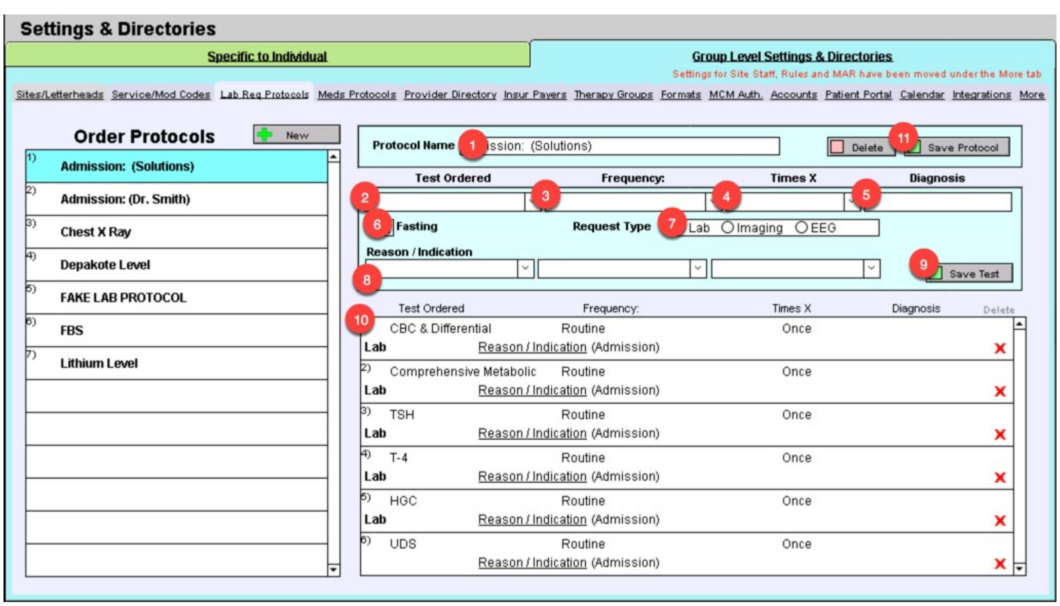
Click the button below to watch a quick video tutorial about the **Service/Modifier Codes** tab.

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.

- Click on the New button to create a new order protocol.

1. Name the protocol.
2. Pick a test from the drop-down menu or type in the name of test.
3. Indicate the frequency from the drop-down menu or type in the frequency.
4. Indicate the number of times the test should be performed.
5. Type in the diagnosis.
6. Click inside this box if the test should be performed while fasting.
7. Indicate what type of request.
8. Choose a reason/indication from the drop-down menu or type in the reason/indication.
9. Save the test newly created.
10. The newly created test will show in this area.
11. Save the protocol.



Click on the button below to watch a brief video tutorial on how to set up a **Lab Req Protocols** tab.

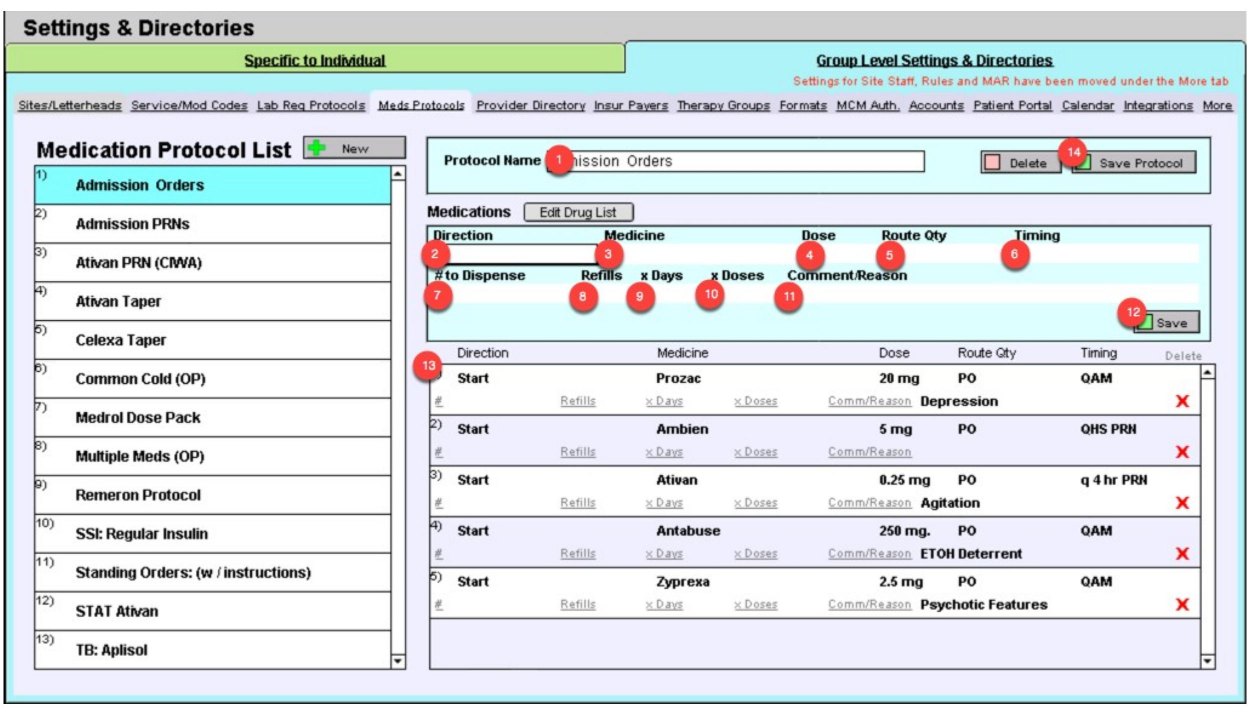
Video Tutorial
Lab Req Protocols

MEDICATION PROTOCOLS TAB

The **Meds 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 nurse or prescriber progress note.

- Click on the New button to create a new medication protocol.

1. Name the medication protocol.
2. Pick the verb from the drop-down menu.
3. Select the medicine from the drop-down menu or type in the medication.
4. Select the dosage.
5. Insert the Route/Qty.
6. Indicate the timing.
7. Insert the number to dispense.
8. Indicate refills.
9. Select the amount of days.
10. Input the dose.
11. Pick a comment/reason from the drop-down menu or type in the reason.
12. Click the 'Save' button to save the newly created medication.
13. The newly created medication will show in this area.
14. Click 'Save Protocol' to save the protocol.



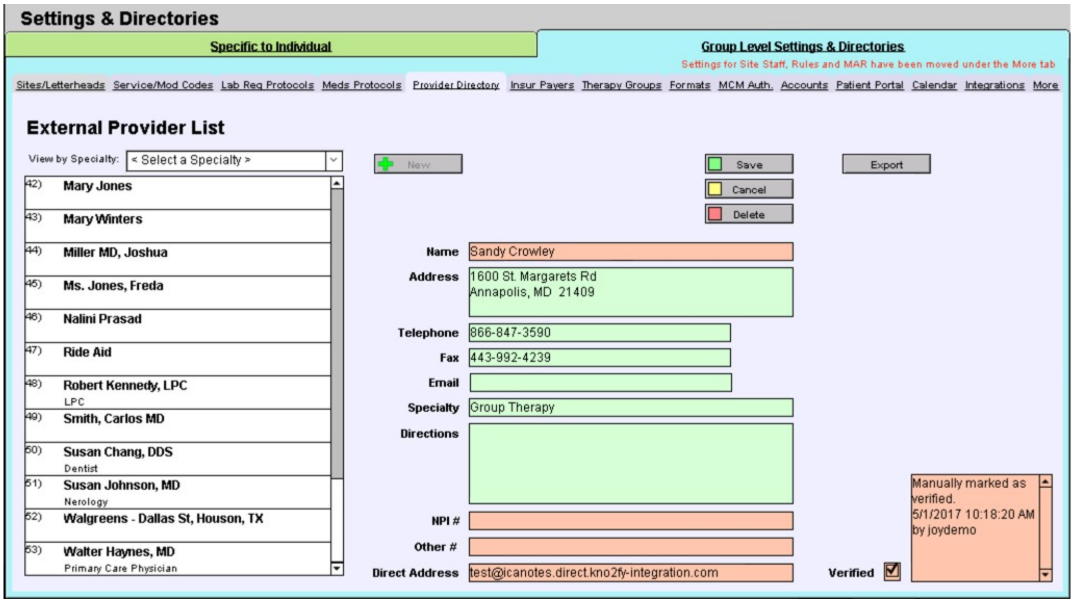
Please click the button below to view a quick tutorial on setting up a **Meds Protocols** tab.

Video Tutorial
Meds Protocols

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 to create a new external provider.
- The cursor will move to the name field. Enter the provider's information and then press the Save button.
- By clicking the Export button, you may export this directory if you ever need to print it or send it electronically.



Please click the button below to view a quick tutorial on setting up a **Provider Directory** tab.

Video Tutorial
Provider Directory

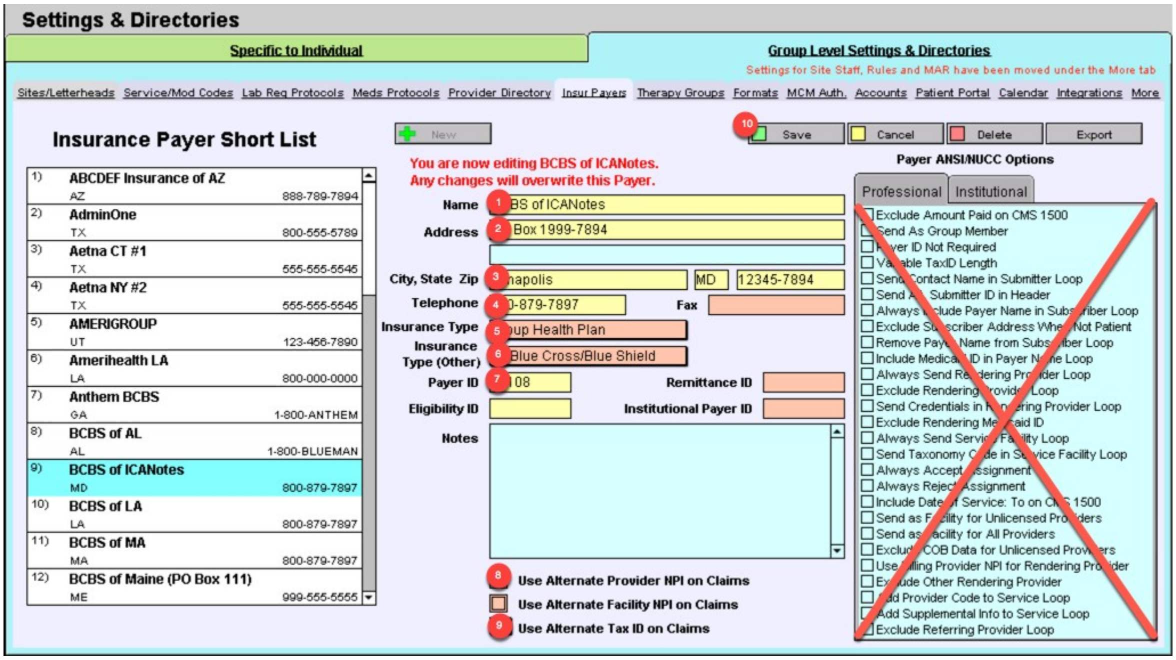
INSURANCE PAYERS TAB

The Insur Payers tab can be used to enter the insurance companies your patients use most frequently and save them to a short list (which will appear when you enter a patient's demographics).

- Click on the New button to enter an insurance company name.

1. Enter the insurance company's name.
2. Enter the street address.
3. Enter the city, state, and zip code to complete the mailing address.
4. Enter the telephone and fax numbers.
5. Designate the insurance type by clicking on the field and selecting from the drop-down menu.

6. If you do not see the option you need for step 6, click in the insurance type (other) option and choose one of the options on the drop-down list.
7. If you intend to send claims electronically, you will have to enter a payer ID – this will be supplied by the clearinghouse you choose to work with.
8. If you would like to use the alternate NPI# entered under **Specific to Individual** tab (located on the Personal Info/Identity tabs) when you send claims to this insurance company, check this box.
9. Click on this box if you would like to use either the Alt #1 or Alt #2 tax ID entered under the **Specific to Individual** tab.
10. Click the 'Save' button to store this insurance company entry.

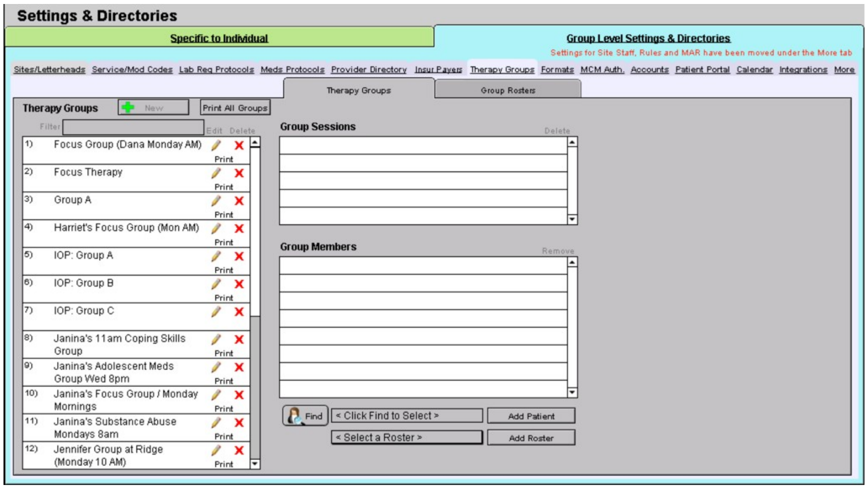


- If you later want to delete this or another insurance company from your short list, return to this screen, click on the appropriate insurance payer from the column on the left, and click the Delete button to remove it.
- You may export this short list for printing or electronic transmission by clicking on the Export button.
- Note: The Payer ANSI/NUCC Options shown on the right should not be edited in any way unless you are instructed to do so by the ICANotes Support or Training Teams.

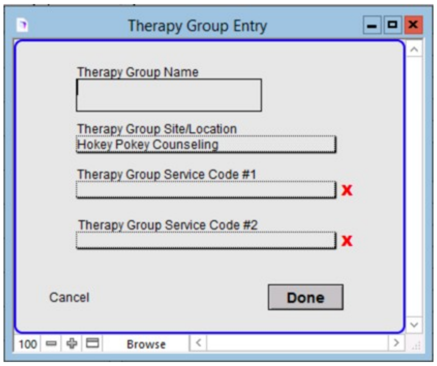
Please click the button below to view a quick tutorial on how to use the **Insur Payers** tab.

Video Tutorial
Insur Payers

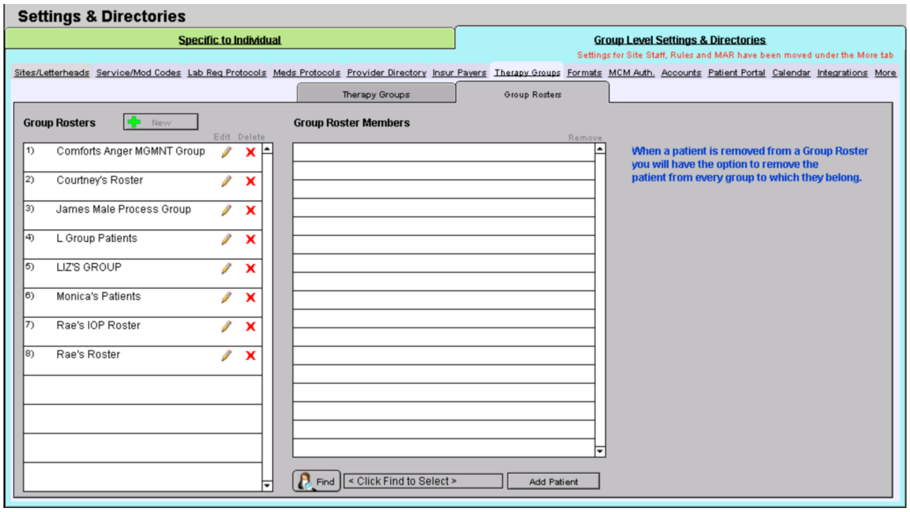
Use the **Therapy Group** tab to create patient therapy groups and to create group therapy note remarks which will be inserted in each participating patient's chart.



- Click on the New button in the upper left of the window (next to **Therapy Groups**) to start a new therapy group.
- The Therapy Group Entry window will open. Enter a Therapy Group Name and the site/location, and service codes. Click the Done button to create the group.

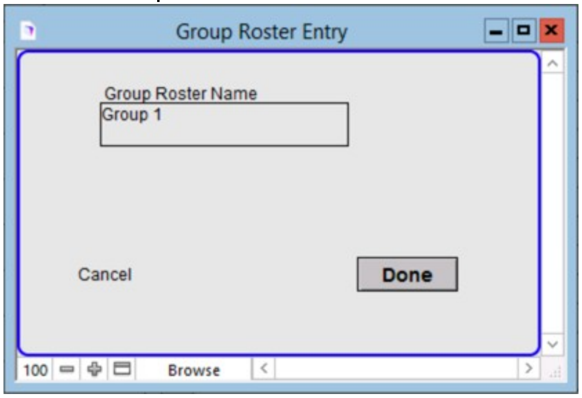


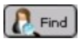
- To create a Group Roster, click the New button in the upper left of the window.



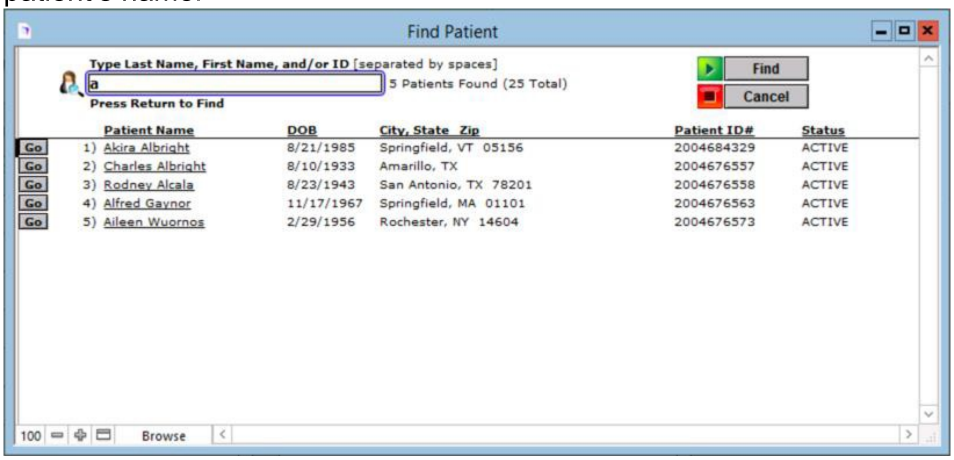
- Enter a Group Roster Name. Click the 

button to create the group roster.



- Find your patient by clicking the 

button. With the **Find Patient** window, locate the patient and click the patient's name.



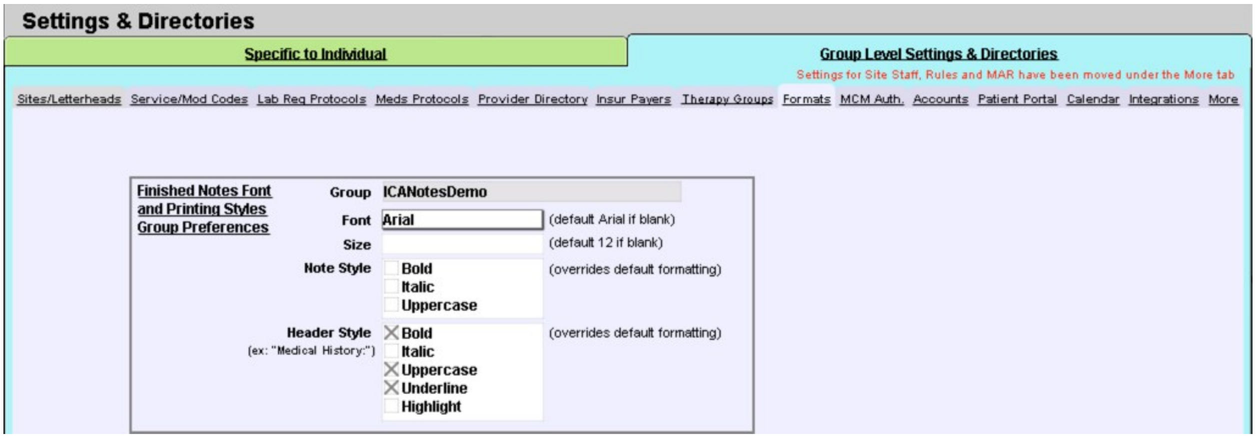
- With the patient's name in the field, click the 

button.

- The patient will be added to the roster. Continue the process until all patients are added.

Please click the button below to view a quick tutorial on how to use the **Therapy Groups** tab.

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



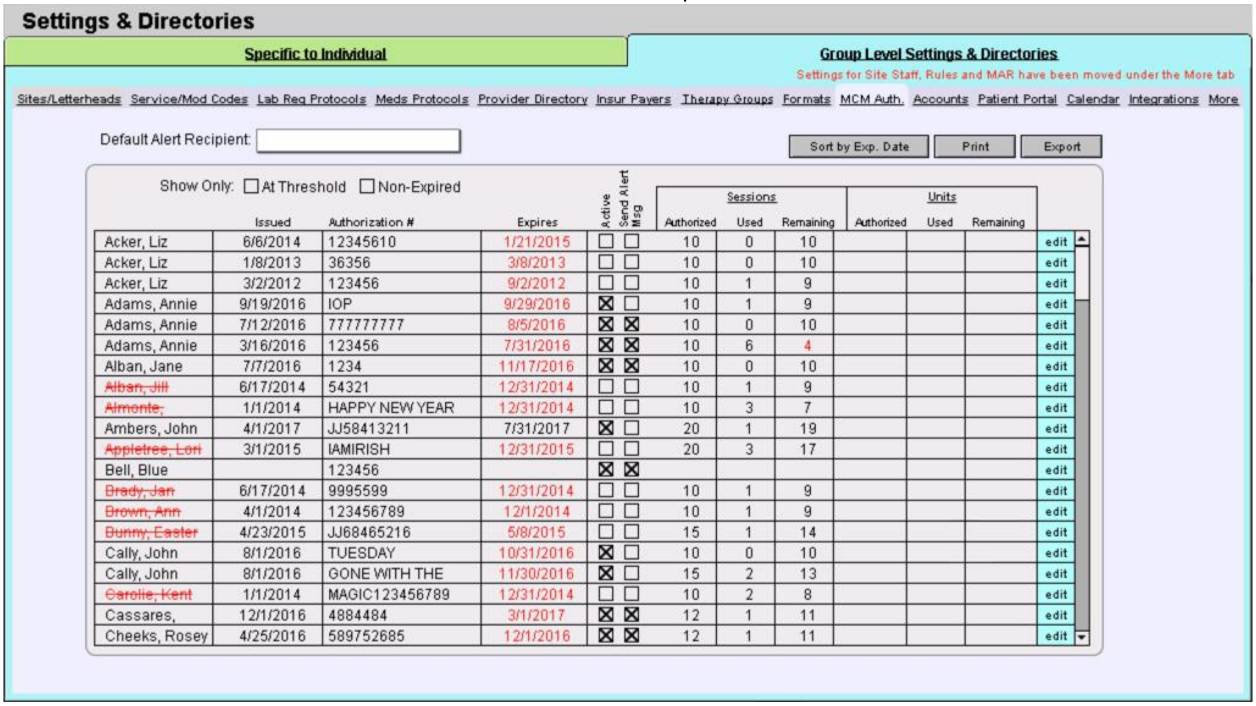
- Click on the **Font** field to open the dropdown list of available fonts (default is Arial).
- Click on the **Size** field to enter a new size (default/blank is 12 pt).
- Click on the appropriate checkbox(es) under **Note Style** to change the style of the body text in your notes.
- Click on the checkbox(es) under **Header Style** to change the style of headers in your notes.

Note: Any changes made here will only affect notes created after the change is made. No previously compiled notes will be altered.

Please click the button below to view a quick tutorial on how to use the **Fonts & Styles** tab.

The **MCM Auth.** tab offers a quick look at all the managed care authorizations that your group has entered into the program.

- The Show Only checkboxes ☐ 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. Alternatively, 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	
Acker, Liz	6/6/2014	12345610	1/21/2015	☐	☐	10	0	10				edit
Acker, Liz	1/8/2013	36356	3/8/2013	☐	☐	10	0	10				edit
Acker, Liz	3/2/2012	123456	9/2/2012	☐	☐	10	1	9				edit
Adams, Annie	9/19/2016	IOP	9/29/2016	☒	☐	10	1	9				edit
Adams, Annie	7/12/2016	777777777	8/5/2016	☒	☒	10	0	10				edit
Adams, Annie	3/16/2016	123456	7/31/2016	☒	☒	10	6	4				edit
Alban, Jane	7/7/2016	1234	11/17/2016	☒	☒	10	0	10				edit
~~Alban, Jill~~	6/17/2014	54321	12/31/2014	☐	☐	10	1	9				edit
~~Almonte,~~	1/1/2014	HAPPY NEW YEAR	12/31/2014	☐	☐	10	3	7				edit
Ambers, John	4/1/2017	JJ58413211	7/31/2017	☒	☐	20	1	19				edit
~~Appletree, Lori~~	3/1/2015	IAMIRISH	12/31/2015	☐	☐	20	3	17				edit
Bell, Blue		123456		☒	☒							edit
~~Brady, Jan~~	6/17/2014	9995599	12/31/2014	☐	☐	10	1	9				edit
~~Brown, Ann~~	4/1/2014	123456789	12/1/2014	☐	☐	10	1	9				edit
~~Bunny, Easter~~	4/23/2015	JJ68465216	5/8/2015	☐	☐	15	1	14				edit
Cally, John	8/1/2016	TUESDAY	10/31/2016	☒	☐	10	0	10				edit
Cally, John	8/1/2016	GONE WITH THE	11/30/2016	☒	☐	15	2	13				edit
~~Carolie, Kent~~	1/1/2014	MAGIC123456789	12/31/2014	☐	☐	10	2	8				edit
Cassares,	12/1/2016	4884484	3/1/2017	☒	☒	12	1	11				edit
Cheeks, Rosey	4/25/2016	589752685	12/1/2016	☒	☒	12	1	11				edit

- The edit button will allow you to edit the MCM authorization for the patient specified.

- The Sort by Exp. Date button will list the patients by expiration date.

- The Print button will print the list.

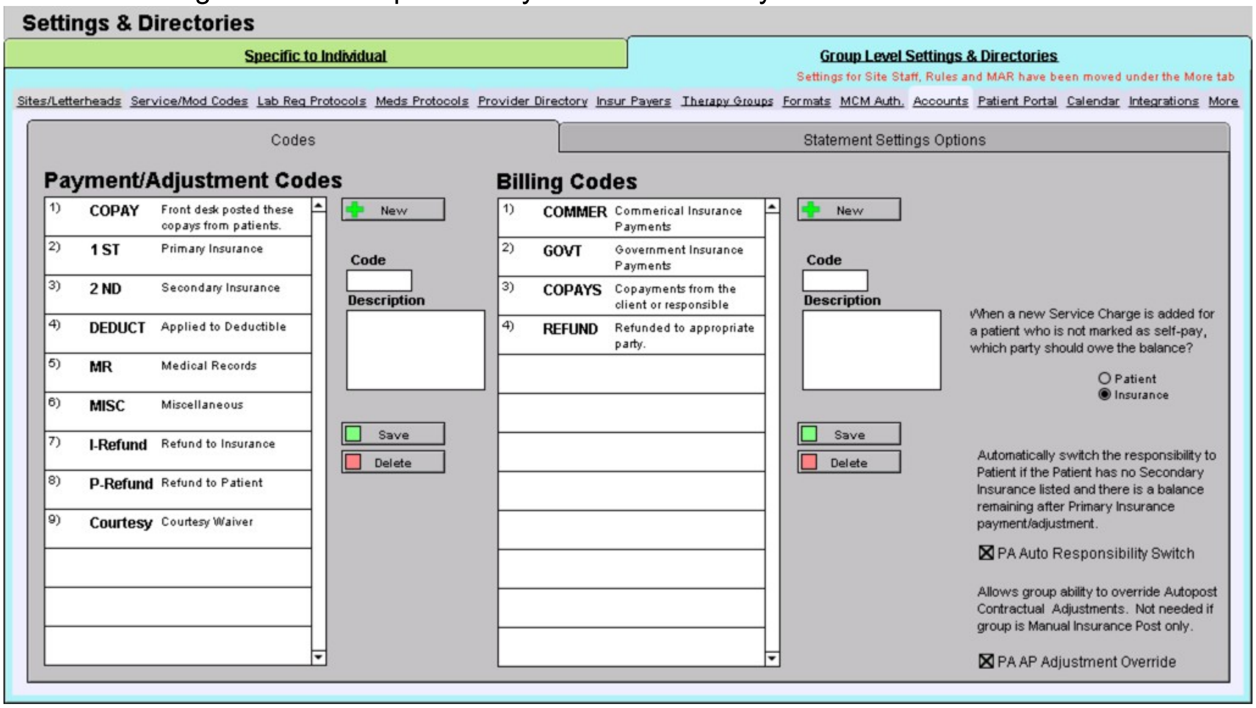
- You may export this list for printing or electronic transmission by clicking on the Export button.

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.

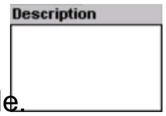
Please click the button below to view a quick tutorial on how to use the **MCM Auth.** tab.

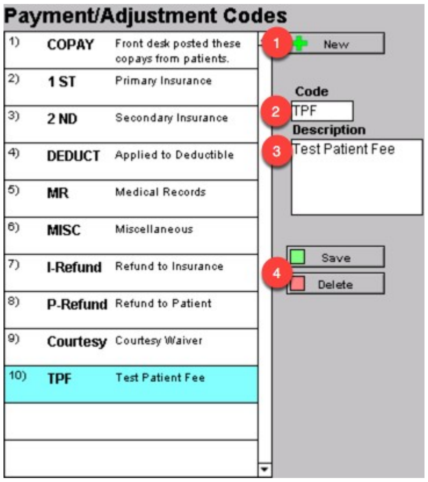
Video Tutorial MCM Auth.

If you are 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 of the Codes tab, 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.

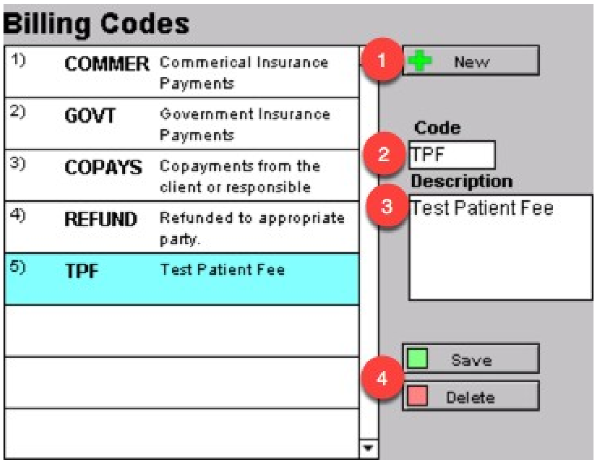
1. Click the  button to create a new code.
2. Enter the Code you would like to use. 
3. Enter the Description for the code. 
4. Select the  button to save the code or  to delete the entry highlighted.



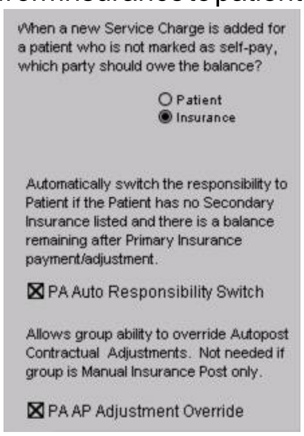
- **Billings Codes** list can be set up in a similar fashion. You can report on these codes as well. They are linked to charges recorded in ICANotes so that you can run reports on these codes.

1. Clickthe  button to create a new code.

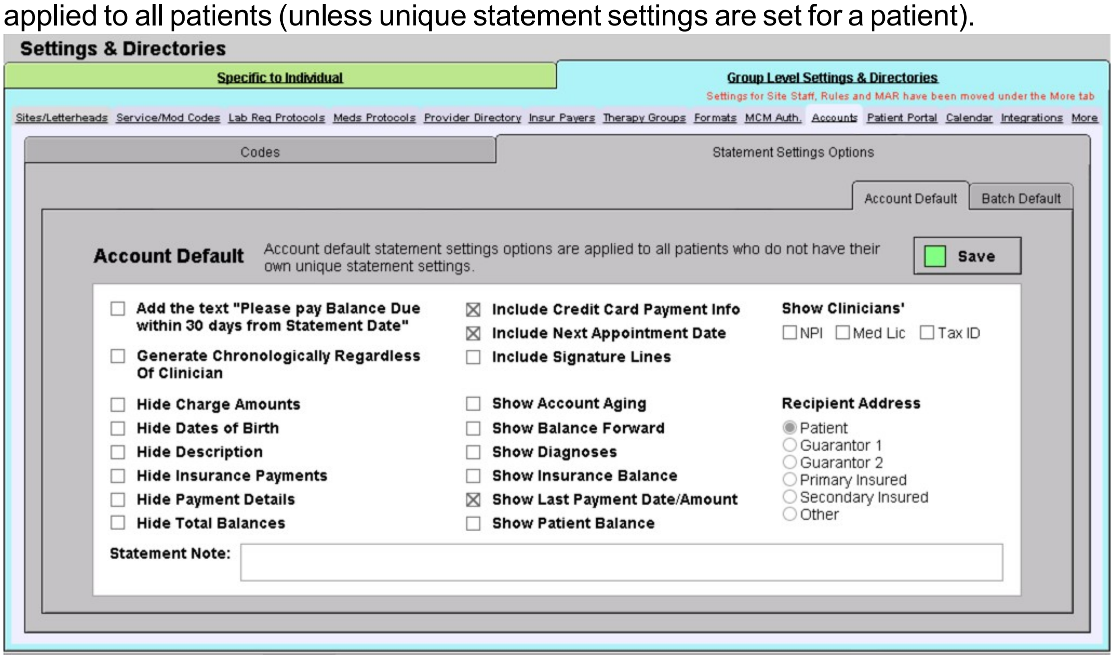
2. Enter the Code you would like to use.
3. Enter the Description for the code.
4. Select the Save button to save the code or Delete to delete the entry highlighted.



- The toggle switch for Patient/Insurance is on the far right along with two checkboxes which are used in the patient account. PA Auto Responsibility Switch is to enable the system to automatically switch the balance responsibility from insurance to patient. AAP Adjustment Override allows you to modify auto posted contractual adjustments.



- On the Statement Settings Options tab, you are able to set up account default statement settings options which are applied to all patients (unless unique statement settings are set for a patient).



Please click the button below to view a quick tutorial on how to use the **Accounts** tab.

MORE TAB

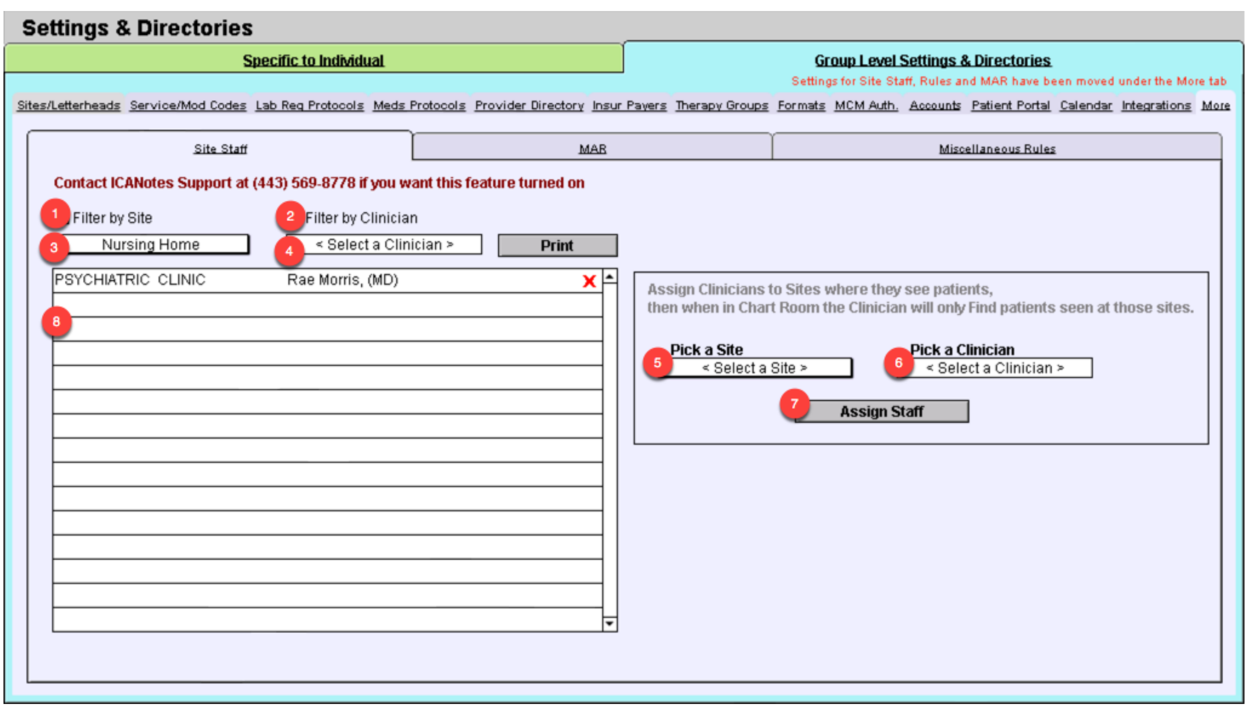
On the **More** tab, you can make further changes to your group level settings and directories.

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 search for patients in the Chart Room.

Note: This feature must be enabled by the ICANotes Support Team. A Security Administrator or Group Owner should call 443-569-8778 or submit a ticket via ticket@icanotes.com to request that this feature be enabled for your group.

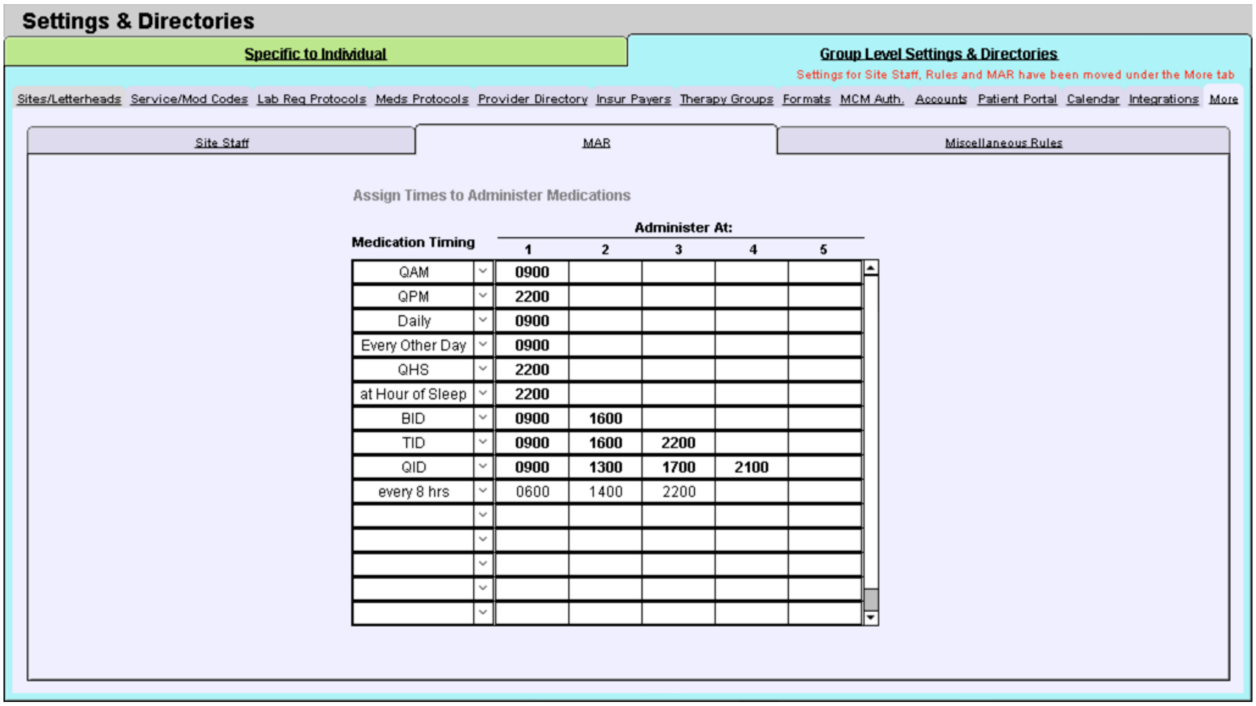
1. Filter by Site checkbox organizes the list by site.
2. Filter by Clinician checkbox organizes the list by clinician.
3. Site selection dropdown list will narrow down the list per site.
4. Clinician selection dropdown list will narrow down the list per clinician.
5. Click on the **Pick a Site** menu and choose the site you want to assign to a clinician.
6. Click on the Pick a Clinician field and select the clinician you are assigning from the dropdown list.
7. Click the Assign Staff button to save the assignment.
8. List of sites and clinicians' assignment.



Please click the button below to view a quick tutorial on how to use the **Site Staff** tab.

MAR TAB

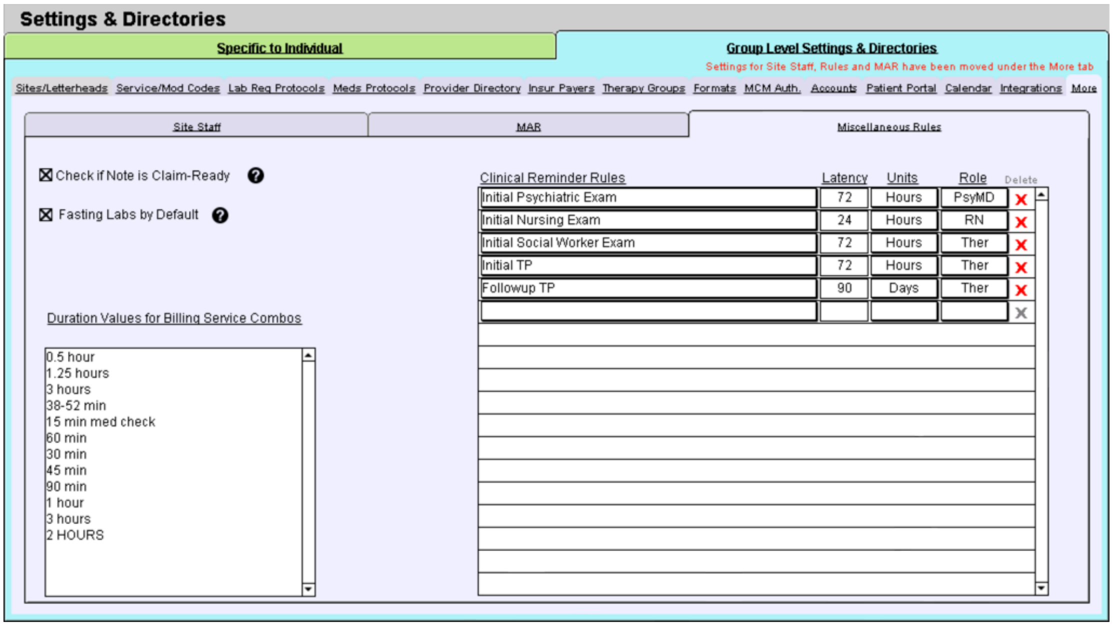
The Medication Administration Record (MAR) is frequently used by inpatient facilities. If your facility intends to use the electronic MAR in ICANotes, you can configure specific times of day to be associated with the medication timing options used for dispensing of medication. Once configured, the administration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



Medication Timing	1	2	3	4	5
QAM	0900				
QPM	2200				
Daily	0900				
Every Other Day	0900				
QHS	2200				
at Hour of Sleep	2200				
BID	0900	1600			
TID	0900	1600	2200		
QID	0900	1300	1700	2100	
every 8 hrs	0600	1400	2200		

Note: Any group intending to use the MAR must attend training with our clinical education specialist. Please visit our website training schedule or email ticket@icanotes.com to request MAR training.

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



- On the left, you will see **Check if Note is Claim-Ready** 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.

- The **Fasting Labs by Default** can be checked to include fasting labs by default.

- **Duration Values for Billing Service Combos** field is a type in field where values can be input for billing.

- On the right, there are a number of rules that can be configured to control the timing of due dates for various patient documents from the time of admission. 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.

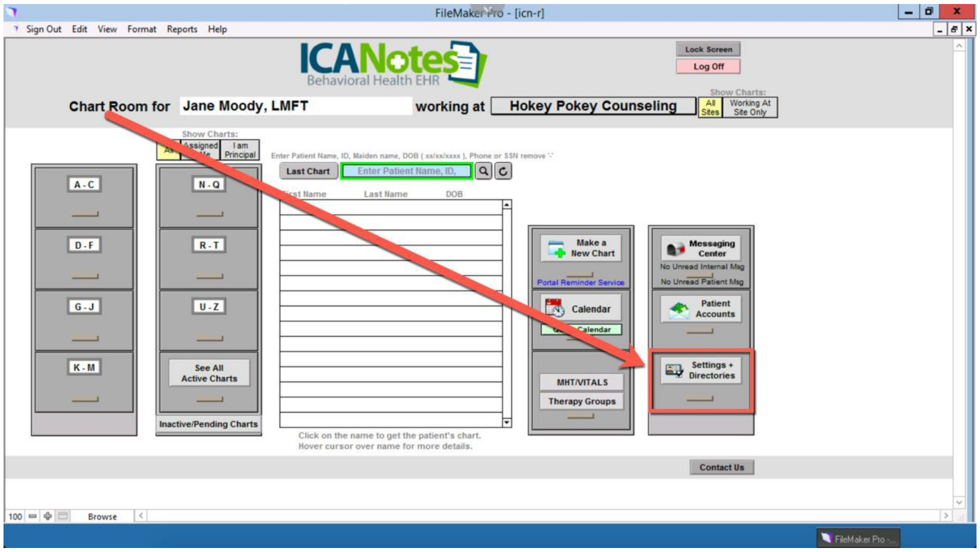
Note: This feature must be enabled ty the ICANotes Support Team. Please call 443-569-8778 or submit a ticket via ticket@icanotes.com to request that this feature be enabled for your group.

Clinical Reminder Rules	Latency	Units	Role	Delete
Initial TP	24	Hours	Principal	
Initial Psychiatric Exam	24	Hours	Ther	
Initial Psychiatric Exam	1	Days	PsyMD	
Followup TP	1	Days	Principal	
Initial Psychiatric Exam				

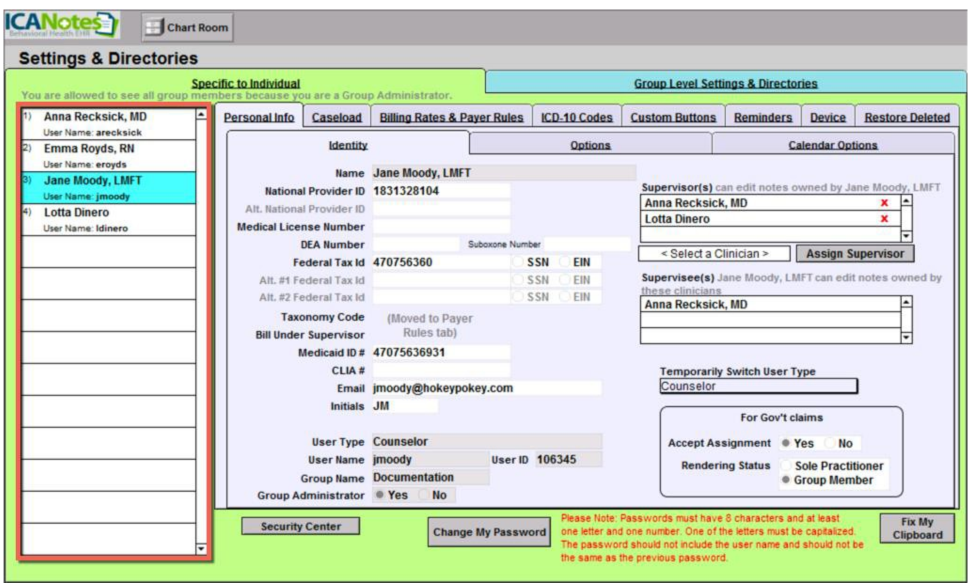
CONFIGURING INDIVIDUAL SETTINGS

In this section, we will review each of the tabs which appear under **Specific to Individual** in **Settings + Directories**.

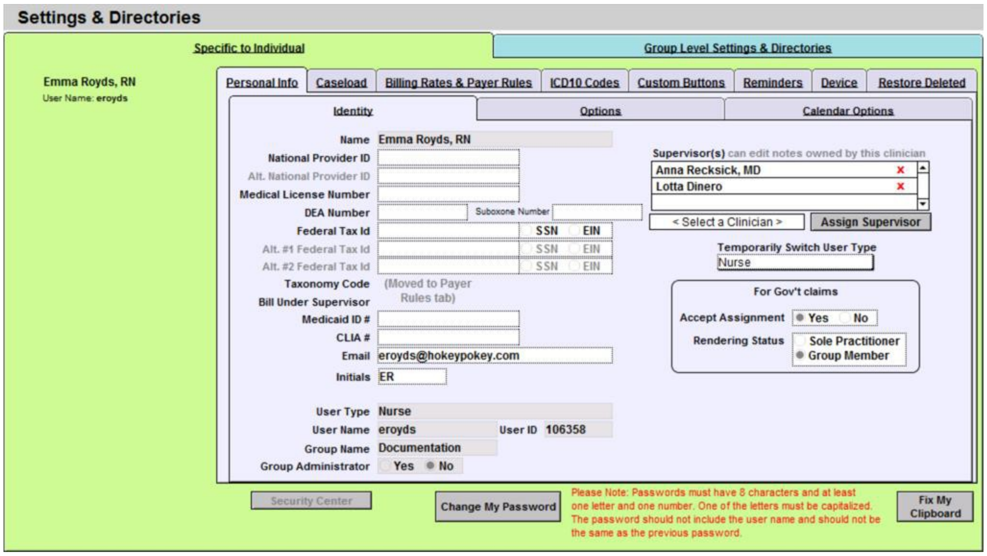
- Click on the 'Settings + Directories' drawer in the Chart Room, as shown below:



- The Specific to Individual tab will be the default window displayed. If you are a group administrator, you have the ability to configure settings for all users in your group and the left side of the window will show all users. Non-administrators will only be able to view and modify their own account settings.



group administrator view



**non-administrator view*

PERSONAL INFOTAB

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 the **Personal Info** tab.

The **Identity** and **Options** tabs are where the user's identification information can be added/edited.

Please click the button below to view a quick tutorial on how to use the **Personal Info** tab.

Video Tutorial
Personal Info

IDENTITY TAB

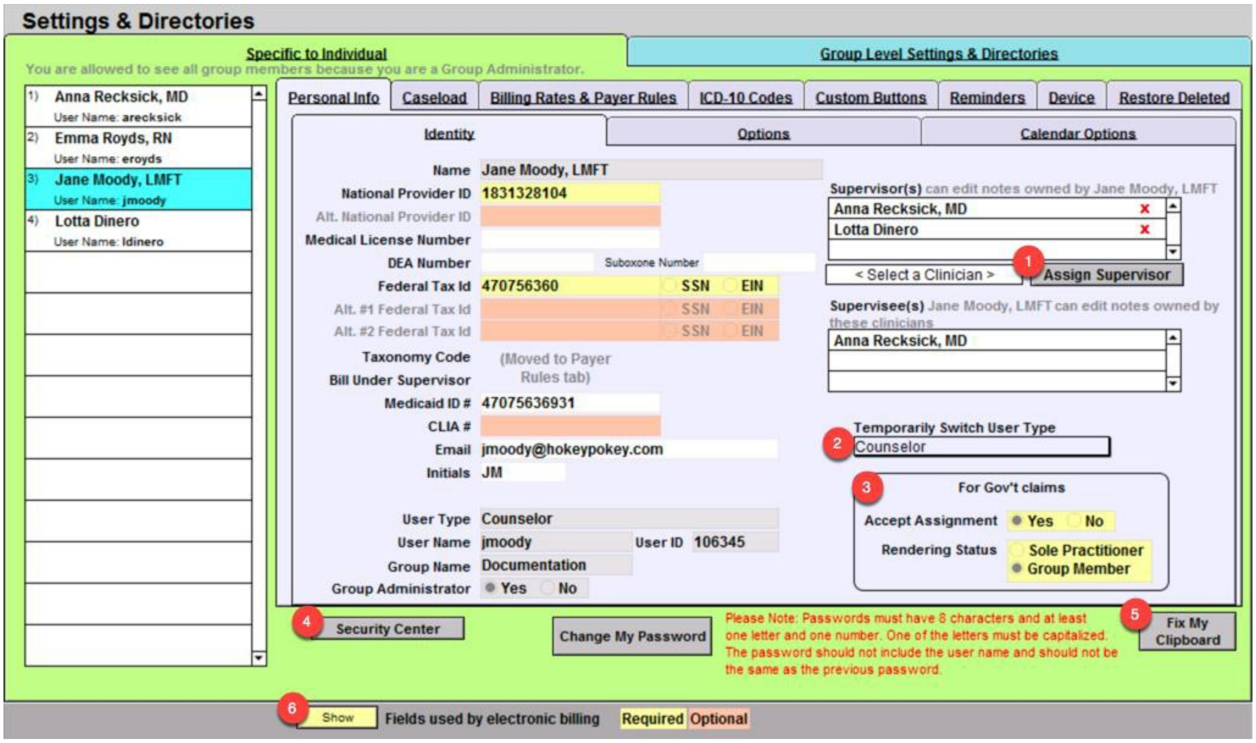
On the **Identity** tab you can enter:

- National Provider ID/Alternate National Provider ID
- Medical License Number
- DEA Number
- Federal Tax ID/Alternate Federal Tax ID
- Medicaid ID
- CLIA#
- Email Address
- Provider Initials (initials will display next to provider-created documents on each Chart Face to provide a quick visual cue if the patient is seen by multiple clinicians)

On the **Identity** tab, you can also do the following:

1. **Assign Supervisors** – Specify a supervisor for each provider. This feature will allow the supervising clinician to have edit access to the work areas of the supervisee's notes. The supervisor setting may also be used to grant access to billers for claim preparation purposes.
2. **Temporarily Switch User Type** – The enables a user to temporarily switch disciplines in order to access fields populated by other disciplines, such as when a nurse fills in for an intake coordinator.
3. **For Gov't claims** – If you accept government assignment for Medicare payments, indicate so here. Also indicate your rendering status.

4. **Security Center** – Users set up as Security Administrators for a group can enter this password-protected area (using the same ICANotes password) to update user accounts. They can add/disable users, reset passwords, and change permissions.
5. **Fix My Clipboard** – Pushing this button will correct a problem that sometimes occurs when attempting to copy and paste to and from the ICANotes program.
6. **Show Fields Used by Electronic Billing** – When this button is pushed, all fields required for electronic billing will display in yellow and optional fields will display in pink.



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

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

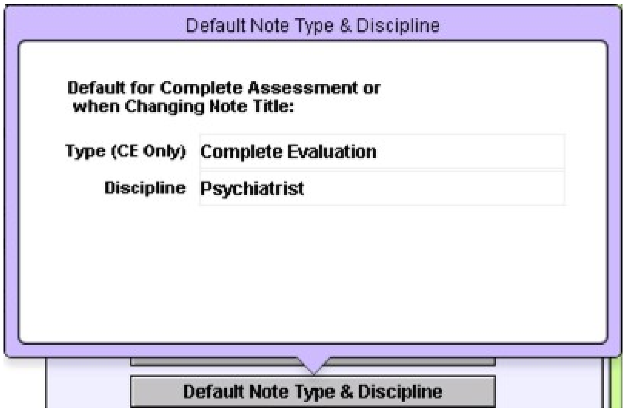
OPTIONS TAB

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

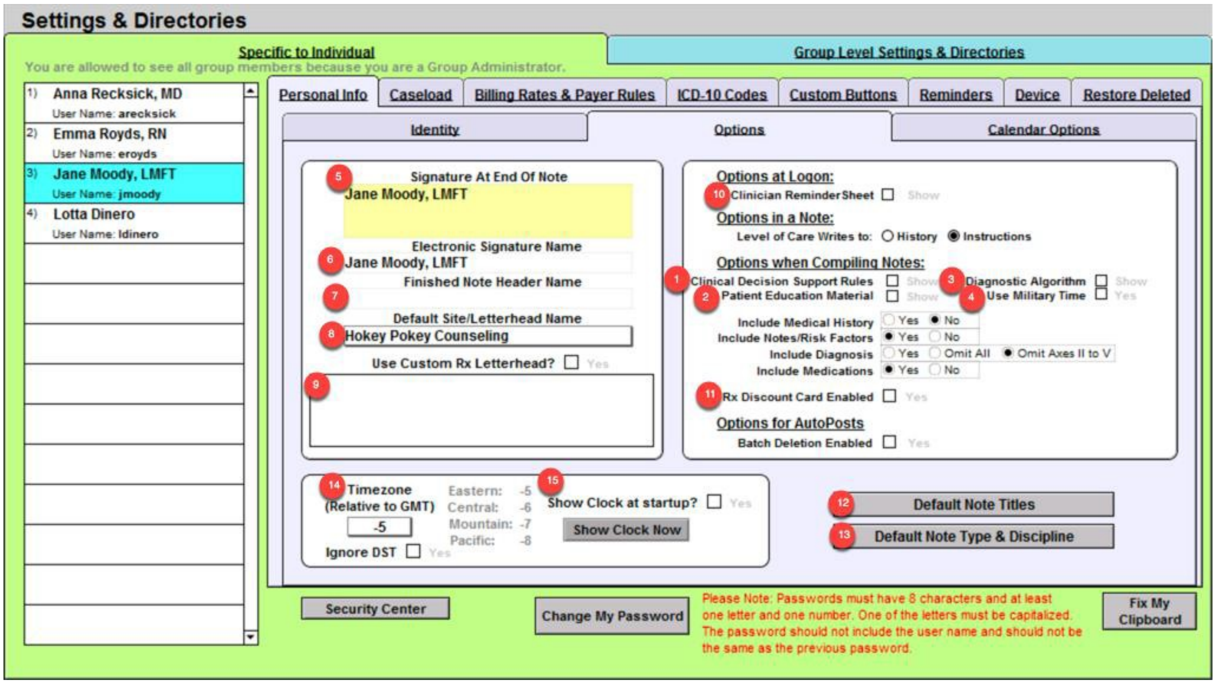
1. **Clinical Decision Support Rules** - Check the Show box if you want the option to view clinical decision support rules when you compile a note. ***This box must be checked if you intent to attest for Meaningful Use incentives.***
2. **Patient Education Material** – Check the Show box if you want ICANotes to prompt you to offer patient education materials. ***This box must be checked if you intent to attest for Meaningful Use incentives.***
3. **Diagnostic Algorithm** – Check this box if, as a prescriber, you would like to review diagnostic algorithms for justifying psychotropic medications and treatment modalities for your patients.
4. **Use Military Time** – Check this box if you would prefer a 24-hour clock instead of a 12-hour clock.
5. **Signature at End of Note** – Enter your signature information as you would like it to appear at the bottom of your notes.
6. **Electronic Signature Name** – Enter your signature name if it differs from your display name (viewed in the **Identity** tab).

7. **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.
8. **Default Note Titles Button** – Choose your default letterhead from a dropdown list of all sites/letterheads that have been created in the **Group Level Settings & Directories**.

9. **Default Note Type & Discipline Button** – If you want to use a different letterhead for your scripts, enter the custom letterhead information in the field and check the box.

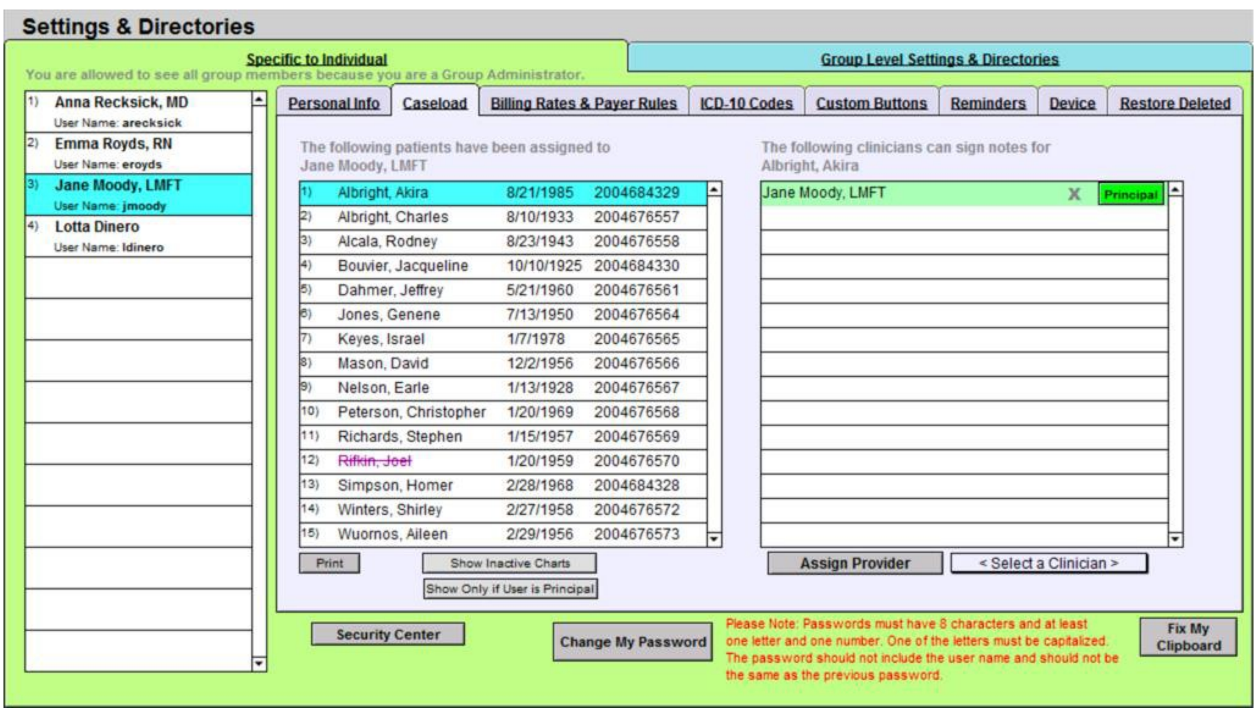


10. **Options at Logon** – Click the Show box to display the Clinician Reminder Sheet at logon (instead of the Chart Room).
11. **Rx Discount Card Enabled** – Choose this checkbox if you would like to enable the Rx discount card. Contact ICANotes Support to have this enabled for your group.
12. **Default Title for Notes** – If you prefer another title, click in the field and enter the title you want to appear on your notes. The Progress Note, non-Rx does have a drop-down menu option – you can double click inside the field to free text another title.
13. **Default Discipline when Changing Note Title** – If you want your credentials to be included in the note title should you decide to change 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.
14. **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.
15. **Show Clock at Startup** – Some clinicians may have ICANotes maximized which blocks the view of the clock on your local desktop. We offer a small clock that will display on the lower right of your screen when you are using ICANotes. You can check the checkbox to have the clock start automatically when you log in or you can come to this screen and press the **Show Clock Now** button to display the clock.



CASELOAD TAB

The Caseload area shows the caseload of the clinician selected on the list in the left column. If you are a Group Administrator, 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 displays patients assigned to the clinician selected on the left. If the total number of patients is needed, scrolling to the end of the list will provide the total as the list of patients is numbered.

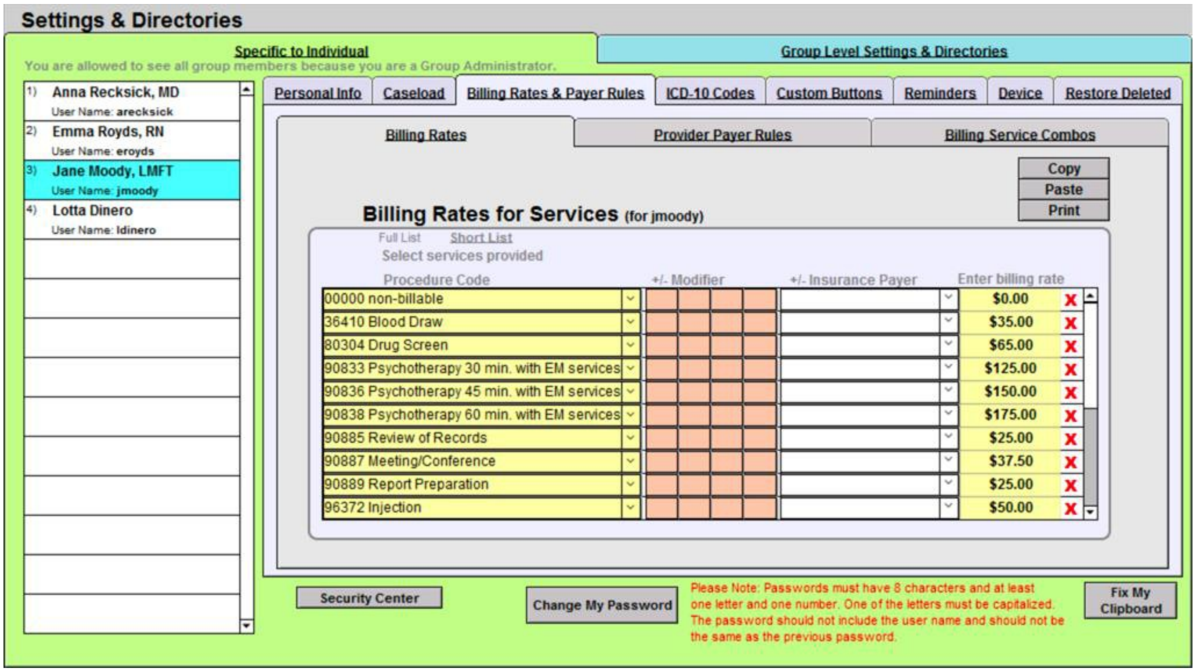
- The right column lists any additional clinicians that are assigned to the patient selected in the middle column. This includes clinicians that were assigned to a patient in the demographics tab of the patient's chart; however, if any clinicians are assigned to a patient chart via this screen, that designation will not appear on the demographics tab of the patient's chart. Further, this will not reflect any supervisors that have been set up under the **Personal Info** tab.

Please click the button below to view a quick tutorial on how to use the **Caseload** tab.

Video Tutorial Caseload

BILLING RATES AND PAYER RULES TAB

The **Billing Rates** and **Provider Payer Rales** tabs are set up specific to the individual. If you are a Group Administrator, you will see all clinicians in your group listed. If you are not a Group Administrator, you will see only your account listed.



Please click the button below to view a quick tutorial on how to use the **Billing Rates & Payer Rules** tab.

Video Tutorial Billing Rates & Payer Rules

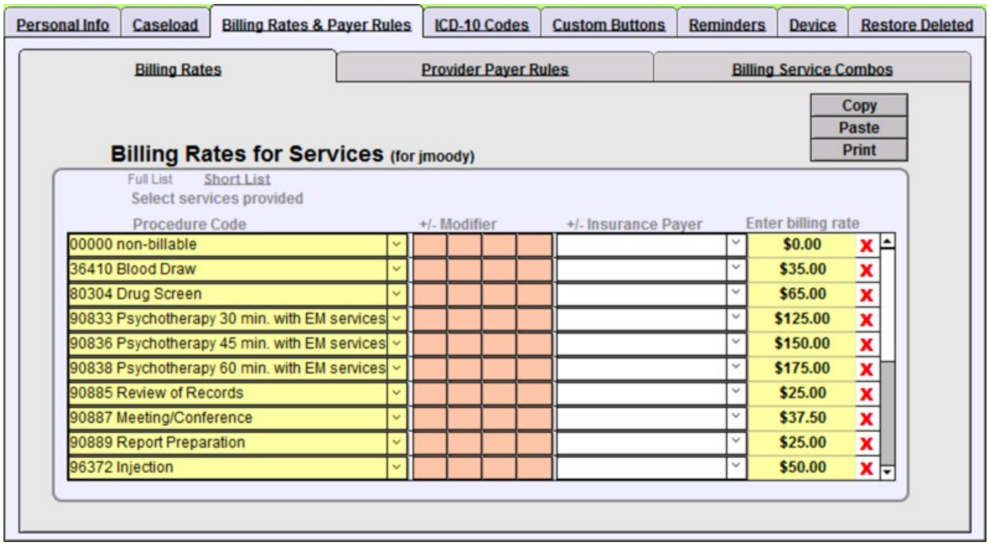
BILLING RATES

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 two-digit codes.

Different rates can also be set per payer; however, this is usually not necessary as payers generally have a predetermined amount that they will pay per service, regardless of what amount is billed. **Tip for Group Administrators:** 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 **Group Level Settings & Directories** 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 titled Procedure Code.
- Enter a Modifier (as needed).
- Enter an Insurance Payer if you want to assign a specific billing rate to a specific insurance carrier.
- 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.
- Select **Copy** to copy the entire list of CPT codes and billing rates.
- Select **Paste** to paste the previously copied list of CPT codes and billing rates onto this user.
- Select **Print** to print the entire list of CPT codes and billing rates.

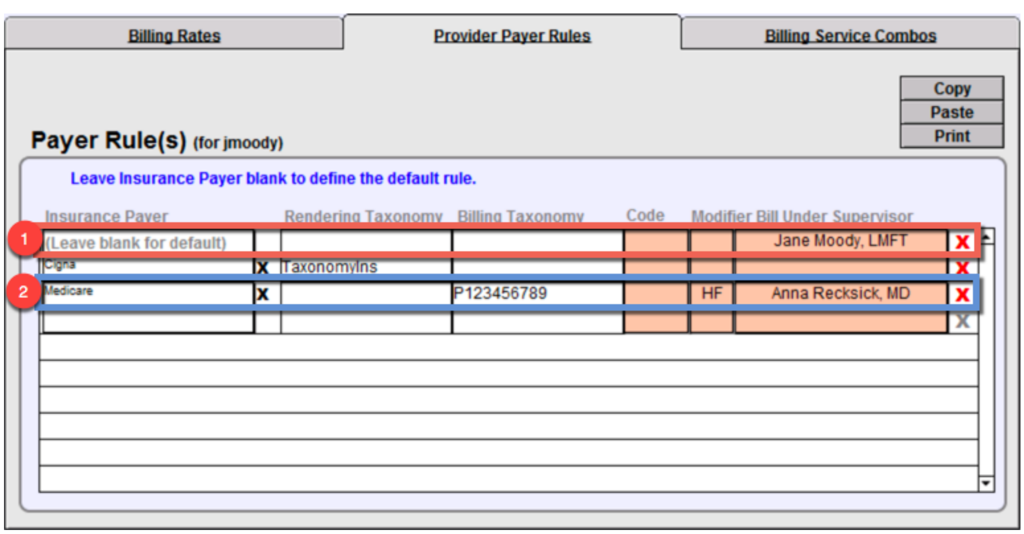


PROVIDER PAYER RULES

The Provider Payer Rules tab defines what information will be added to an insurance claim, per insurance payer.

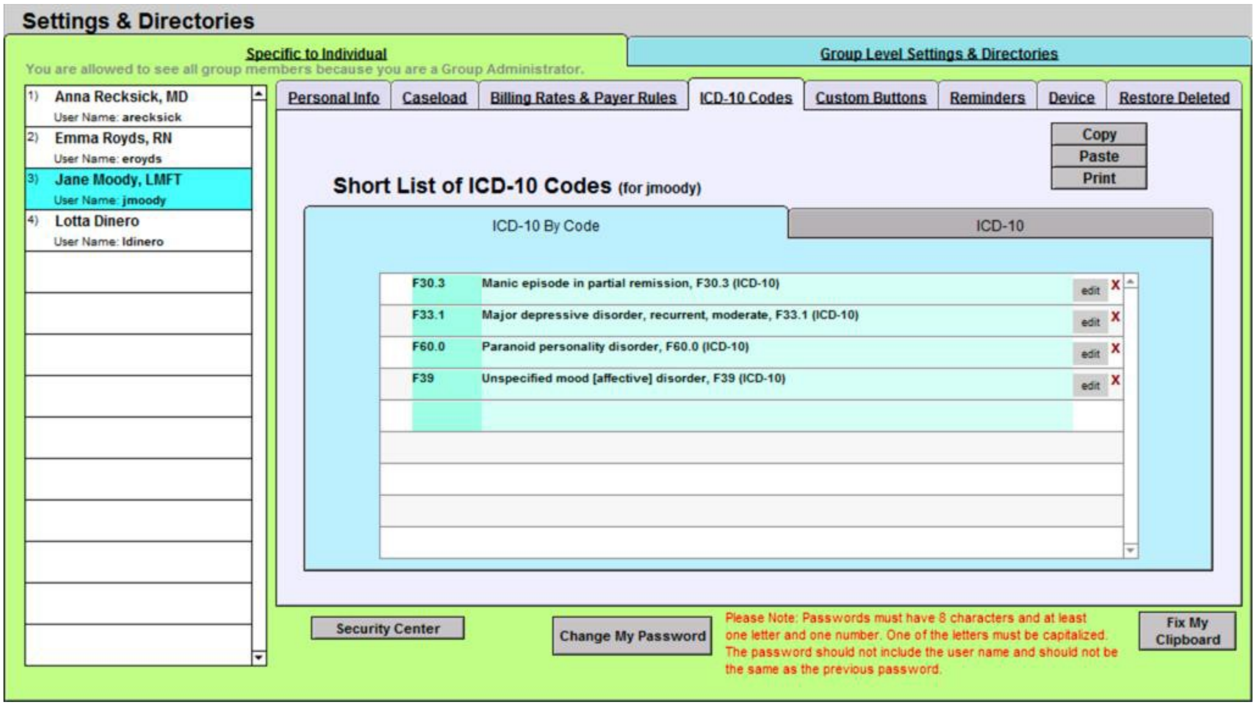
1. Since all fields except for the Bill Under Supervisor are blank in the example below, Jane Moody, LMFT is the default supervisor for this user, meaning that Jane Moody LMFT's billing information will be present on all claims if no other supervisors are defined.

2. Anna Recksick, MD's information will be present on claims when Medicare is the payer, and the Billing Taxonomy and Modifier specified in that row will also be on the claim.

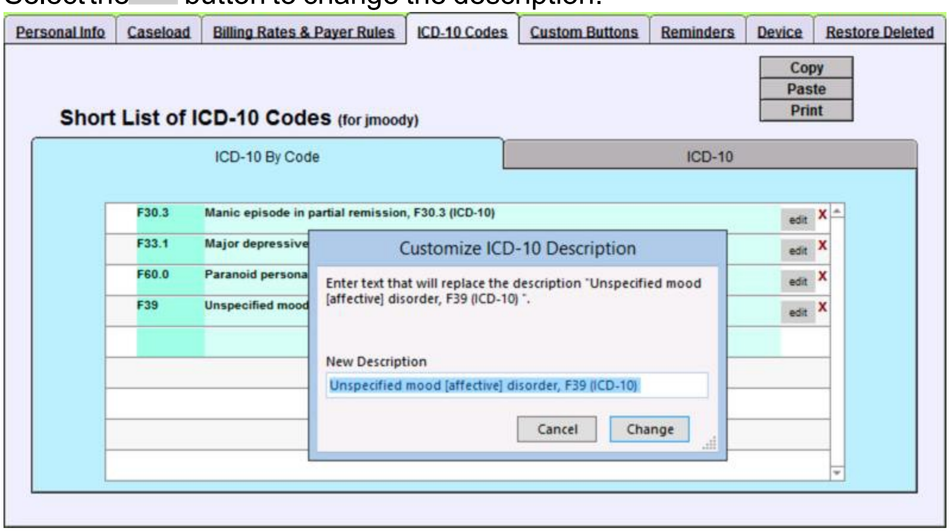


ICD-10 CODES

The **ICD-10 Codes** tab allows you to create a short list of ICD-10 Codes for the user. This list is used in the diagnosis fields of notes for a shorter list to choose from.

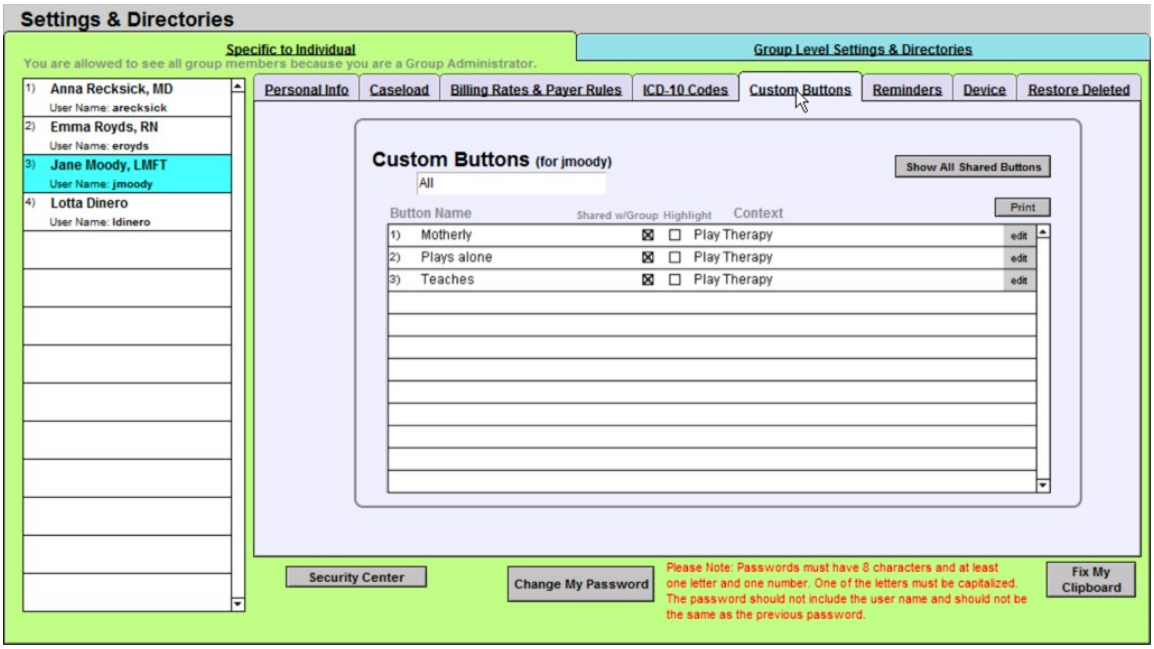


- To delete an ICD-10 code, just press the red **X** to the right of the code.
- Select **Copy** to copy the entire list.
- Select **Paste** to paste the previously onto this user.
- Select **Print** to print the entire list.
- Select the edit button to change the description.

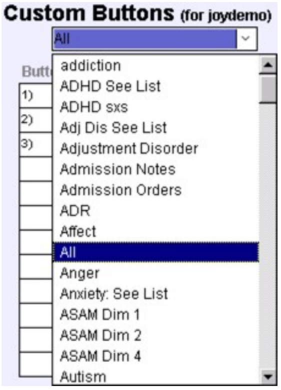


CUSTOM BUTTONS TAB

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 display 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 to a custom button on the list:

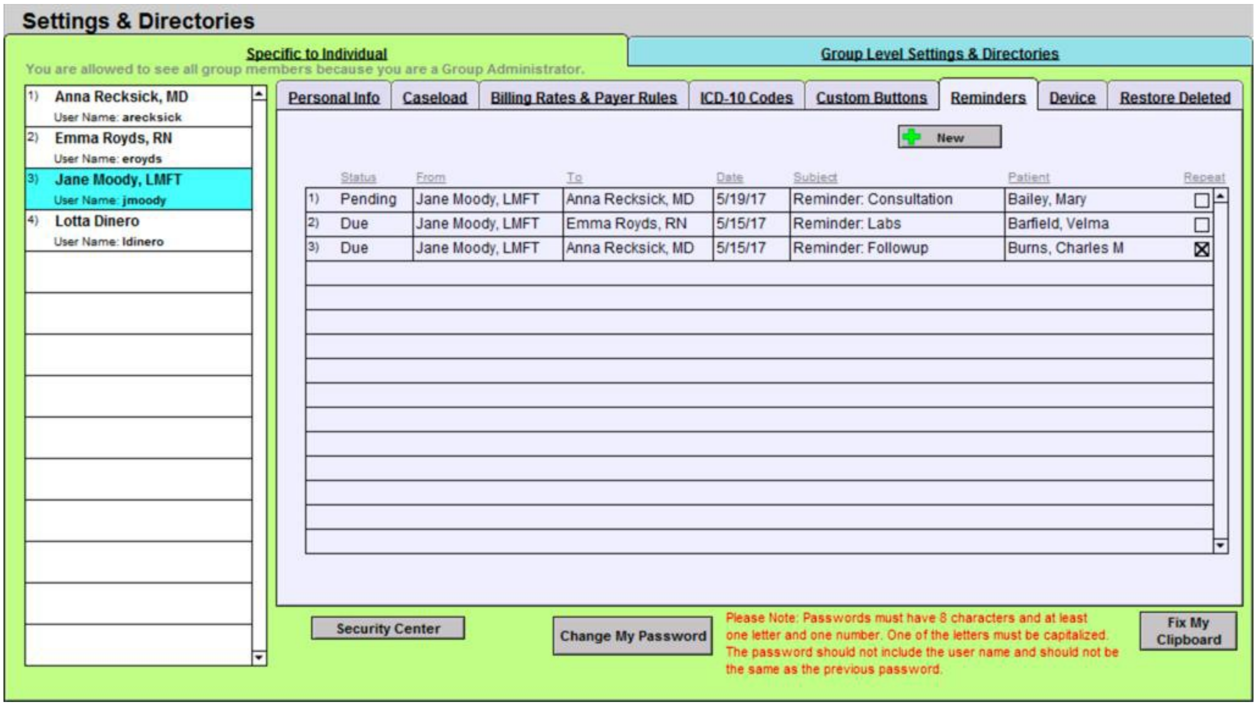
- By clicking the button next to a custom button, you can edit the name and content of a edit button, share it with specific users (or all users) in your group, or delete the button.

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

- 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.

Please click the button below to view a quick tutorial on how to use the **Custom Buttons** tab.

The **Reminders** tab 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 clicking the 

 button.
- This brings up a new window that allows you to select from four preset reminder types: Patient, Clinician, Staff, 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 this Patient?** Check yes or no.
  - If yes, click on the <Type Last Name to Select> field to select the 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. If you click on the icon, you will be able to open the patient's chart.

For a Staff Reminder:

- Follow the same steps listed above for a Clinician Reminder but select a staff member rather than a clinician as the recipient.

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 this Patient?** Select yes or no.
  - If yes, click on the <Type Last Name to Select> field to select the 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. If you click on the icon, you will be able to open the patient's chart.

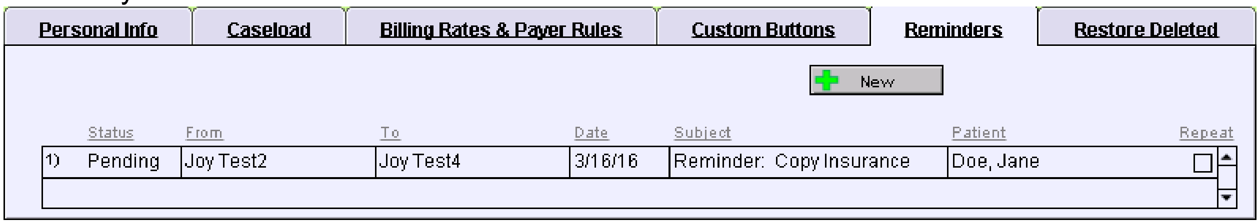
For AIMS Exam:

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

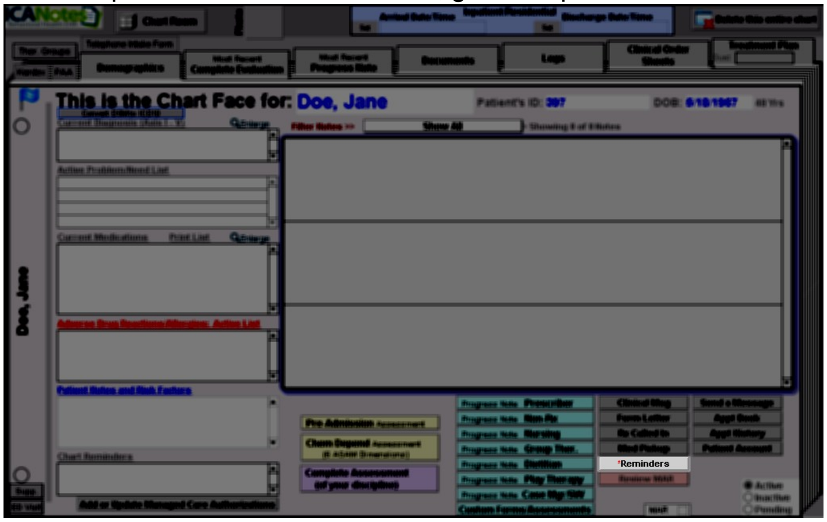
Once the reminder has been created:

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

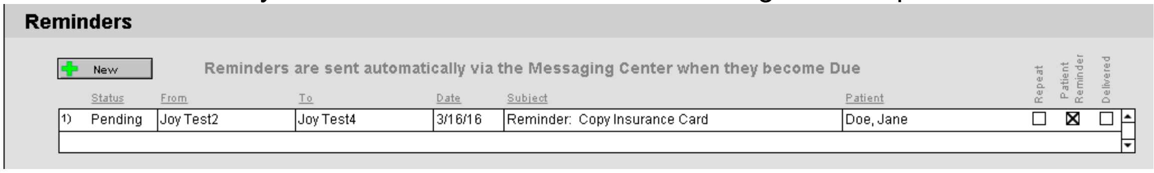
- The newly created reminder will show on the tab.



- After the patient has been contacted, go to the patient's Chart Face and click the ***Reminders** button.



- Select the reminder you wish to view and the reminder dialog box will open.

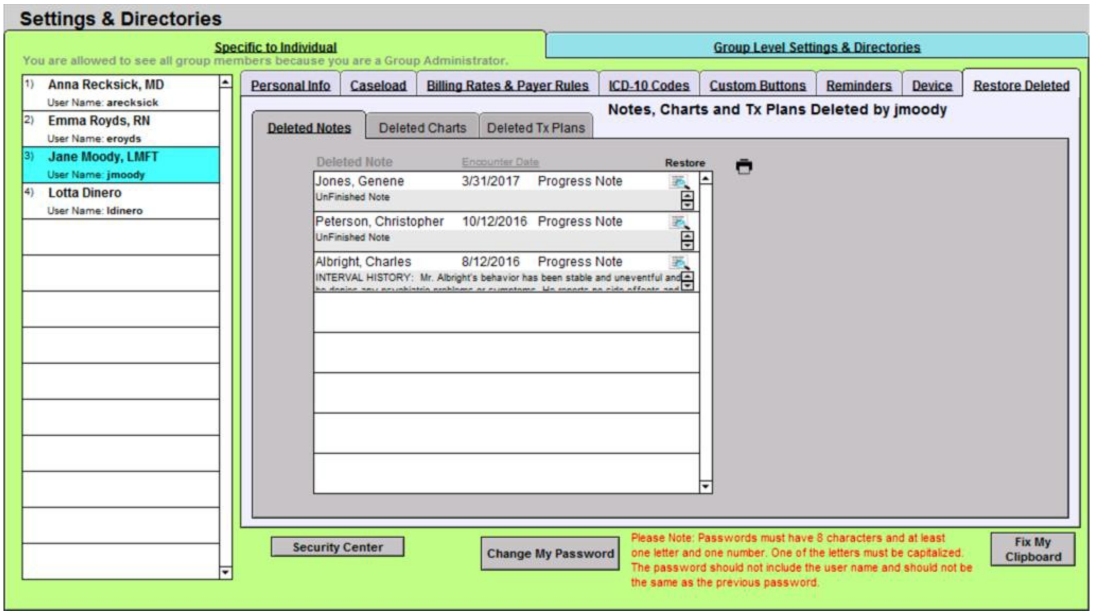


- Check the contacted box – today's date will populate. You can click the calendar icon to change the date if necessary. This checkbox is also available when accessing the reminder from the **Reminders** tab.

Please click the button below to view a quick tutorial on how to use the **Reminders** tab.

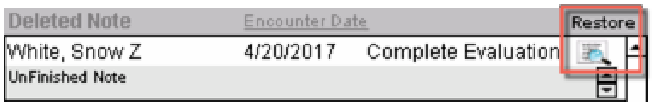
RESTORE DELETED TAB

The Restore Deleted tab feature is used to restore any notes or charts you may have deleted and now wish to have restored. All users have the ability to view those charts and notes that they have deleted personally; group administrators are able to review charts and notes that other users may have deleted. Deleted charts are listed on the left while deleted notes are listed on the right.



Note: Because deleted charts and notes are viewed by the user that took the delete action, it is necessary to know who deleted a chart or note in order to restore it. The permission to delete a chart or note may be granted or restricted within the **Security Center**.

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

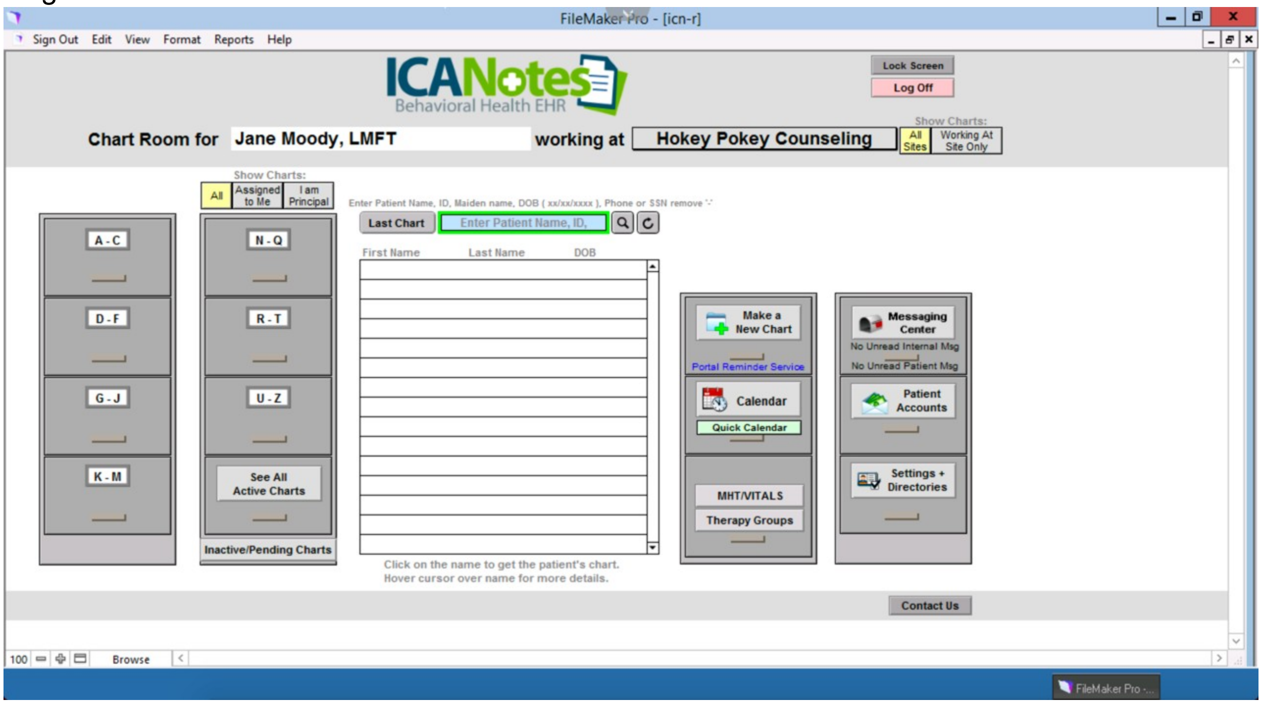


You can print a list of the Deleted Notes, Deleted Charts, or Deleted Tx Plans by clicking the icon.

Please click the button below to view a quick tutorial on how to use the **Restore Deleted** tab.

CREATING AND ACCESSING CHARTS

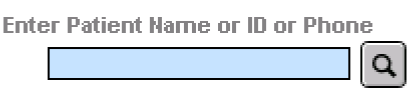
The opening screen in ICANotes is known as the Chart Room.



- Included in the Chart Room are two filing cabinets on the left where you will find patient charts organized alphabetically (A-C, D-F, etc.). After clicking in a particular drawer, the names of patient charts stored in that drawer will display in the middle of the screen in alphabetical order by last name. You can then scroll to the patient name whose chart you are looking for and click on the name to open the patient's chart.

- You may narrow the list to all charts, charts assigned to you, and charts that you are principal by clicking on the buttons shown below.

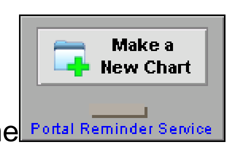
- You can search for a patient by name or ID by typing into the search field and hitting the  button.



- Hitting the 

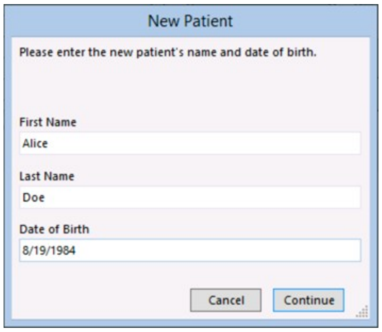
button takes you right to the last patient you visited during your current login session.

CREATING A NEW CHART

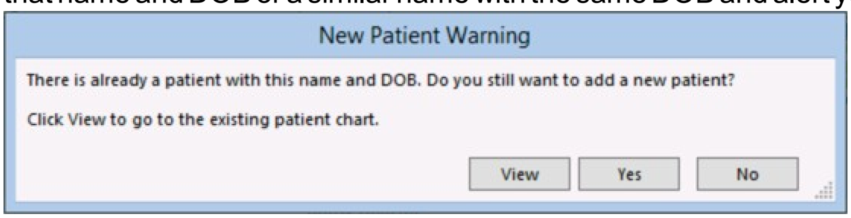
- Click on the 

drawer in the **Chart Room**.

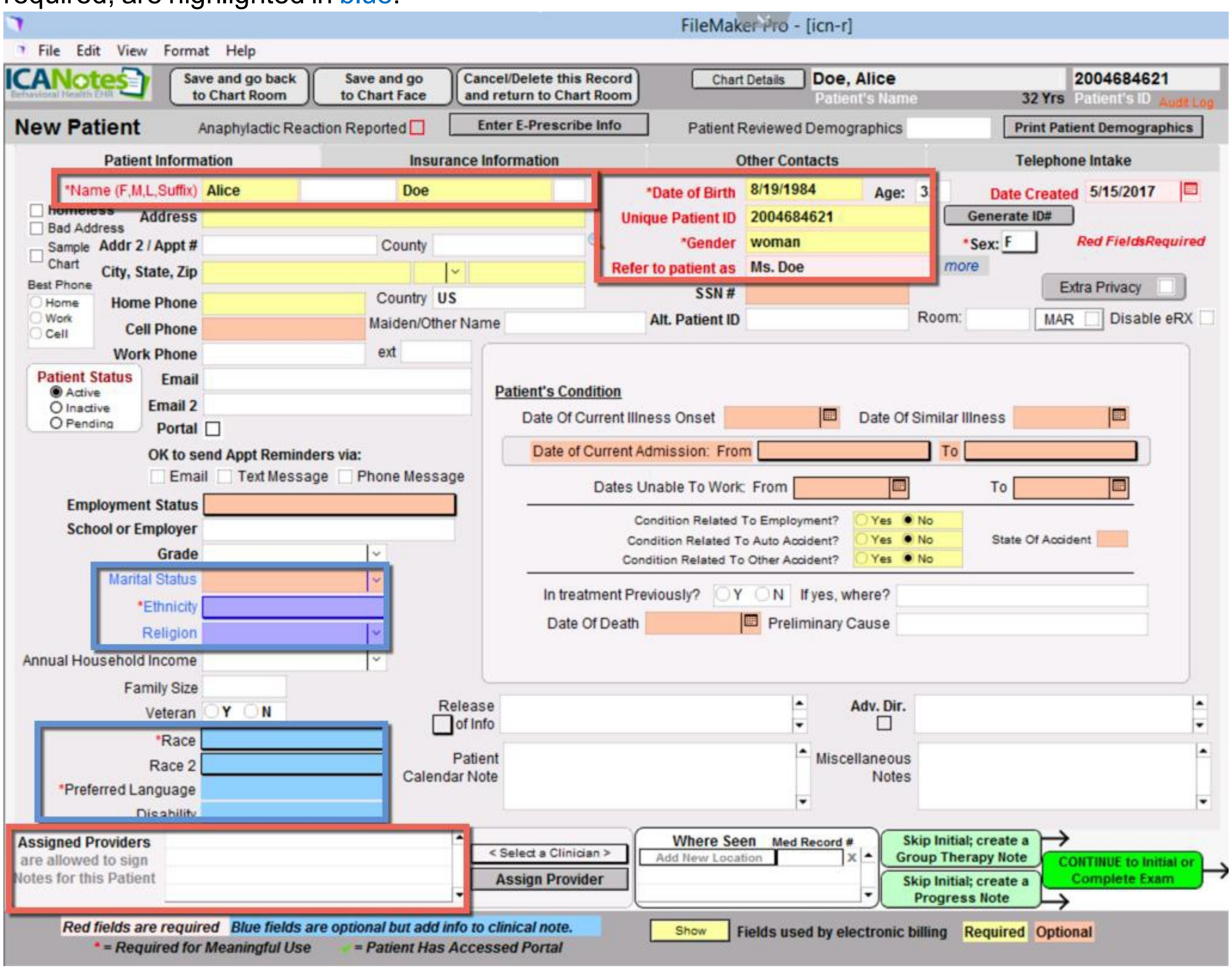
- A popup will appear requiring the patient's first name, last name, and date of birth.



- After populating these fields, click the Continue button. The program will check to see if a chart already exists with that name and DOB or a similar name with the same DOB and alert you to help prevent duplicate charts.



- If no similar patients currently exist within your account, the system will then bring you to the demographics portion of the patient chart. The required fields will be highlighted in red; those fields that are helpful, but not required, are highlighted in blue.

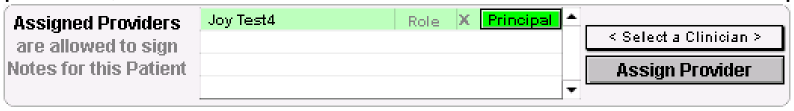


- Again, if you intend to use ICANotes for electronic billing purposes, clicking the Show button in the bottom middle for 'Fields used by electronic billing' will highlight those fields required for billing purposes in yellow and those fields that are optional in pink.

- If you will be utilizing the e-prescription feature of ICANotes, you will also need to fill out the Zip Code and Home Phone Number fields for the patient.

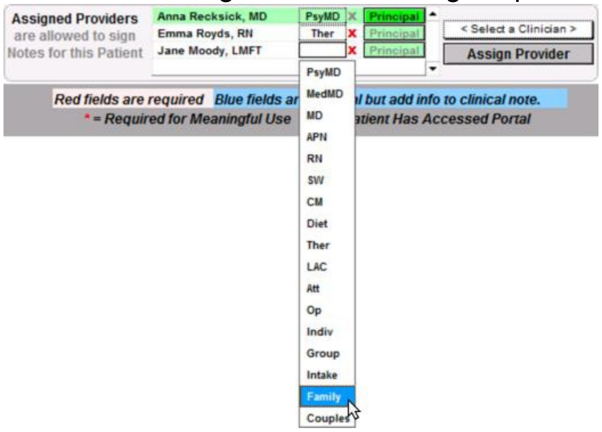
- If you are using the Patient Portal, you will need to populate the patient's email address and check Portal (contact the ICANotes Support team to turn on the Patient Portal or the ICANotes Sales team to turn on the Premium Patient Portal).

- You will need to assign a provider in the lower left-hand corner. To do this, click on the field above the Assign Provider button and choose a provider from the list that appears. After selecting the appropriate provider, click the Assign Provider button and confirm that the provider name appears on the left.



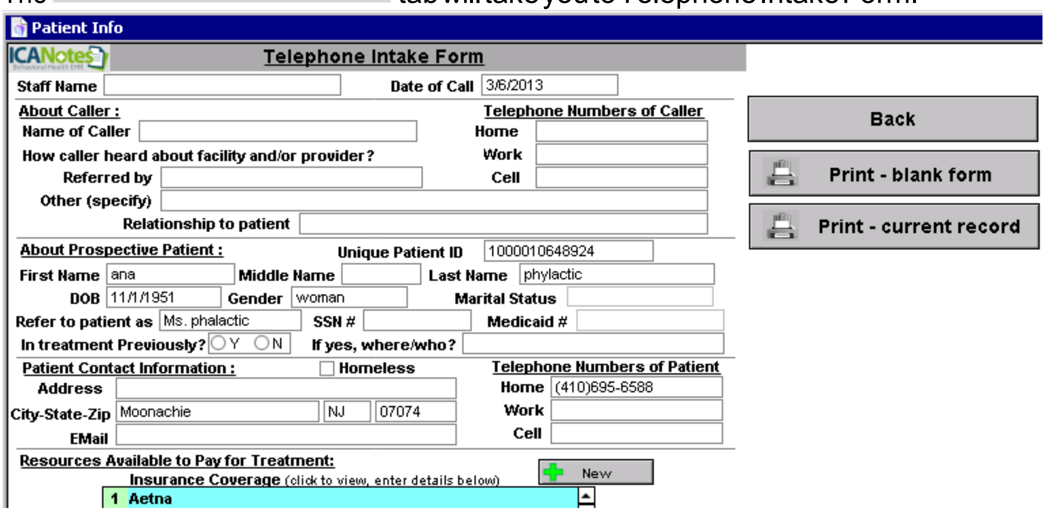
- The first assigned provider will be considered the principal provider and will be highlighted in green. You may assign other providers as needed and change the principal provider designation as appropriate by clicking the Principal button on any provider names that are not highlighted in green.

- You can also assign roles to the assigned providers by clicking into the middle column and selecting from the menu.



- Once you have the appropriate providers assigned to the patient chart, you have several options:

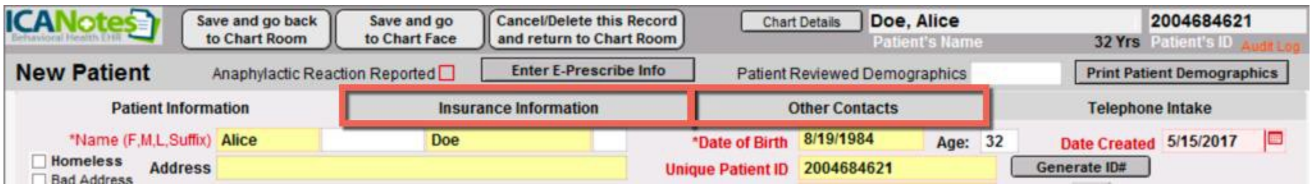
  - The Telephone Intake tab will take you to Telephone Intake Form.



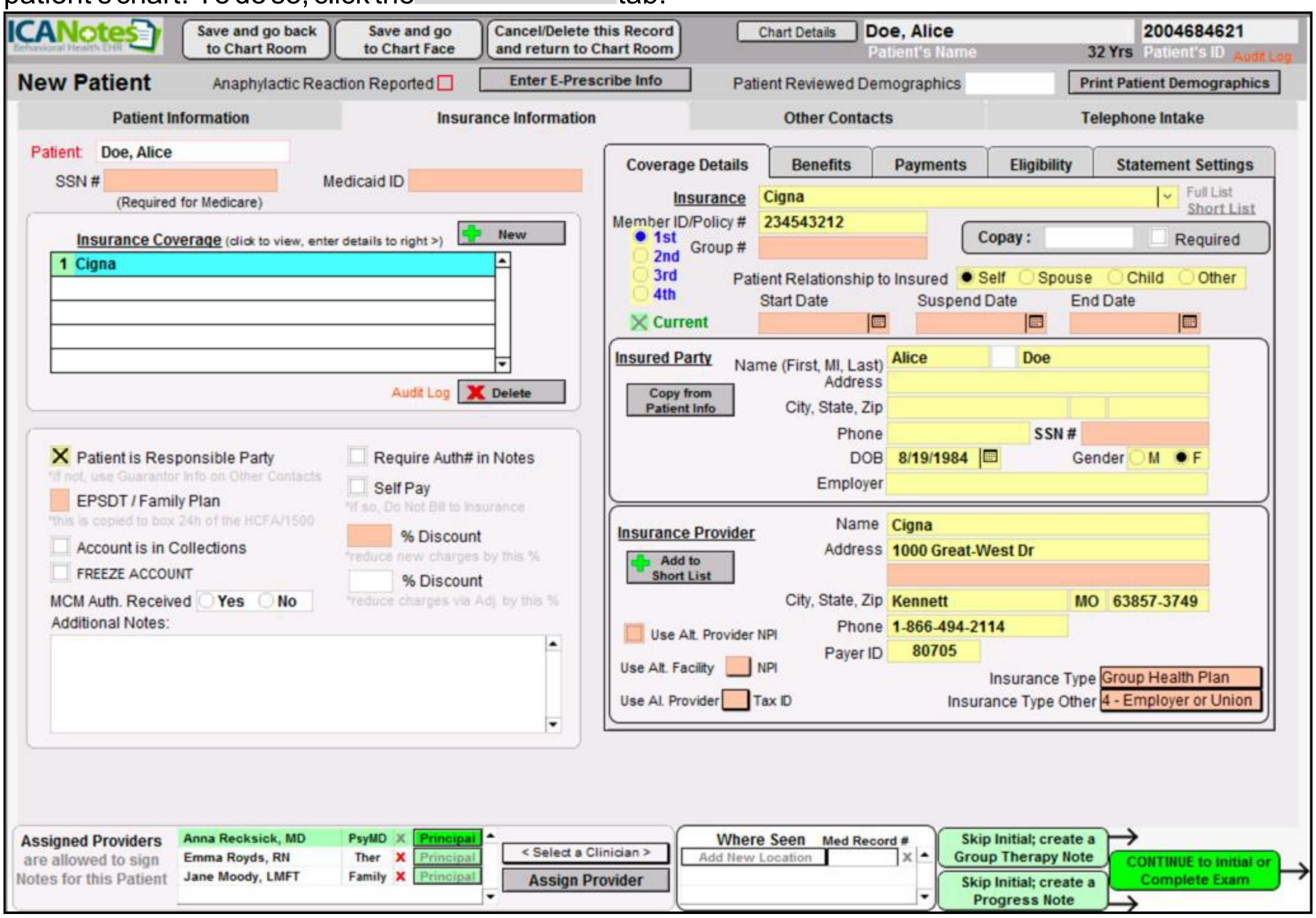
  - The Save and go back to Chart Room button will save the patient information and return you to the Chart Room.

- The [Save and go to Chart Face] button will save the patient information and return you to the Chart Face.
- The [Cancel/Delete this Record and return to Chart Room] button will not save the patient information and return you to the Chart Room.
- The [Skip Initial; create a Group Therapy Note] button will save the patient information and open a Group Therapy Note.
- The [Skip Initial; create a Progress Note] button will save the patient information and open a Progress Note.
- The [CONTINUE to Initial or Complete Exam] button will save the patient information open a Complete Assessment.

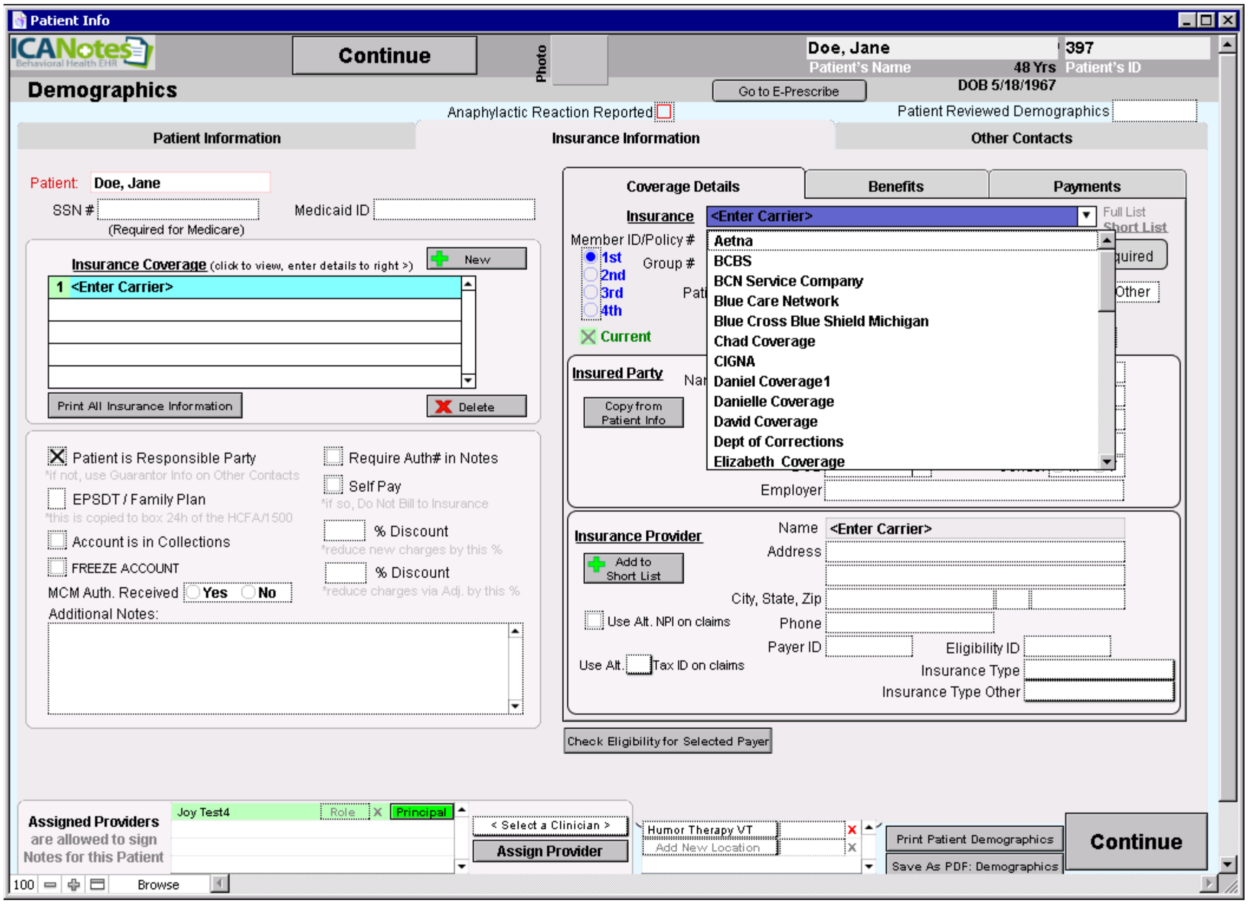
• Continue filling out information in the demographics portion of the chart, including insurance information and other contacts.



• If you will be using the billing portion of ICANotes, it is recommended that you add insurance information to the patient's chart. To do so, click the [Insurance Information] tab.



• Click the [New] button and choose the appropriate insurance carrier from the insurance list that appears on the right.



- Proceed to fill out the remaining insurance information. You may prefer to use the "Show Fields used by electronic billing" button at the bottom to highlight required fields in yellow.

- After entering the patient's demographic information, you are ready to begin charting on your patient.