

# QuickStartUserGuide



TSPlus ICANotes QuickStart User Guide

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#### CONTACTING ICANOTESSUPPORT

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: <u>Click here</u> 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 <u>sales@icanotes.com</u>.

#### CHANGES TO YOUR ACCOUNT

#### If you want to:

Add more users to your Group Remove users from your Group Add electronic signature to your account Add e-prescribing to your account Set up electronic billing via a clearinghouse Inquire about your ICANotes bill Set up credit card processing

#### Go to or Contact:

Knowledge Base Article Knowledge Base Article Knowledge Base Article ICANotes Website (at the bottom) ICANotes Website Partners Billing – 866-847-3590 or billing@icanotes.com ICANotes Website

#### LOGGING INTO ICANOTES

 Go to <u>https://ehr.icanotes.com</u> 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.
  - o GototheICANotes 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

User name:	jmoody
Password:	

 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.

FileMaker+rro - [icn-r]	- 0 ×
3 Sign Out Edit View Format Reports Help	_ 8 ×
Lock Screen Log Off	^
Chart Room for Jane Moody, LMFT working at Hokey Pokey Counseling	
Show Charts:         A signed line         I asigned	
Contact Us	
100 = 4 = Browse <	▼ i ≮
	Maker Pro

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

**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).

Name:	Virtual Printer (redirected 101	8) ~	Properties
Status: Type: Where:	Universal Printer Virtual Printer (redirected 101) Virtual Printer IE Edge (redirect Virtual Printer with Preview (redirected printer with Preview)	8) :te x 10 18) edirected 10 18)	
Comment			Print to file
Print rang <ul> <li>All</li> <li>Pages</li> </ul>	from: 1 to: 1	Copies Number of	copies: 1 ♀
umber pag	es from: 1		

Print		Hokey Pokey			
Total: 2 shee	Cancel Print	Counseling Power Counseling 1000 Saint Margarets Road Annapolis, MD 21409-5547 443-699-278 443-992-4239			
Destination	PDFwriter     Lisanet PDFwriter	Dr. Recksick's Header Name Page 1 of 2 Albright, Charles 8/12/2016 1D 20048/76557 DOB: 8/10/1933			
	Change	Progress Note			
Pages	All	INTERVAL HISTORY. Mr. Albright today dunies any psychiatic problems or symptoms. His behavior has been appropriate and uneventful. No side effects are described or evident. Problem Petrhent Review of Symptoms/Associated Signs and Symptoms. He specifically denies psycholic, depresses, or anxiety symptoms.			
	e.g. 1-5, 8, 11-13	EXAM Mood is authymic with no signs of depression or elevation. His speech reveals no abnormalities of rate, volume, or articulation and his singuage delis are intract. He convincingly denies suicidal dees. There are no associative or homicidal desor interforms. There are no agos to phychicito process. His behavior is not bazer and there are no indications that hallouinations or delusions are present. There are no agos of a thought disorder. Associations are intract, thereing the description of the dup delayed the researcher. Comparison to detain the automation are intact, thereing the comparison of delusions are present. There are no agos of a thought disorder. Associations are intact, thereing the comparison of delusions of delusions of the dup of the delayed the dup delayed the dup of the dup o	EXAM Mood is euthymic with no signs of depression or elevation. His speech reveals no abnormalities of rate, volume, or articulation and his language skills are indact. He convincingly denies suicidal ideas. There are no assautive or homicidal ideas of interions. There are no signs of psychotic process. His behavior is not bizare and there are no indications that hallucinations or delusions are present. There are no signs of a thought disorder. Associations are intact,		
Copies	1	Intendig's generary optics: and though content appropriate. Cognitive functioning, based on vocabuler, and note of homeologies, and the second secon			
		DIAGNOSES: The following Diagneses are based on currently available information and may change as additional information becomes available.			
Paper size	A4 👻	Major depressive disorder, recurrent, moderate, F33.1 (ICD-10) (Active)			
Scale	100	Start Lexapro 20 mg PO QAM # 30 (thirty) (Depression) Order given by Anna Redixid, MD on 8/12/2016 2.44.44 PM			
Options	Fit to page	Return 4 weeks, or earlier if needed.			
		99203 (Office / Out pt, New)			
Print using sy	vstem dialog (\て発P)	Anna Recksick, MD			
Open PDF in	Preview	Electronically Signed By: Anna Recksick, MD			
		On: 8/12/2016 2:48:14 PM			

- By clicking the Change... 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 Print 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.

	Print	×
Print:	Current record v	
Name Statu Type Whe	Universal Printer     Universal Printer     Virtual Printer (Metected 215)     Virtual Printer IE Edge (redirected 215)     Virtual Printer with Preview (redirected 215) are: CrWPC397:	Properties
Com	iment:	Print to file
A	range     Copies       All     Number       Pages from: 1     to: 1       1     1	er of copies: 1 ÷
Number	r pages from: 1	OK Cancel

Action complete - click to view PDF

- When this message 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.



Close the tab once the document has printed.



## CHANGING YOUR PASSWORD

From within ICANotes:



In the main ICAN otes Chart Room, click on the screen.

drawer in the lower right-hand corner of the

- Click on the Change My Password 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"

Password Change	
Current password:	
Confirm password:	

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 <u>https://upload.icanotes.com</u> or clicking the the log on screen.

   Welcome to ICANotes Documents
   Welcome to ICANotes LIC. It is for authorized or improper use of this system result in administrative disciplinary action and chill and criminal penalties. By continuing to use this system result in administrative disciplinary action and chill and criminal penalties. By continuing to use this system result in administrative disciplinary action and chill and criminal penalties. By continuing to use the conditions stated in this warning:
   Upload Site
   Upload Site
   Upload Site

   Username:
   Username:
   Username:
   Username:
   Username:

   Username:
   Username:
   Other States the result when your password has been reset.
   Other States the result when your password has been reset.
- 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.

Set up Security (	uestions and Answers
ICANotes now offers an online pa service, you will need to provide a below. Once you have saived this information at this time, you can c	ssword reset service for users who have forgotten their password. In order to take advantage of thi unique e-mail address that belongs ONLY to you as well as answers to three security questions nformation, you will need to log back in to the upload site. If you do not want to provide this lick cancel and go directly to your upload site.
	Please provide your email address and the answers to the following security questions.
Username:	
Email:	
Security Question 1:	1. What was your childhood nickname?
Answer:	
Security Question 2:	2. In what city did you meet your spouse/significant other?
Answer:	
Security Question 3:	3. What is the name of your favorite childhood friend?
Answer:	
	Save Cancel

• 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.

Security Question 1:	1. What was your childhood nickname?	•
Answer	1. What was your childhood nickname?	-
	<ol><li>In what city did you meet your spouse/significant other?</li></ol>	
Security Question 2:	3. What is the name of your favorite childhood friend?	
Answer:	<ol> <li>What street did you live on in third grade?</li> <li>What is your oldest sibling's birthday month and year?</li> </ol>	
Security Question 3:	6. What is the middle name of your oldest child?	
Answer:	<ol> <li>What is your oldest sibling s middle name?</li> <li>What school did you attend for sixth grade?</li> </ol>	
	9. What was your childhood phone number including area code?	
	10. What is your oldest cousin's first and last name?	
	12. In what city or town did your mother and father meet?	
	13 Where were you when you had your first kiss?	
	14. What is the first name of the boy or girl that you first kissed?	
	15. What was the last name of your third grade teacher?	
	16. In what city does your nearest sibling live?	
	17. What is your oldest brother's birthday month and year?	
	18. What is your maternal grandmother's maiden name?	
	19. In what city or town was your first job?	
	20. What is the name of the place your wedding reception was held?	*

• 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.

Username:	
Password <sup>*</sup>	
Eorgot Password?	
To begin, please enter your ICANotes usernan	ne and password.

• 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.

Username:		Or		
Email:				
Security Question:	Viii		•	
Answer:				_
Please	e provide the answer to y	our security question.		AN AND

• If successful, you will receive this message:

		1
You will receive an em	ail when your password	has been reset
		nas been teset.

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



• 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.

Welcome to ICANotes Documents
"Din is a private computer system and is the property of C.Absins 110. It is an adhesived one only situadihesived or improper one of this system may result is administration disciplinary action and colorand parallels. By confirming is one this system you tolk atta your assuments of and comment is these memory and conditions of one (CCCT INMECOATES I you do not agree to the conditions council is this exempt.
Source if cary hinding sugger trave by dome to if than it accure time accuracy to CANuthin man for bodied due to solverdided manehormers a
Username Pastword
Your password has been reset. Please wait couple minutes and enter your ICANotes username and password again.

**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 ICAN otes 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 Excelfile 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 <a href="https://upload.icanotes.com/filedrop/">https://upload.icanotes.com/filedrop/</a>. After you have uploaded your file via the secure Dropbox link, please send an email to <a href="https://upload.icanotes.com">ticket@icanotes.com</a> 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	canbeanyformataslongasitisunique
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 '<u>Group Level Settings & Directories</u>' 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.

- <complex-block><complex-block>
- 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.

u are allowed to see all on	Sper	cific to Individual	u are a Grou	p Administrator.			Group Level Se	attings & Directories				
Anna Recksick, MD	P	Personal Info	Caseload	Billing Rates & Paye	r Rules	CD-10 Code:	s Custom Butto	1. Group Level Settings & Directories				
User Name: arecksick Emma Royds, RN	-		Identity			Options		2. Show				
User Name: eroyds				Inne Manda LINET								
Jane Moody, LMFT			Name	Jane Moody, LMF1			Supervisor(s)	can edit notes owned by Jane Moody J MF				
User Name: jmoody		Nationa	I Provider ID	1831328104			Anna Recksi	ck. MD ×				
) Lotta Dinero	Alt. Nationa	Provider ID				Lotta Dinero	X					
User Name: Idinero	Medical Lice	nse Number					-					
			DEA Number	470756260	oxone Number		< Select a	Clinician > Assign Supervisor				
		Fe Fe	derai Tax Id	470750300	33	N EIN	Suparvisas/s	Jane Moody J MET can edit notes owned by				
		AIL #1 Fe	deral Tax Id		55	N EIN	these cliniciar	ns				
		AIL #2 Ft	roerar rax io		33	EIN		<u>•</u>				
		Taxo	onomy Code	(Moved to Payer								
		Bill Under	supervisor	Alles taby				•				
			Aedicaid ID #	4/0/5030931	_		_					
							CLIA #				Temporar	ily Switch User Type
								Email	јтооду@покеурокеу	.com		Counselo
				Initials	JM				For Gov't claims			
				Courseles			10.00	and the second				
		_					User Type	imoodu	Uner 10 4	06246	Accept	Assignment ves No
		3	user Name	Decumentation	User ID 1	00345	Rende	ering Status Sole Practitioner				
		Crown A	troup Name	Nos No				· Group Member				
		Group A	annustrator	= 105 NO								
			0			Please Not	e: Passwords must ha	ve 8 characters and at least Fix My				

#### 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:

	Eacility Info	Letterhead	Electronic Billing	Calendar Options
--	---------------	------------	--------------------	------------------

## FACILITY INFO TAB

- Under the Facility Info tab, you create a new site by clicking on the 📥 🔤 button.
- Abox 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.

Enter the name for this complete name in the l	location. You can enter a more etterhead.
NOTE: Once entered, t	he name cannot be modified.
Site Name:	
Site Name:	

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.

Specific to Indivi	dual	Group Level Settings for Site Str	Settings & Directories M. Rules and MAR have been moved under the More ta
tes/Letterheads Service/Mod Codes Lab Reg Protocol	s Meds Protocols Provider Directory Insur Payers	Therapy Groups Formats MCM Auth,	Accounts Patient Portal Calendar Integrations Mo
Anne Arundel Medical Center	Facility Info	Letterhead	Electronic Billing
Hokey Pokey Counseling	+ New	Default Billing	
Uisable	Site Name*		
	(or abbreviation - for location & letter	head lists)	
	Site Type	vilia	
	NOTE: Your notes will print differently	for in/out patient facilities.	
	NPI for Facility 2		
	Alternate #1 NPI for Facility		
	Alternate #2 NPI for Facility		
	Facility Other ID 5		
	Place Of Service Code		1 Site Type
			2. NPI
	Facility Name		3. Alternate #1 NPI
	Address Line 1		<ol> <li>Alternate #2 NPI</li> </ol>
	Address Line 2	and the second	5. Facility Other ID
			6. Place of Service Code
	City	State Zip (9-digits)	7. Facility Name
•	Phone 9 Fax	( 10	8. Address

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.

Eacility Info	Letterhead	Electronic Billing
Enter letterhead informa automatically be include menu above to select for changed at any time	tion below. Do not enter your Name. It will d where appropriate. You may use the Format nt, style, size etc. Your text may be edited or	
Address:	Hokey Pokey Counseling 1600 Saint Margarets Road Annapolis, MD 21409-5547	
Telephone and Fax: Use Facility Phone / Fax	443-569-8778 443-992-4239	
	Hokey Pokey Counseling 1600 Saint Margarets Road Annapolis, MD 21409-5547 443-569-84778 443-992-4739	

• 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.

		Address:	Hokey Po 1600 Sain	okey Counseling		
EllaMateria	- lien.el	Use Facility Address	Annapoli	Cut		
* Sign Out Edit View Format Reports Help	- found			Copy		
ICANotes Eont				Paste		
Settings & Direc Style 8		Telephone and Fax:	4	Font	•	
Align Text 9	Group Level Settings & Directories		4	Size	•	
Line Spacing 10	estings for Site Staff. Rules and MAR have been moved under the More tab	Use Facility Phone / Fax		Style	•	Plain Text
In the second state of the second state o	INTER RESIDUE RESIDUE LANCELINE SERVICE RESERVED FOR			Text Color	•	Bold
Hospital // P Marvice         Datability           7         News / News / Consenting         18           0 Miles / Out pt service         Statute         24           0 Miles / Out pt service         Statute         24           0 Miles / Out pt service         Statute         24           24         Price and the end of the service with a service with a service of the service with a service of the serv	d <u>Dectronic Diling</u>		Hokey + 1600 Sa Annapol 44 44	Chart by Adm_Letterhead_ overy counsening in Margarets Road is, MD 21409-5547 33-569-8778 33-992-4239	Selected::address	Italie <sup>L</sup> S Underline Double Underline Condense Extend Stri <u>k</u> eout S <u>m</u> all Caps
Use Facility Phone / Fax		Fields used by electronic	billing Required			Highlight
Holter Polary Counselin 1000 Sant Magarets Ro Annapolis, MD 21409-55 443-929-4239	d 7					UPPERC <u>A</u> SE Iowercase <u>T</u> itle Case
						<u>S</u> uperscript Subsc <u>r</u> ipt

## 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 button.

CANOTES Chart Room			
Settings & Directories			
Specific to Indiv	idual	Group Level Se	ettings & Directories
Sites/Letterheads Service/Mod Codes Lab Reg Protoco	Is Meds Protocols Provider Directory Insur P	avers Therapy Groups Formats MCM Auth, A	counts Patient Portal Calendar Integrations More
Anne Arundel Medical Center     Anne Arundel Medical Center     Disable	Facility Info	Letterhead	Electronic Billing
2) Hokey Pokey Counseling Office / Out pt service Disable	Click the Use Facility Address the electronic billing informat to 3 lines of up to 26 characte second line.	s button to copy the site address, then edi tion below so that it will fit when formatted ers each, with no punctuation in the	t 1
	Use Facility Address Hokey Po	okey Counseling Int Margarets Road	
	Annapoli Service Facility Address	ls, MD 21409	
	HOKEY PO LAON SAL	DKEY COUNSELING DKEY COUNSELING INI MARGARETS ROAD IS, MD 21409	
	Billing Address for this Service Facility:	Pay To Address for this Service Facility:	
	Hokey Pokey Counseling ~ HOKEY POKEY COUNSELING 1600 SAINT MARGARETS ROAD ANNAPOLIS, MD 21409	Hokey Pokey Counseling ~ Hokey Pokey Counseling 1600 SAINT MARGARETS ROAD ANNAPOLIS, MD 21409	
V	Billing NPI 1306919782		

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.

Settings & Directories												
Speci	ific to	Individu	al					Group Leve	el Settings & D	Directo	ories.	
								Settings for Site :	Staff, Rules and	MAR h	ave been moved under the l	More tab
Sites/Letterheads Service/Mod Codes Lab	Reg P	rotocols	Meds Proto	cols Pro	vider	r Directory In	sur Payers The	rapy Groups Formats MCM Aut	h. Accounts P	atient	Portal Calendar Integration	ns More
Service Code Short List	le froi	m the lis	don-Billable		1	Revenue Type your or	Codes wn code into ti	ne last row		<b>Мо</b> Туре	difier Code Short	List st row
00000 No Show(Late Cancel	~	Nevende	N N	/ ¥ •	J [	Room & Bo	ard			25	Use E/M+PSYTX	XA
00000 non-billable	~	<u> </u>		Ŷ	11	Code	Rate	Description		A	Primary Physician	X
1036F Non tobacco User	~	<u> </u>		Ŷ		00005	\$200.00	Daily Room/Board		G	T Telehealth	X
12345 SUBAXONE SELF PAY \$300	~	i		X		Code	Rate	Description		U	3 Clinician Admin Rx	X
55555 Provider Training	~	i		X	Г	0126	\$900.00	Inpatient Detox	X			
90785 Interactive Complexity	~	i		X		0914		Outpatient Psychiatric	X			
90791 Psych Diagnostic Interview	~	i		X		0905	\$400.00	IOP Daily, MH	X			
90792 Psychiatric Diagnostic Interview	· ~	i		X		0906	\$800.00	IOP Daily, CD	X			
90834 Psychotherapy 45 min.	~	i		X		0944	\$500.00	Drug Rehab	X			
90837 Psychotherapy 60 min.	~	0914		X		0945	\$500.00	ETOH Rehab	X			
90846 FAM PSYTX W/O PATIENT	~	0916		X		0916	\$200.00	Family Therapy	X			
90847 FAM PSYTX W/PATIENT	~	0916		X		0915	\$100.00	Group Therapy	X			
90853 Group psychotherapy	~	0915		X		906	\$80.00	CD Treatment, Hourly	X			
90862 Medication Management	~			X		0906	\$250.00	CD Tx, Per Diem	X			
90867 TMS, Initial	~	1		/ X								
90868 TMS, Subsequent	~			/ X								
96101 psychological testing, Licensed	~			X								
96118 Neuropsychological testing,	~			X	- [				•			•

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.

Type in a new o down arrow to	sustom Service Code (or cancel and press the select a standard Service Code).
5-Digit Service	Code (required):
Descriptive Tex	t (optional):

**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.

Code	Rate	Description	
			X

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**.

Description	
	х

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.

	Specific to Indiv	dual							Grou	up Level Settings 8	Directories	1	
								-1.	Settings	for Site Staff, Rules an	id MAR have b	een moved und	der the Mo
Le	tterheads Service/Mod Codes Lab Reg Protoco	s <u>Me</u>	ds	Prote	ocols	s Provider Dire	ctory Insu	Payers Therapy Groups	Formats M	ICM Auth, Accounts	Patient Porta	<u>Calendar</u> Int	egrations
	Order Protocols	v		Г			_					-	
			Protocol Name 10ssi			tocol Name 🧲	ssion:	(Solutions)		Delete	Save P	Save Protocol	
	Admission: (Solutions)			-		Test Orde	Ordered Frequency:			Times X		Diagnosis	
	Admission: (Dr. Smith)			2	F			3		4	5		
	Chest X Ray			T	6	Fasting		Request Type	7 Lab	Olmaging OE	EG		
_	Denakote Level	-		1	Reas	son / Indication				<u>.</u>		9	
_		_		8					Ľ		Ľ	🛃 Sar	ve Test
	FAKE LAB PROTOCOL			-		Test Ordered		Frequency:		Times X		Diagnosis	Delete
	FBS			10	(	CBC & Differer	itial	Routine		Once			
		-		L	ab		Reason	<u>/Indication</u> (Admissior	)				×
	Lithium Level			2)	(	Comprehensiv	e Metabol	ic Routine		Once			
				L	ab		Reason	/Indication (Admission	)				×
_		-		3)	1	TSH		Routine		Once			
				L	ab		Reason	<u>/Indication</u> (Admission	)				×
				4)		T-4		Routine		Once			
_		_		l	ab		Reason	<u>/Indication</u> (Admission	)				×
				5	ł	HGC		Routine		Once			
				L	ab		Reason	Indication (Admission	)				x
		_		6)	I	UDS		Routine		Once			
		L					Reason	(Indication (Admission	i)				×

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



## 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.

Sett	ings & Directories									
	Specific to Individual				]		Group Level Settin	ngs & Directories		
							Settings for Site Staff, Ru	les and MAR have bee	in moved under	the More
tes/Le	tterheads Service/Mod Codes Lab Reg Protocols Me	ds Proto	cols Provider I	<u>Directory</u> Insu	r Payers Therap	ov Groups Fo	rmats MCM Auth, Acco	unts Patient Portal	Calendar Integr	ations M
Me	dication Protocol List 💷 New								14	
1)	Admission Orders		Protocol Nam	e <u>Unission</u>	Orders			Delete	🛃 Save Prot	locol
21		Me	edications	Edit Drug List	7					
ſ´	Admission PRNs	Di	irection	Me	dicine		Dose Route Qt	y Timing		
3)	Ativan PRN (CIWA)	2	to Dispense	3 Refills	x Davs	noses (	4 5	6		
4)	Ativan Taper	7		8	9 1				12-	
5)	Celexa Taper		Direction		Madiaina		Doop	Pouto Otu	Timing	Save
6)	Common Cold (OD)	13	Start		Brozec		20 mg	Roule Gity	CAM	Delete
		1	Start	Refille	y Dave	v Doses	Comm/Reason De	nreesion	Scenario -	×
7)	Medrol Dose Pack	2)	Start	1150002	Ambien	<u></u>	5 ma	PO	OHS PRN	-
8)	Multiple Meds (OP)	#		<u>Refills</u>	<u>× Davs</u>	× Doses	Comm/Reason			×
9)		3)	Start		Ativan		0.25 mg	PO	q 4 hr PRN	
	Remeron Protocol	#		<u>Refills</u>	<u>× Days</u>	$\times \text{Doses}$	<u>Comm/Reason</u> Ag	itation		×
10)	SSI: Regular Insulin	4)	Start		Antabus	e	250 mg.	PO	QAM	
11)		#		<u>Refills</u>	× D avs	$\times \text{Doses}$	Comm/Reason ET	OH Deterrent		×
<u> </u>	Standing Orders: (w / instructions)	5)	Start		Zyprexa		2.5 mg	PO	QAM	
12)	STAT Ativan	#		<u>Refills</u>	<u>× D avs</u>	× Doses	Comm/Reason Ps	ychotic Features		X
13)	TB: Aplisol									

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



#### 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 <u>Export</u> button, you may export this directory if you ever need to print it or send it electronically.

	Specific to Individual					Group Lev	el Settings	& Directories			
						Settings for Site	Staff, Rules a	nd MAR have be	en moved	under the M	ore ta
tes/Le	atterheads Service/Mod Codes Lab Reg Protocols Me	ds Protocols	Provider Di	rectory Insur Payer	s Therapy Groups	Formats MCM Aut	h. Accounts	Patient Portal	Calendar	Integrations	E Mo
Ext	ernal Provider List										
	hu Causialta I.a Dalanta Oranialta								_		
VIEUU	by speciality: < Select a Speciality >	+	lew .			Save		Export			
42)	Mary Jones 4	•				Cance	1				
						Delete					
43)	Mary Winters					U Delete					
44)	Miller MD, Joshua		Name	Sandy Crowley							
	Miller MD, Joshda		nume	buildy crowley							
K5)	Ms. Jones, Freda		Address	1600 St. Margaret	IS Rd						
	80700-1009 100-0100			Annapons, ND 2	1409						
46)	Nalini Prasad										
47)	P14-114	16	lephone	866-847-3590							
47)	Ride Aid		Fax	443-992-4239							
48)	Robert Kennerly I DC		Email								
	LPC		Panalatha	Group Thoropy							
49)	Smith, Carlos MD		specially	Group merapy							
		Di	rections								
50)	Susan Chang, DDS										
51)	Suean Johnson MD	-							Manually	marked as	2
.,	Nerology								verified.	markeu as	1
52)	Walgreens - Dallas St, Houson, TX		NPI #						5/1/2017	10:18:20 A	AM
									by joyder	no	
i3)	Walter Haynes, MD		Other #								
	Primany Care Physician	-		to at Otra and a star	and the address in the second						

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



## 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 <u>New</u> 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 <u>Personal</u> <u>Info/Identity tabs</u>) 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.

Settin	igs & Directories											
	Spec	ific to Individual					Group Level 9	Settings & Directories				
					Settings for Site Staff, Rules and MAR have been moved under the More							
Sites/Letter	rheads Service/Mod Codes Lab	Reg Protocols Med	Is Protocols Provide	er Directory In	nsur Payers T	herapy Groups Fo	mats MCM Auth.	Accounts Patient Portal Calendar Integrations More				
				_			0					
Ins	surance Payer Sho	rt List	New New				📶 Save	Cancel Delete Export				
			You are now	editing BCB	S of ICANote	es.		Payer ANSI/NUCC Options				
1) A	BCDEF Insurance of AZ	<u> </u>	Any change	s will overwri	ite this Paye	er.		Desta stissed In stitution at				
A	Ζ	888-789-7894	Name	BS of ICAI	Notes							
2) A	dminOne			2 Box 1000	0.7004			Exclude Amount Paid on CMS 1500				
T.	X	800-555-5789	Address	BUX 1999	9-7034			Lend As Group Member				
раў <b>д</b>	etha CT #1							Va able TaxID Length				
4) 0	∧ otna NV #2	000-000-0040	City, State Zip	<sup>3</sup> hapolis		MD 1	2345-7894	Sena Contact Name in Submitter Loop				
1 n		555,555,5545	Telephone	41-879-789	7	Fax		Send A Submitter ID in Header				
5) A	MERIGROUP				h Dian			Always Clude Payer Name in Subscriber Loop				
U U	T	123-456-7890	Insurance Type	5 pup Health	n Plan			Remove Pave Name from Subscriber Loop				
6) A	merihealth LA		Type (Other)	Blue Cros	ss/Blue Shie	ld		Include Medica, ID in Payer None Loop				
L	A	800-000-0000	Paver ID	7 08	1	Remittance II	0	Always Send Reidering Provider Loop				
7) A	nthem BCBS							Exclude Rendering rovide Loop				
G	A	1-800-ANTHEM	Eligibility ID		Ins	titutional Payer II	D	Exclude Rendering Me caid ID				
8) B	CBS of AL		Notes				-	Always Send Servic / Fa tilty Loop				
A	L	1-800-BLUEMAN						Send Taxonomy de in Sevice Facility Loop				
9) B	CBS of ICANotes							Always Accept Assignment				
M	1D	800-879-7897						Always Reject Assignment				
10) B	CBS of LA							Send as E vilty for Unicensed Providers				
	A	800-879-7897						Send as racility for All Providers				
110 B	CBS OF MA	000 070 7007					-	Exclude COB Data for Unlicensed Provers				
12) D	CDS of Maine (DO Doy 111)	000-878-7887		<b>6</b>	an ata Danis			Use Aling Provider NPI for Rendering Provider				
	(FO BUX 111)	999-555-5555	-	Use Alte	ernate Provid	Der NPI on Claims	5	Explude Other Kendering Provider				
	184		1	Use Alte	ernate Facilit	y NPI on Clairns		Add Supplemental Info to Service Loop				
				🕘 Use Alte	ernate Tax ID	on Claims		Exclude Referring Provider Loop				

- 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.



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.

	Specific	c to Individual				Group L Settings for S	evel Settings &	& Directories and MAR have bee	n moved (	under the More ta
tes/Le	tterheads Service/Mod Codes Lab Re	eq Protocols M	eds Protocols Provider Din	otory Insur Payers	Therapy Groups	Formats MCM	Auth. Accounts	Patient Portal (	Calendar	Integrations Mor
Thera	amy Groups 📥 New	Print All Groups	Therapy Grou		Group Rosters					
F	liter	Edit Delete	Group Sessions			Delete				
1)	Focus Group (Dana Monday AM)	/ × -				1				
2)	Focus Therapy	Print X				_				
3)	Group A	/ X								
4)	Harriet's Focus Group (Mon AM)					•				
5)	IOP: Group A	/ X	Group Members			Remove				
6)	IOP: Group B	X								
7)	IOP: Group C	/ X	L							
8)	Janina's 11am Coping Skills Group	/ X								
9)	Janina's Adolescent Meds Group Wed 8pm	Print								
10)	Janina's Focus Group / Monday Mornings	Print								
11)	Janina's Substance Abuse Mondays 8am	Print	< Select a	d to Select >	Add Pati	ent				
12)	Jennifer Group at Ridge	/ X	- ocidera							

- Click on the <u>sew</u> 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.

	Specif	ic to l	ndivid	ual		Group Level Settings & Directories						
							Setting	ings for Site Staff, Rules and MAR have been moved	under the More ta			
es/Le	tterneads Service/Mod Lodes Lab H	(eq Pri	tocois	Me	ds Protocols Provider Directory Insur	Pavers Therapy Groups	Formats	ts MCM Auth, Accounts Patient Portal Lalendar	integrations Mo			
				_	Therapy Groups	Group Rosters						
Grou	p Rosters 🕂 New				Group Roster Members							
		Edit	Delete	-			Remove	ve				
1)	Comforts Anger MGMNT Group	/	×	H			^	<ul> <li>When a patient is removed from a G you will have the option to remove the</li> </ul>	loup Roster			
2)	Courtney's Roster	1	×					patient from every group to which th	ey belong.			
		-						-				
5)	James Male Process Group	/	×					-				
Ð	L Group Patients	1	×									
		-						-				
5)	LIZ'S GROUP	/	×									
5)	Monica's Patients	1	X									
	Deale IOD Bester		~									
0	Rae's IOP Roster	/	×									
0	Rae's Roster	1	х									
								1				
			_									
							-	<b>*</b>				

• Enter a Group Roster Name. Click the **Done** button to create the group roster.



• Find your patient by clicking the Lten button. With the Find Patient window, locate the patient and click the patient's name.

8	a	me, and/or ID [se	5 Patients Found (25 Total)	Find	
	Press Return to Find Patient Name	DOB	City, State Zip	Patient ID#	Status
1	L) Akira Albright	8/21/1985	Springfield, VT 05156	2004684329	ACTIVE
2	2) Charles Albright	8/10/1933	Amarillo, TX	2004676557	ACTIVE
3	3) Rodney Alcala	8/23/1943	San Antonio, TX 78201	2004676558	ACTIVE
4	+) Alfred Gaynor	11/17/1967	Springfield, MA 01101	2004676563	ACTIVE
5	5) <u>Aileen Wuornos</u>	2/29/1956	Rochester, NY 14604	2004676573	ACTIVE
	E Pravera (				

- With the patient's name in the field, click the Add Patient button.
   Add Patient
   Add Patient
- 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.

Settings &	Directories								
	Specific to Indivi	lual				Group	Level Settings	& Directories	
<u>Sites/Letterheads</u> Si	ervice/Mod Codes Lab Reg Protocol	<u>Pavers</u>	Therapy Groups	Settings for Formats MC	r Site Staff, Rules a <u>M Auth.</u> <u>Accounts</u>	nd MAR have been moved Patient Portal Calendar	Integrations More		
E	Finished Notes Font Grou and Printing Styles Group Preferences Si	p ICANotesDen nt <u>Arial</u> e	10 (default Arial (default 12 if	l if blank) blank)					
	Note Style	e Bold Italic Uppercase	(overrides de	efault form	atting)				
	Header Sty (ex: "Medical History	e X Bold ") Italic X Uppercase X Underline Highlight	(overrides de	efault form	atting)				

- 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.



#### MCM AUTHORIZATION 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.

		Specific to	Individual					Gro	up Level S	Settings	& Directo	cies.	ad under the Me
attarbasde San	ice/Mod Codes	e Jah Reg P	rotocols Made Protocols	Provider Directory	Incur Pave	are Tharar	or Groups	Formate 1	MCM Arth	Account	Patient P	ortal Calery	tar Integrations
etterneaus <u>serv</u>	ice/mod codes	s Lap neg r	Meds Protocors	Provider birectory	Insur Faye	as Tuerat	iý Gloups	Formats	MCM Adun.	Accounts	e <u>rauent r</u>	ortai <u>Caren</u>	ar integrations
Default A	lert Recipien	.t						Sort b	y Exp. Date		Print	Export	
	Show Only:	At Thres	hold 🗌 Non-Expired		ve d Alert J	[	Sessions	1	T	<u>Units</u>		1	
		Issued	Authorization #	Expires	A cti Sen Msg	Authorized	Used	Remaining	Authorized	Used	Remaining		
Acker, L	z	6/6/2014	12345610	1/21/2015		10	0	10				edit 📤	
Acker, L	z	1/8/2013	36356	3/8/2013		10	0	10				edit	
Acker, L	z	3/2/2012	123456	9/2/2012		10	1	9				edit	
Adams,	Annie 9	3/19/2016	IOP	9/29/2016		10	1	9				edit	
Adams,	Annie 7	//12/2016	777777777	8/5/2016	$\boxtimes$	10	0	10				edit	
Adams,	Annie 3	3/16/2016	123456	7/31/2016	$\boxtimes$	10	6	4				edit	
Alban, J	ane	7/7/2016	1234	11/17/2016	$\boxtimes$	10	0	10				edit	
Alban, J	# 6	5/17/2014	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	
Appletre	<del>e, Lori</del>	3/1/2015	IAMIRISH	12/31/2015		20	3	17				edit	
Bell, Blu	e		123456		$\boxtimes$							edit	
Brady, J	an e	5/17/2014	9995599	12/31/2014		10	1	9				edit	
Brown, /	tinn .	4/1/2014	123456789	12/1/2014		10	1	9				edit	
Bunny, I	<del>aster</del> 4	4/23/2015	JJ68465216	5/8/2015		15	1	14		_		edit	
Cally, Jo	hn	8/1/2016	TUESDAY	10/31/2016		10	0	10				edit	
Cally, Jo	hn	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	
Cassan	es, 1	2/1/2016	4884484	3/1/2017	$\boxtimes$	12	1	11				edit	
Cheeks	Rosey 4	1/25/2016	589752685	12/1/2016	$\boxtimes$	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 <u>Export</u> 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.



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.





- **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. ICANotesQuickStartUserGuide|ToContactSupport: 443-569-8778

- 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 belete the entry highlighted.



• The toggle switch for Patient/Insurance is on the farright 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 autoposted 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).

tings & Directories			
Specific to Individual	vider Directory Insur	Group J Settings for S Pavers Therapy Groups Formats MCM	Level Settings & Directories Site Staff, Rules and MAR have been moved under the Mor 1 Auth. Accounts Patient Portal Calendar Integrations
Codes		Statemen	t Settings Options
			Account Default Batch Default
Account Default Account default statement own unique statement setti	settings options ngs.	are applied to all patients who o	to not have their Save
Add the text "Please pay Balance Due within 30 days from Statement Date"     Generate Chronologically Regardless Of Clinician	⊠ Include ( ⊠ Include I □ Include S	Credit Card Payment Info Next Appointment Date Signature Lines	Show Clinicians'
Hide Charge Amounts	Show Ac	count Aging	Recipient Address
<ul> <li>Hide Dates of Birth</li> <li>Hide Description</li> <li>Hide Insurance Payments</li> <li>Hide Payment Details</li> <li>Hide Total Balances</li> </ul>	<ul> <li>Show Ba</li> <li>Show Dia</li> <li>Show Ins</li> <li>Show La</li> <li>Show Pa</li> </ul>	lance Forward agnoses surance Balance st Payment Date/Amount tient Balance	Patient     Guarantor 1     Guarantor 2     Primary Insured     Secondary Insured     Other
Statement Note:			

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 <u>ticket@icanotes.com</u> 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.

Settings & Directories						
Specific to Individual			Group Level S	ettings & Directories	1	
			Settings for Site Staf	ff, Rules and MAR have b	een moved under the M	lore tab
Sites/Letterneads Service/Mod Codes Lab Ked Protocols Meds	Protocols Provider Directory Insur	Pavers Therapy Groups	Formats MCM Auth.	Accounts Patient Portal	<u>Calendar</u> Integration	s More
Site Staff	MAB			Miscellaneous Rules	2	
Contact ICANotes Support at (443) 569-8778 if you v	vant this feature turned on					
Filter by Site     Filter by Clinicia     Nursing Home     Select a Clin     PSYCHIATRIC CLINIC     Rae Morris, (MD)	n iician > Print	Assign Clinicians t then when in Char Pick a Site	o Sites where they s Room the Clinician Site > 6 7 Assign St	see patients, will only Find patients <b>Pick a Clinician</b> < Select a Clinician aff	s seen at those site:	S.

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 ICAN otes, 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.

Settings & Directories													
Specific to Individ	ual						Gro	oup Level	Settings &	Directories			
							Setting	for Site St	aff, Rules ar	nd MAR have be	en moved	under the Mo	re tab
Sites/Letterheads Service/Mod Codes Lab Reg Protocols	Meds Protocols	Pro	vider Direct	ory <u>Insur Pa</u>	<u>vers T</u>	herapy Groups	Formats	MCM Auth.	Accounts	Patient Portal	<u>Calendar</u>	Integrations	More
Site Staff				MAR					Misc	ellaneous Rules			
		, chan	visiotor Mo	disations									
	ssign nines to r	sum	IIIIIstei Me	uications -									
M	edication Timing			A	dminis	ter At:							
	OAM		1	2	3	4	5	-					
	OPM		2200			_	+	-17					
	QEM	÷.	2200				+						
l -	Dally Dally	÷.	0000				+						
	Every Other Day	Ť	0900				+						
	QHS	Ť	2200				+						
	at Hour of Sleep	Ť	2200	4000			+						
	BID	Ť	0900	1000	220		+						
		Ť	0900	1000	470	0 2400	+						
	QID	Ň	0900	1300	1/0	0 2100							
L –	every 8 hrs	×	0600	1400	220	0							
		×				_							
		×				_							
		×				_							
		~				_							
L		×						-					
													_

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

## MISCELLANEOUS RULES TAB

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

Settings & Directories						
Specific to Individual		Group Level Settings 8 Settings for Site Staff, Rules an	<mark>A Directories</mark> Id MAR have be	en moved	under the N	fore tab
tes/Letterheads Service/Mod Codes Lab Reg Protocols Meds	Protocols Provider Directory Insur Payers Therapy Groups	Formats MCM Auth, Accounts	Patient Portal	<u>Calendar</u>	Integration	is Mor
Site Staff	MAR	Miso	ellaneous Rules			
🛛 Check if Note is Claim-Ready 🛛 🕜	Clinical Reminder Rules	Latenc	<u>y Units</u>	<u>Role</u>	Delete	
	Initial Psychiatric Exam	72	Hours	PsyMD		
🛛 Fasting Labs by Default 🕜	Initial Nursing Exam	24	Hours	RN	X	
	Initial Social Worker Exam	72	Hours	Ther		
	Initial TP	72	Hours	Ther		
	Followup TP	90	Days	Ther	X	
Duration Values for Billing Service Combos					X	
0.5 hour 1.25 hours 3 hours 38-52 min 15 min med check 60 min 30 min 45 min 90 min 1 hour 3 hours 2 HOURS						

- 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 <u>ticket@icanotes.com</u> to request that this feature be enabled for your group.

Clinical Reminder Rules	<u>Latency</u>	<u>Units</u>	<u>Role</u>	Delete	2
Initial TP	24	Hours	Principal	X	•
Initial Psychiatric Exam	24	Hours	Ther	X	
Initial Psychiatric Exam	1	Days	PsyMD	X	
Followup TP	1	Days	Principal	<b>X</b>	
Initial Psychiatric Exam				<b>X</b>	
				X	Ŧ

# 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.

u are allowed to see all group	Specific to Individual	u are a Grou	p Administrator.			Group Level Sett	ings & Director	ries	
Anna Recksick, MD	Personal Info	Caseload	Billing Rates & Payer Rule	s ICI	D-10 Codes	Custom Buttons	Reminders	Device	Restore Delet
User Name: arecksick Emma Royds, RN		Identity			Options	The second se	Ca	alendar Opt	tions
User Name: eroyds		Harris	Jana Moody LMET		1		-		
Jane Moody, LMFT		Name	Jane Moody, LMF1			Supervisor(s)	an edit notes o	wned by J	ine Moody, I MF
User Name: jmoody	All Nationa	Dravider ID	1031320104			Anna Recksick	K, MD		×
Lotta Dinero	Alt. Nationa	I Provider ID				Lotta Dinero			x
User Name: Idinero	Medical Lice	nse number	C. berry M						•
		DEA NUMBER	ATOTEC2CO	CCM	CINI	< Select a C	linician >	Assign S	upervisor
	-	deral Tax Id	4/0/30300	221	CIN	Supervisee(s)	ane Moody, I M	IFT can edit	notes owned
	AIL #1 FC	deral Tax Id		S S M	EIN	these clinicians	and moday, cm	n roun oun	moteo ennea i
	Tan	Code	an and the Design		C Lin	Anna Recksick	k, MD		Ĥ
	Pill Under	Supervises	(Moved to Payer Rules tab)						<u> </u>
	Bill Under	Supervisor	47076636034						•
	-     '	CLIA #	41013030331			Temporarih	Switch Hear T		
		Email	imoody@hokeynokey.com			Counselor	Switch User 1	ype	1
	-1 - 1	Initiale	IM						
		minuara				ſ	For Gov't cl	aims	
		liser Type	Counselor			Accept An	signment	lon No	
		liser Name	imoody liser	ID 106	345	AcceptAs	signment • 1	les Ono	
		Group Name	Documentation	10 100	1040	Renderi	ng Status	Sole Practi	tioner
	Group Ar	Iministrator	e Yes No				• 6	stoup men	iber
	Group A		- 100 _ 110						

\*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.



# **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.

are allowed to see all gr	Sper	tific to Individual	u are a Grou	p Adminis	trator.				Group Level Sett	ings & Directo	ries	
Anna Recksick, MD	Ĥ	Personal Info	Caseload	Billing R	Rates & P	ayer Rules	ICD	10 Codes	Custom Buttons	Reminders	Device	Restore De
User Name: arecksick Emma Royds, RN	-1		Identity	6				Options	Ĩ	C	alendar Opt	ions
User Name: eroyds			Hama	Iano Mor	ody LME	r						
Jane Moody, LMFT		Nationa	I Provider ID	1931329	104				Supervisor(s) c	an edit notes o	wned by Ja	ne Moody, LN
User Name: jmoody		Alt Nationa	I Provider ID	1031320	104				Anna Recksick	, MD		×
Lotta Dinero		Medical Licer	nse Number						Lotta Dinero			×
user warne. Jumero		incurcur Lice	DFA Number			Suboxone Num	er					•
		Fe	deral Tax Id	4707563	60	(C)	SN	FIN	< Select a C	linician >	Assign Si	upervisor
		Alt, #1 Fe	ederal Tax Id				SN	EIN	Supervisee(s) J	ane Moody, LN	AFT can edit	notes owned
		Alt. #2 Fe	ederal Tax Id			1.3	SN	EIN	these clinicians			
		Taxo	onomy Code	(Move	d to Pave	AT.			Anna Recksick	, MD		
		Bill Under	Supervisor	Rul	les tab)							
		8	Aedicaid ID #	4707563	6931				· · · · · · · · · · · · · · · · · · ·			
	-1		CLIA #						Temporarily	Switch User T	ype	
			Email	jmoody@	hokeypo	key.com			2 Counselor		200	)
			Initials	JM					-			
									3	For Gov't cl	laims	
			User Type	Counselo	or				Accept As	signment 🔍	Yes No	
			User Name	jmoody		User ID	1063	45	Renderi	ng Status	Sole Practit	ioner
			Group Name	Documen	ntation					• (	Group Mem	ber
		Group Ad	dministrator	• Yes	No							
		4			1		1	Please Note:	Passwords must have	8 characters an	d at least	5 Fix N
		Security	Center		Chang	e My Passwe	brd	one letter and	one number. One of t	he letters must b	e capitalized.	Clipbo
	-				-		_	the same as t	he previous password	e user name and 1	a should not t	
		_										

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**.

Progress Note, non-Rx	Progress Note
Case Mgmt/SW Rx	Case Mgmt/SW Note
Group Therapy	Group Therapy Note
Nursing	Nursing Note
Play Therapy	Play Therapy Note
Treatment Plan	Treatment Plan

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.

Default for Con when Changin	nplete Assessment or g Note Title:	
Type (CE Only)	Complete Evaluation	
Discipline	Psychiatrist	

- 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 check box 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.

Settings & Director	Sper	ific to Individual					Group Level Sett	ings & Director	ries	
1) Anna Recksick, MD User Name: arecksick	up men	Personal Info	Caseload	Billing Rates & Pa	yer Rules	ICD-10 Codes	Custom Buttons	Reminders	Device	Restore Delete
2) Emma Royds, RN User Name: eroyds 3) Jane Moody, LMFT User Name: imoody 4) Lotta Dinero User Name: Idinero		G Jane G Jane Q B Hoke U	Identity Signatur Moody, LMFT Electron Moody, LMFT Finished Default Site y Pokey Cour Ise Custom R	e At End Of Note	÷5	Options Options a Options in Options in Level o Options in Level o Options in Level o Options in Level o Options in Level o Options in Include Me Include Me I	tt Logon: Reminder Sheet   na Note: of Care Writes to: O H when Compiling Not no Support Rules   lucation Material   Nedical History () tes/Risk Factors () ude Medications () ude Medications () unt Card Enabled   or AutoPosts   Dietoin Enabled	Ca Show listory Instruc les: Show Diagn Show Usan (show (show (show) (sh	etions etions e Military Ti Omit Axe	hm Show: me Yes
		(Relative (Relative Ignore D	zone Ea to GMT) Ce 5 MG 93 IST Yes Center	stern: -5 intral: -6 Show C ountain: -7 icific: -8 Change	lock at sta w Clock N My Passw	rtup? Ves ww Please Note: one letter and The passwor the same as t	Passwords must have ione number. One of i d should not include th the previous passworn	Default Note 1 ault Note Type 8 a 6 characters annihe letters must be the letters must be the user name and d.	Titles & Discipline d at least e capitalized should not	e Fix My Clipboard

## 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.

u are allowed to see all or	Specific to Individua	1 vou are a Grout	Administrator.			Group Level Sett	ings & Director	ies	
Anna Recksick, MD	Personal Info	Caseload	Billing Rates &	& Payer Rules	ICD-10 Codes	Custom Buttons	Reminders	Device	Restore Deleted
Emma Royds, RN User Name: eroyds	The followin Jane Moody	ig patients hav /, LMFT	e been assigne	d to	The f	ollowing clinicians c pht, Akira	an sign notes f	or	
Jane Moody, LMFT	1) Albrigh	nt, Akira	8/21/1985	2004684329	▲ Jane	Moody, LMFT		Х	Principal
User Name: jmoody	2) Albrigh	nt, Charles	8/10/1933	2004676557					
User Name: Idinero	3) Alcala	Rodney	8/23/1943	2004676558					
THE REPORT OF	4) Bouvie	er, Jacqueline	10/10/1925	2004684330					
	5) Dahm	er, Jeffrey	5/21/1960	2004676561					
	6) Jones	Genene	7/13/1950	2004676564					
	7) Keyes	, Israel	1/7/1978	2004676565					
	8) Masor	n, David	12/2/1956	2004676566					
	9) Nelso	n, Earle	1/13/1928	2004676567					
	10) Peters	on, Christophe	er 1/20/1969	2004676568					
	11) Richar	ds, Stephen	1/15/1957	2004676569					
	12) Rifkin,	Joel	1/20/1959	2004676570					
	13) Simps	on, Homer	2/28/1968	2004684328					
	14) Winter	s, Shirley	2/27/1958	2004676572					
	15) Wuorn	ios, Aileen	2/29/1956	2004676573					
	Print	Show On	v Inactive Charts ly if User is Princip	al		Assign Provider	< Select	a Clinician	>
	Securi	ty Center	Cha	nge My Passwo	Please Note one letter an The passwo	Passwords must have d one number. One of the	8 characters and he letters must be te user name and	d at least capitalized should not i	Fix My Clipboard

- 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.



#### 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.

ou are allowed to see all gro	Spec	ific to Individual bers because you are a Group	Administrator.			Group Lev	el Setti	ngs & Direct	tories		
Anna Recksick, MD	P	Personal Info Caseload	Billing Rates & Payer Rule	s K	D-10 Cod	es Custom Bu	ittons	Reminders	E Device	Restore	Delete
Emma Royds, RN     User Name: eroyds		Billing Rate	s	Pro	vider Pay	er Rules		Billir	ng Service C	Combos	
) Jane Moody, LMFT User Name: jmoody									_	Copy Paste	
User Name: Idinero		Full List St Select servio	tes for Services (f hort List ces provided	or jmo	ody)					Print	
		00000 non-billable	Code	+/-	lodifier	+/- Insura	ance Pa	yer En	\$0.00	X	
		36410 Blood Draw	~					~	\$35.00	X	
		80304 Drug Screen	v					~	\$65.00	X	
		90833 Psychotherapy	30 min. with EM services ~					~	\$125.00	X	
		90836 Psychotherapy	45 min. with EM services ~					~	\$150.00	X	
		90838 Psychotherapy	60 min. with EM services ~					~	\$175.00	X	
		90885 Review of Rec	ords 🗸					~	\$25.00	X	
		90887 Meeting/Confe	rence					~	\$37.50	X	
		90889 Report Prepara	ation	1				~	\$25.00	X	
		96372 Injection	~					~	\$50.00	X-	
		Security Center	Change My Pass	sword	Please N one lette The pas	ote: Passwords mu r and one number: 1 sword should not in	ust have i One of th iclude the	8 characters a le letters must e user name a	and at least be capitalized nd should not	t. Fib be	c My board

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



# **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. ICANotes QuickStart User Guide | To Contact Support: 443-569-8778

- 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 <u>Copy</u> 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.

nal Info Caseload Billing Rates & Payer R	ules	i L	D-10	Code	es (	Custom Buttons	Remin	ders	Device	Restore [
Billing Rates		Pro	vider	Paye	er Rule	S		Billing	Service C	ombos
Billing Rates for Services	(fo	or jmo	ody)						F	Copy Paste Print
Full List <u>Short List</u> Select services provided										
Procedure Code	_	+/-	lodif	ier		+/- Insurance	Payer	Ent	er billing ra	ite
00000 non-billable	~							~	\$0.00	X
36410 Blood Draw	~							~	\$35.00	X
80304 Drug Screen	~							~	\$65.00	X
90833 Psychotherapy 30 min. with EM service:	s ~							~	\$125.00	X
90836 Psychotherapy 45 min. with EM service:	s ~							~	\$150.00	X
90838 Psychotherapy 60 min. with EM service:	s ~							~	\$175.00	X
90885 Review of Records	~							~	\$25.00	X
90887 Meeting/Conference	~							~	\$37.50	X
90889 Report Preparation	~							~	\$25.00	X
96372 Injection	~							~	\$50.00	X -
	_						1	_		

# 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.

		Billing Service Comb	<u>05</u>
			Copy Paste Print
e N	lodif	ier Bill Under Supervisor	
		Jane Moody, LMFT	X
			X
	HF	Anna Recksick, MD	X
			X
		Modif	Modifier Bill Under Supervisor     Jane Moody, LMFT     HF Anna Recksick, MD

#### 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.

Se	ttings & Directori	es								
Yo	uses allowed to see all grou	Spe	cific to Individual	u are a Grou	n Administrator		Group Level Setti	ngs & Director	ries	
1)	Anna Recksick, MD User Name: arecksick	-	Personal Info	Caseload	Billing Rates & Payer Rules	ICD-10 Codes	Custom Buttons	Reminders	Device	Restore Deleted
2)	Emma Royds, RN User Name: eroyds								Copy Paste	e
3)	Jane Moody, LMFT User Name: jmoody		Short	List of I	CD-10 Codes (for jmoor	ly)			Print	
4)	Lotta Dinero User Name: Idinero				ICD-10 By Code	Ľ		ICD-10		
				F30.3	Manic episode in partial remission	n, F30.3 (ICD-10)			edit	x
				F33.1	Major depressive disorder, recur	ent, moderate, F33.	1 (ICD-10)		edit	x
				F60.0	Paranoid personality disorder, F60	).0 (ICD-10)			edit	x
				F39	Unspecified mood [affective] disor	der, F39 (ICD-10)			edit	x
		$\exists$	-							
			-							
		$\exists$								Ŧ
		-1								
L		-	Security	Center	Change My Passw	Please Note: one letter and The passwo the same as	Passwords must have d one number. One of the rd should not include the the previous password	8 characters and he letters must be e user name and l.	d at least e capitalized. should not be	Fix My Clipboard

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

Shor	t List of	ICD-10 Code	S (for jmood	ly)		ICD-10		
	F30.3	Manic episode in p	artial remission	n, F30.3 (ICD-10)			edit	X
	F33.1	Major depressive	(	Customize ICD	-10 Description	-	edit	x
	F60.0	Paranoid persona	Enter text that	at will replace the o	lescription "Unspecifi	ed mood	edit	x
	F39	Unspecified mood	[affective] dis	order, F39 (ICD-10			edit	x
-			New Descript	tion				_
-			Unspecified	mood [affective] d	sorder, F39 (ICD-10)	-		
-					Cancel Chi	ange		

#### 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.

Settings & Directories	Settings & Directories											
Spe	cific to Individual				Group Level Setti	ngs & Directori	es					
You are allowed to see all group me	mbers because yo	u are a Group	Administrator.									
1) Anna Recksick, MD	Personal Info	Caseload	Billing Rates & Payer Rules	ICD-10 Codes	Custon Buttons	Reminders	Device Re	estore Deleted				
2) Fmma Royds, RN					- 0							
User Name: eroyds												
3) Jane Moody, LMFT		Custom	Buttons (for jmoody)			Show All	Shared Buttons					
User Name: jmoody		All						-				
4) Lotta Dinero		Button N	ame Shared w/	Froun Highlight	Context		Print					
User Name: Idinero		1) Mot	herly	🛛 🗆 Play Th	erapy		edit	a				
		2) Play	/s alone	B D Play Th	erapy		edit					
		3) Tea	ches	D Play Th	erapy		edit					
				<b>u u v v v v v v v v v v</b>								
								- j				
	L		201	Diesse Note: I	Pasewords must have	8 characters and	at least					
	Security	Center	Change My Passw	one letter and	one number. One of th	ne letters must be	capitalized.	Clipboard				
-				The passwor	d should not include th	e user name and	should not be					
				the same as t	me previous password							

• 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:

Button Name	Shared w/Group Highlight Context	
1) Motherly	🛛 🖾 Play Therapy	edit 📤

- 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 <u>Show All Shared Buttons</u> in the upper righthand 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.

		Spe	cific to Individual					Group Level Settin	gs & Directo	ries	
ou	are allowed to see all gro	up men	bers because y	ou are a Grou	p Administrat	or.		r í			) 
	Anna Recksick, MD	Ê	Personal Info	Caseload	Billing Rate	s & Payer Rules	ICD-10 Codes	E Custom Buttons	Reminders	Device	Restore Deleted
	Emma Royds, RN User Name: eroyds							🛉 N	ew		
	Jane Moody, LMFT		Status	From		To	Date	Subject	Pat	ient	Repeat
	User Name: jmoody		1) Pendin	ig Jane Mo	ody, LMFT	Anna Recksick, MD	5/19/17	Reminder: Consultatio	n Ba	ley, Mary	
	Lotta Dinero		2) Due	Jane Mod	ody, LMFT	Emma Royds, RN	5/15/17	Reminder: Labs	Ba	field, Velma	
	User Name: Idinero	-1	3) Due	Jane Mo	ody, LMFT	Anna Recksick, MD	5/15/17	Reminder: Followup	Bu	ns, Charles	M 🛛
-											
_											

- You may start a new reminder by clicking the 🛨 New 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.

Pers	onal Info	Caseload	Billing Rates & Payer	Rules	Custom Buttons	Reminders	Restore Deleted
						2014	
						ew	
	<u>Status</u>	From	<u>To</u>	<u>Date</u>	Subject	Patient	<u>Repeat</u>
1)	Pending	Joy Test2	Joy Test4	3/16/16	Reminder: Copy Insur	ance Doe, Jane	
							•

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

	CLOCAT Charleson	Andred Baller To		a Bala Time	Culture this entire dia
Res G	Ada Demographics Complete Evaluation	Hud facart Date	umonto Logo	Classed Grear Shoulds	Transitionent Plan
	This is the Chart Face for	Doe, Jane	Patient's ID: 397	008: 618	1967 All Yes
	Autor Prohims Need Lad		a na anna an		2
a, Jane	Current Medications Point Lint Galinerge				
8	Adverse Brus Reaction Adversion Adverse List				
	Chart formendars	Pre-Administra researcent Chem Segand researcent It alter Depend researcent	Program Inte President Program Inte Nation Program Inte Nation Program Inte Cesto Nation Program Inte Cesto Nation	Clinical King Frank Letter Re Calles In Kinst Palmo *Reminders	nd a Ulessage Aggi Book Aggi Ulatery dent Account
three the	Add on Spiddle Manageri Care Authorizations	Complete Assessment (of your discipline)	Programe Note: Play Therapy Programe Note: Case May Silv Contom Forms Assessments	Resident With	Active Inactive Pending

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

Rei	min	ders								
	+	New	Reminders	are sent automati	ically via 1	the Messaging Center when they become D	ue	beat	rtient minder	ivered
		<u>Status</u>	From	<u>To</u>	<u>Date</u>	Subject	Patient	E E	P B	Del
	1)	Pending	Joy Test2	Joy Test4	3/16/16	Reminder: Copy Insurance Card	Doe, Jane		X	
						·				Ţ

• 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.

🛛 Patient Reminder	Contacted Date 3/10/2016
--------------------	--------------------------

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.

You	are allowed to see all gr	Spec	ific to Indivi	idual ise you	are a Grou	p Adminis	trator.		Group Level Sett	ings & Director	ties	10
1)	Anna Recksick, MD	-	Personal	Info	Caseload	Billing R	ates & Payer Rule	ICD-10 Codes	Custom Buttons	Reminders	Device	Restore Delete
2)	User Name: arecksick Emma Royds, RN User Name: eroyds		Deleted Notes Delete		ed Charts	Deleted Tx Plans	Notes, Char	arts and Tx Plans Deleted by jmoody				
3) Jane Moody, LMFT User Name: jmoody				Delete	ed Note	Er	icounter Date	Rest				
User Name: jmoody Lotta Dinero				Jones UnFinist	, Genene hed Note	3/	31/2017 Progres	s Note 🛛 😹	<b>-</b>			
	User Name: Idinero			Peters	son, Christ hed Note	opher 10	0/12/2016 Progres	s Note 😹				
-				Albrigh	ht, Charles	8/	12/2016 Progres	s Note 🛛 🛣				
				INCOME DOM:	AL LICTORY	Ale Albeight	a babattas bas bass stal	in and concentration and a				
-				INTERV	AL HISTORY	Mr. Albright	s behavior has been stal	e and uneventful and				
				INTERV	AL HISTORY	Mr. Albright's	s behavior has been stal	le and uneventful and	-			
				INTERV	AL HISTORY	Mr. Albright's	s behavior has been stal or cumotome. Un more	le and uneventful and≜ - no oldo offonto ond ₹				
				INTERV	AL HISTORY	Mr. Albright's	s behavior has been stal or cumptomer Un second	le and uneventful and ▲	-			
				INTERV		: Mr. Albright's	s behavior has been stal	le and uneventful and <u>▲</u>	-			
						: Mr. Albright's	s behavior has been stat	le and uneventful and a	-			
						: Mr. Albright's	s behavior has been stat	le and uneventful and	-			
						Wr. Abright's	s behavior has been stat	ie and uneventful and a	-			

**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.

Deleted Note	Encounter Da	ite_	Restore
White, Snow Z	4/20/2017	Complete Evaluation	1
Un Finished Note			÷

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.



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

1		FileMaker Pro - [icn-r]	_ 0 ×
Sign Out	Edit View Format Re	Reports Help	- 8 ×
	Chart Room for	Jane Moody, LMFT       working at	<u>^</u>
	A-C D-F G-J K-M Inac	See All Active Charts 	
		Contact Us	
			~
100 - 0	Browse <		> .d
		Tam's	ker Pro .

- 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.

Show Charts:						
All	Assigned to Me	l am Principal				

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



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

## CREATING A NEW CHART



- Click on the Portal Reminder Service drawer in the Chart Room.
- A popup will appear requiring the patient's first name, last name, and date of birth.

	New Patient
Please enter the new pa	atient's name and date of birth.
First Name	
Alice	
Last Name	
Doe	
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.

New Patie	ent Warning		
There is already a patient with this name and DOB Click View to go to the existing patient chart.	8. Do you still want to	add a new pa	itient?
	View	Yes	No

• 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.

seal Health EHR	Save and go back to Chart Room	Save and go to Chart Face Car and	cel/Delete this Record	Chart	Details Do	e, Alice	e	200468462 32 Yrs Patient's D	1
w Patient	Anaphylactic Reaction	Reported E	nter E-Prescribe Info	Patient R	Reviewed Dem	ographics	[	Print Patient Demogra	phics
Patie	ent Information	Insurance I	nformation	0	ther Contacts	1		Telephone Intake	
"Name (F,I	II,L,Suffix) Alice	Doe		*Date of Birth	8/19/1984	Age:	3 Da	te Created 5/15/2017	
Bad Address	Address		Un	ique Patient ID	2004684621		Genera	ate ID#	
Sample Addr	2 / Appt #	County	4	*Gender	woman		*Sex:	Red FieldsRe	quir
Chart City,	State, Zip	~ ·	Refe	er to patient as	Ms. Doe		more		_
Home Hone	ne Phone	Country US		SSN#				Extra Privacy	_
Work C	ell Phone	Maiden/Other Nan	ne	Alt. Patient ID			Room:	MAR Disable	eRX
Wo	rk Phone	ext							
atient Status	Fmail								
Active	Email 2		Patient's Condition						
O Pending	Portal		Date Of Current III	ness Onset		Date Of	Similar Illness		
	OK to send Appt Reminders	/ia·	Date of Current	Admission: From	n		To		
	Email Text Message	Phone Message				1.000			
Employme	nt Status		Dates	Unable To Work	From		10		
School or l	Employer		0	Condition Related 1	To Employment	O Yes	No		
	Grade	~	Co	ondition Related To	o Auto Accident'	O Yes	No Sta	ate Of Accident	
				ndition Related To	Other Accident	U Tes	NO		
Mari	tal Status	~							
Mari	tal Status	×	In treatment Pr	eviously? OY	ON If yes	where?			
Mari	tal Status *Ethnicity	<b>*</b>	In treatment Pr Date Of Death	eviously? OY	ON If yes	where?			
Mari	tal Status *Ethnicity Religion		In treatment Pr Date Of Death	eviously? OY	ON Ifyes Preliminar	where? y Cause			
Mari	tal Status *Ethnicity Religion d Income	× ×	In treatment Pr Date Of Death	eviously? OY	ON Ifyes Prelimina	where? y Cause			
Mari nual Househol Fa	tal Status *Ethnicity Religion d Income amily Size	Peleos	In treatment Pr Date Of Death	eviously? OY	N If yes Preliminar	where? y Cause			
Mari nual Househol Fa	tal Status *Ethnicity Religion d Income amily Size Veteran Y N	v v Releas	In treatment Pr Date Of Death	eviously? OY	N If yes Preliminal	where? y Cause Adv. Dir.			
Mari nual Househol Fa	tal Status *Ethnicity Religion d Income amily Size Veteran Y N *Race	¥ ▼ ■ ■ ■ Releas	In treatment Pr Date Of Death	eviously? OY	N If yes Preliminar	where? y Cause Adv. Dir.			
Mari nual Househol Fa	tal Status *Ethnicity Religion d Income amily Size Veteran Y N *Race Race 2		In treatment Pr Date Of Death te	eviously? OY	N Ifyes Preliminal	where? y Cause Adv. Dir.			
nual Househol Fa	tal Status *Ethnicity Religion d Income amily Size Veteran Y N *Race Race 2 anguage	✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓	In treatment Pr Date Of Death o nt te	eviously? OY	N If yes Preliminar	where? y Cause Adv. Dir.			
Nari nual Househol Fa	tal Status *Ethnicity Religion d Income amily Size Veteran Y N *Race Race 2 anguage Disability	Y Y Releas ☐ of Int Patie Calendar No	In treatment Pr Date Of Death o nt te	eviously?	N If yes Preliminar	where? y Cause Adv. Dir.			
nual Househol Fa *Preferred L igned Provide	tal Status *Ethnicity Religion d Income amily Size Veteran Y N *Race Race 2 anguage Disability rs	Releas of Int Patie Calendar No	In treatment Pr Date Of Death e te	eviously? Y	N If yes Preliminal	Adv. Dir.	kip Initial; creat		
Preferred L igned Provide allowed to sig	tal Status *Ethnicity Religion d Income amily Size Veteran *Race Race 2 Language Disability rs pn ent	Releas of Int Patie Calendar No	In treatment Pr Date Of Death e o nt te <u>&lt; Select a Clinician &gt;</u>	eviously? Y	N If yes Preliminar	where? y Cause Adv. Dir. ccellaneous Notes	kip Initial; creat oup Therapy No		ial or

• Again, if you intend to use ICANotes for electronic billing purposes, clicking the <u>show</u> 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.

Assigned Providers	Joy Test4	Role )	K Principal	▲ .	
are allowed to sign				l	< Select a Clinician >
Notes for this Patient				_	Assign Provider
				• 1	

- 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 Telephon	eIntakeForm.
📑 Patient Info			
<b>ICANotes</b>	<u>Telephone In</u>	take Form	
Staff Name		Date of Call 3/6/2013	
About Caller : Name of Caller	-	Telephone Numbers of Caller Home	Back
How caller hea Referred	rd about facility and/or provider?	Work Cell	📇 Print - blank form
Other (spec	ify)		Print - current record
About Prospec	tive Patient : Unique	Patient ID 1000010648924	
First Name and DOB 11.	a Middle Name Middle Name Middle Name	Last Name phylactic Marital Status	
Refer to patient	tas Ms. phalactic SSN #	Medicaid #	
In treatment P	reviously? OY ON If yes, whe	ere/who?	
Address	t Information : United Homele	ess <u>Telephone Numbers of Patient</u> Home (410)695-6588	
City-State-Zip M	loonachie NJ 0	7074 Work Cell	
Resources Ava	nilable to Pay for Treatment: Insurance Coverage (click to view, en	ter details below)	
1	Aetna	<b>_</b>	

0

The to Chart Room button will save the patient information and return you to the Chart Room.

0	The to Chart Face button will save the patient information and return you to the Chart Face.
0	Cancel Delete this Record button will not save the patient information and return you to the Chart Room.
0	The Group Therapy Note button will save the patient information and open a Group Therapy Note.
0	The Progress Note button will save the patient information and open a Progress Note.
0	The <b>CONTINUE to Initial or</b> 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.

ICANotes	Save and go back to Chart Room	Save and go to Chart Face	Cancel/Delete this Record and return to Chart Room	Char	t Details Doe, Datie	Alice	9	2 32 Yrs	00468462 atient's ID	1 Audit Log
New Patient	Anaphylactic Read	tion Reported 🔲 🛛	Enter E-Prescribe Info	Patient I	Reviewed Demog	graphics		Print Patie	nt Demograp	phics
Patient Info	ormation	Insura	nce Information		Other Contacts			Telephone	e Intake	
*Name (F,M,L,Sul	ffix) Alice	Doe		*Date of Birth	8/19/1984	Age:	32	Date Created	5/15/2017	
Bad Address	ess		U	nique Patient ID	2004684621		0	Generate ID#		

• 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.

CANotes	Save and go back	Save and go	Cancel/Delete th	his Record	Chart Details	Doe, Alice		2004684621
New Patient	Anaphylactic Rea	ction Reported	Enter E-Presc	ribe Info	Patient Reviewed	Demographics		Print Patient Demographics
Patient In	nformation	Insur	ance Information		Other Cor	tacts		Telephone Intake
Patient Doe, Alice	N for Medicare)	edicaid ID		Coverage Det	ails Benefits	Payment	s Eligibility	Statement Settings
Insurance Cov 1 Cigna	verage (dick to view, ente	r details to right >)	New	Member ID/Polic 1st 2nd 3rd 4th Current	p # 234543212 p # Patient Relations Start Date	hip to Insured Suspe	Copay: • Self O Spou end Date I I	ShortList Se Child Other End Date
X Patient is Res	ponsible Party r Info on Other Contacts ly Plan	Audit Log		Copy from Patient Info	Name (First, MI, L Add City, State Pr Empi	ARCE ARCE ARCE ARCE ARCE ARCE ARCE ARCE	SSN #	Gender M • F
Account is in C FREEZE ACCOU MCM Auth. Receive Additional Notes:	24h of the HCPA/1500 Collections INT ed Yes No	*reduce new charges by Discour Molecourt reduce charges vie	t s by this % t Adj. by this %	Add to Add to Short List Use Alt. Prov Use Alt. Facility Use Al. Provider	vider Na Add City, State vider NPI Pt NPI Pay Tax ID	ress 1000 Gre Kennett Ione 1-866-49 80705	4-2114 Insurance Type Ot	MO 63857-3749 ype Group Health Plan her 4 - Employer or Union
Assigned Providers are allowed to sign Notes for this Patient	Anna Recksick, MD Emma Royds, RN Jane Moody, LMFT	PsyMD X Principal Ther X Principal Family X Principal	<ul> <li>Select a Cli</li> <li>Assign Pro</li> </ul>	nician > Add	Vhere Seen Med	Record #	Skip Initial; creat Group Therapy N Skip Initial; creat Progress Note	e a CONTINUE to Initial or Complete Exam

 Click the <u>the New</u> button and choose the appropriate insurance carrier from the insurance list that appears on the right.

Continue       Bode, Jane       337         Protections       Doe, Jane       337         Productive Name       At Yis Product's Name       3097         Patient Information       Dob 5/16/1967       Patient Reviewed Demographics         Patient Information       Name       Patient Reviewed Demographics       Patient Reviewed Demographics         Statistic Doc, Jane       Medicaid ID       Image: Contrage       Coverage Details       Benefits       Pagements         Item Concreage       Medicaid ID       Image: Coverage Details       Benefits       Pagements         Item Concreage       Coverage       Dobis       Coverage       Dobis       Coverage         Pagement	tient Info				_
emographics       Oo to E.Prescribe       DOB 5/18/1967         Patient Information       Patient Reviewed Demographics       Patient Reviewed Demographics         Itent Doe, Jane       SSN #       Itent Information       Other Contacts         Itent Doe, Jane       Medicaid ID       Itent Provider       Benefits       Pagenetics         Insurance Coverage Details       Benefits       Pagenetics       Deametics         Insurance Coverage Coverage (clust to view, enter details to right >)       New       BCN Service Company       BCN Service Company       BCN Service Coverage         Insurance Coverage Coverage Coverage       Coverage Details       Benefits       Pagenetics         Insurance Coverage Coverage Coverage Coverage       Coverage Details       Benefits       Pagenetics         Insurance Coverage       Coverage Details       Benefits       Pagenetics         Insurance Coverage       Coverage       Coverage       Coverage         Insurance Coverage       Coverage       Coverage       Coverage       Coverage         Insurance Coverage       Serf Pay       Recurs Provider       Name       Coverage       Coverage         Insurance Coverage       Serf Pay       Serf Pay       Coverage       Employee       Daniel Coverage       Daniel Coverage       Daniel Coverage		Continue	ot ot	Doe, Jane Patient's Name	48 Yrs Patient's ID
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- 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.