

QuickStart User Guide – TSPlus

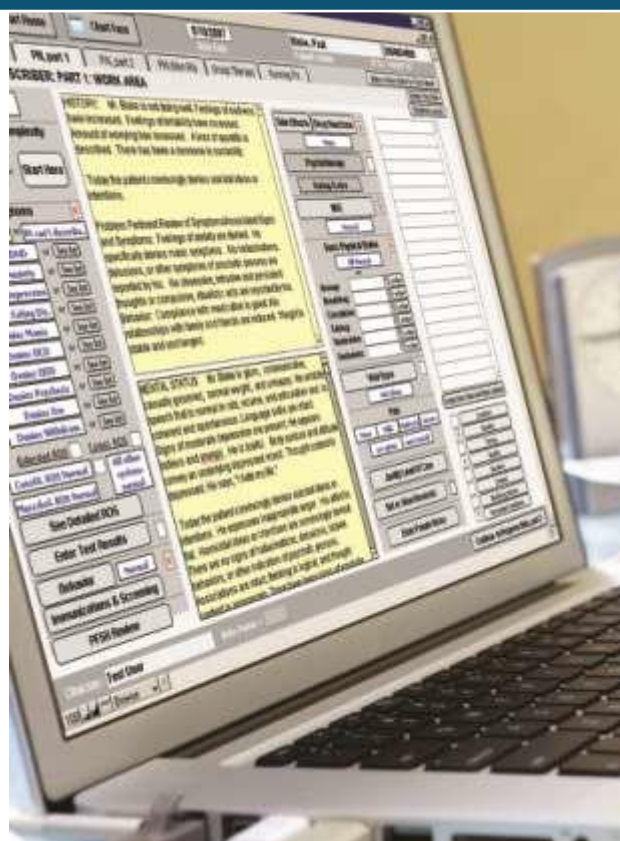


TABLE OF CONTENTS

Contacting ICANotes Support.....	3
Helpful Links	3
Logging into ICANotes	4
Printing	5
Safari Browser Printing.....	7
Changing Your Password	8
Importing Patient Demographics	11
Configuring Group Settings	14
Sites/Letterheads Tab	15
Facility Info Tab	15
Letterhead Tab	16
Electronic Billing Tab	17
Integrations Tab	18
Service/Modifier Codes Tab.....	18
Lab Requisition Protocols Tab.....	20
Medication Protocols Tab.....	21
Provider Directory Tab	22
Insurance Payers Tab.....	23
Therapy Groups Tab	24
Therapy Groups.....	25
Group Rosters.....	26
Formats Tab	28
MCM Authorization Tab	29
Accounts Tab	30
Codes.....	30
Statement Settings Option.....	32
Calendar Tab	33
Integrations Tab	35
More Tab	35
Site Staff	35
MAR.....	36
Miscellaneous Rules.....	37
Claim Templates.....	38
Configuring Individual Settings	38
Personal Info Tab	41
Identity Tab	41
Options Tab	42
Calendar Options.....	44
Caseload Tab.....	45
Billing Rates and Payer Rules Tab.....	46
Billing Rates	47
Provider Payer Rules	48
Billing Service Combos	49
ICD-10 Codes.....	49
Custom Buttons Tab	51
Reminders Tab	52
Restore Deleted Tab.....	54
Creating and Accessing Charts	55

Creating a New Chart	56
Telehealth	61
Telehealth Setup (PC)	61
Telehealth Setup (Mac)	66
Initiating a Telehealth Session (PC)	71
Initiating a Telehealth Session (Mac).....	79
Telehealth FAQ's	88



CONTACTING ICANOTES SUPPORT

Our Support team is available to assist you 24x7 via phone, email, and chat. 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.

By Phone: 443-569-8778

By E-Mail: ticket@icanotes.com

By Live Chat: [Visit our website](#) for live chat assistance with a member of our Support Team.

Submit a Support Ticket: [Click here](#) to submit a ticket to our Support Portal, no login required!

Access our Support Portal: [Click here](#) to log into 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

HELPFUL LINKS

If you want to:

- Searchable Knowledge Base
- Schedule Training Session
- Watch Recorded Training
- Add e-prescribing to your account
- Setup electronic billing via our clearinghouse
- Add telehealth to your account
- Add Patient Portal or Text Reminders
- Inquire about your ICANotes bill

Go to or Contact:

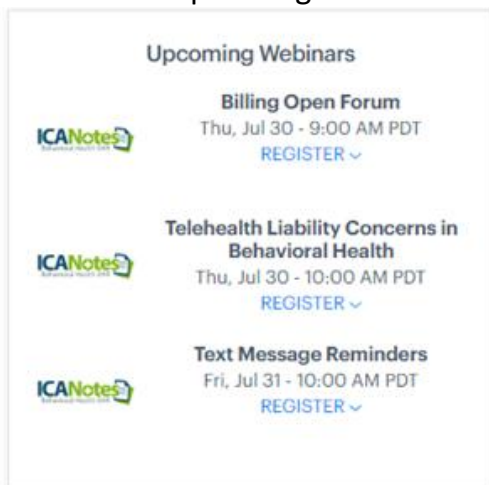
- [Knowledge Base Articles](#)
- [Book Training](#)
- [Video Tutorials](#)
- [eRx Order Form](#)
- [Clearinghouse Order Form](#)
- [Telehealth Activation Form](#)
- [Portal and/or Text Activation Form](#)
- Billing – 866-847-3590 or billing@icanotes.com

LOGGING INTO ICANOTES

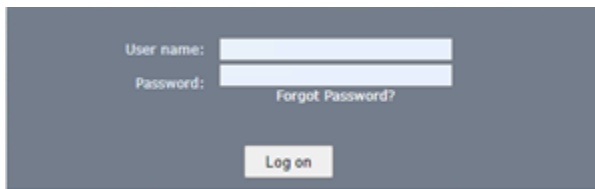
- Go to <https://ehr.icanotes.com> from any browser (Chrome works the best). This will bring you to the Log On screen.



- From the Log On screen you can:
 - Log into ICANotes
 - Access the Upload Site by clicking the **UPLOAD SITE** button
 - Go to the ICANotes Support website by clicking the **SUPPORT** button
 - Visit the Patient Portal by clicking the **PATIENT PORTAL** button
 - Access Video Tutorials by clicking the **VIDEO TUTORIALS** button
 - View upcoming Webinars offered by the ICANotes Training team



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

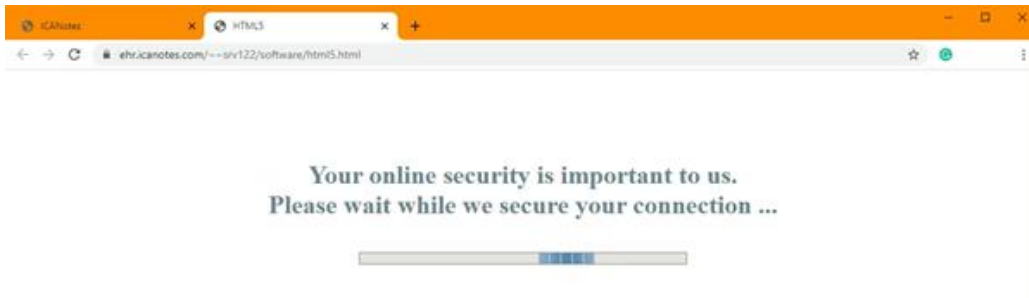


User name:

Password:

[Forgot Password?](#)

- A second browser tab will open and briefly display a security progress bar as you are connected to your account.



- You will now be logged into ICANotes.

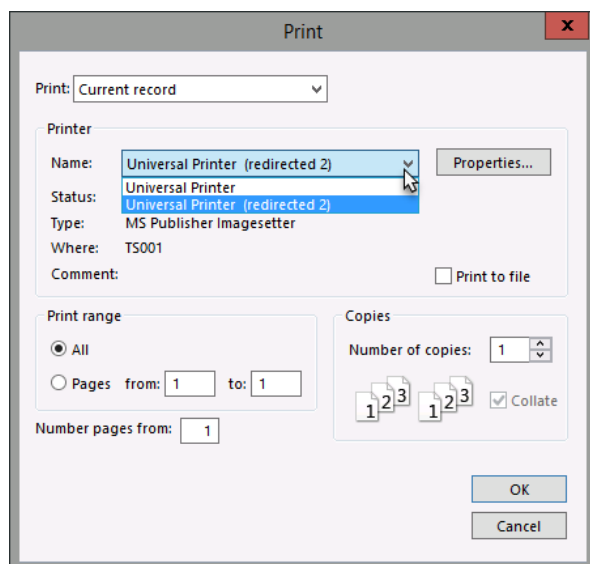


If you use a Topaz Signature Pad for signature capture on a PC or are trying to export a very large amount of data from ICANotes, please review this [Knowledge Base article](#).

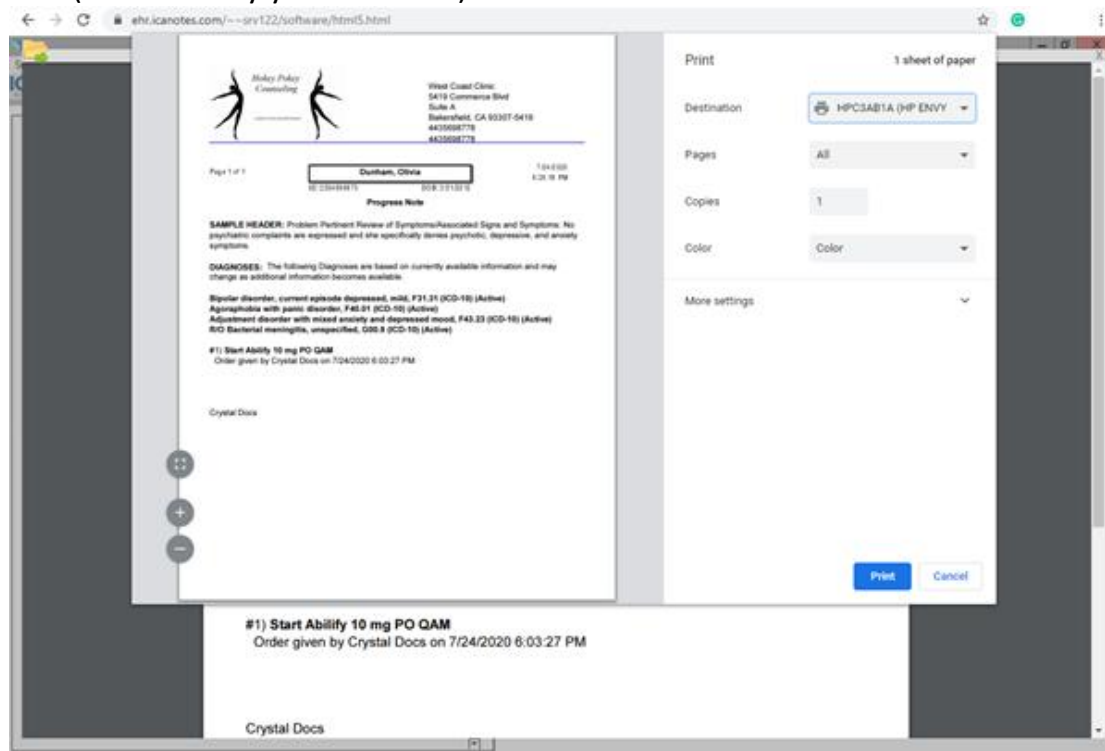
Forgot your password? Locked out? If the wrong username/password combination is entered three times in a row, ICANotes will prevent further login attempts for 20 minutes. If this happens, or if you cannot remember your password, contact your group's Security Administrator or call ICANotes Support at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

PRINTING

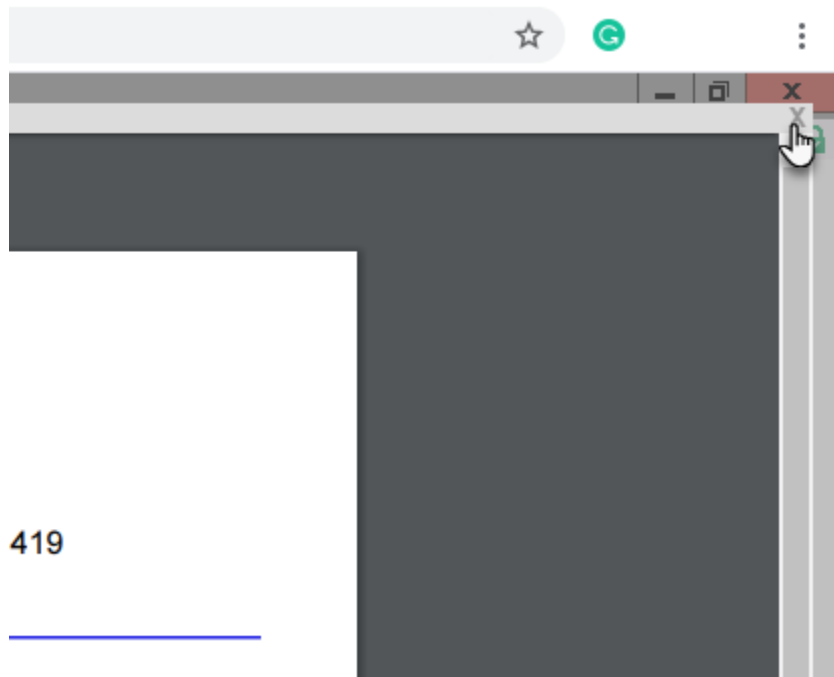
- Click the Print button within ICANotes for the document/report you wish to print.
- Make sure that **Universal Printer** is selected as the name of the printer.



- The print dialog window may appear on top of the preview of the document or report you're printing. Click into the Destination dropdown to select the appropriate printer, or to Save As PDF (if allowed by your browser).

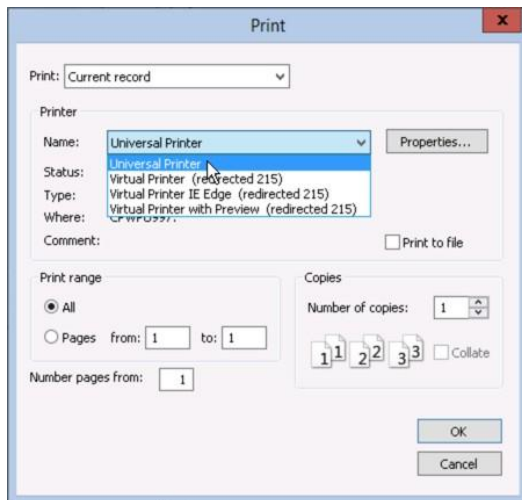


- Click to **Print**.
- If the print preview screen remains open, click the small x at the top right corner to close it and return to the previous screen.



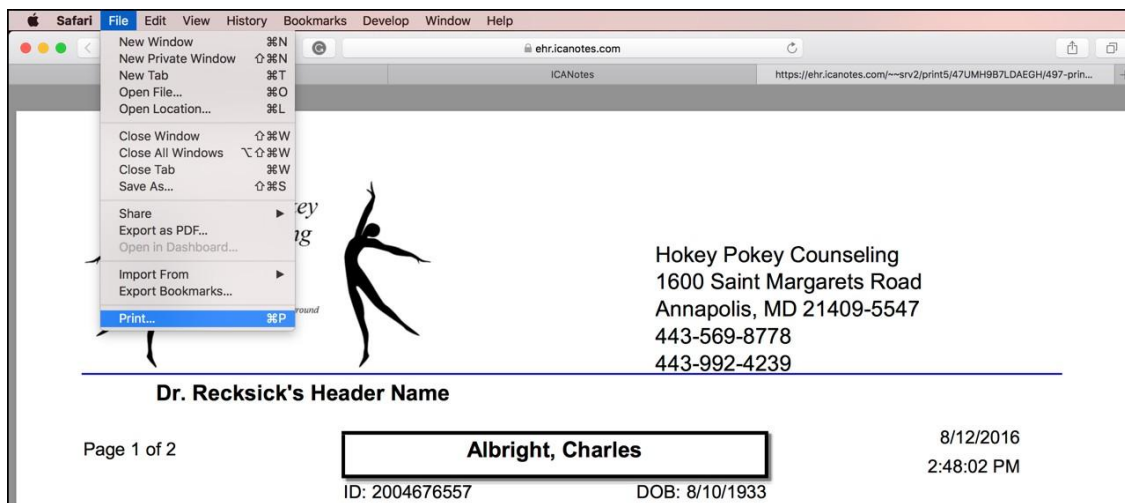
SAFARI BROWSER PRINTING

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

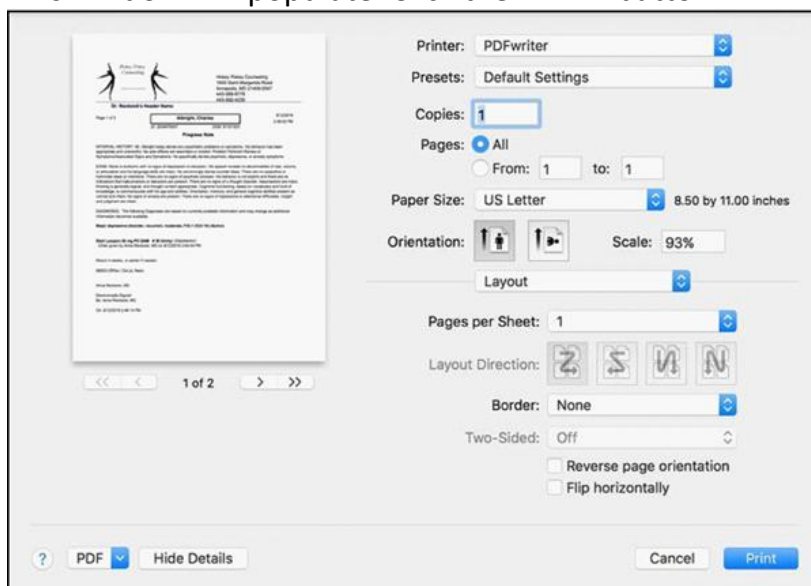


Action complete - click to view PDF

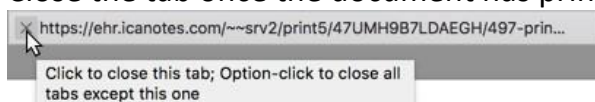
- When this message appears in the middle of the window, click to view the PDF. This will open another tab in your web browser.
- With the document showing, go to the File menu in the top left of your Mac desktop and select Print.



- This window will populate. Click the **Print** button.

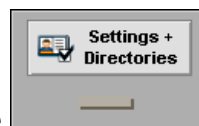


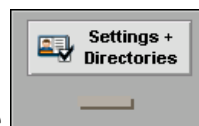
- Close the tab once the document has printed.

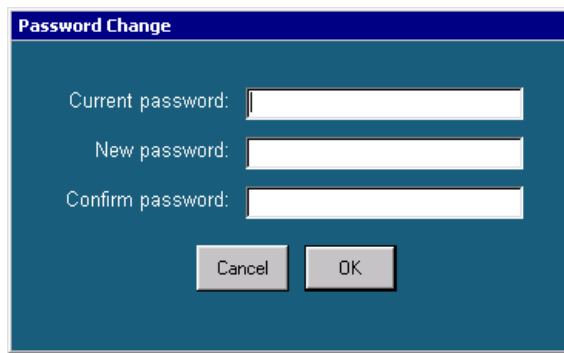


CHANGING YOUR PASSWORD

From within ICANotes:



- In the main ICANotes Chart room, click on the  drawer in the lower right corner of the screen.
- Click on the **Change My Password** button located in the bottom middle of the screen.
- Enter your current password in the first field. In the second and third fields, you'll enter your desired new password (make sure they match).



Password Change

Current password:

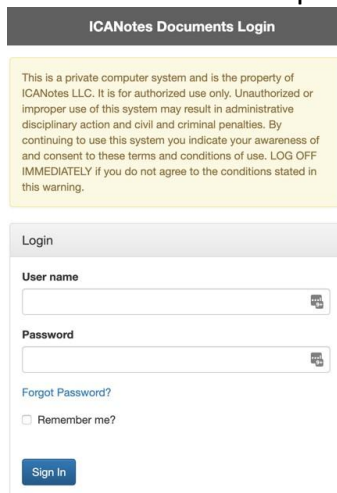
New password:

Confirm password:

- Note: Passwords must be a minimum of eight (8) characters, including at least one upper case letter, one lowercase letter, and a number or special character.
- Click the button to proceed. You will receive a confirmation message if successful.

From the Upload Site:

- You can access the upload site by navigating to <https://upload.icanotes.com>



ICANotes Documents Login

This is a private computer system and is the property of ICANotes LLC. It is for authorized use only. Unauthorized or improper use of this system may result in administrative disciplinary action and civil and criminal penalties. By continuing to use this system you indicate your awareness of and consent to these terms and conditions of use. LOG OFF IMMEDIATELY if you do not agree to the conditions stated in this warning.

Login

User name:

Password:

[Forgot Password?](#)

☐ Remember me?

- The first time you login to the ICANotes Upload Site, you will be prompted to complete a few security questions. We highly recommend you complete these questions, as they will be used as part of the ICANotes security protocol should you ever need to call Support for a password reset.



Answers

Username:

1. What was your childhood nickname?

answer

2. In what city did you meet your spouse/significant

answer

3. What is the name of your favorite childhood friend?

answer

- There are a wide variety of questions that you can choose from for your security questions. Click the down arrow to the right of the field to view the full list of questions and make a selection.

- Once you have filled in your email address and selected three security questions and answers, click **Submit**.

Answers

Username

1. What was your childhood nickname?

2. In what city did you meet your spouse/significant

3. What is the name of your favorite childhood friend?

- Next time you have forgotten your password, go to the Upload Site and click the **Forgot Password?** Link.

Login

User name

Password

Forgot Password?

☐ Remember me?

- You will be prompted to input your username or unique email address. Click to **Continue**.

Please enter your username or email address.

- 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. Once entered, click to **Submit**.

Question

What was your childhood nickname?

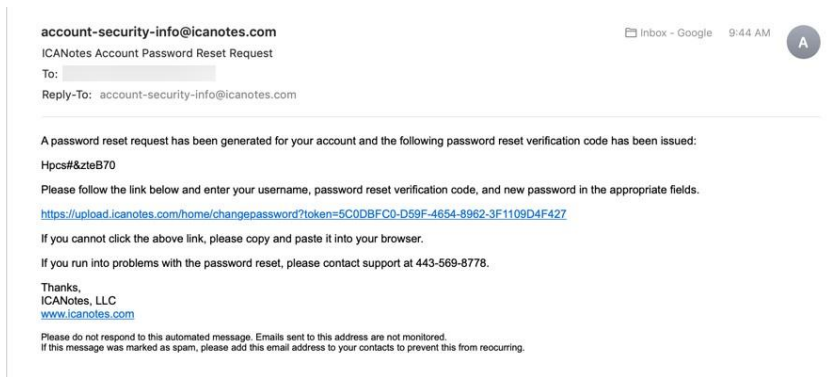
Answer

- If successful you will receive the following message:

You will receive an email when your password has been reset. If you have not received an email in 10 minutes please check your spam folder.

You may now close the window or [Click here](#) to return to the login page.

- Check your email and find your temporary password.



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

Username

Password reset verification code

Passwords must be between 8 and 16 characters and cannot be the same as the password reset verification code

New password

Confirm new password

Reset

- You will know you were successful when you receive the following message:

Your password has been reset.
 Please wait a couple minutes for this process to complete and enter your ICANotes username and password again.
[Click here](#) to return to the login page.

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

IMPORTING PATIENT DEMOGRAPHICS

If you currently have your patient demographics in electronic form, we can import the data into ICANotes for you at no extra charge. Please make every effort to ensure that your import file follows

these instructions exactly, as this will enable us to perform your data import more quickly. Files which do not follow these instructions will require more time for 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 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 naming convention, where “username” is your ICANotes username:
“PatientDemographics_username.xls” (without quotations).

After your Excel file has been saved according to the following instructions, either fill out the spreadsheet template appropriately or copy and paste the information from another spreadsheet. In many cases 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 file name), and submit your file by uploading it to <https://upload.icanotes.com/filedrop/>. After you have uploaded your file via the secure Dropbox link, please send an email to ticket@icanotes.com to notify us of your file upload, including the following information:

- Your ICANotes username
- The name of the file you uploaded
- Contact person name, email address, and phone number in case we have questions about your data file
- Desired date for import (must be minimum 2 business days after file submission): mm/dd/yyyy

Our team will review your spreadsheet and contact you if we have any questions. You will receive an email notification as soon as your import is complete.

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

FirstName	should not contain salutations or initials
LastName	should not contain title or initials
PatientID	can be any format as long as it is unique
Gender	M, F, O or Male, Female, Other or Man, Woman or Boy, Girl, Person
DOB	1/31/2001 or 1/31/01 or 01/31/2001 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 here:

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
MiscellaneousNotes
PrimaryCarePhysicianName
ReferredByName
EmergencyContact
EmergencyContactNotes
InsuranceCompany1
PolicyNumber1
GroupNumber1
InsuranceCompanyTelephoneNumber1
InsuredFirstName1
InsuredLastName1
InsuredMiddleName1
InsuredDOB1
InsuranceCompany2
PolicyNumber2
GroupNumber2
InsuranceCompanyTelephoneNumber2
InsuredFirstName2
InsuredLastName2
InsuredMiddleName2
InsuredDOB2
PharmacyName
PharmacyPhone
PharmacyFax

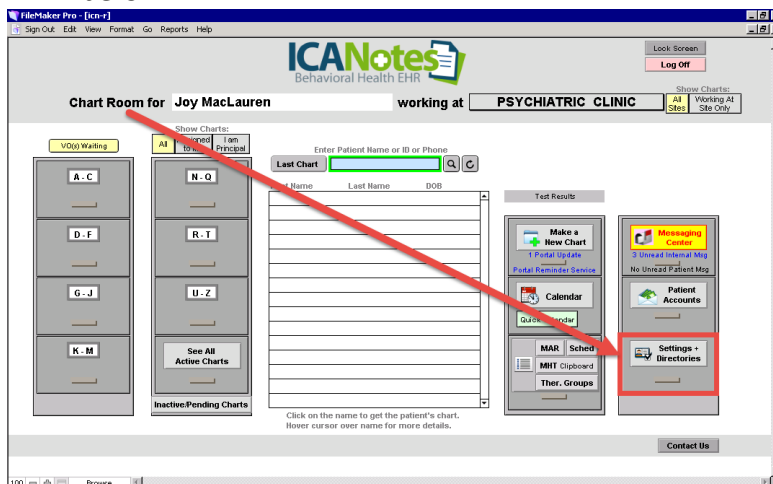
Note: Any field not listed above may be included in the MiscellaneousNotes field by naming your desired data to be imported as “MiscellaneousNotes_YourFieldName”, e.g. MiscellaneousNotes_BalanceDue. When imported, all fields you name in that fashion will be merged and will be available in the Miscellaneous Notes in the Demographics page of the patient chart.

Please note that all imports are final.

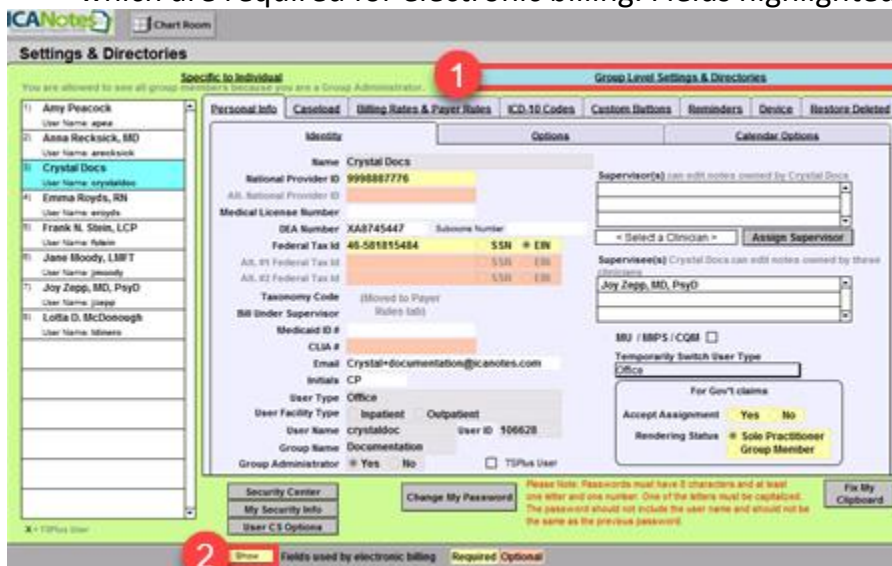
CONFIGURING GROUP SETTINGS

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

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



- Click on the Group Level Settings & Directories tab.
- Clicking the **Show** button at the bottom of the screen will highlight in yellow the fields which are required for electronic billing. Fields highlighted in pink are optional.



SITES/LETTERHEADS TAB

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



FACILITY INFO TAB

Under the **Facility Info** tab, you create a new site by clicking on the  **New** button.

You will be prompted to specify a name for the new site. This name is used primarily for internal purposes only and should be something you will easily recognize, as it will appear in dropdowns throughout ICANotes where you will set a site location. **Note that once set, the site name cannot be modified.**

Click  to continue.

With the site name created, you will next be prompted to provide the following details about the site location:

1. Click in the dropdown to set the **Site Type**.
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) enter the **Facility Other ID**.
6. Choose a **Place of Service** code by making a selection in the dropdown field.
7. Enter the **Facility Name** exactly as it should appear on your letterhead.
8. **Address Line 1**.
9. **Address Line 2**.
10. **City** where the facility is located.
11. **State** where the facility is located.
12. 9-digit **Zip** code where the facility is located.
13. Facility **Phone** number.
14. Facility **Fax** number.
15. Click to **Save**.

Settings & Directories

Specific to Individual

Group Level Settings & Directories

Sites/Letterheads | Service/Mod Codes | Lab Res Protocols | Meds Protocols | Provider Directory | Insur Payers | Therapy Groups | Formats | MCM Auth. | Accounts | Calendar | Integrations | More

Facility Info | Letterhead | Electronic Billing | Integrations

+ New # Edit

Default Billing

Site Setup Entry

Site Name: West Coast Clinic (or abbreviation - for location & letterhead lists)
*The Site Name cannot be modified

Site Type: Office / Outpatient service

*The Site Type is used for CPT E/M coding.
NOTE: Your notes will print differently for in/out patient facilities.

NPI for Facility: 1234567890

Alternate #1 NPI for Facility: 0987654321

Alternate #2 NPI for Facility:

Facility Other ID:

Place Of Service Code: 11 Office

Facility Name: West Coast Clinic

Address Line 1: 5419 Commerce Blvd

Address Line 2: Suite A

City: Bakersfield

State: CA

Zip (9-digits): 93307-5419

Phone: 4435698778

Fax: 4435698778

Cancel Save

You may add other locations in the **Facility Info** tab as needed if your group operates in multiple locations, or for specific 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 can edit inside these boxes (white area) as needed.

Facility Info | **Letterhead** | **Electronic Billing** | **Integrations**

Enter letterhead information below. Do not enter your Name. It will automatically be included where appropriate. You may use the Format menu above to select font, style, size etc. Your text may be edited or changed at any time.

Address: West Coast Clinic
5419 Commerce Blvd
Suite A
Bakersfield, CA 93307-5419

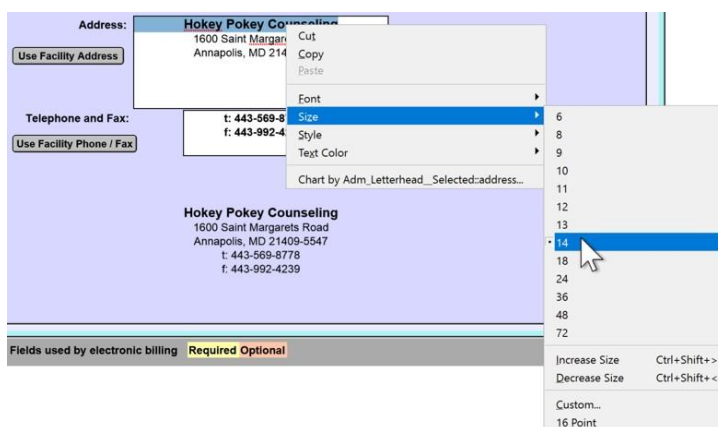
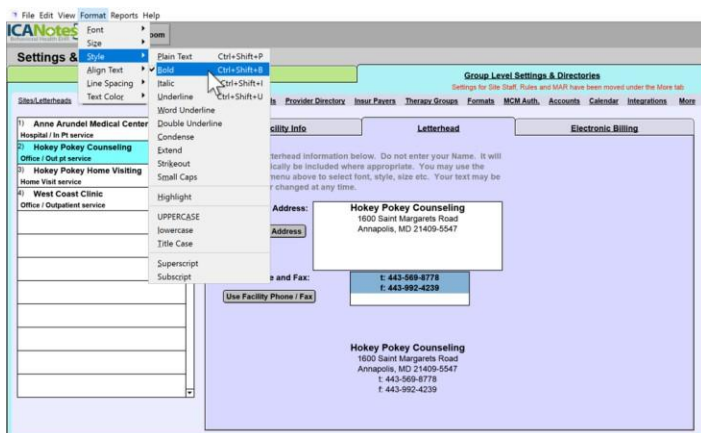
Use Facility Address

Telephone and Fax: 4435698778
4435698778

Use Facility Phone / Fax

West Coast Clinic
5419 Commerce Blvd
Suite A
Bakersfield, CA 93307-5419
4435698778
4435698778

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



ELECTRONIC BILLING TAB

The **Electronic Billing** tab may be found to the right of the Letterhead tab. You need to enter information on this tab for each site listed on the left that will be used to submit claims (either electronically or by printing CMS 1500 forms).

- Click on the first Site name in the left column you want to configure.
- Press the **Use Facility Address** button and the address you entered in the Facility Info tab for that site will populate in the address field.
- Click in the box below labelled **Billing Address for this Service Facility**. Click into the dropdown field to select the site from which you will send your electronic claims. You can select either the same site if the billing information is the same or select a different site (which must first be setup in the Facility Info tab) if the Billing Address and Billing NPI are different. The Facility Address, Billing Address, and Pay to Address can be three unique addresses if needed for billing purposes.
- The **Billing NPI** and billing address will populate based on the service facility location you choose.
- You may choose to highlight fields that are required in Settings & Directories for electronic billing using the **Show** button.

Settings & Directories

Specific to Individual

Group Level Settings & Directories
Settings for Site Staff, Rules and MAR have been moved under the More tab

Sites/Letterheads Service/Mod Codes Lab Res Protocols Meds Protocols Provider Directory Insur Payers Therapy Groups Formats MCM Auth Accounts Calendar Integrations More

1) Anne Arundel Medical Center
Hospital / In Pt service [Disable]

2) Hokey Pokey Counseling
Office / Out pt service [Disable]

3) Hokey Pokey Home Visiting
Home Visit service [Disable]

4) Telehealth
Office / Outpatient service [Disable]

5) West Coast Clinic
Office / Outpatient service [Disable]

Facility Info Letterhead Electronic Billing Integrations

Click the Use Facility Address button to copy the site address, then edit the electronic billing information below so that it will fit when formatted to 3 lines of up to 26 characters each, with no punctuation in the second line.

Use Facility Address West Coast Clinic
5419 Commerce Blvd Suite A
Bakersfield, CA 93307-5419

Service Facility Address formatted for Electronic Billing:
WEST COAST CLINIC
5419 COMMERCE BLVD SUITE A
BAKERSFIELD, CA 93307-5419

Billing Address for this Service Facility: Pay To Address for this Service Facility:

West Coast Clinic West Coast Clinic

WEST COAST CLINIC WEST COAST CLINIC
5419 COMMERCE BLVD SUITE A 5419 COMMERCE BLVD SUITE A
BAKERSFIELD, CA 93307-5419 BAKERSFIELD, CA 93307-5419

Billing NPI
1234567890

Show Fields used by electronic billing Required Optional

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



INTEGRATIONS TAB

The **Integrations** tab may or may not contain information, depending on whether your ICANotes account has been setup with any integrated services such as eStatement generation and online payment collection via BillFlash. If so, you'll see a message stating that related functionality is not enabled.

Facility Info Letterhead Electronic Billing Integrations

Related functionality requires that both eStatement generation & online payment collection via BillFlash be enabled.

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 for both professional and institutional billing.

The **Service Code Short List** will be required when you create your individual billing rates under the 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 (setup here) rather than a longer list of all available billing codes.

- In the left column, click the down arrow  next to the field to open the full list of available service codes.
- If you do not see the 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 descriptive text, then click the  button.

Revenue Codes can be created for inpatient settings. If you are strictly an outpatient facility you may disregard this area. Click the next blank row (in the example below, the row right under 0024) and add the code, rate, and description.

Specific to Individual **Group Level Settings & Directories**

Sites/Letterheads Service/Mod Codes Lab Req Protocols Meds Protocols Provider Directory Insur Payers Therapy Groups Formats MCM Auth. Accounts Calendar Integrations More

Service Code Short List **Print**

Use the arrow to add a Procedure Code from the list or... Type in your own code

Revenue Code	Non-Billable	Always PR
00000 non-billable	☒	☒
00001 Broken Furniture	☒	☒
00001 Clinic Fee	☒	☒
00002 Print/Provide Enter Medical	☒	☒
1036F Non tobacco User	☒	☒
36410 Blood Draw	☒	☒
80101 Urine Drug Screen	☒	☒
80104 Drug Screen, Multiple	☒	☒
80304 Drug Screen	☒	☒
90833 Psychotherapy 30 min. with	☒	☒
90836 Psychotherapy 45 min. with	☒	☒
90838 Psychotherapy 60 min. with	☒	☒
90885 Review of Records	☒	☒
90887 Meeting/Conference	☒	☒
90889 Report Preparation	☒	☒
96150 Health & Behavioral	☒	☒
96372 Injection	☒	☒
99201 (Office / Out pt, New)	☒	☒

Revenue Codes

Type your own code into the last row

Room & Board

Code	Rate	Description	Basis
905	\$50.00	MH Aftercare	UN
905	\$120.00	MH LOP Group (low	UN
905	\$150.00	MH IOP Group	UN
906	\$50.00	SA Aftercare	UN
906	\$120.00	SA LOP Group (low	UN
906	\$150.00	SA IOP Group	UN
MH 905	\$120.00	Dual DX LOP (low	UN
MH 905	\$150.00	Dual Dx IOP Group	UN
0024	\$500.00	Inpatient Rehabilitation	

Modifier Code Short List

Type your own code into last row

Description
25 Medical E/M Same DOS
59 Same DOS
ET Emergency Service
GV Hospice
HA Sex Off. Eval Addend.
HF Adult SA Individual (OP)
HO Initial DI
QW Medicare Drug Test
SF Sliding Fee Scale
SK Sex Off. Evaluation
TC BCBS IOP Modifier
U4 Facility Based IOP
U8 CPP Modifier
XE Same DOS/Same
XP Same DOS/Different

If you use modifier codes, such as for telehealth billing, you may click on a blank field in the right column and type in your own code to create a **Modifier Code Short List**.

Specific to Individual **Group Level Settings & Directories**

Sites/Letterheads Service/Mod Codes Lab Req Protocols Meds Protocols Provider Directory Insur Payers Therapy Groups Formats MCM Auth. Accounts Calendar Integrations More

Service Code Short List **Print**

Use the arrow to add a Procedure Code from the list or... Type in your own code

Revenue Code	Non-Billable	Always PR
00000 non-billable	☒	☒
00001 Broken Furniture	☒	☒
00001 Clinic Fee	☒	☒
00002 Print/Provide Enter Medical	☒	☒
1036F Non tobacco User	☒	☒
36410 Blood Draw	☒	☒
80101 Urine Drug Screen	☒	☒
80104 Drug Screen, Multiple	☒	☒
80304 Drug Screen	☒	☒
90833 Psychotherapy 30 min. with	☒	☒
90836 Psychotherapy 45 min. with	☒	☒
90838 Psychotherapy 60 min. with	☒	☒
90885 Review of Records	☒	☒
90887 Meeting/Conference	☒	☒
90889 Report Preparation	☒	☒
96150 Health & Behavioral	☒	☒
96372 Injection	☒	☒
99201 (Office / Out pt, New)	☒	☒

Revenue Codes

Type your own code into the last row

Room & Board

Code	Rate	Description	Basis
905	\$50.00	MH Aftercare	UN
905	\$120.00	MH LOP Group (low	UN
905	\$150.00	MH IOP Group	UN
906	\$50.00	SA Aftercare	UN
906	\$120.00	SA LOP Group (low	UN
906	\$150.00	SA IOP Group	UN
MH 905	\$120.00	Dual DX LOP (low	UN
MH 905	\$150.00	Dual Dx IOP Group	UN
0024	\$500.00	Inpatient Rehabilitation	

Modifier Code Short List

Type your own code into last row

Description
25 Medical E/M Same DOS
59 Same DOS
ET Emergency Service
GV Hospice
HA Sex Off. Eval Addend.
HF Adult SA Individual (OP)
HO Initial DI
QW Medicare Drug Test
SF Sliding Fee Scale
SK Sex Off. Evaluation
TC BCBS IOP Modifier
U4 Facility Based IOP
U8 CPP Modifier
XE Same DOS/Same
XP Same DOS/Different

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

Video Tutorial
Service/Modifier Codes

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  button to create a new order protocol.
 - Name the protocol.

- Pick a test from the dropdown menu or type in the name of test.
- Indicate the frequency from the dropdown menu or type in the frequency.
- Indicate the number of times the test should be performed.
- Type in the diagnosis.
- Click inside this box if the test should be performed while fasting.
- Indicate what type of request.
- Choose a reason/indication from the dropdown menu or type in the reason/indication.
- Save the newly created test.
- The newly created test will show in this area.
- Save the protocol.

Click the button below to watch a quick tutorial about the **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 medications list in a prescribing progress note. This is not relevant to DrFirst ePrescribe.

- Click on the  **New** button to create a new medication protocol.
 - Name the medication protocol.
 - Pick the verb from the dropdown menu.
 - Select the medicine from the dropdown menu or type in the medication name.
 - Select the dosage.
 - Insert the Route Qty.
 - Indicate the timing.
 - 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 dropdown 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. Continue adding medications as needed to build the full protocol.
14. Click **Save Protocol** to save it.

Settings & Directories

Specific to Individual

Group Level Settings & Directories

Sites/Letterheads Service/Mod Codes Lab Req Protocols Meds Protocols Provider Directory Insur Payers Therapy Groups Formats MCM Auth Accounts Patient Portal Calendar Integrations More

Medication Protocol List New

1) Admission Orders

2) Admission PRNs

3) Ativan PRN (CWA)

4) Ativan Taper

5) Celexa Taper

6) Common Cold (OP)

7) Medrol Dose Pack

8) Multiple Meds (OP)

9) Remeron Protocol

10) SS: Regular Insulin

11) Standing Orders: (w / instructions)

12) STAT Ativan

13) TB: Aplisol

Protocol Name Delete Save Protocol

Medications Edit Drug List

Direction	Medicine	Dose	Route Qty	Timing	Delete
Start	Prozac	20 mg	PO	QAM	X
Start	Ambien	5 mg	PO	QHS PRN	X
Start	Ativan	0.25 mg	PO	q 4 hr PRN	X
Start	Antabuse	250 mg.	PO	QAM	X
Start	Zyprexa	2.5 mg	PO	QAM	X

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

Video Tutorial
Meds Protocols

PROVIDER DIRECTORY TAB

Use the **Provider Directory** tab to create a list of providers that you communicate with outside of your practice's ICANotes group. These providers may be Primary Care Physicians, referring providers, or any other providers you may want to have in a central directory. This list is especially useful for making referrals as you can store contact data as well as directions for the patient.

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

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

Video Tutorial
Provider Directory

INSURANCE PAYERS TAB

The **Insur Payers** tab can be used to enter details of the insurance companies your patients use most frequently and save them to a short list which will appear when you enter insurance details in a patient's demographics. Before you start creating, it is suggested you click the **Show** button to highlight the required and optional fields for electronic billing.

- Click on the **+ New** button to enter an insurance company name.
 1. Enter the insurance company's name.
 2. Enter the mailing address (as seen on the patient's insurance card).
 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 into the field and making a selection from the dropdown list.
 6. If you do not see the appropriate option in insurance type, click into the dropdown find in insurance type (other) and make a selection from the list.
 7. If billing electronically, enter the payer ID, as provided by your clearinghouse. If needed, there is also an Alternative Payer ID field.
 8. If both your clearinghouse and ICANotes accounts are enabled for eligibility, enter the eligibility ID code as provided by your clearinghouse.
 9. If needed and your account is enabled for it, enter the Remittance ID.
 10. Click into the dropdown field to select a Submission Method, such as Electronic or Paper.
 11. For electronic billing of institutional claims, enter the Institutional Payer ID as provided by your clearinghouse.

12. Select an ID Qualifier to appear in box 24i of your claims if this is deemed necessary by your clearinghouse or insurance payer.
13. If it is necessary to use alternate Provider or Facility NPI's or an alternate Tax Id, use the appropriate fields here to specify which order to use, as set in other areas of Settings and Directories.
14. Click into the field to see and apply situational ANSI/NICC options for professional and institutional billing. Please consult with a member of ICANotes Support or Training before making changes here, as these rules will make an impact on how your claims are billed out.
15. If your account is enabled for it, you can specify certain options to apply to your live eligibility checks.
16. Click to **Save** any changes you make to the insurance payer to ensure your billing is prepared accordingly.

Settings & Directories

Specific to Individual

Insurance Payer Short List

	Name	Phone
1)	Aetna	205-498-5525
2)	Cigna	1-800-494-2114
3)	Medicare	123-456-7878
4)	UBH Medicare	555-555-5555
5)	United Healthcare	800-800-8000

You are now editing Cigna. Any changes will overwrite this Payer.

Name: 1
Address: 2 Great-West Dr
City, State, Zip: 3 Inett MO 63857-3749
Telephone: 4 26-494-2114 Fax: 5
Insurance Type: 6 Sup Health Plan
Insurance Type (Other): 6
Payer ID: 7 105 Alternative Payer ID: 8
Eligibility ID: 8 74 Remittance ID: 9
Submission Method: 10 Chronic Institutional Payer ID: 11
ID Qualifier 24i: 12
Notes: 13
☐ Use Alternate Provider NPI on Claims
☐ Use Alternate Facility NPI on Claims
☐ Use Alternate Tax ID on Claims

Payer ANSI/NICC Options

Professional: 14 Institutional: 15 Eligibility: 15

Buttons: 16 Save, Cancel, Delete, Export

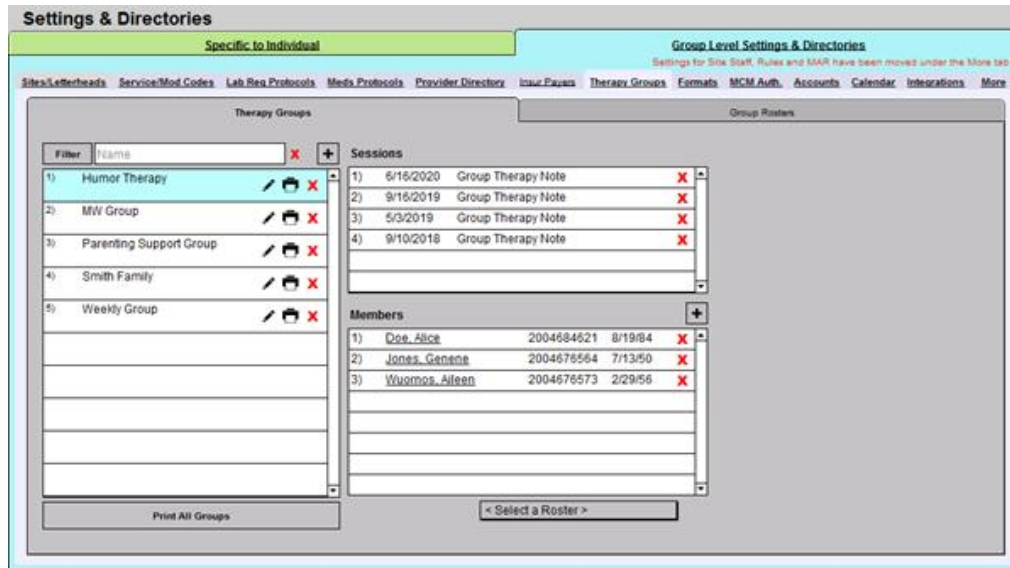
- If you later want to delete this or another insurance payer from your short list, return to this screen, click on the appropriate insurance payer name on the left, and click the button to remove it.
- You may export this short list for printing or electronic transmission by clicking on the button.

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

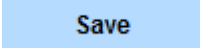


THERAPY GROUPS TAB

Use the **Therapy Group** tab to create patient therapy groups, view sessions created for each group, as well as manage members and rosters assigned to specific groups in the Therapy Groups section. In the Group Rosters section, you can create new rosters and assign patients to them.



- In the Therapy Groups section, click the  button to create a new group.
- In the Therapy Group Entry window, enter the name of the new Therapy Group to be created and the Site/Location where group services will occur. You can add multiple service codes as needed for billing purposes by clicking into each dropdown field and making a selection from the service code short list.

- Click the  button to save your changes. The new group name will appear in the column on the left.
- In the Members section, click the  button to search for a patient to add to the group.
- In the Add Patient window, search for patient by name or ID number, then click .

- Click a patient's name in the search results to add them to the list.

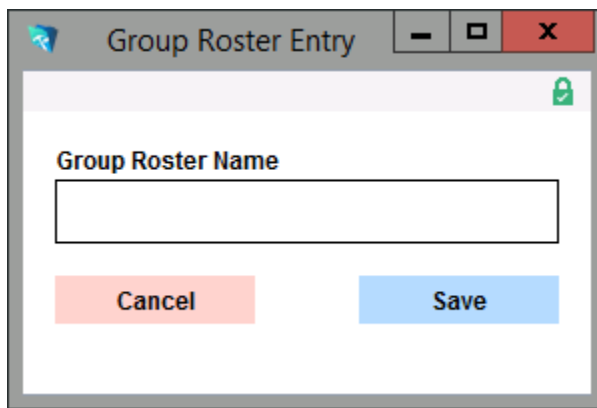
Name	DOB	City, State, Zip	Patient ID #	Status
Electronic B Claims			EBillingClaims	Active
Gene Belcher	10/10/2007	Cape May, NJ 08204	2004690023	Active
Goldilocks Bear	2/18/1992	Rutland, VT 05701	2004696083	Active
Jacqueline Bouvier	10/10/1925	Springfield, VT 05156	2004684330	Active
Kent Brockman	9/18/1968	Springfield, VT 05156	2004684333	Inactive
Linda Belcher	9/18/1968	Cape May, NJ 08204	2004690021	Active
Lou Belcher	10/26/2009	Cape May, NJ 08204	2004690024	Active
Mary Bailey	7/21/1973	Springfield, VT 05156	2004684331	Active
Peter Bishop	7/17/2004	Bakersfield, CA 93307	2004696643	Active

- To add patients from a specific roster to the group, click into the **< Select a Roster >** dropdown and make a selection.
- With a Roster name selected, click **Weekly Group** **+** to add all patients within that roster to the Members section.

GROUP ROSTERS

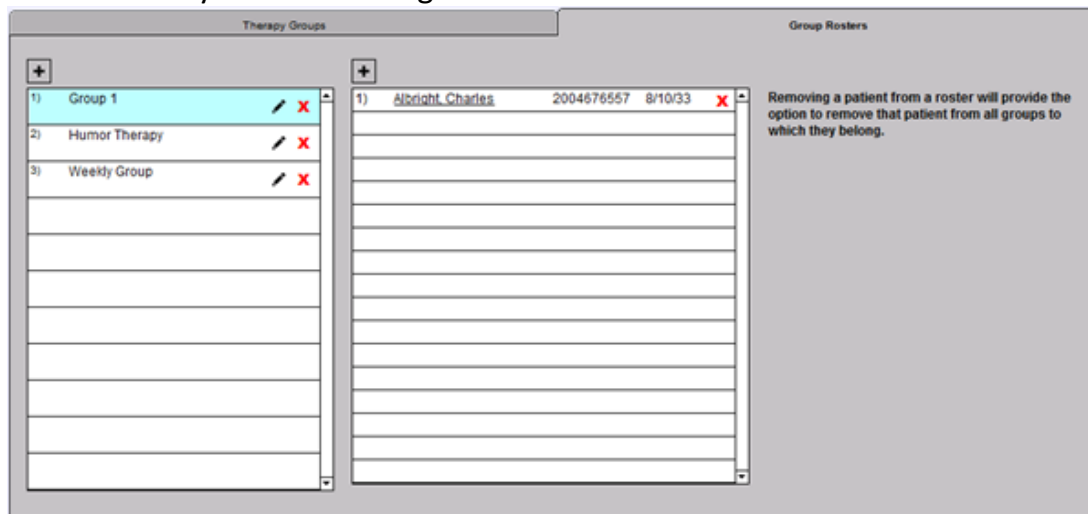
To build a roster of patients that can be applied to any group, navigate to the Group Rosters section.

- Click the **+** button in the column on the left to create a new Group Roster.
- In the Group Roster Entry, type the name of the group roster, then click **Save** to save.



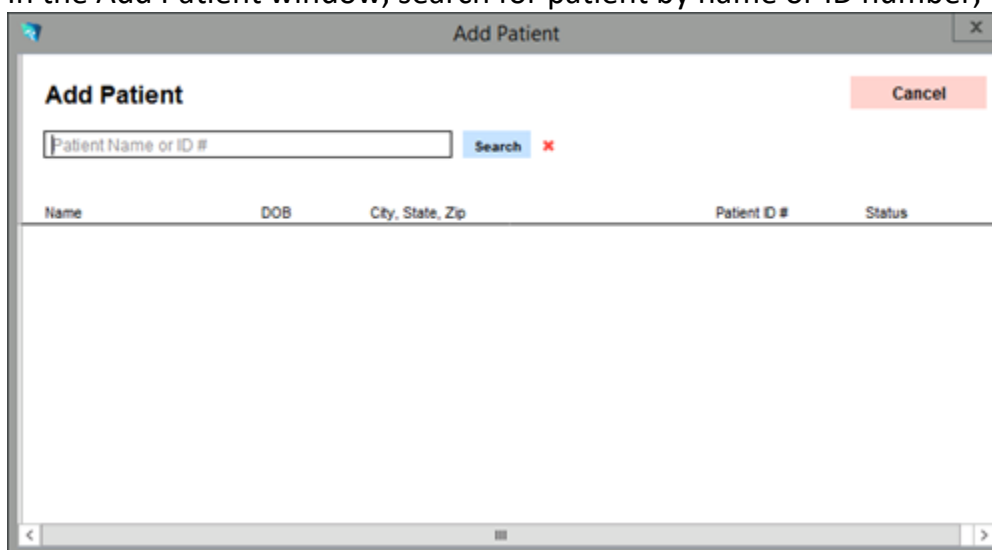
A dialog box titled "Group Roster Entry" with a standard Windows window frame. It contains a text input field labeled "Group Roster Name" and two buttons at the bottom: "Cancel" (pink) and "Save" (blue).

- The newly created roster will appear in the left column.
- To add patients to a roster, click the name of the roster in the left column. All patients will be itemized by name in the right column.



The main interface is split into two panes. The left pane, titled "Therapy Groups", has a "+" button at the top and a list of groups: "1) Group 1", "2) Humor Therapy", and "3) Weekly Group". Each group has a pencil icon and a red "X" icon to its right. The right pane, titled "Group Rosters", has a "+" button at the top and a list of patients. The first patient is "1) Albright, Charles" with ID "2004676557" and date "8/10/33". To the right of the patient list is a text box that says: "Removing a patient from a roster will provide the option to remove that patient from all groups to which they belong."

- Click the  button atop the right column to add a patient to the roster.
- In the Add Patient window, search for patient by name or ID number, then click .



A dialog box titled "Add Patient" with a "Cancel" button in the top right. It features a search input field labeled "Patient Name or ID #" with a "Search" button and a red "X" icon to its right. Below the search field is a table with the following headers: "Name", "DOB", "City, State, Zip", "Patient ID #", and "Status". The table body is currently empty.

- Click a patient's name in the search results to add them to the list.

Add Patient

Search: b

20 Patients Found

Name	DOB	City, State, Zip	Patient ID #	Status
Electronic B Claims			EBillingClaims	Active
Gene Belcher	10/10/2007	Cape May, NJ 08204	2004690023	Active
Goldilocks Bear	2/18/1992	Rutland, VT 05701	2004696083	Active
Jacqueline Bouvier	10/10/1925	Springfield, VT 05156	2004684330	Active
Kent Brockman	9/18/1968	Springfield, VT 05156	2004684333	Inactive
Linda Belcher	9/18/1968	Cape May, NJ 08204	2004690021	Active
Lou Belcher	10/26/2009	Cape May, NJ 08204	2004690024	Active
Mary Bailey	7/21/1973	Springfield, VT 05156	2004684331	Active
Peter Bishop	7/17/2004	Bakersfield, CA 93307	2004696643	Active

- Patients will appear in the right column as they are added to the roster. Continue this workflow until all patients are added to the roster.

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



FORMATS TAB

Use the **Formats** tab to control the font and text style of finished notes for all users in your practice.

Settings & Directories

Specific to Individual | Group Level Settings & Directories

Sites/Letterheads | Service/Mod Codes | Lab Req Protocols | Meds Protocols | Provider Directory | Insur Payers | Therapy Groups | **Formats** | MCM Auth. | Accounts | Calendar | Integrations | More

Finished Notes Font & Printing Styles Group Preferences

Group: Documentation

Font: (default Arial if blank)

Size: (default 12 if blank)

Note Style: ☐ Bold ☐ Italic ☐ Uppercase (overrides default formatting)

Header Style: ☒ Bold ☐ Italic ☒ Uppercase ☐ Underline ☐ Highlight (overrides default formatting)

Override Font Setting: ☐ Ignore Font setting & retain all font formatting as entered in each note.

Override Size Setting: ☐ Ignore Size setting & retain all size formatting as entered in each note.

- Click on the **Font** field to open the dropdown list of available fonts. The default is Arial.
- Click on the **Size** field to enter a new font size. The default is 12pt, even if left blank.
- Click on the appropriate checkbox(es) in **Note Style** to change the text style within the body of your notes.

- Click on the checkbox(es) in **Header Style** to change the style of headers within your notes.

Individual users will be able to adjust the font and style options within individual notes that will not affect notes globally. As an additional option, click to **Override Font Setting** to ignore font setting and retain all font formatting as entered in each note, or **Override Size Setting** to ignore size setting and retain all size formatting as entered in each note.

Note: Any changes made here will only affect notes created after the change is made. Previously compiled notes will not be altered.

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

Video Tutorial
Fonts & Styles

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 screenshot shows the 'Settings & Directories' window with the 'MCM Auth.' tab selected. The window is divided into 'Specific to Individual' and 'Group Level Settings & Directories' sections. The 'MCM Auth.' tab displays a table of patient authorizations with columns for Patient Name, Issued, Authorization #, Expires, Active, and Sessions/Units. The table includes buttons for 'edit' and 'Print'.

Patient Name	Issued	Authorization #	Expires	Active	Sessions			Units			edit
					Authorized	Used	Remaining	Authorized	Used	Remaining	
Banner, Bruce	5/14/2019	6546322	12/31/2019	X	20	1	19				
Hudson,	5/1/2019	78457845	12/31/2019	X	28	0	28				
Marble, Meghan	6/1/2019	848168418145	12/31/2019	X	7	0	7				
Simpson,	1/6/2020	5458745	4/6/2020	X	20	0	20				
Smith, Beth	7/1/2019	4564156189414	12/31/2019	X	50	1	49				

- The Show Only checkboxes **Show Only: ☐ At Threshold ☐ Non-Expired** allow you to show only those patients whose authorizations are at or past the threshold, or those that are not non-expired and active, respectively. Alternatively, any listing in red needs attention as this indicates one of the two alert thresholds have been reached, either for number of sessions/units and/or expiration date.
- 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 authorization expiration date.
- The **Print** button will print the list of authorizations.
- You may also export this listing for printing or electronic transmission by clicking on the **Export** button.

If you need to update the thresholds for a patient's authorization, you may do so by either clicking the **edit** button or in the Chart Face by clicking the **Add or Update Managed Care Authorizations** button in the lower left-hand corner.

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

Video Tutorial
MCM Auth.

ACCOUNTS TAB

If you are using Patient Accounts to keep track of charges and payments, you can setup codes under the **Accounts** tab to link to a patient or charge in order to report on any of the codes you create, and establish default statement settings options.

The screenshot shows the 'Settings & Directories' window with the 'Accounts' tab selected. The 'Specific to Individual' section is active, showing 'Payment/Adjustment Codes' and 'Billing Codes' tables. The 'Payment/Adjustment Codes' table has a 'New' button and a 'Save' button. The 'Billing Codes' table also has a 'New' button and a 'Save' button. The 'Settings' section on the right contains several options, including 'When a new Service Charge is added for a patient who is not marked as self-pay, which party should owe the balance?' with radio buttons for 'Patient' and 'Insurance', and 'PA AP Adjustment Override' which is checked.

CODES

In the Codes tab on the left, the **Payment/Adjustment Codes** section can be used to setup a payment code and description. When you post a payment in Patient Accounts, you can link these codes to that payment in order to report on them at a later time. The codes must be linked to a payment in order to be able to report on them.

1. Click the  **New** button to create a new code.
2. Enter the Code you would like to use.

Code

3. Enter the Description for the code.

Description

4. Click the button to save the code, or to delete the highlighted entry.

Payment/Adjustment Codes

1)	AR	Posted by Anna Redicksick
2)	ER	Posted by Emma Royds
3)	JM	Posted by Jane Moody
4)	LD	Posted by Lotta Dinero
5)	COPAY	Front desk posted these copays from patients
6)	LF	Late Fee
7)	TPF	Test Patient Fee

Code

Description

A **Billing Codes** list can be setup 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. Click the button to create a new code.
2. Enter the Code you would like to use.
3. Enter the Description for the code.
4. Select the button to save the code or to delete the highlighted entry.

Billing Codes

1)	GOVT	Government Insurance Payments
2)	COMMER	Commercial Insurance Payments
3)	COPAYS	Copayments from the client or responsible party
4)	REFUND	Refunded to appropriate party
5)	MISC	Miscellaneous Fees
6)	TBC	Test Billing Code

Code

Description

Additional Settings to control where responsibility is assigned – whether patient or insurance – and how responsibility is switched can be controlled to the right of the Billing Codes tab. **PA Auto Responsibility Switch** will automatically switch the responsibility to the patient if the patient has no Secondary Insurance or has Secondary, but no Tertiary Insurance and there is a balance remaining after the application of any Primary Insurance payments/adjustments. **PA AP Adjustment Override** allows group ability to override Autopost Contractual Adjustments. This setting is not needed if your group is Manual Insurance Post only.

Settings

When a new Service Charge is added for a patient who is not marked as self-pay, which party should owe the balance?

☐ Patient
☒ Insurance

Automatically switch the responsibility to Patient if the Patient has no Secondary Insurance or has Secondary, but no Tertiary Insurance and there is a balance remaining after the application of any Primary Insurance payments/adjustments.

☐ PA Auto Responsibility Switch

Allows group ability to override Autopost Contractual Adjustments. Not needed if group is Manual Insurance Post only.

☒ PA AP Adjustment Override

STATEMENT SETTINGS OPTION

In the Statement Settings Options tab on the right, you can establish default settings for account and batch statements, which are applied to all patients (unless unique statements are set on a per patient basis in their individual Patient Accounts).

Settings & Directories

Specific to Individual

Group Level Settings & Directories

[Sites/Letterheads](#)
[Service/Mod Codes](#)
[Lab/Ref. Protocols](#)
[Media Protocols](#)
[Provider Directories](#)
[Insur. Payers](#)
[Therapy Groups](#)
[Formats](#)
[MCM Auth.](#)
[Accounts](#)
[Calendar](#)
[Interactions](#)
[More](#)

Codes

Statement Settings Options

Account Default

☒ Add the text "Please pay Balance Due within 30 days from Statement Date"
 ☒ Generate Chronologically Regardless Of Clinician
 ☐ Exclude Insurance From Payment Amounts
 ☐ Hide Adjustment Amounts
 ☐ Hide Charge Amounts
 ☐ Hide Clinician Name
 ☐ Hide Dates of Birth
 ☐ Hide Description
 ☐ Hide Insurance Payment Details
 ☐ Hide Payment Details
 ☐ Hide Total Balances
 ☐ Use Guarantor 1 Address If Available & Patient Is NOT Responsible

☒ Include Patient Check # In Payment Details
 ☒ Include Credit Card Payment Info
 ☐ Include Modifiers
 ☐ Include Next Appointment Date
 ☐ Include Signature Lines
 ☐ Show Account Aging
 ☒ Show Balance Forward
 ☐ Show Diagnoses
 ☐ Show Insurance Balance
 ☒ Show Last Payment Date/Amount
 ☒ Show Patient Balance
 ☒ Sort Services New To Old
 ☐ Replace "Make Check Payable To" with:

Show Clinicians'
 ☐ NPI
 ☐ Med Lic
 ☐ Tax ID

Return Address Location: Hokey Pokey Counseling
 Billing Address Location: Hokey Pokey Counseling

Statement Note:

Responsible Party:
 ☒ Patient
 ☐ Guarantor 2
 ☐ Secondary Insured
 ☐ Guarantor 1
 ☐ Primary Insured

Save

Groups who are enabled for additional integrations, such as BillFlash statement generation, may see additional statement settings. These additions are differentiated in red text within Account Default and Batch Default settings.

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

Video Tutorial
Accounts

CALENDAR TAB

In the **Calendar** tab are two distinct settings which can be set by Group Administrators: Settings that Individual Users can Override and Group Level Only Settings.

The screenshot shows the 'Settings & Directories' interface with two main tabs: 'Specific to Individual' and 'Group Level Settings & Directories'. The 'Specific to Individual' tab is active, showing settings that individual users can override. The 'Group Level Settings & Directories' tab is also visible, showing settings that are enforced for the entire group.

Settings & Directories

Specific to Individual

time scale increments (in minutes)

start day at (select 0 for midnight)

end day at (select 24 for midnight)

default appt duration (in minutes)

refresh interval (number of minutes between auto-refresh)

show weekends ☐

hide cancelled appointments ☐

hide rescheduled appointments ☐

do not enter current patient in new event ☐

note highlight ☒

The following Settings are only enforced after a new login:

show column count ☐

show scheduled clinicians only ☐

Group Level Settings & Directories

Settings for Site, Staff, Rules and MAAT have been moved under the More tab

Group Level Only Settings

Double Scheduling = A clinician has more than one appointment scheduled in the same time slot

prevent double scheduling (except over canceled/rescheduled) ☐

warn before double scheduling ☒

prevent double scheduling over block outs ☐

only group admin may add/edit/delete block outs ☐

show type color instead of status color ☒

number of columns to display

Double Booking = A patient is scheduled with more than one clinician in the same time slot

prevent double booking (except over canceled/rescheduled) ☐

warn before double booking ☐

Double Booking Medicare = A patient with currently active Medicare primary coverage is scheduled for more than one appointment on the same date

prevent double booking of a medicare patient (except over canceled/rescheduled) ☐

warn before double booking a medicare patient ☐

In **Settings that Individual Users can Override**, settings selected in this area will default for each staff/clinician account unless the staff/clinician establishes individual options within their personal calendar. Individual user options supersede group options.

Settings that Individual Users can Override ?

time scale increments (in minutes)

start day at (select 0 for midnight)

end day at (select 24 for midnight)

default appt duration (in minutes)

refresh interval (number of minutes between auto-refresh)

show weekends ☐

hide cancelled appointments ☐

hide rescheduled appointments ☐

do not enter current patient in new event ☐

note highlight ☒

The following Settings are only enforced after a new logon.

show column count ☐

show scheduled clinicians only ☐

In **Group Level Only Settings**, settings selected in this area will always be the default for each staff/clinician account during each login session. The individual user has no way to override these options.

Group Level Only Settings ?

Double Scheduling = A clinician has more than one appointment scheduled in the same time slot

prevent double scheduling (except over canceled/rescheduled) ☐

warn before double scheduling ☒

prevent double scheduling over block outs ☐

only group admin may add/edit/delete block outs ☐

show type color instead of status color ☒

number of columns to display

Double Booking = A patient is scheduled with more than one clinician in the same time slot

prevent double booking (except over canceled/rescheduled) ☐

warn before double booking ☐

Double Booking Medicare = A patient with currently active Medicare primary coverage is scheduled for more than one appointment on the same date

prevent double booking of a medicare patient (except over canceled/rescheduled) ☐

warn before double booking a medicare patient ☐

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



INTEGRATIONS TAB

The **Integrations** tab contains additional settings for customers utilizing integrations with ICANotes, such as Kno2 for electronic transmission of patient records. Please consult with your Account Manager or with ICANotes Support for configuring these settings.



MORE TAB

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



SITE STAFF

The **Site Staff** section is useful for organizations with multiple locations. Use this tab to assign clinicians to one or more sites/locations. When assigned to a site, clinicians will only be able to retrieve charts for patients being seen at that site when searching for patients in the Chart Room.

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

1. The **Filter by Site** checkbox organizes the list by site/location.
2. The **Filter by Clinician** checkbox organizes the list by clinician.
3. The **Site** selection dropdown list will narrow the list per site.
4. The **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. Each assigned clinician/site will be itemized in the listing below.

Settings & Directories

Specific to Individual

Group Level Settings & Directories

Sites/Letterheads Service/Mod Codes Lab Res Protocols Meds Protocols Provider Directory Insur Payers Therapy Groups Formats MCM Auth Accounts Calendar Integrations More

Site Staff MAR Miscellaneous Rules Claim Templates

Contact ICANotes Support at (443) 569-8778 if you want this feature turned on

1 Filter by Site 2 Filter by Clinician

3 < Select a Site > 4 < Select a Clinician > Print

Hokey Pokey Counseling Emma Royds, RN

8

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

5 Pick a Site < Select a Site > 6 Pick a Clinician < Select a Clinician >

7 Assign Staff

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

Video Tutorial
More Tab

MAR

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

Settings & Directories

Specific to Individual

Group Level Settings & Directories

Sites/Letterheads Service/Mod Codes Lab Res Protocols Meds Protocols Provider Directory Insur Payers Therapy Groups Formats MCM Auth Accounts Calendar Integrations More

Site Staff MAR Miscellaneous Rules Claim Templates

Assign Times to Administer Medications

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

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

The **Miscellaneous Rules** section has several features you may wish to enable for your group. Before you start creating, it is suggested you click the **Show** button to highlight the required and optional fields for electronic billing.

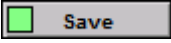
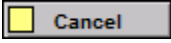
- On the left, you will see the **Check if Note is Claim-Ready** checkbox. If you submit claims electronically or print HCFA forms regularly, then this box should be checked so that the system automatically reviews each billable note when it is compiled to see whether it has all the elements to make a valid claim.
- The **Fasting Labs by Default** checkbox can be checked so that when a new lab test order is added it will be marked as “Fasting” by default.
- If your account is enabled for generating unique patient IDs, use the **Next Unique Patient ID#** field to indicate the starting ID value.
- **Forward Patient’s Telephone Intake Notes To** is where you can decide if you want the intake notes from the telephone intake to go into various areas within ICANotes.
- The **Duration Values for Billing Service Combos** section is a type-in field where values can be input for billing purposes.
- On the right, there are a number of **Clinical Reminder Rules** which 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 require attention.

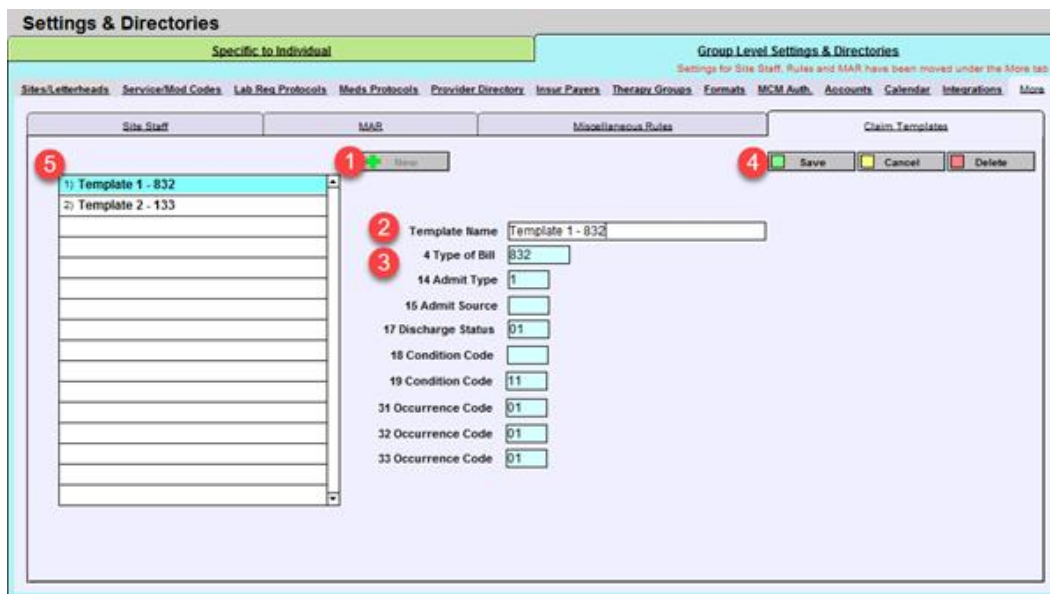
Note: This feature must be enabled by ICANotes Support. Please call 443-569-8778 or submit a ticket via ticket@icanotes.com to request that this feature be enabled for your group.

Clinical Reminder Rules	Latency	Units	Role	Delete
Initial Psychiatric Exam	60	Hours	PsyMD	X
Initial Nursing Exam	24	Hours	RN	X
Initial TP	72	Hours	Ther	X
Followup TP	90	Hours	Ther	X
				X

CLAIM TEMPLATES

The **Claim Templates** section can be utilized by inpatient facilities to build templates of pre-defined fields for populating institutional claims from within ICANotes.

1. Click the  button to start creating a new claim template.
2. Give the template a Template Name.
3. Fill in the pre-defined fields by type. Each number represents a different box number within the institutional claim.
4. When finished, click  to save,  to cancel, or  to delete the selected claim template.
5. Each claim template will be itemized on the left. Click on one to view or make changes.



CONFIGURING INDIVIDUAL SETTINGS

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

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

The screenshot shows the ICA Notes Behavioral Health EHR interface. At the top, it says 'Chart Room for Crystal Docs working at West Coast Clinic'. Below this are various navigation buttons and a search bar. A red arrow points to the 'Settings + Directories' button in the right-hand drawer, which is highlighted with a red box.

The **Specific to Individual** tab will be the default window displayed when navigating to Settings & Directories. If you are a group administrator, you have the ability to configure settings for all users in your group as all accounts are itemized within the left side of the window. Non-group administrators will only be able to view and modify their own account settings.

Group Administrator view:

The screenshot shows the 'Settings & Directories' window. The 'Specific to Individual' tab is selected, and the 'Group Administrator view' is displayed. The left sidebar lists users, with 'Crystal Docs' selected. The main area shows the settings for 'Crystal Docs', including personal information, medical license, and supervisor information. The 'Supervisor(s)' field is set to 'Joy Zepp, MD, PsyD'.

Non-Group Administrator view:

Additional buttons appear along the bottom of the Specific to Individual area of Settings and Directories:

- **Security Center** – ICANotes users setup as Security Administrators for a group can enter this password-protected area (using their same password) to update user accounts and apply additional group level settings. They can add/disable users, reset passwords, and change permissions.
- **My Security Info** – Users can check their email address is unique, as well as retrieve security questions and answers from the Upload Site. If a user calls into ICANotes Support to reset their account password, these security questions may be used to help confirm their identity.
- **User CS Options** – Accessible to Group Administrators, User CS Options allow you to set the default options at the user level for all clinical summaries, such as whether to include medical history, diagnoses, medications and more.
- **Change My Password** – Users can opt to change their ICANotes password at any time. It is highly recommended you log out of your account following a password reset, then log back in.
- **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.
- **Show Fields Used by Electronic Billing** – When this button is clicked, all fields required for electronic billing will display in yellow, with optional fields will displayed in pink.

PERSONAL INFO TAB

Settings within the **Personal Info** tab pertain to your identity and personal preferences. When you first enter Settings & Directories, you'll be looking at the **Identity** section of this tab. In Personal Info you will also access **Options** and **Calendar Options**.

IDENTITY TAB

The screenshot shows the 'Identity' tab within a software interface. The tab is divided into three sections: 'Identity', 'Options', and 'Calendar Options'. The 'Identity' section contains fields for Name (Crystal Docs), National Provider ID (9998887776), Alt. National Provider ID, Medical License Number, DEA Number (XA8745447), Suboxone Number, Federal Tax ID (46-581815484), SSN, EIN, Alt. #1 Federal Tax ID, Alt. #2 Federal Tax ID, Taxonomy Code, Bill Under Supervisor, Medicaid ID #, CLIA #, Email (Crystal+documentation@icanotes.com), Initials, CP, User Type (Office), User Facility Type (Inpatient/Outpatient), User Name (crystaldoc), User ID (106628), Group Name (Documentation), and Group Administrator (Yes/No). The 'Options' section contains fields for Supervisor(s) and Supervisee(s). The 'Calendar Options' section contains fields for MU / MIPS / CQM, Temporarily Switch User Type, and For Gov't claims (Accept Assignment, Rendering Status).

On the left side of the Identity tab you can enter your:

- National Provider ID (NPI)
- Alternate NPI
- Medical License Number
- DEA Number
- Suboxone Number Federal Tax ID
- Alternate Federal Tax ID (1)
- Alternate Federal Tax ID (2)
- Medicaid ID #
- CLIA #
- Email
- Initials – initials display on note previews within every patient's chart face as a means for quickly identifying which provider the note belongs to

Additional details will also display which cannot be edited from within this screen, either because they require modification by a Security Administrator in the Security Center, or because they are default fields set by ICANotes:

- Name – this is set by your Security Administrator in the Security Center
- User Type – this is your assigned discipline and is controlled by your Security Administrator
- User Facility Type
- User Name

- Group Name – this is an internal designation by ICANotes
- Group Administrator
- TSPlus User – if checked, this box indicates your account is setup for TSPlus web access

On the right side of the Identity tab, you can view or modify the following settings (Click the [Show](#) button to highlight any required and optional fields for electronic billing):

- **Supervisor(s)** – Specify one or more supervisors 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.
- **Supervisee(s)** – Any other user for whom you are designated a supervisor for will have their name displayed here. For all users named here, you will have edit access to their notes.
- **MU/MIPS/CQM** – This designation is controlled by the Security Administrator in the Security Center.
- **Temporarily Switch User Type** – Clicking into this dropdown field will allow the user to temporarily appear as another user type or discipline for the purposes of accessing fields within notes that are specific to that discipline (such as prescribing providers, or when a nurse fills in for an intake coordinator). Additional temporary user types may be assigned by the Security Administrator in the Security Center.
- **For Gov't Claims** – If you accept government assignment for Medicare payments, indicate so here. Also indicate your rendering status (sole practitioner or group member).

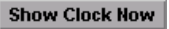
Click the button below to view a quick tutorial on how to use the **Identity** tab.

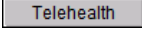
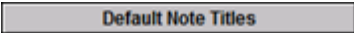
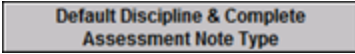
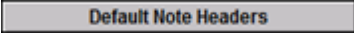
Video Tutorial
Identity Tab

OPTIONS TAB

The screenshot displays the 'Options' tab within the ICANotes application. The interface is divided into three main sections: 'Identity', 'Options', and 'Calendar Options'. The 'Identity' section on the left includes fields for 'Signature At End Of Note' (1), 'Electronic Signature Name' (2), 'Finished Note Header Name' (3), 'Default Site/Letterhead Name' (4), and a checkbox for 'Use Custom Rx Letterhead?' (5). The 'Options' section in the center contains several sub-sections: 'Options at Logon' (8) with a checkbox for 'Clinician Reminder Sheet'; 'Options in a Note' (9) with a checkbox for 'Navigate to Simplified PN'; 'Options when Compiling Notes' (10) with checkboxes for 'Clinical Decision Support Rules', 'Patient Education Material', and 'Include Medical History'; 'Options for AutoPosts' (11) with a checkbox for 'Batch Deletion Enabled'; and a 'Timezone' section (6) with a dropdown menu and a 'Show Clock at startup?' checkbox (7). The 'Calendar Options' section on the right includes a 'Telehealth' checkbox (12) and three buttons at the bottom: 'Default Note Titles' (13), 'Default Discipline & Complete Assessment Note Type' (14), and 'Default Note Headers' (15).

Under **Options**, you can enter the following information. Before you start, it is recommended you click the  button to highlight the required and optional fields for electronic billing.

1. **Signature at End of Note** – Enter your signature information as you would like it to appear at the bottom of your notes. This is not the same as your Electronic Signature.
2. **Electronic Signature Name** – Your Electronic Signature Name will populate when the electronic signature is generated for you by ICANotes Staff.
3. **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.
4. **Default Site/Letterhead Name** – If you have multiple sites, you can use this dropdown field to select the site you are working at. This will apply that site's letterhead to your notes, as well as set this site as the Facility Location for each note created.
5. **Use Custom Rx Letterhead** – By clicking the Yes checkbox, you can override the letterhead of your ICANotes-generated prescriptions (within standard medications) with whichever letterhead information is entered here.
6. **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 and will not impact already-created notes.
7. **Show Clock at Startup** – Some clinicians may have ICANotes maximized which blocks the view of the block on your local desktop. We offer a small clock that will display in the lower right corner of your screen when you are using ICANotes. You can click the checkbox to have the clock start automatically when you login, or when you click the  button to start displaying the clock right away.
8. Options at Logon:
 - a. **Clinician Reminder Sheet** – Click the checkbox to automatically display the Clinician Reminder Sheet each time you login to ICANotes. When enabled, you will see this report before seeing the Chart Room.
9. Options in a Note:
 - a. **Navigate to Simplified Note** – Click this checkbox to enable the Simplified version of the Progress Note rather than the full version.
 - b. **Level of Care Writes to** – Specify whether the Level of Care should automatically write to either the History or Instructions within a progress note.
10. Options When Compiling Notes:
 - a. **Clinical Decision Support Rules** – Click to enable showing Clinical Decision Support Rules. These rules show detailed information via a pop-up window when certain actions are performed in ICANotes and **is required in order to comply with Meaningful Use**.
 - b. **Patient Education Material** – Click to enable the ability to print Patient Education Material for medications and/or diagnoses. **This box must be checked if you intend to attest for Meaningful Use incentives**.
 - c. **Diagnostic Algorithm** – Click this box if, as a prescriber, you would like to review diagnostic algorithms for justifying psychotropic medications and treatment modalities for your patients.
 - d. **Use Military Time** – Check this box if you would prefer a 24-hour (military time) clock instead of a 12-hour clock.

- e. **Include Medical History** – Choose between the available radio buttons to specify whether to include Medical History within your patient notes.
 - f. **Include Notes/Risk Factors** – Choose between the available radio buttons to specify whether to include Notes and Risk Factors within your patient notes.
 - g. **Include Diagnosis** – Choose between available options to specify whether to include diagnoses, omit all, or omit only Axes II-V in your patient notes.
 - h. **Include Medications** – Choose between available options to specify whether to include medications within your patient notes.
 - i. **Rx discount Card Enabled** – Choose this checkbox if you would like to enable the Rx discount card. Contact ICANotes Support to have this feature enabled for your group.
11. Options for AutoPosts:
- a. **Batch Deletion Enabled** – When this checkbox is enabled, the user will have the ability to batch delete remittances from within the Auto Post Reports window. When not enabled, remittances can only be deleted one remittance at a time.
12. **Telehealth** – Click the  button to view your assigned Telehealth Token. This code will only display if your account has been enabled for Telehealth by ICANotes Support.
13. **Default Note Titles** – Click the  button to view options for applying default note titles to various types of progress notes. This will replace the default name for each note type.
14. **Default Discipline & Complete Assessment Note Type** – Click the  button to set a custom default Type and Discipline for the Complete Assessment.
15. **Default Note Headers** – Click the  button to set the Progress Note initial header, or set no initial header, within progress notes.

Click the button below to view a quick tutorial on how to use the **Options** tab.



CALENDAR OPTIONS

In the **Calendar Options** tab, there are settings which can be set per user for both the Legacy and New Calendars.

Personal Info	Caseload	Billing Rates & Payer Rules	ICD-10 Codes	Custom Buttons	Reminders	Device	Restore Deleted																																						
Identity		Options			Calendar Options																																								
For the rest of this session: ☐ Use Legacy Calendar ☒ Use New Calendar		Settings selected in this area will default for this staff / clinician. These individual options supersede group options.																																											
		<table border="1"> <thead> <tr> <th></th> <th>Individual</th> <th>Group</th> </tr> </thead> <tbody> <tr> <td>time scale increments (in minutes)</td> <td> </td> <td>15</td> </tr> <tr> <td>start day at (select 0 for midnight)</td> <td> </td> <td>8:00:00</td> </tr> <tr> <td>end day at (select 24 for midnight)</td> <td> </td> <td>19:00:00</td> </tr> <tr> <td>default appt duration (in minutes)</td> <td> </td> <td>30</td> </tr> <tr> <td>refresh interval (number of minutes between auto-refresh)</td> <td> </td> <td>5</td> </tr> <tr> <td>start on view</td> <td> </td> <td>(Requires New Logon)</td> </tr> </tbody> </table>			Individual	Group	time scale increments (in minutes)		15	start day at (select 0 for midnight)		8:00:00	end day at (select 24 for midnight)		19:00:00	default appt duration (in minutes)		30	refresh interval (number of minutes between auto-refresh)		5	start on view		(Requires New Logon)	<table border="1"> <thead> <tr> <th></th> <th>Indiv.</th> <th>Group</th> </tr> </thead> <tbody> <tr> <td>show weekends</td> <td>☐</td> <td>☐</td> </tr> <tr> <td>hide cancelled appointments</td> <td>☐</td> <td>☐</td> </tr> <tr> <td>hide rescheduled appointments</td> <td>☐</td> <td>☐</td> </tr> <tr> <td>do not enter current patient in new event</td> <td>☐</td> <td>☐</td> </tr> <tr> <td>maximize calendar window</td> <td colspan="2">☐</td> </tr> </tbody> </table>				Indiv.	Group	show weekends	☐	☐	hide cancelled appointments	☐	☐	hide rescheduled appointments	☐	☐	do not enter current patient in new event	☐	☐	maximize calendar window	☐	
	Individual	Group																																											
time scale increments (in minutes)		15																																											
start day at (select 0 for midnight)		8:00:00																																											
end day at (select 24 for midnight)		19:00:00																																											
default appt duration (in minutes)		30																																											
refresh interval (number of minutes between auto-refresh)		5																																											
start on view		(Requires New Logon)																																											
	Indiv.	Group																																											
show weekends	☐	☐																																											
hide cancelled appointments	☐	☐																																											
hide rescheduled appointments	☐	☐																																											
do not enter current patient in new event	☐	☐																																											
maximize calendar window	☐																																												

Choose which version of the Calendar you want to use for the entirety of your login session.

For the rest of this session:

☐ Use Legacy Calendar

☒ Use New Calendar

Here you can decide what to show on your Calendar. The default group option will display, but individual users may override these options. The **Start on View** field is for setting the type of calendar view you wish to see by default when you load the calendar.

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



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 own account listed.

Settings & Directories

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

Group Level Settings & Directories

Personal Info **Caseload** **Billing Rates & Payer Rules** **ICD-10 Codes** **Custom Buttons** **Reminders** **Device** **Restore Deleted**

The following patients have been assigned to Joy Zepp, MD, PsyD

1)	Banner, Bruce	4/14/1970	2004694898
2)	Bear, Goldlocks	2/18/1992	2004696083
3)	Burns, Charles M	6/25/1917	2004684335
4)	Doe, Alice	8/19/1984	2004684621
5)	Doe, John	6/18/1986	2004695718
6)	Hudson, Barbara	2/14/1963	2004692406
7)	Mouse, Micky	3/31/1950	2004696275
8)	Smith, Beth	6/18/1976	2004696098
9)	Smith, Summer	6/5/2000	2004690951
10)	Test, Charlotte	2/18/1992	2004696085
11)	Test, Katherine	1/10/1949	1000010670492
12)	Test, Lisa S	1/8/1972	1000010670496

The following clinicians can sign notes for

Print **Export** **Show Inactive Charts** **Show Only if User is Principal** **Assign Provider** **< Select a Clinician >**

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

The left column (within the Caseload tab) displays patients assigned to the clinician selected on the left. If the total number of patients is need, scrolling to the end of the list will provide a total count, as the patient list is numbered.

Use the buttons located underneath the column to Print or Export the caseload listing, Show Inactive Charts, or Show Only if User is Principal. These last two buttons will function to filter the caseload listing by the chosen option.

The right column lists any additional clinicians who are also assigned to the selected (from the left column) patient's chart. This includes clinicians who were assigned to a patient via Demographics in the patient's chart. However, if any clinicians are assigned to a patient chart via this screen, the designation will not appear within Demographics in the patient's chart. Further, this will not reflect any supervisors who have been assigned under the **Personal Info** tab.

To assign a provider here, click first **< Select a Clinician >** to Select a Clinician from the dropdown field, then click the **Assign Provider** button.

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 & Payer Rules** tab is setup 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. Before you start creating, it is recommended you click the button to highlight the required and optional fields for electronic billing.

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

Video Tutorial
Billing Rates & Payer
Rules

BILLING RATES

The **Billing Rates for Services** section 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, such as for telehealth services.

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 the amount that is billed. **Tip for Group Administrators:** When setting up rates for a new group, it is helpful to use the Copy and Paste buttons to populate rules between providers, rather than re-creating lists for each provider.

The short list is a list of service codes used most often by your group. 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, then selecting the **Service/Modifier Codes** tab.

- To enter billing rates, select a code using the dropdown arrow in the left column titled **Procedure Code**.
- Enter one or more **Modifiers**, as needed.
- Enter an **Insurance Payer** if you want to assign a specific rate to a specific insurance carrier.
- Enter the **Billing Rate** for that service in the last column on the right.
- To delete a billing rate rule, click the red **X** to the right of the billing rate.
- Select **Copy** to copy the entire list of service codes and billing rates.
- Select **Paste** to paste the previously copied list of service codes and billing rates to another user.
- Select **Print** to print the entire list of service codes and billing rates.

PROVIDER PAYER RULES

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

Insurance Payer	Insurance Group #	Code	Modifier	Rendering Taxonomy	Billing Taxonomy	Bill Under Supervisor
[All Payers]	[All Groups]	[All Codes]				Joy Zepp, MD, PsyD
Cigna	[All Groups]	[All Codes]		X123456789	X987654321	Anna Resnick, MD
United Healthcare	[All Groups]	[All Codes]		X111222333	X444555666	Anna Resnick, MD

1. Since all fields except for the **Bill Under Supervisor** are blank in the example below, the chosen provider (Joy Zepp, MD, PsyD) will be set as the default supervisor for this user, meaning that their billing information will be present on all claims if no other supervisors are defined.
2. The selected provider's (Anna Resnick, MD) information will be present on claims when United Healthcare is the payer, and the taxonomies specified in that row will also be used on the claim.

Click the  icon to view detailed information about building Provider Payer Rules.

Payer Rules

Default Payer Rule
 Used to define default rendering & billing taxonomy codes.
 Default codes will be applied when no other matching payer rule is found.
 To define, leave Insurance Payer, Insurance Group Number & Service code blank.

Default Insurance Payer Rule
 To define, leave Insurance Group Number & Service code blank.

Default Rendering Taxonomy Code
 Is also applied when user is set as a bill under supervisor.

Insurance Group Number & Service Code
 When applying payer rules, they work together.
ALL rules which contain only one are invalid and ignored.
 To send different taxonomies using this combination, create a unique rule for each combination billed.
 Only the Service code in the first position of a note is matched.

Billing Taxonomy Code & Bill Under Supervisor
 Billing taxonomy code is **NOT** overridden by bill under supervisor settings.
 Applied payer rules with an empty billing taxonomy code will cause **ALL** corresponding elements in **ALL** related claims to also be empty.

Auto Modifiers
 Modifiers are **NOT** matched when referencing taxonomy codes **NOR** bill under supervisor information.
 It is best to create rules for default auto modifiers without taxonomy codes or bill under supervisor specified.
 If group has Set Modifiers Based on CBR enabled, then payer rules will **NOT** be used to auto set modifiers.

BILLING SERVICE COMBOS

The **Billing Service Combos** section will display content if the feature is enabled for your account. To have this section enabled, Security Administrators should reach out to ICANotes Support for more information.

Personal Info
Caseload
Billing Rates & Payer Rules
ICD-10 Codes
Custom Buttons
Reminders
Device
Restore Deleted

Billing Rates
Provider Payer Rules
Billing Service Combos

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.

In the ICD-10 By Code section, click into the initial (short) field to enter an ICD-10 code by its code (ex: F41.1), then press the Enter or Tab keys to populate the description in the next (long) field.

In the ICD-10 section, use the three fields to search and enter diagnosis codes by type (ex: F01-F99 Mental, Behavioral, and Neurodevelopmental disorders), category (ex: F01-09, F10-19, F20-29, etc.), then subcategory (listing of specific codes within the chosen category)

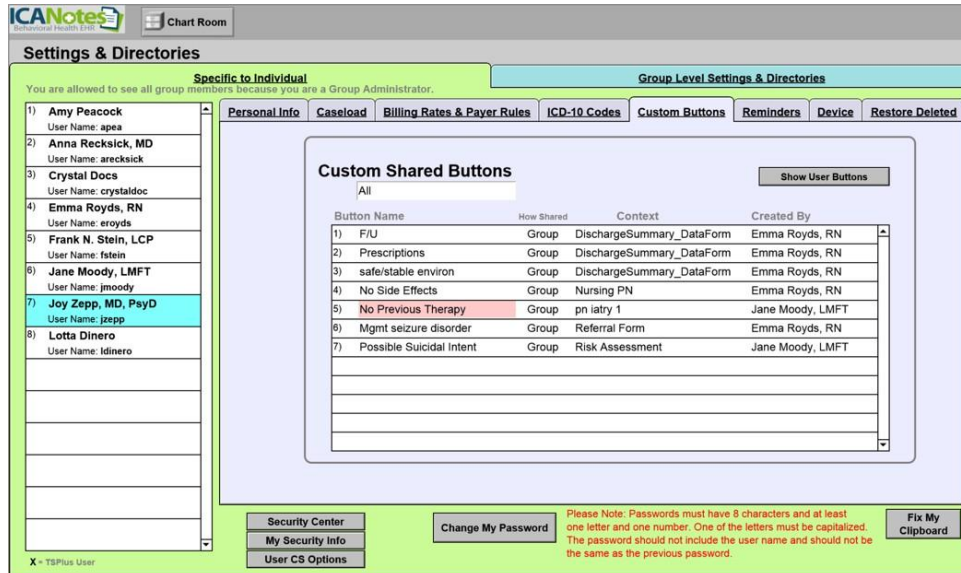
- To delete an ICD-10 code, click the red **X** to the right of the code.
- Select **Copy** to copy the entire list.
- Select **Paste** to paste the copied list to another user.
- Select **Print** to print the entire list.
- Select the **edit** button to change the description of the diagnosis code.

Click the button below to view a quick tutorial on how to use the **ICD-10 Codes** tab.

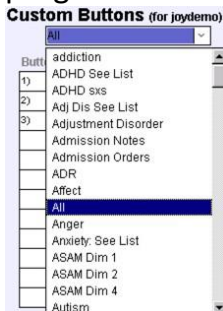


CUSTOM BUTTONS TAB

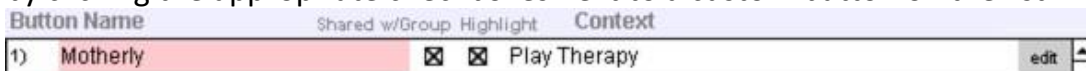
The **Custom Buttons** tab allows you to view and manage the custom buttons you have created in ICANotes. When you first click on this tab, the system will automatically display all custom buttons created throughout the system.



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



- You may choose to highlight (in red) a button on the list or share it with your entire group by clicking the appropriate checkboxes next to a custom button on the list:



- By clicking the **edit** button next to a custom button, you can edit the name and content of that specific custom button, share it with selected users or disciplines, or with the entire group.
- If you want to review the list of all shared buttons in your group, click the **Show All Shared Buttons** button in the upper right-hand corner.
- If you are a Security Administrator, you will have the additional benefit of reviewing custom content 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.

Video Tutorial Custom Buttons

REMINDERS TAB

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

[illegible]

- You can start a new Reminder by clicking the  button.
- A new window will open which will allow you to select from four 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, whether the reminder should be repeated, and at what interval.
- Enter a **Subject** for the reminder.
- Type your **Message**.
- Link to this Patient? Choose yes or no.
 - If yes, click on the **<Click 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 labelled **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 steps outlined 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 member (**Recipient**) who will receive the Reminder to contact the patient.
- 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 **<Click 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 labelled **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 setup 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:



- The newly created Reminder will show on the tab.

Personal Info

Caseload

Billing Rates & Payer Rules

Custom Buttons

Reminders

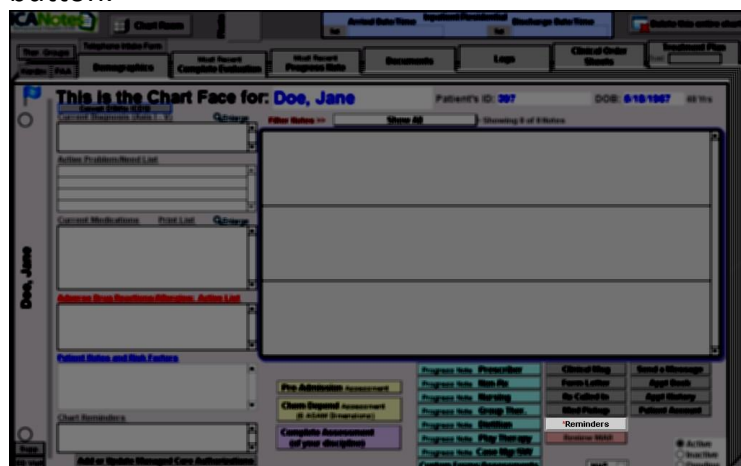
Restore Deleted

+

New

Status	From	To	Date	Subject	Patient	Repeat
1) Pending	Joy Test2	Joy Test4	3/16/16	Reminder: Copy Insurance	Doe, Jane	☐ ▲ ▼

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



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

Status	From	To	Date	Subject	Patient	Repeat	Patient Reminder	Delivered
1) Pending	Joy Test2	Joy Test4	3/16/16	Reminder: Copy Insurance Card	Doe, Jane	☐	☒	☐

- 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

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

Video Tutorial
Reminders

RESTORE DELETED TAB

The **Restore Deleted** tab feature is used to restore any notes, charts, or Treatment Plans you may have deleted and now wish to have restored. All users can view those charts and notes that they have personally deleted. Group Administrators can review charts, notes, and Treatment Plans that others may have deleted as well.

Settings & Directories

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

Specific to Individual

Group Level Settings & Directories

Personal Info | Caseload | Billing Rates & Payer Rules | ICD-10 Codes | Custom Buttons | Reminders | Device | **Restore Deleted**

Deleted Notes | Deleted Charts | Deleted Tx Plans

Notes, Charts and Tx Plans Deleted by crystaldoc

Deleted Note	Resource Date	Restore
Parker, Oliver	7/24/2020	Quick Note
This note should contain the new custom note title.		
Marzipan, Maricella	7/20/2020	Progress Note
Unfinished Note		
Patient, Areal	7/10/2020	Progress Note
Unfinished Note		
Walker, Petra	6/22/2020	Primary Care Note
Unfinished Note		
Bishop, Peter	6/15/2020	Progress Note
Unfinished Note		
Parker, Oliver	5/22/2020	Progress Note
Unfinished Note		
Patient, Areal	5/15/2020	Progress Note
Unfinished Note		
Maricle, Meghan	4/24/2020	Complete Evaluation
Unfinished Note		

Security Center | My Security Info | User CS Options | Change My Password | Please Note: Passwords must have 5 characters and at least one letter and one number. One of the letters must be capitalized. The password should not include the user name and should not be the same as the previous password. | Fix My Clipboard

X = TSPplus User

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, note, or Treatment Plan, simply click the  icon to the right of the itemized listing.

Deleted Note	Encounter Date	Restore
Windsor, Liz	3/16/2020	Nursing Note
Unfinished Note		

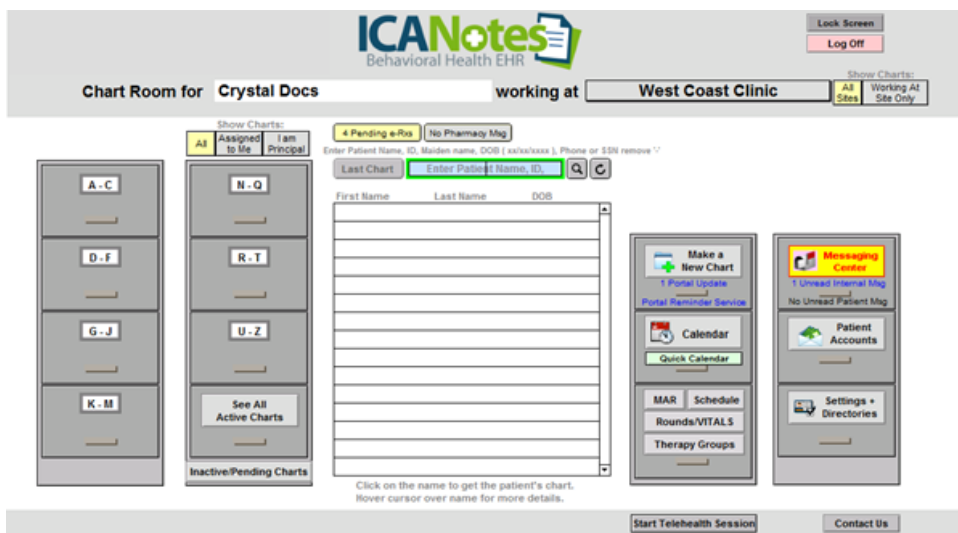
You can print a list of the Deleted Notes, Deleted Charts, or Deleted Tx Plans by clicking the  icon.

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

Video Tutorial
Restore Deleted

CREATING AND ACCESSING CHARTS

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



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

Show Charts:

All	Assigned to Me	I am Principal
-----	----------------	----------------

- You can search for a patient by name, ID, DOB, phone number or social security number by typing into the search field and hitting either the Enter/Return key on your keyboard or clicking the  icon.

Enter Patient Name, ID, Maiden name, DOB (xx/xx/xxxx), Phone or SSN remove "

Last Chart  

- Clicking the **Last Chart** button takes you to the most recently accessed chart visited during your current login session. If the button is greyed out, there is no most recent chart to recall.

CREATING A NEW CHART



- Click on the **Make a New Chart** button in the Chart Room.
- A popup will appear, requiring the patient's first name, last name, and date of birth.

 A screenshot of a "Create New Patient" dialog box. It contains the text "Please enter the new patient's name and date of birth." and three input fields: "First Name", "Last Name", and "Date of Birth". At the bottom are "Cancel" and "Create" buttons.

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

 A screenshot of a "New Patient Warning" dialog box. It contains the text "There is already a patient with this name and DOB. Do you still want to add a new patient?" and "Click View to go to the existing patient chart." At the bottom are "View", "Yes", and "No" buttons.

- 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**. Fields which are helpful, but not required, are highlighted in **blue**.

ICANotes Save and go back to Chart Room Save and go to Chart Face Cancel Chart Creation and return to Chart Room Chart Details White, Snow Patient's Name 73 Yrs Patient's ID [Audit Log](#)

New Patient Anaphylactic Reaction Reported ☐ Enter E-Prescribe Info Patient Reviewed Demographics [Print Patient Demographics](#)

Patient Information **Episodes of Care** **Insurance Information** **Other Contacts** **Telephone Intake**

*Name (F,M,L,Suffix) Snow White
Refer to patient as White Maiden/Other Name
*Date of Birth 2/14/1947 Age: 73 Multiple Birth ☐ Birth Order
*Sex ☐ *Gender ☐ more Other Names
Address ☐ Homeless
Addr 2 / Appt # County ☐ Bad Address
City, State, Zip
Home Phone Country US
Cell Phone Best Phone ☐ Home ☐ Work ☐ Cell
Work Phone ext Appt Reminders via:
Email ☐ Email
Email 2 ☐ Text Message
SSN # ☐ Phone Message
Marital Status
Sexual Orientation
*Ethnicity Disability
Ethnicity 2 Family Size
*Race Employment Status
Race 2 Annual Household Income
*Preferred Language School or Employer
Religion Grade
Native American ☐ Y ☐ N Tribal Affiliation
HIE Opt In ☐ Yes ☐ No
HIE Opt Start HIE Opt End
Release of Info
Adv. Dir.
Patient Calendar Note
Miscellaneous Notes

Assigned Providers are allowed to sign Notes for this Patient

Where Seen Med Rec #

Red fields are required Blue fields are optional but add info to clinical note.
* = Required for Meaningful Use = Patient Has Accessed Portal
Show Fields used by electronic billing Required Optional

- If you intend to use ICANotes for electronic billing purposes, clicking the button in the bottom center of the screen will highlight fields which are required for billing purposes in yellow, as well as optional fields in pink.

ICANotes Save and go back to Chart Room Save and go to Chart Face Cancel Chart Creation and return to Chart Room Chart Details White, Snow Patient's Name 73 Yrs Patient's ID [Audit Log](#)

New Patient Anaphylactic Reaction Reported ☐ Enter E-Prescribe Info Patient Reviewed Demographics [Print Patient Demographics](#)

Patient Information **Episodes of Care** **Insurance Information** **Other Contacts** **Telephone Intake**

*Name (F,M,L,Suffix) Snow White
Refer to patient as White Maiden/Other Name
*Date of Birth 2/14/1947 Age: 73 Multiple Birth ☐ Birth Order
*Sex ☐ *Gender ☐ more Other Names
Address ☐ Homeless
Addr 2 / Appt # County ☐ Bad Address
City, State, Zip
Home Phone Country US
Cell Phone Best Phone ☐ Home ☐ Work ☐ Cell
Work Phone ext Appt Reminders via:
Email ☐ Email
Email 2 ☐ Text Message
SSN # ☐ Phone Message
Marital Status
Sexual Orientation
*Ethnicity Disability
Ethnicity 2 Family Size
*Race Employment Status
Race 2 Annual Household Income
*Preferred Language School or Employer
Religion Grade
Native American ☐ Y ☐ N Tribal Affiliation
HIE Opt In ☐ Yes ☐ No
HIE Opt Start HIE Opt End
Release of Info
Adv. Dir.
Patient Calendar Note
Miscellaneous Notes

Assigned Providers are allowed to sign Notes for this Patient

Where Seen Med Rec #

Red fields are required Blue fields are optional but add info to clinical note.
* = Required for Meaningful Use = Patient Has Accessed Portal
Show Fields used by electronic billing Required Optional

- Customers utilizing e-prescribing may be required to fill in additional fields as well, such as the patient's zip code and a home phone number.
- Security Administrators can likewise set additional mandates which will require fields be completed. If any of these fields are skipped, you will receive a prompt citing which fields require entries before saving.
- If you are using the Patient Portal, you will need to populate the patient's email address and check the Portal box (contact the ICANotes Support team for more information on utilizing the Patient Portal, or the ICANotes Sales team to inquire about enabling the Premium Patient Portal).
- A cell phone and/or email address will likewise be necessary for customers who will be utilizing ICANotes Telehealth.
- You will need to assign a provider in the lower left-hand corner of the Demographics screen. To do this, click to either **<Select a Clinician>** or select **<Multiple Clinicians>** if assigning more than one provider at once. After selecting the appropriate provider(s), click the **Assign Provider(s)** button and confirm that the provider name(s) appears on the left.

Assigned Providers are allowed to sign Notes for this Patient

< Select a Clinician >

< Multiple Clinicians >

Assign Provider(s)

- 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 which are not highlighted in green.

Cell Phone

Work Phone

Email

Email 2

SSN #

Marital Status

Sexual Orientation

*Ethnicity

Ethnicity 2

*Race

Race 2

*Preferred Language

Religion

Native American

PsychMD

MedMD

MD

APN

RN

SW

CM

Diet

Ther

LAC

Att

Op

Emp

Indiv

Ann

Group

Sch

Intake

Family

Couples

TripleP

CPP

SkBuild

PeerSup

Famldvo

Principal

Ther

Principal

Assigned Providers are allowed to sign Notes for this Patient

Anna Recksick, MD

Jane Moody, LMFT

- Once the appropriate providers are assigned to the patient's chart, you have numerous options:
- The **Telephone Intake** tab will take you to the Telephone Intake Form.

- The **Save and go back to Chart Room** button will save the patient's chart and return you to the Chart Room.
- The **Save and go to Chart Face** button will save the patient's chart and take you to the patient's Chart Face.
- The **Cancel Chart Creation and return to Chart Room** button will cancel chart creation and return you to the Chart Room.
- The **Skip Initial; create a Group Therapy Note** button will save the patient's chart and open a new Group Therapy Note.
- The **Skip Initial; create a Progress Note** button will save the patient's chart and open a new Progress Note.
- The **CONTINUE to Initial or Complete Exam** button will save the patient's chart and open a new Complete Assessment.
- Continue filling out information in the Demographics portion of the chart, including insurance information and other contacts. The Episodes of Care tab is used primarily for patients in an inpatient facility.

- 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 into the **Insurance Information** tab.

New Patient Anaphylactic Reaction Reported ☐ Enter E-Prescribe Info Patient Reviewed Demographics ☐ Print Patient Demographics

Patient Information | Episodes of Care | **Insurance Information** | Other Contacts | Telephone Intake

Patient: White, Snow Medicaid ID

Insurance Coverage (click to view, enter details to right >)

☒ Patient is Responsible Party ☐ Require Auth# in Notes
if not, use Guarantor info on Other Contacts

☐ EPSDT / Family Plan ☐ Self Pay
This is copied to box 24b of the HCFA1500 If not, do not fill in Insurance

☐ Account is in Collections ☐ % Discount
Reduce new charges by this %

☐ FREEZE ACCOUNT ☐ % Discount
Reduce charges via Adj. by this %

MCM Auth. Received: ☐ Yes ☐ No ☐ % Discount
Reduce charges via Adj. by this %

Additional Notes:

Coverage Details Benefits Payments Eligibility Statement Settings Additional Info

Insurance

Member ID/Policy # ☐ Required

1st Group # 2nd 3rd 4th

Patient Relationship to Insured: ☐ Self ☐ Spouse ☐ Child ☐ Other

Start Date Suspend Date End Date

☒ Current

Insured Party

Name (First, MI, Last)

Address

City, State, Zip

Phone SSN #

DOB Gender ☐ M ☐ F ☐ U

Employer

Insurance Provider

Name

Address

City, State, Zip

Phone

Payer ID Alt. Payer ID

☐ Use Alt. Provider NPI ☐ NPI ☐ Tax ID

☐ Use Alt. Facility ☐ Facility ☐ Tax ID

☐ Use Alt. Provider ☐ Tax ID

ID Qualifier 24i

Insurance Type Insurance Type Other

Submission Method

- Click the button to choose the appropriate insurance carrier from the insurance payer list.

Patient Information | Episodes of Care | **Insurance Information** | Other Contacts | Telephone Intake

Patient: White, Snow Medicaid ID

Insurance Coverage (click to view, enter details to right >)

1 Cigna

☒ Patient is Responsible Party ☐ Require Auth# in Notes
if not, use Guarantor info on Other Contacts

☐ EPSDT / Family Plan ☐ Self Pay
This is copied to box 24b of the HCFA1500 If not, do not fill in Insurance

☐ Account is in Collections ☐ % Discount
Reduce new charges by this %

☐ FREEZE ACCOUNT ☐ % Discount
Reduce charges via Adj. by this %

MCM Auth. Received: ☐ Yes ☐ No ☐ % Discount
Reduce charges via Adj. by this %

Additional Notes:

Coverage Details Benefits Payments Eligibility Statement Settings Additional Info

Insurance

Member ID/Policy # ☐ Required

1st Group # 2nd 3rd 4th

Patient Relationship to Insured: ☐ Self ☐ Spouse ☐ Child ☐ Other

Start Date Suspend Date End Date

☒ Current

Insured Party

Name (First, MI, Last)

Address

City, State, Zip

Phone SSN #

DOB Gender ☐ M ☐ F ☐ U

Employer

Insurance Provider

Name

Address

City, State, Zip

Phone

Payer ID Alt. Payer ID

☐ Use Alt. Provider NPI ☐ NPI ☐ Tax ID

☐ Use Alt. Facility ☐ Facility ☐ Tax ID

☐ Use Alt. Provider ☐ Tax ID

ID Qualifier 24i

Insurance Type

Insurance Type Other

Submission Method

- Proceed to fill out the remaining insurance information from the patient's insurance card. If the insurance payer selected has been added to your group's insurance payer short list, some if not all insurance information will populate for you. You may prefer to use the "Show Fields used by electronic billing" button at the bottom to highlight required fields in yellow.
- If the patient is the insured party, use the button to copy their patient information into the Insured Party fields. Otherwise, fill in these fields with the insured individual's information.
- Fields which are not required can be completed at any time by returning to the Demographics screen.

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

Video Tutorial
Creating Charts

TELEHEALTH

ICANotes offers a proprietary Telehealth feature that works in conjunction with the EHR. The clinician can launch a telehealth session from a scheduled appointment, patient chart, or the Chart Room. The patient receives an invitation to join the session via email or text message with a link they can click on to join the session.

The following device and browsers are compatible for patients:

Telehealth Compatibility		Patients can access their telehealth session using a variety of devices and browsers.		
		CHROME	FIREFOX	SAFARI
WINDOWS COMPUTERS		X	X	
MAC COMPUTERS		X	X	X
CHROMEBOOKS		X		
ANDROID PHONES & TABLETS (ANDROID 6.0+)		X		
IPHONES & IPADS (IOS 12.2+)				X

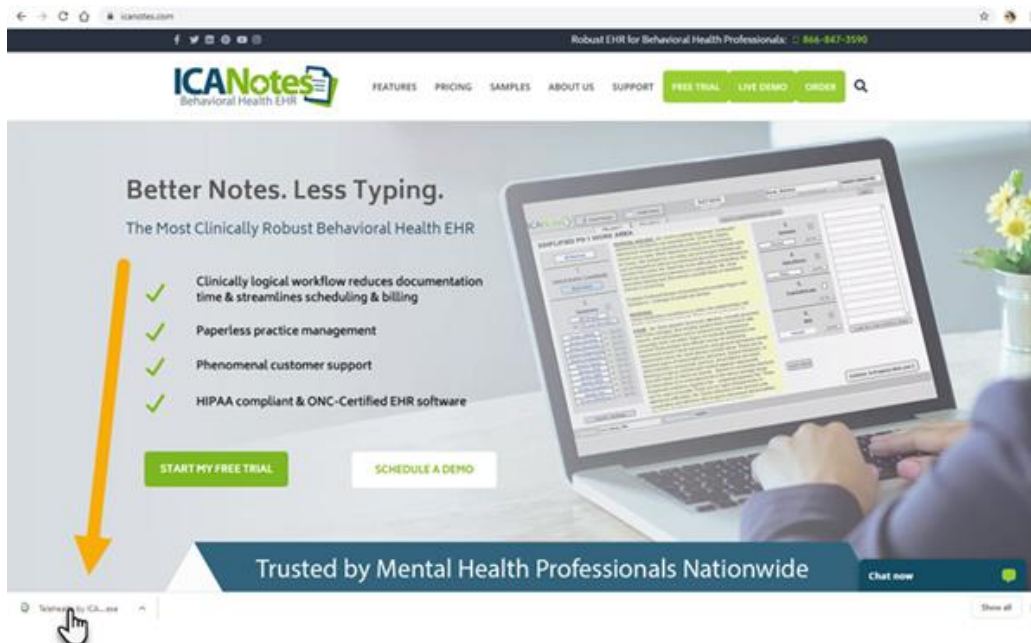
Please click the button below to view a video tutorial on installing, initiating, and troubleshooting ICANotes Telehealth.

Video Tutorial
Telehealth

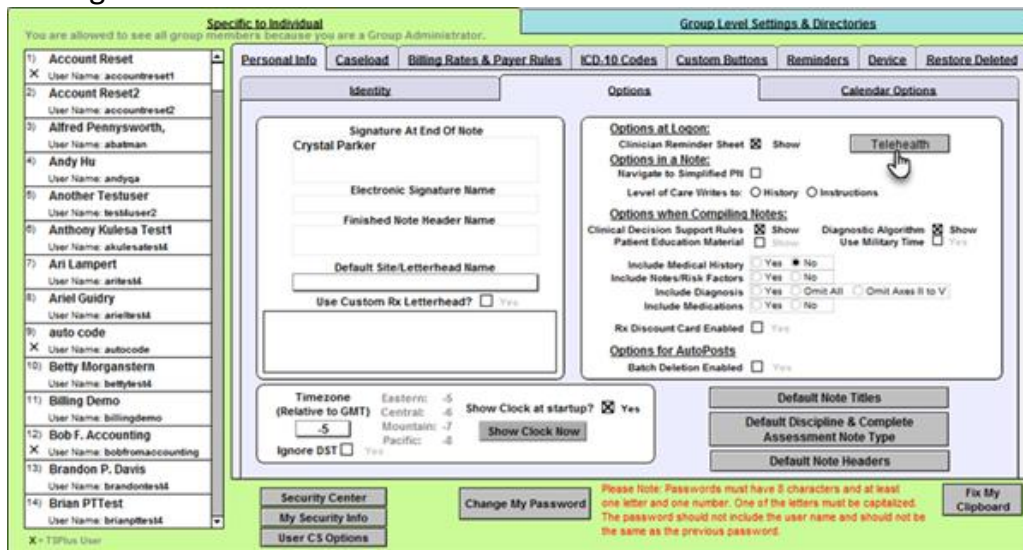
TELEHEALTH SETUP (PC)

ICANotes customers on a PC can download the ICANotes telehealth application [here](#).

1. Once downloaded, click to open the .exe file. Chrome users will see the file in the lower left corner of their browser window. For other browsers, check your Downloads folder.



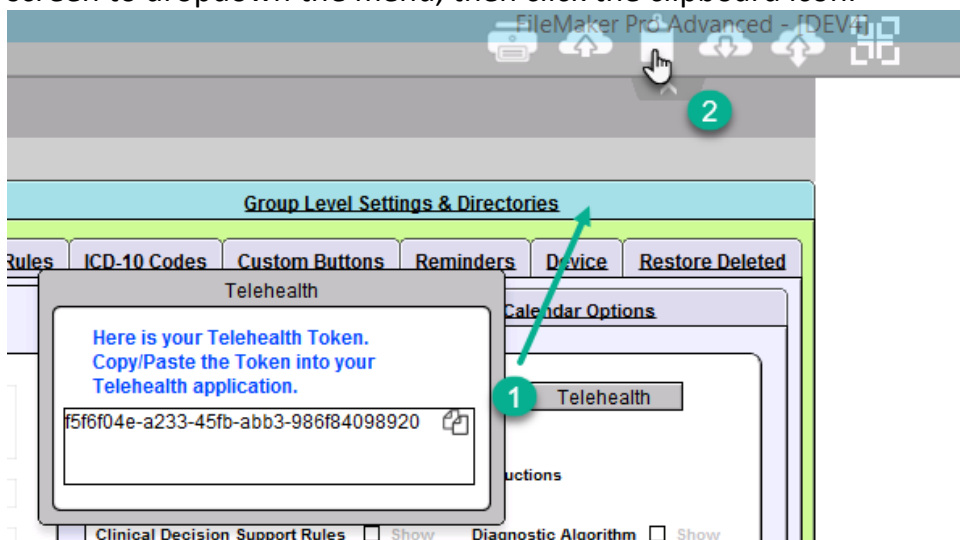
- When your account has been enabled for Telehealth and the receiver app is downloaded, you will need to generate your Telehealth Token. *This is a necessary step in order to connect your ICANotes account to the Telehealth app. You will only need to generate a Token once. If the telehealth app is deleted and later re-installed on your machine, you will need to generate a new token.* The Token is found in the **Options** tab of your Individual Settings & Directories. Click the **Telehealth** button.



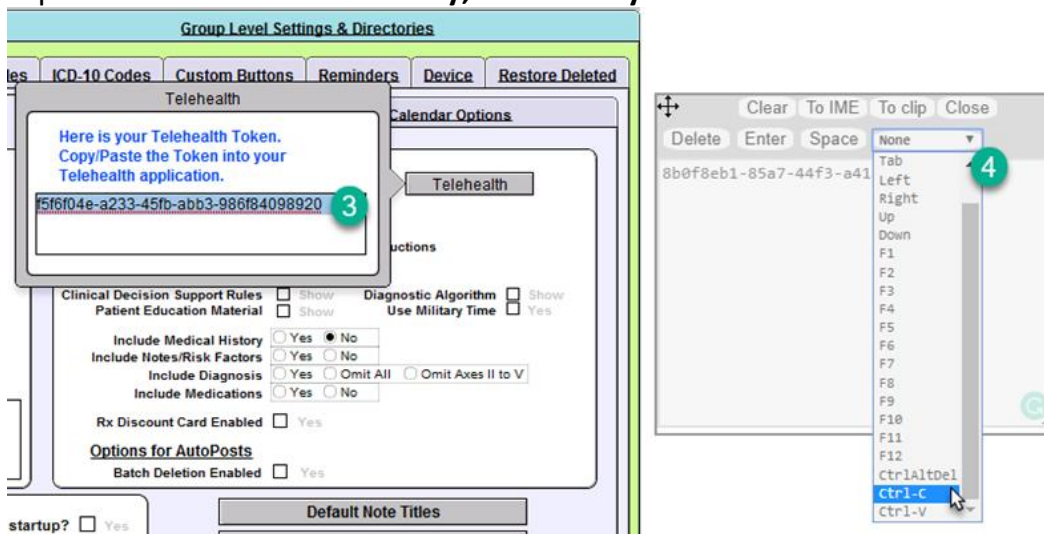
- In the Telehealth pop-out, click the **Get Telehealth Token** button, which will generate a string of characters, as displayed below:



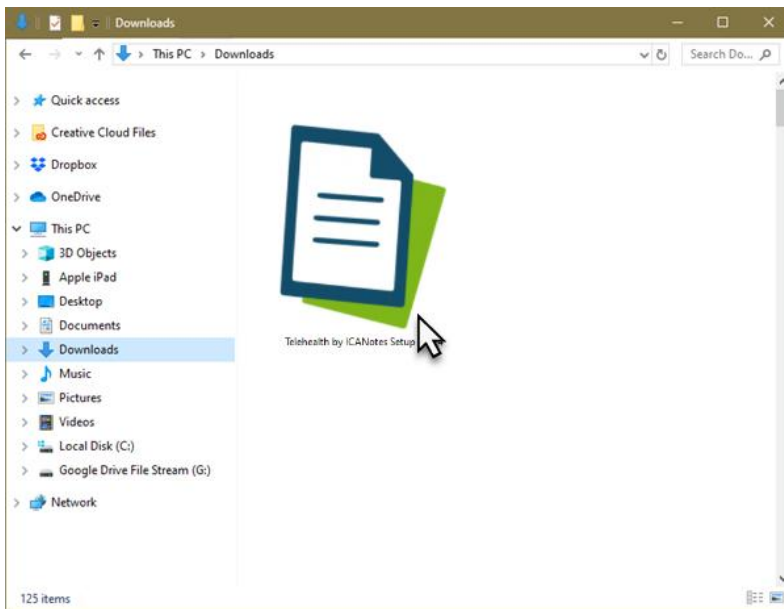
- After clicking the Telehealth button, click the arrow at the very top center of the ICANotes screen to dropdown the menu, then click the clipboard icon.



- If you do not see the Token key in the clipboard window, go ahead and highlight it using your mouse, then right-click and choose the **copy** option to transfer the key to the clipboard window. **Alternatively, use the keyboard shortcut CTRL+C to copy.**



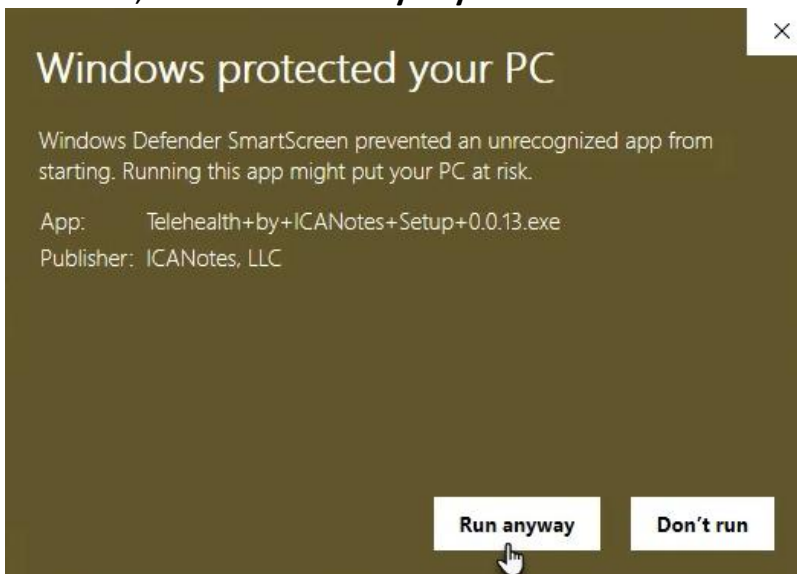
- From the clipboard window, click into the dropdown and choose the **Ctrl-C** option. This is the copy functionality. The key will now be located on your computer's internal clipboard for pasting.
- From your Chrome browser window or Downloads folder, double-click to launch the Telehealth by ICANotes installation file.



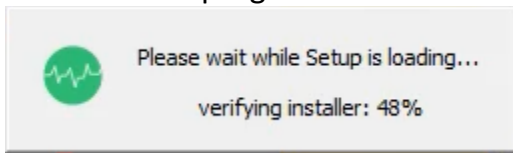
8. You may see a Windows security notice depending on your computer's security settings. Click **More Info** to expand the window and view additional options.



9. In the expanded view you will see the App name and Publisher, which will display as ICANotes, LLC. Click **Run Anyway** to continue with installation.



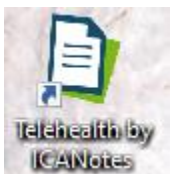
10. You'll see the progress of the installation on your screen, as seen below:



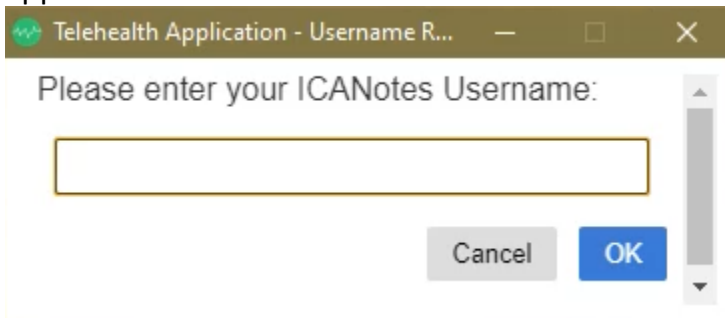
11. Once the installation is complete, click to **Finish**. If the *Run Telehealth by ICANotes* checkbox is checked, the app will open automatically.



12. Otherwise, click the new shortcut icon on your desktop to open the Telehealth receiver file. This icon is automatically included with the installation.

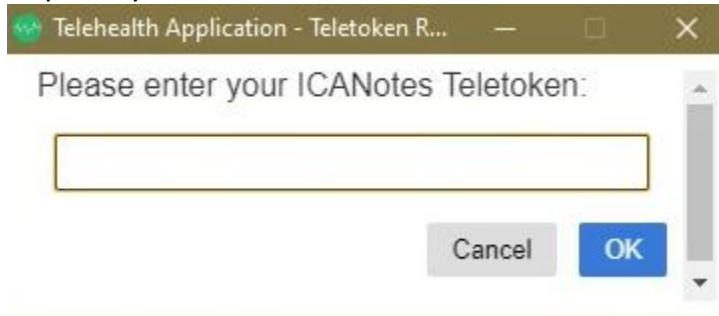


13. Once the Telehealth app is launched, you will be prompted to enter your ICANotes username. This is case-sensitive and the same username you use to login to the ICANotes application.

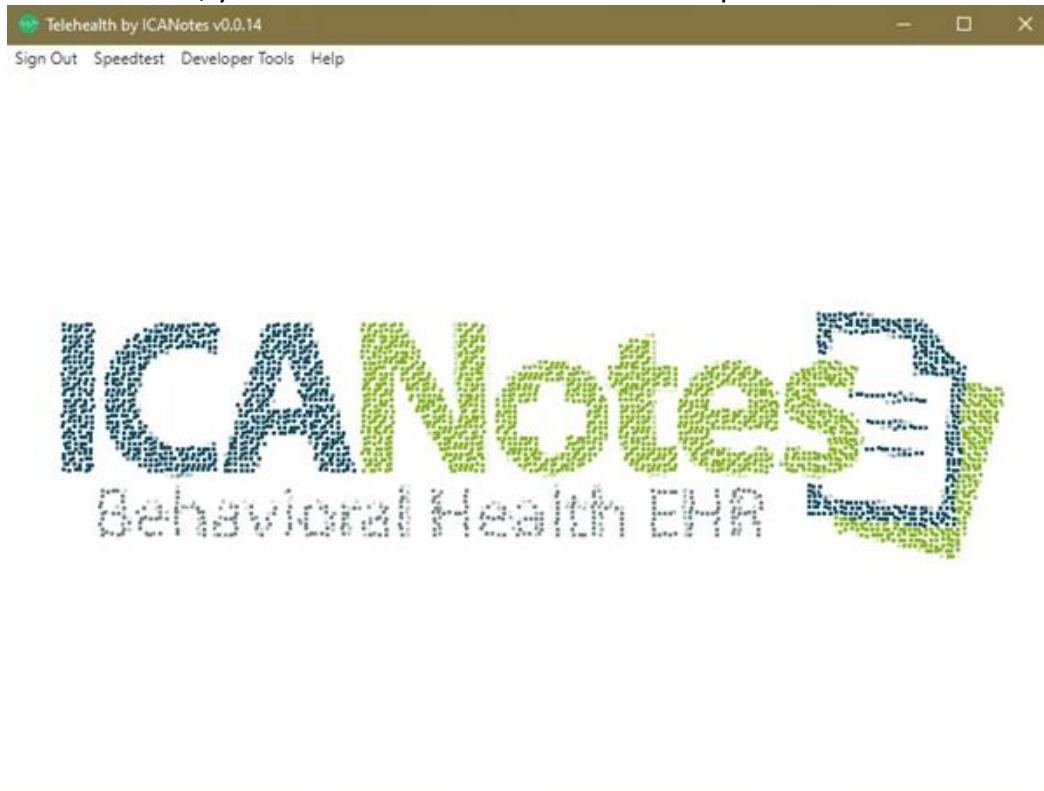


14. Next, you'll enter the Telehealth Token generated in Settings & Directories. Paste or type the alphanumeric token ID into the field. The ICANotes Teletoken is case sensitive – it is

highly suggested to copy and then paste into this field. Use the keyboard shortcut CTRL+V to paste your telehealth token into the window.



15. Once entered, you'll see the ICANotes Telehealth splash screen:



Keep this window open for as long as is necessary. You can position the window as needed, clicking-and-dragging it across the screen or to a secondary monitor. The window itself is programmed to always sit on top of other open applications so that it will remain within primary view. It's best to have the receiver open before initiating a telehealth session but can be opened once a patient invitation has been sent. It is recommended you close other apps during a telehealth session (excluding ICANotes).

Now that setup is complete, you are ready to invite patients to join a telehealth session.

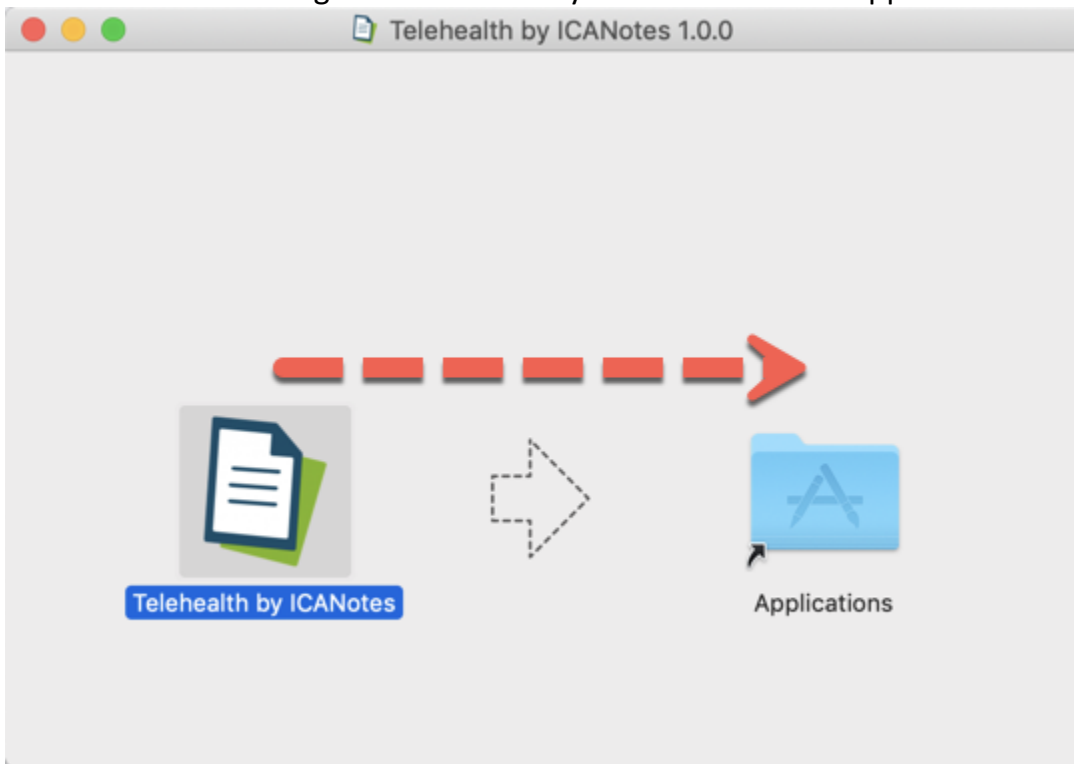
TELEHEALTH SETUP (MAC)

ICANotes customers on a Mac can download the ICANotes telehealth application [here](#).

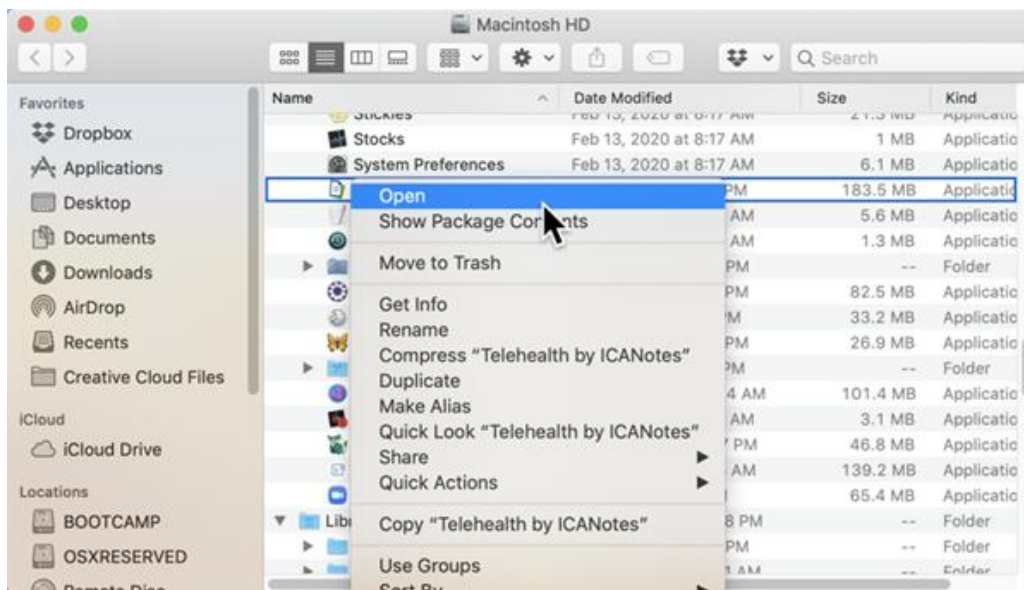
1. Once downloaded, click your Downloads icon in the bottom tray, as seen below:



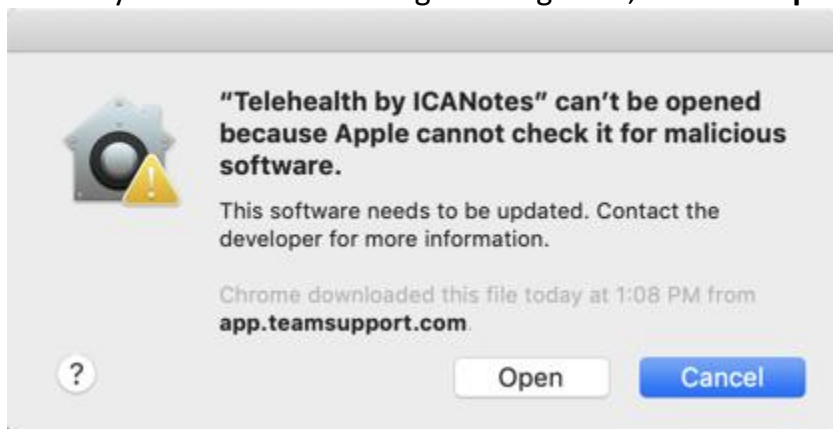
2. This window should populate on your screen. If not, click on the Telehealth+by+ICANotes file in Downloads. Drag the Telehealth by ICANotes into the Applications folder.



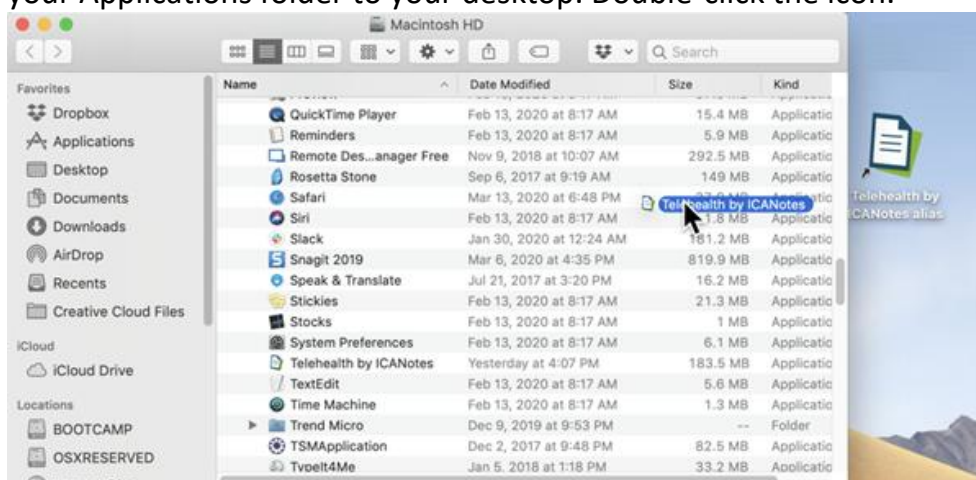
3. Go to your Finder and under Applications, locate the Telehealth by ICANotes file. Right-click and choose **Open** to start installation. Please note, you will need to follow these instructions for the first time to run the application. DO NOT double click the icon; instead, right-click and choose **Open**.



- You may receive the following warning. If so, click the **Open** button.

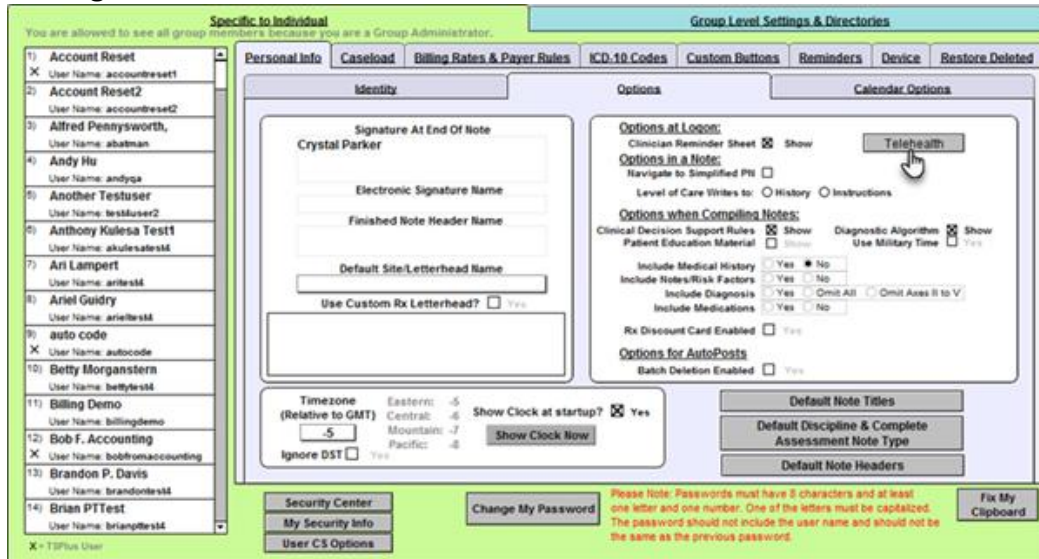


- If the icon does not populate on your desktop, drag the Telehealth by ICANotes icon from your Applications folder to your desktop. Double-click the icon.



- When your account has been enabled for Telehealth and the receiver app is downloaded, you will need to generate your Telehealth Token. *This is a necessary step in order to connect your ICANotes account to the Telehealth app. You will only need to generate a Token once. If the telehealth app is deleted and later re-installed on your machine, you will*

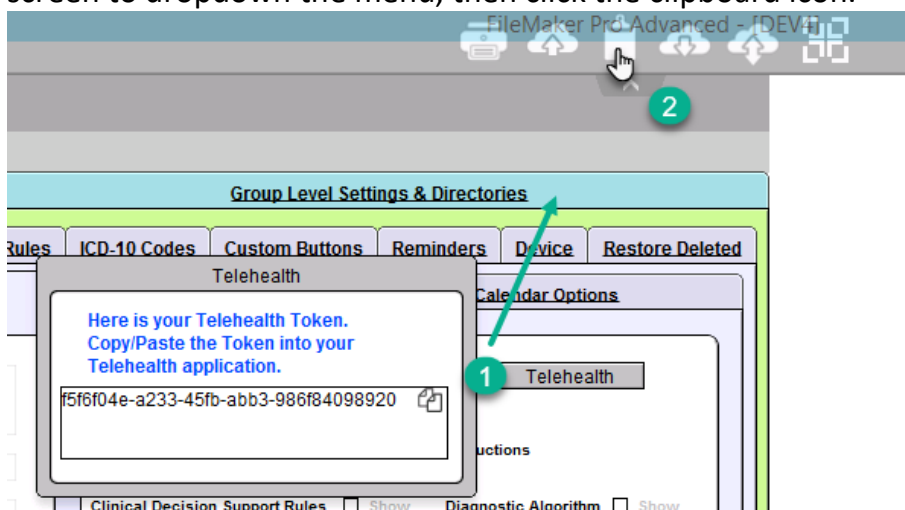
need to generate a new token. The Token is found in the **Options** tab of your Individual Settings & Directories. Click **Telehealth**.



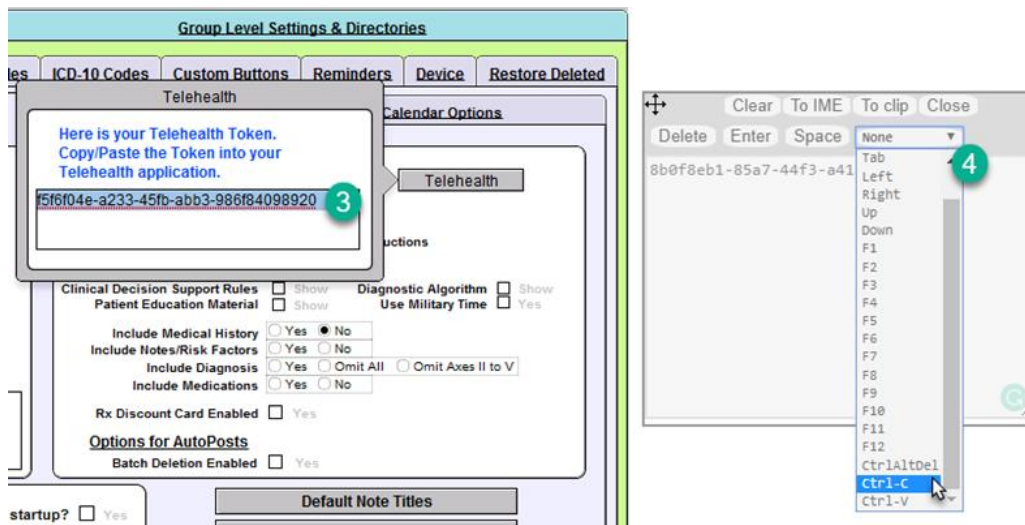
7. In the Telehealth pop-out, click to **Get Telehealth Token**, which will generate a string of characters, as displayed below:



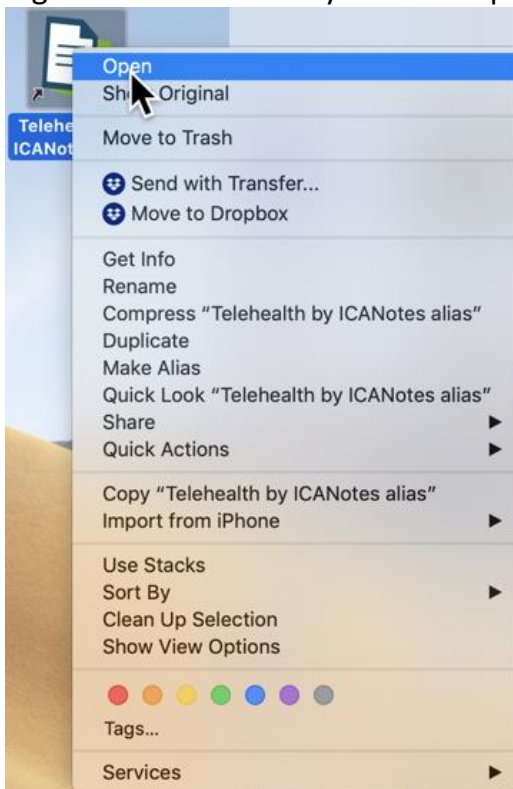
8. After clicking the Telehealth button, click the arrow at the very top center of the ICANotes screen to dropdown the menu, then click the clipboard icon.



9. If you do not see the Token key in the clipboard window, go ahead and highlight it using your mouse, then right-click and choose the **copy** option to transfer the key to the clipboard window.



10. From the clipboard window you can highlight the key, right-click and choose **copy** from the dropdown menu. Or, click into the dropdown and click the **Ctrl-C** option. This is the copy functionality. The key will now be located on your computer's internal clipboard for pasting.
11. Right-click the icon on your desktop and choose **Open** from the dropdown menu.



12. Once the Telehealth app is launched, you will be prompted to enter your ICANotes username. The username is case sensitive.

Please enter your ICANotes Username:

Cancel

OK

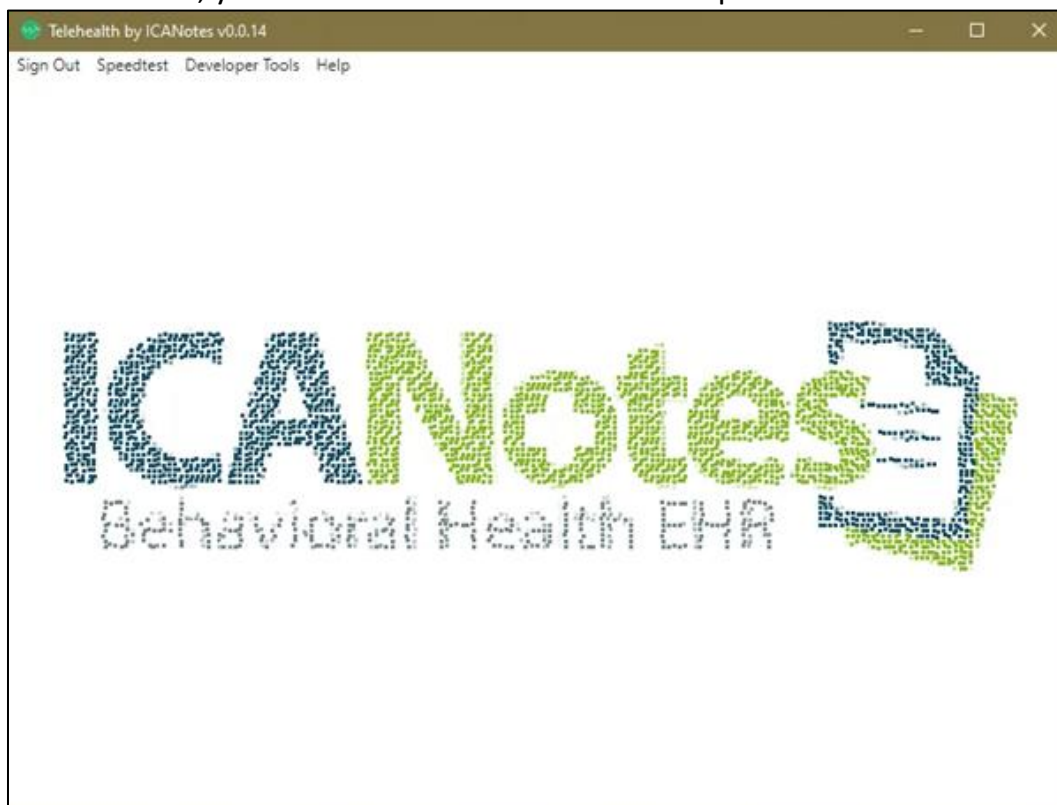
13. Next you will paste or type the alphanumeric Token ID into the field. The Token is case sensitive. It's strongly suggested to copy and then paste the Token into this area. Use the keyboard shortcut CMD+V to paste your Telehealth Token into the window.

Please enter your ICANotes Teletoken:

Cancel

OK

14. Once entered, you'll see the ICANotes Telehealth splash screen:



Keep this window open for as long as is necessary. You can position the window as needed, clicking-and-dragging it across the screen or to a secondary monitor. The window itself is programmed to always sit on top of other open applications so that it will remain within primary view. It's best to have the receiver open before initiating a telehealth session but can be opened once a patient invitation has been sent. It is recommended you close other apps during a telehealth session (excluding ICANotes).

Now that setup is complete, you are ready to invite patients to join a telehealth session.

INITIATING A TELEHEALTH SESSION (PC)

To initiate a Telehealth session, you'll send an email or text message (if enabled) invitation to the patient. First, check to make sure their email address and/or cell phone number are current in Demographics.

From the Chart Room, click to go to a patient's chart, then click into **Demographics**. Check the Email field to make sure the patient's email is present. For text messaging, check the Cell Phone field for accuracy.

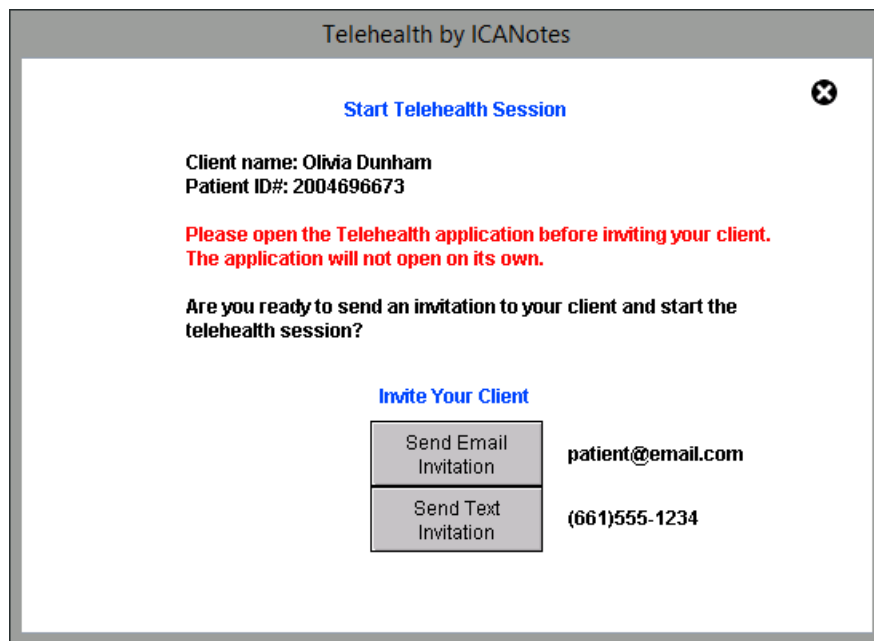
Telehealth sessions can be initiated from three locations:

- From the Chart Room
 - When you click **Start Telehealth Session** you will be prompted with a *Find Patient* window. Search for the patient, then the session will initiate from the Chart Face.

- From the Chart Face
 - From the patient's Chart Face, click **Start Telehealth Session**, located in the bottom left corner (under **Add or Update Managed Care Authorizations**).

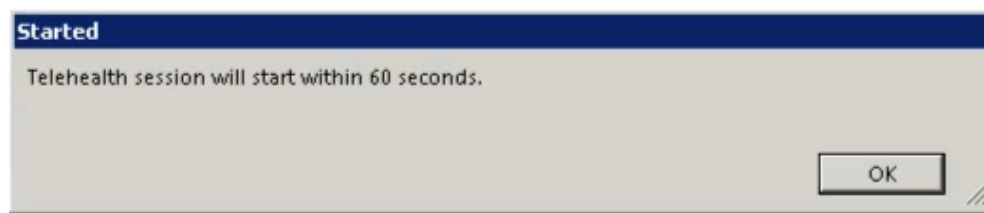
- From the Calendar (Event Details)
 - From the Calendar, click to open the *Event Details* window for the scheduled appointment, then click **Start Telehealth Session**.

Once you've searched for the patient via either of these starting points, you will receive a pop-up asking you to choose whether to invite the client via Text or Email.



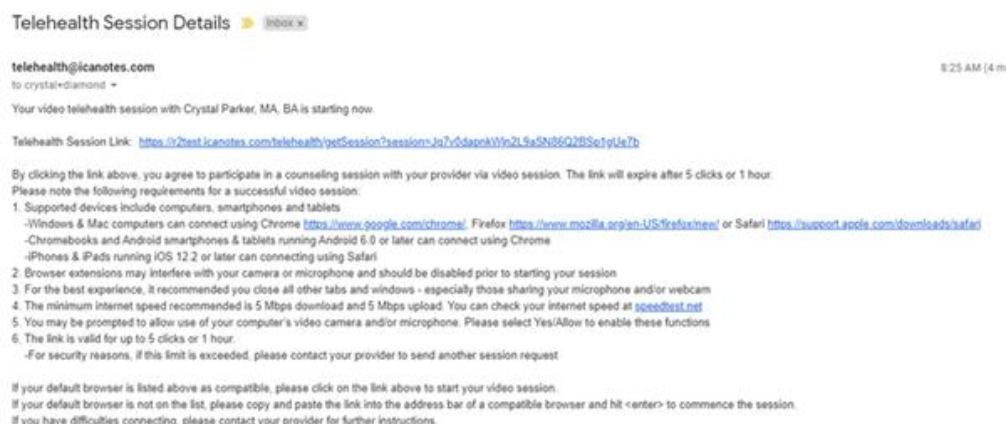
If the patient has no current email address or cell phone number in Demographics, you'll see a red text notification next to the appropriate field alerting you to the missing information. Add the missing information in Demographics to proceed with that invitation method.

Click either option to send the session invitation. If you don't intend to start the session, click the X at the top right corner to cancel. Otherwise, click **OK** to launch.

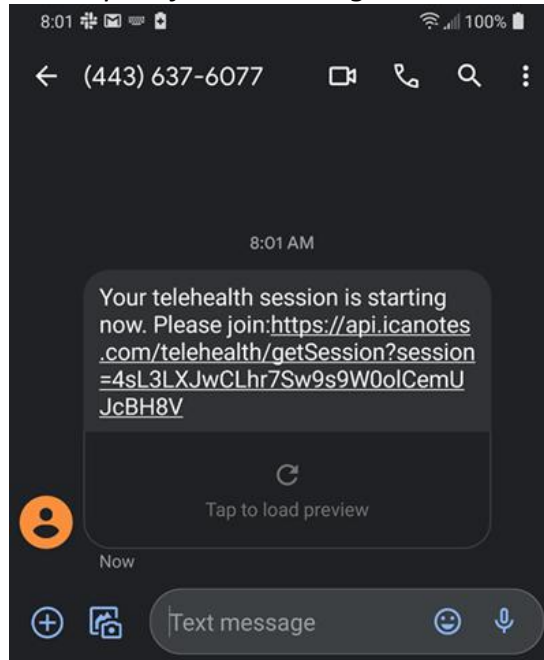


At this point, the patient will receive an email or text message inviting them to join the Telehealth session. **Please note**, this link is only available for five (5) clicks or one (1) hour. If needed, reopen a session following the steps above which will provide a new link for you and your patient.

Example of Email invitation:



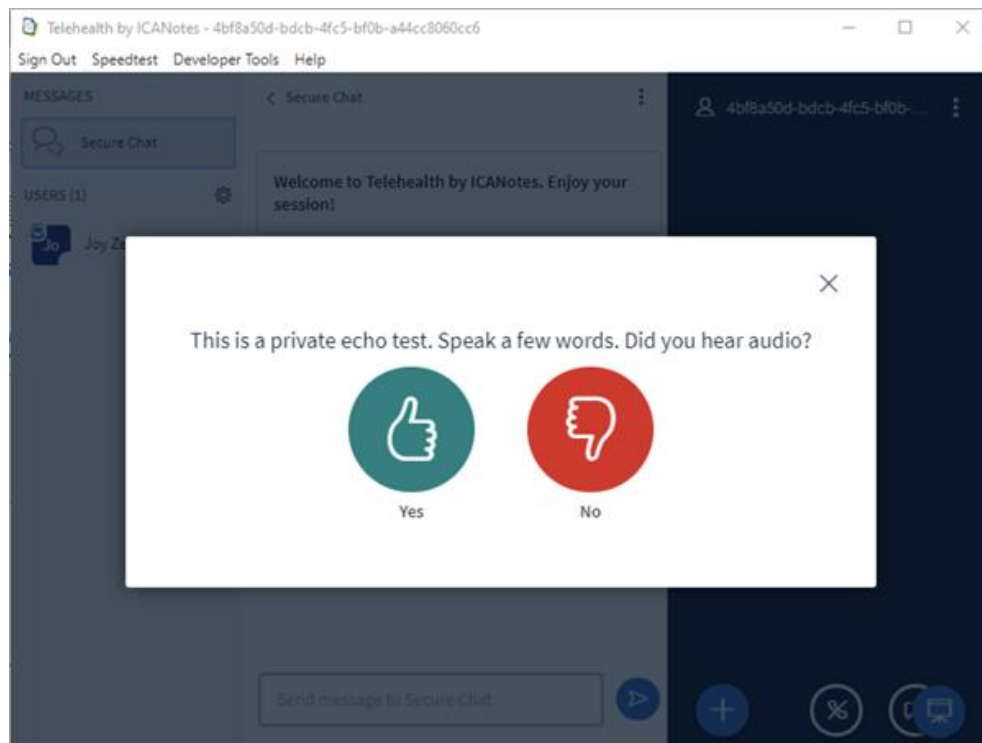
Example of Text Message invitation:



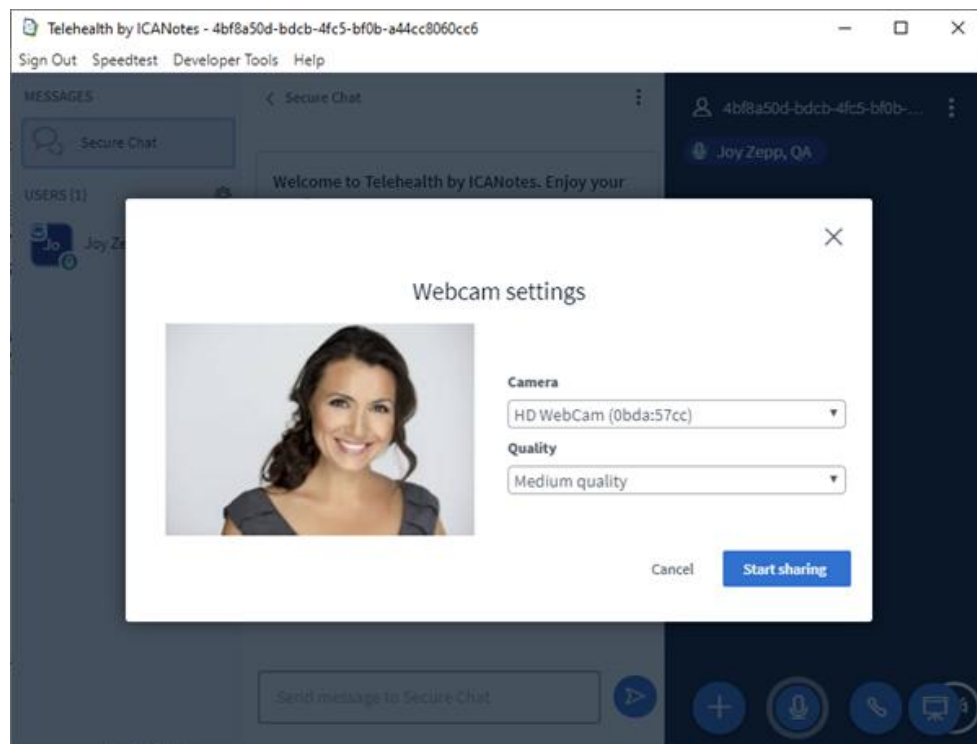
Patients have access to the Telehealth session using a variety of devices and browsers:

- **Windows:** Chrome, Firefox
- **Mac/Apple:** Chrome, Firefox, Safari
- **Chromebook:** Chrome
- **Android Phones and Tablets (Android 6.0+):** Chrome
- **iPhone/iPad (iOS 12.2+):** Safari

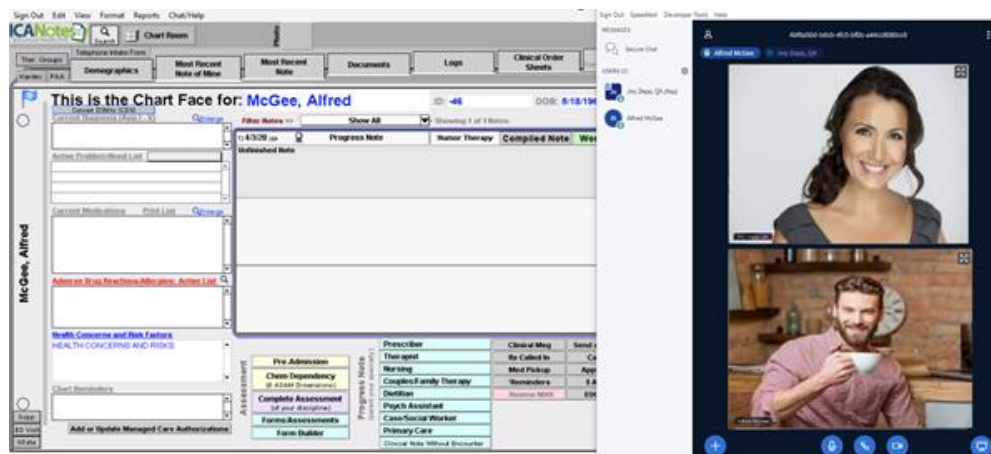
Your Telehealth splash screen will activate. First you will receive an echo test. Say a few words and confirm if you hear the audio (you'll hear your own voice repeated back to you).



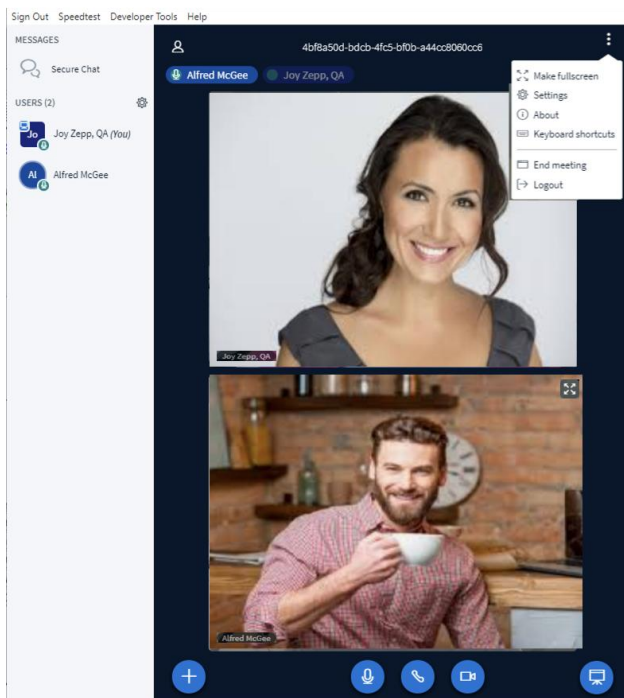
You will then be prompted for the webcam settings. Make adjustments as needed and then click the **Start Sharing** button.



The patient will follow the link contained in the notification to launch the Telehealth session from their computer or device (by cell phone, tablet, PC or Mac). You'll see the patient appear on screen once they have successfully connected. The patient's picture will load into your session. The Telehealth session will remain on the top of your desktop so you can create your note for the patient while you conduct therapy.

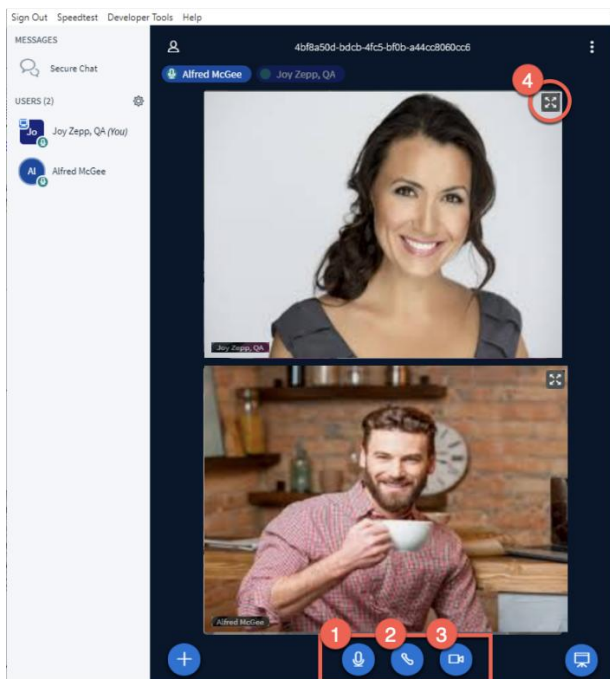


In the top right of the Telehealth window you will have the following options:



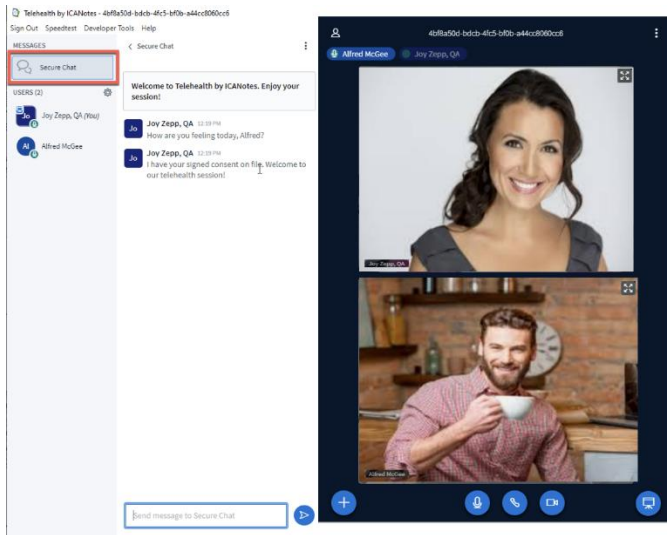
- **Make fullscreen**
- **Settings**
- **About**
- **Keyboard shortcuts**
- **End meeting**
- **Logout**

In the bottom center of the Telehealth session you have the following options:

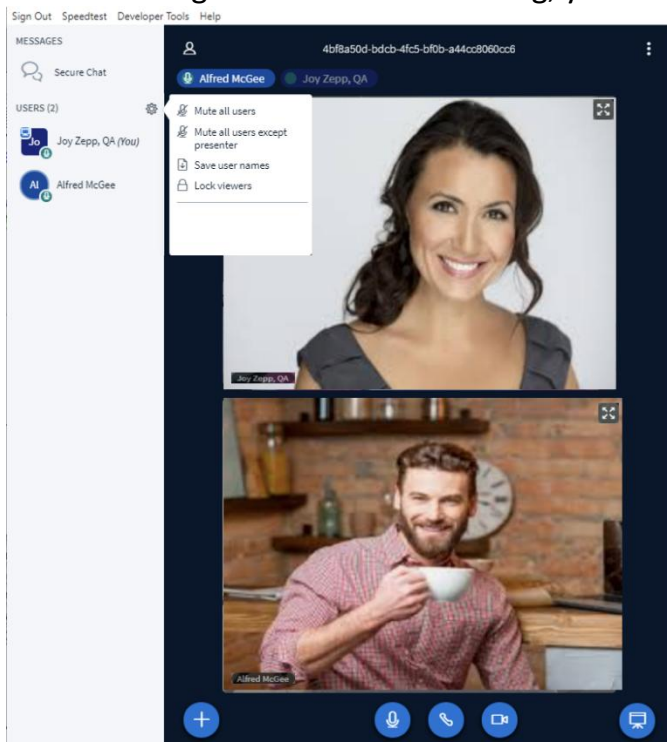


- 1. Mute your microphone**
- 2. Leave audio**
- 3. Turn off webcam**
- 4. Fullscreen**

You can type into the Secure Chat channel to engage in a text-chat, which the patient can also participate in.

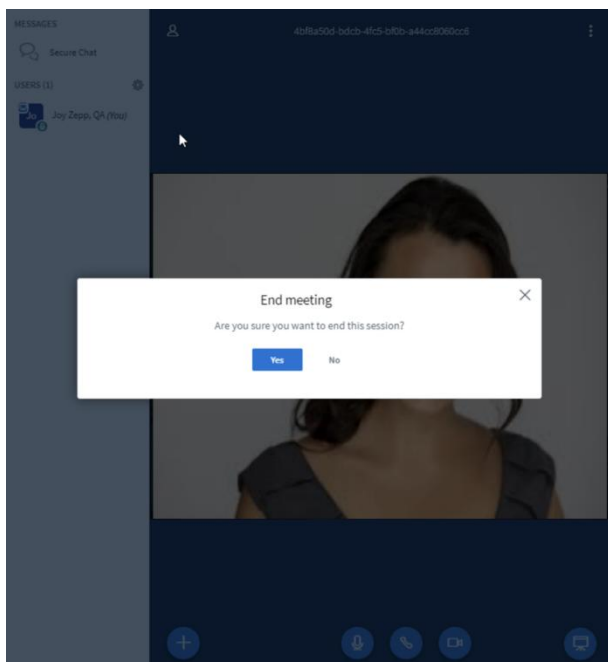


Within Settings next to the User listing, you have the following options:



- **Mute all users**
- **Mute all users except presenter**
- **Save usernames**
- **Lock viewers**

Once you select End Meeting from the dropdown menu option at the top right, you will receive a pop-up confirmation. Click **Yes** to end the session.



INITIATING A TELEHEALTH SESSION (MAC)

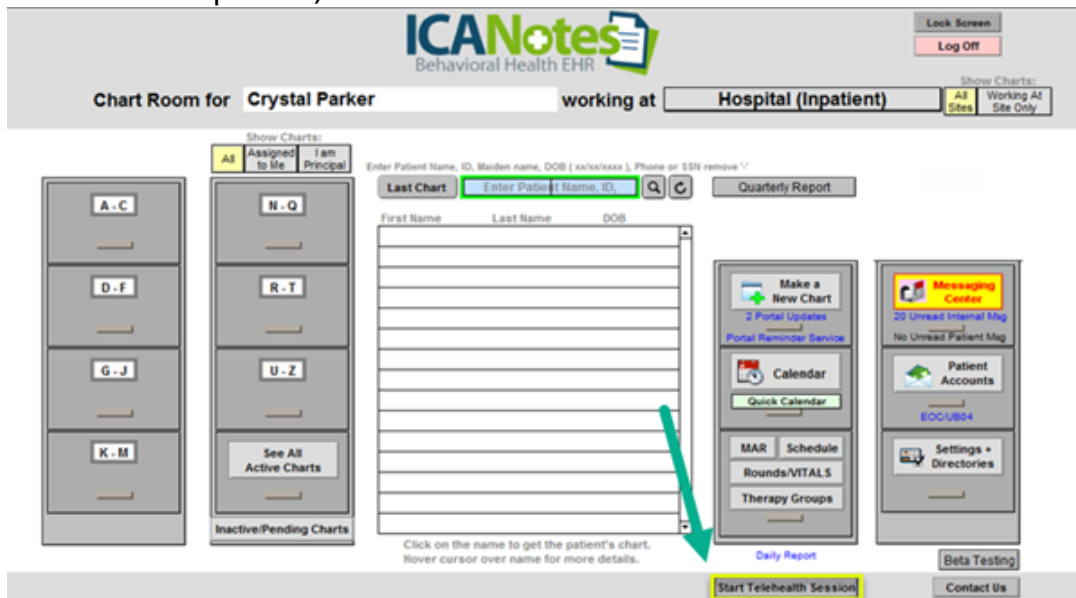
To initiate a Telehealth session, you'll send an email or text message (if enabled) invitation to the patient. First, check to make sure their email address and/or cell phone number are current in Demographics.

From the Chart Room, click to go to a patient's chart, then click into **Demographics**. Check the Email field to make sure the patient's email is present. For text messaging, check the Cell Phone field for accuracy.

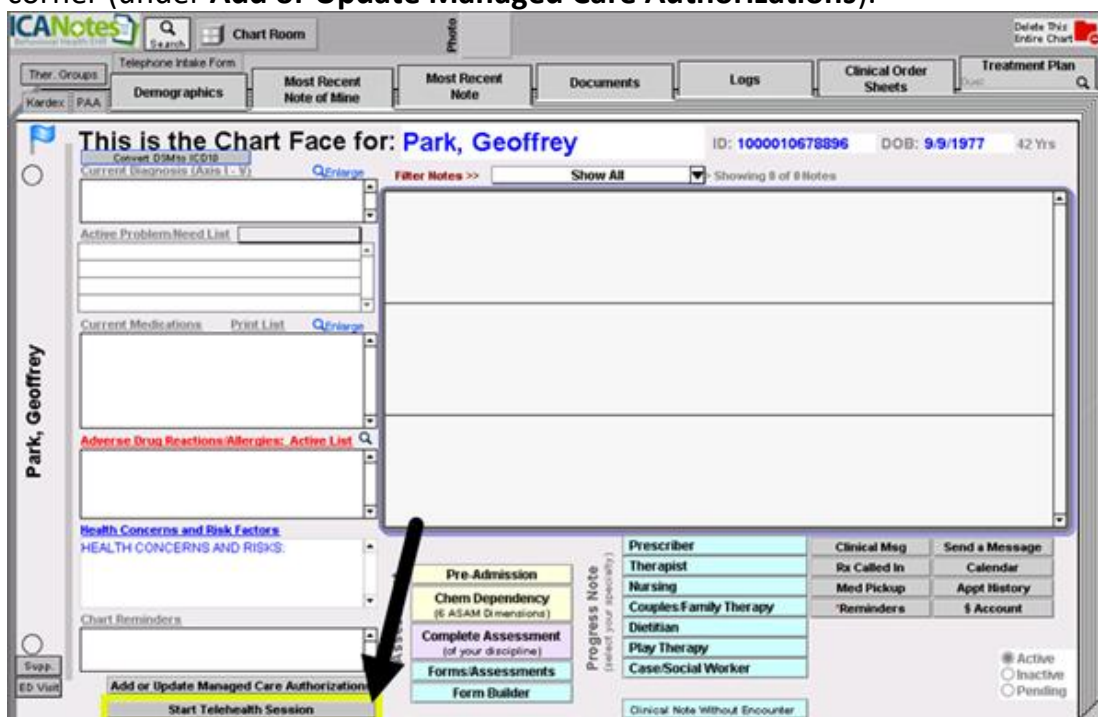
A screenshot of the ICANotes software interface showing the 'New Patient' demographics form for Alfred McGee. The form is organized into several sections: Patient Information, Episodes of Care, Insurance Information, Other Contacts, and Telephone Intake. The Patient Information section includes fields for Name (Alfred McGee), Date of Birth (5/18/1967), Age (52), Sex (Male), Gender (man), Address (78 S Straight Ave, Homosassa, FL 34446), City, State, Zip, Home Phone, Cell Phone ((352) 257-1281), Work Phone, Email (brian.abler@icanotes.com), and SSN. The Telephone Intake section includes fields for Date of Entry (4/3/2020), Unique Patient ID (-46), Alt Patient ID, Room (MAR), Extra Privacy, API/eRx, and Portal. There are also checkboxes for 'Sample Chart', 'Email', 'Text Message', and 'Phone Message'. The form also includes fields for Marital Status (married), Sexual Orientation (Straight or), Ethnicity (Unknown), Race (White), Preferred Language (English), Religion, and Veteran status. A 'Generate ID#' button is located in the top right of the form.

Telehealth sessions can be initiated from three locations:

- From the Chart Room
 - When you click **Start Telehealth Session** you will be prompted with a *Find Patient* window. Search for the patient, then the session will initiate from the Chart Face.



- From the Chart Face
 - From the patient's Chart Face, click **Start Telehealth Session**, located in the bottom left corner (under **Add or Update Managed Care Authorizations**).

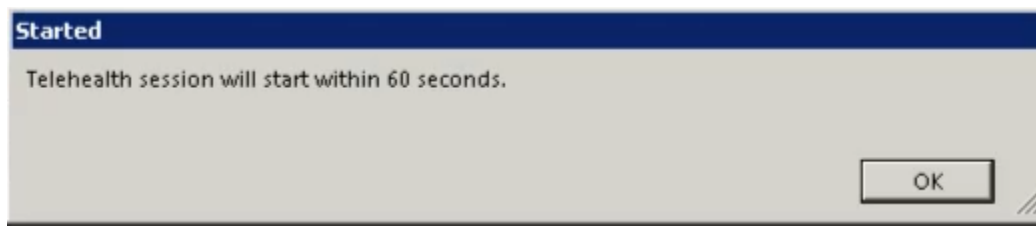


- From the Calendar (Event Details)
 - From the Calendar, click to open the *Event Details* window for the scheduled appointment, then click **Start Telehealth Session**.

Once you've searched for the patient via either of these starting points, you will receive a pop-up asking you to choose whether to invite the client via Text or Email.

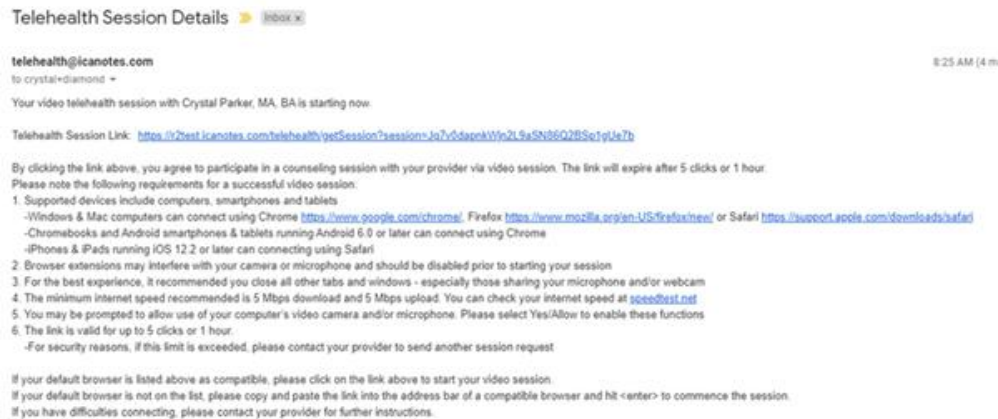
If the patient has no current email address or cell phone number in Demographics, you'll see a red text notification next to the appropriate field alerting you to the missing information. Add the missing information in Demographics to proceed with that invitation method.

Click either option to send the session invitation. If you don't intend to start the session, click the X at the top right corner to cancel. Otherwise, click **OK** to launch.

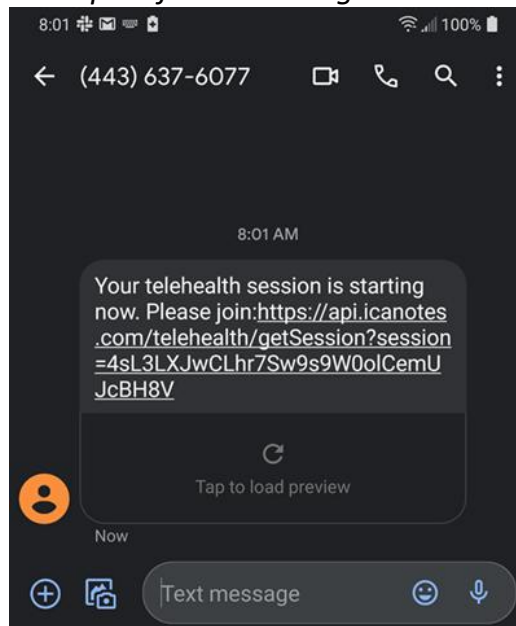


At this point, the patient will receive an email or text message inviting them to join the Telehealth session. **Please note**, this link is only available for five (5) clicks or one (1) hour. If needed, reopen a session following the steps above which will provide a new link for you and your patient.

Example of Email invitation:



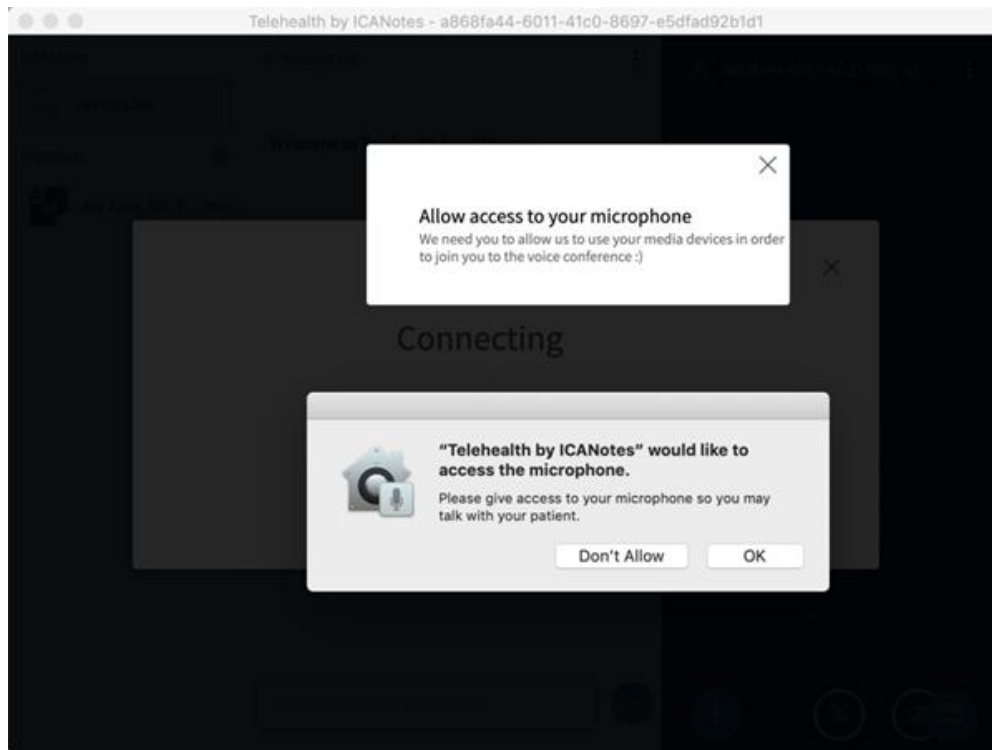
Example of Text Message invitation:



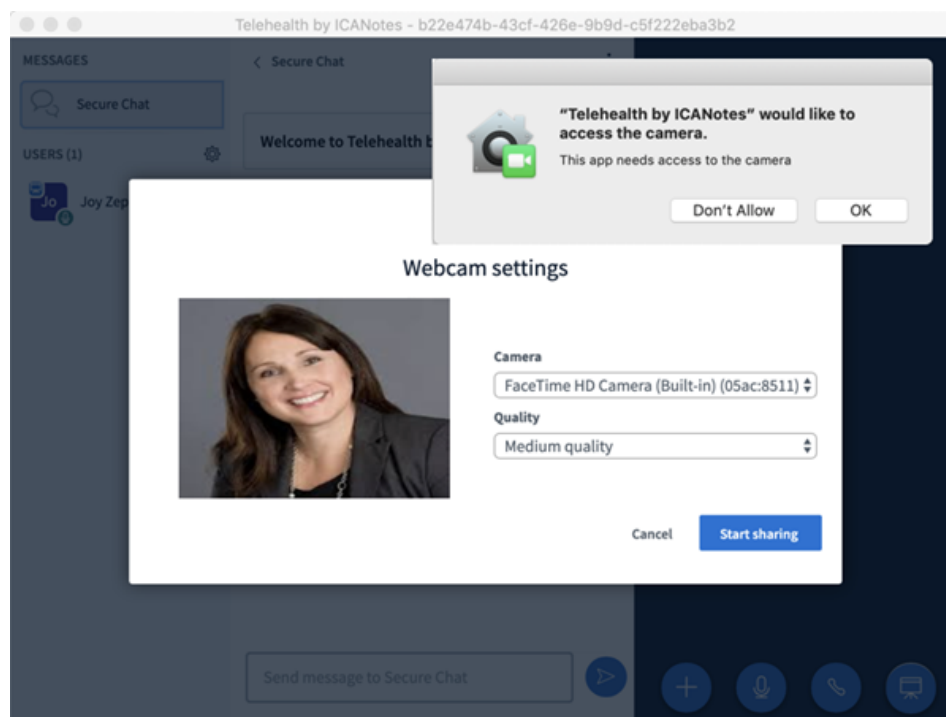
Patients have access to the Telehealth session using a variety of devices and browsers:

- **Windows:** Chrome, Firefox
- **Mac/Apple:** Chrome, Firefox, Safari
- **Chromebook:** Chrome
- **Android Phones and Tablets (Android 6.0+):** Chrome
- **iPhone/iPad (iOS 12.2+):** Safari

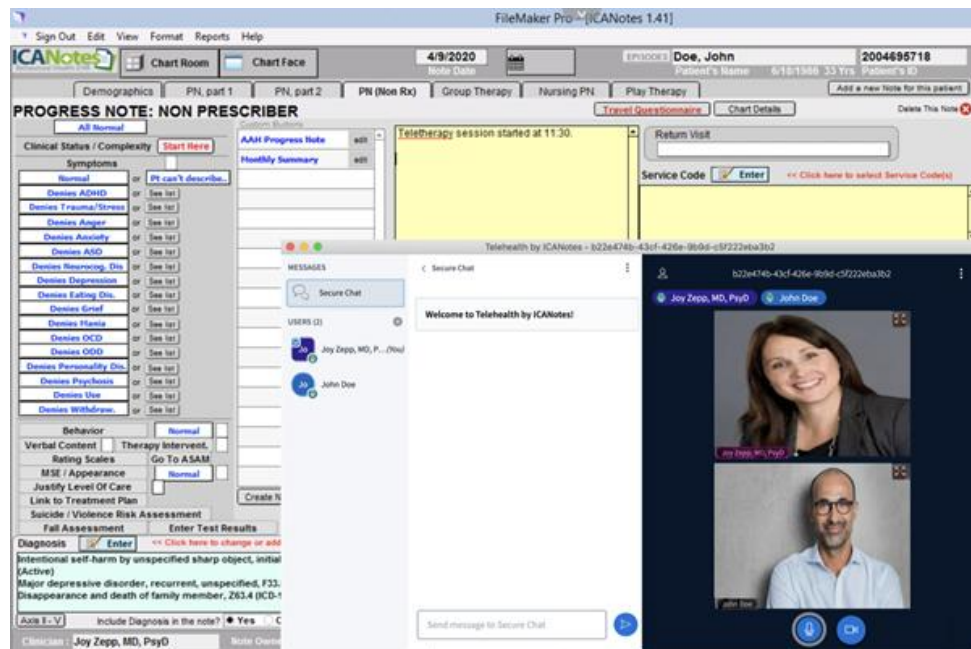
Your Telehealth splash screen will activate. First, you will receive a request to access your microphone. Click **OK**.



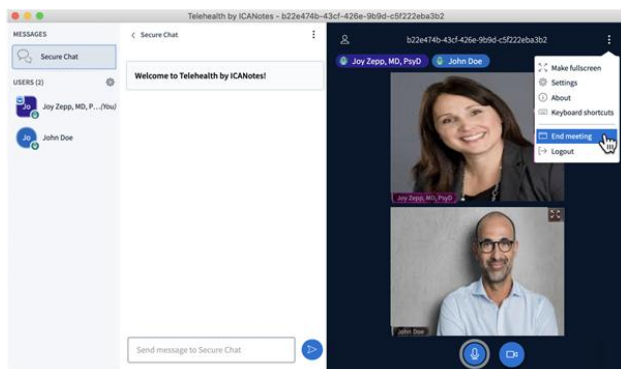
You will then be prompted for the webcam settings. Make adjustments as needed and then click the **Start Sharing** button. You may also need to click **OK** to access the camera.



The patient will follow the link contained in the notification to launch the Telehealth session from their computer or device (by cell phone, tablet, PC or Mac). You'll see the patient appear on the screen once they have successfully connected. The patient's picture will load into the session. The Telehealth session will remain on top of your desktop so you can create your note for the patient while you conduct therapy.

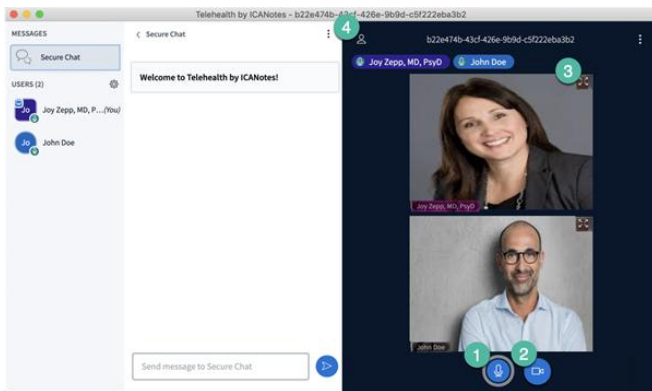


In the top right of the Telehealth window you will have the following options:



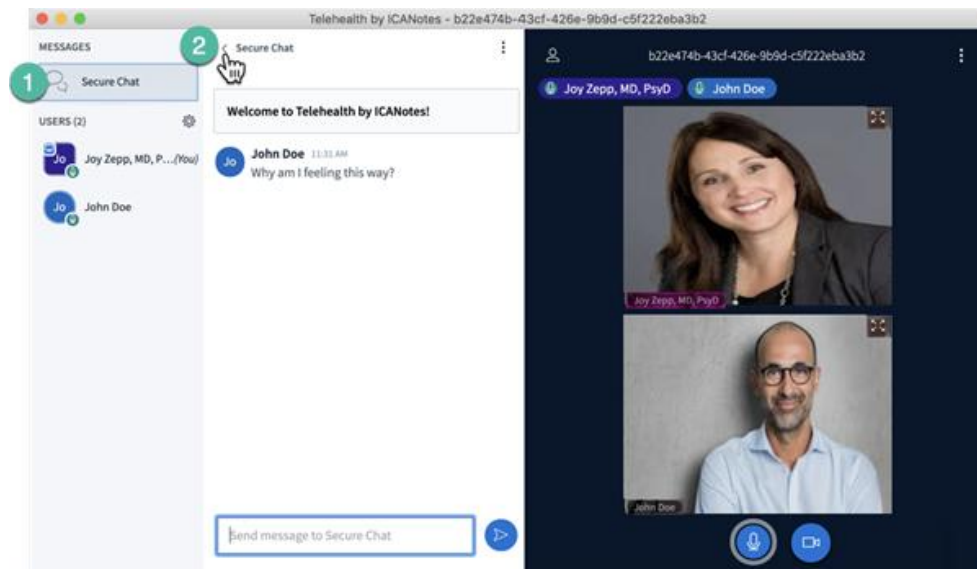
- **Make fullscreen**
- **Settings**
- **About**
- **Keyboard shortcuts**
- **End meeting**
- **Logout**

In the bottom center of the Telehealth session you have the following options:

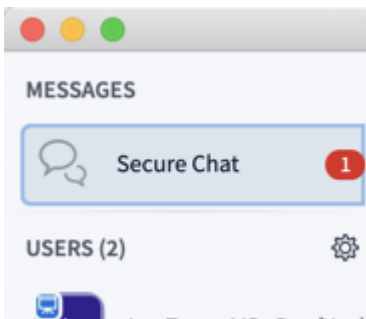


1. Mute your microphone
2. Turn off webcam
3. Make client fullscreen
4. Make Telehealth screen larger

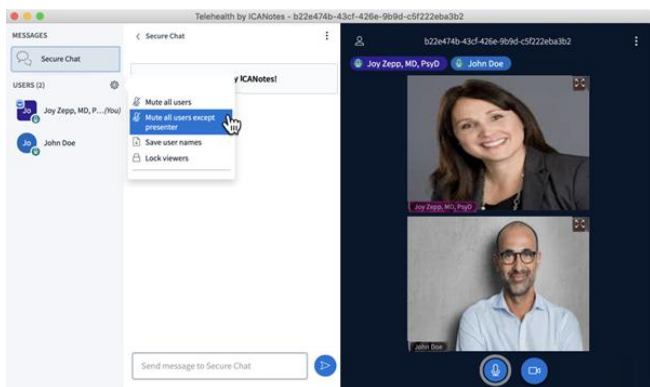
You can type into the Secure Chat channel with your patient, and the patient will be able to use this feature with you (1). You can minimize the Secure Chat channel by clicking on the arrow (2) as shown below:



While minimized, if your patient sends you a message, a number will appear in the top left corner. Click on Secure Chat to reopen the Secure Chat window, as seen below:

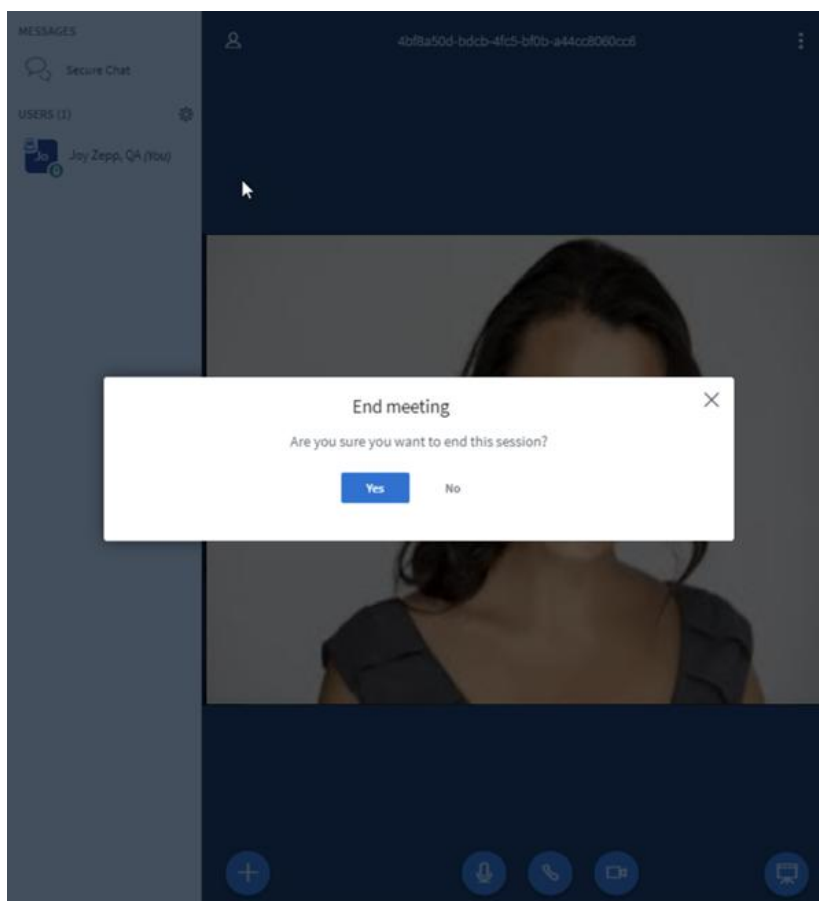


In Settings, there are additional options you can utilize:

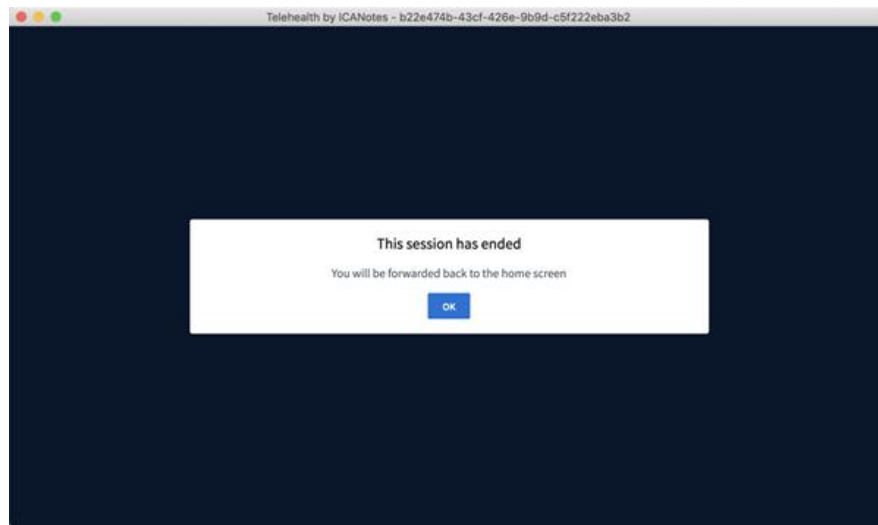


- **Mute all users**
- **Mute all users except presenter**
- **Save usernames**
- **Lock viewers**

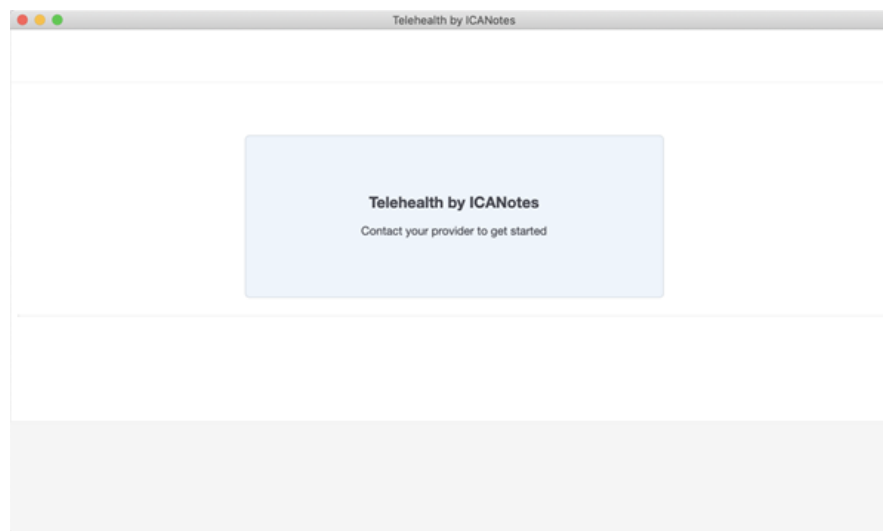
Once you select **End Meeting** (from the dropdown menu option in the top right), you will receive a pop-up confirmation. Click **Yes** to end.



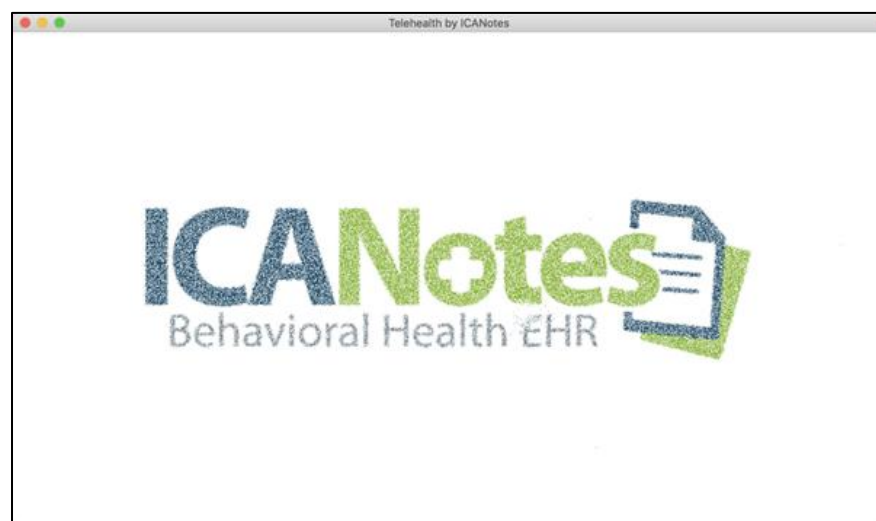
When the session ends, click the **OK** button.



Your Telehealth screen will briefly flash this window:



The screen will return to the starting splash screen. You are now ready to start another Telehealth session.



What follows are some frequently asked questions pertaining to the ICANotes Telehealth service.

Is Telehealth secure?

ICANotes Telehealth is HIPAA compliant and a secure, fully featured and comprehensive behavioral health telemedicine application. An email is sent to the client from the clinician within ICANotes. The client then clicks the secured, encrypted link. Once the link is accessed, the Telehealth session begins within the web browser. No download is needed on the client's side.

What equipment will I need?

1. A broadband internet connection
2. Computer (desktop or laptop)
3. Webcam
4. Microphone

Can I prescribe medicine using Telehealth?

Yes, utilizing e-prescribing you can send prescriptions electronically in conjunction with the Telehealth application.

Do I need to attest to an insurance company before providing Telehealth service?

At this time, ICANotes encourages clinicians to attest to an insurance company prior to providing telehealth service. However, some insurance companies have waived attestation at this time. Check with your payers to see if attestation has been waived.

How do I schedule my Telehealth appointments?

The ICANotes Calendar has a direct link to our Telehealth solution. You can schedule clients on the ICANotes Calendar and then initiate a session from Event Details.

Does my patient need to consent to telehealth services?

Telehealth consent varies by each state and payer source. A standard Telehealth Services Informed Consent form can be found in Forms/Assessments within each patient's chart.

.....