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## CONTACTING ICANOTESUPPORT

Our Support team is available to assist you via phone Monday through Thursday 8:30am to 7:30pm Eastern (5:30am to 4:30pm Pacific) and Fridays 9:00am to 6:30pm Eastern (6:00am to 3:30pm Pacific). Support chat is available Monday through Thursday 9:00am to 7:00pm Eastern (6:00am to 4:00pm Pacific) and Fridays 9:30am to 6:00pm Eastern (6:30am to 3:00pm Pacific). Whether you need assistance with troubleshooting or training, our friendly support experts are waiting to answer your call and respond quickly to address your request. We also have someone on-call after hours to assist customers who are unable to access the program.

**By Phone:** 443-569-8778

**By E-Mail:** [ticket@icanotes.com](mailto:ticket@icanotes.com)

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

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

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

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

[Video Tutorials](#)

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## REFERRALS

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

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## CHANGES TO YOUR ACCOUNT

**If you want to:**

- Add more users to your Group
- Remove users from your Group
- Add electronic signature to your account
- Add e-prescribing to your account
- Set up electronic billing via a clearinghouse

**Go to or Contact:**

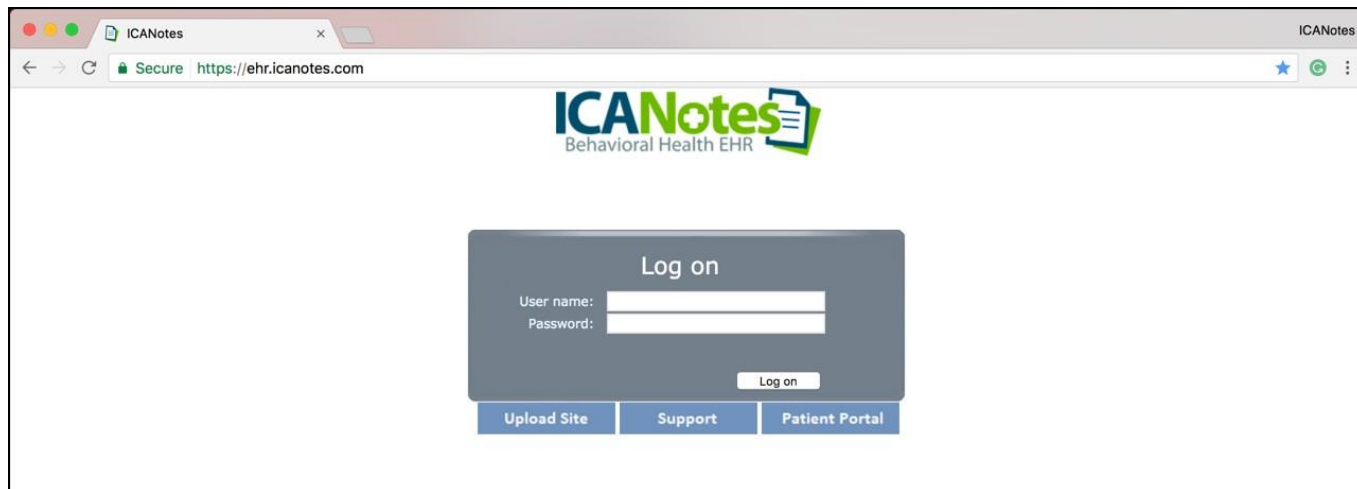
- [Knowledge Base Article](#)
- [Knowledge Base Article](#)
- [Knowledge Base Article](#)
- [ICANotes Website](#) (at the bottom)
- [ICANotes Website Partners](#)

Inquire about your ICANotes bill  
Set up credit card processing

Billing – 866-847-3590 or [billing@icanotes.com](mailto:billing@icanotes.com)  
[ICANotes Website](#)

## LOGGING INTO ICANOTES

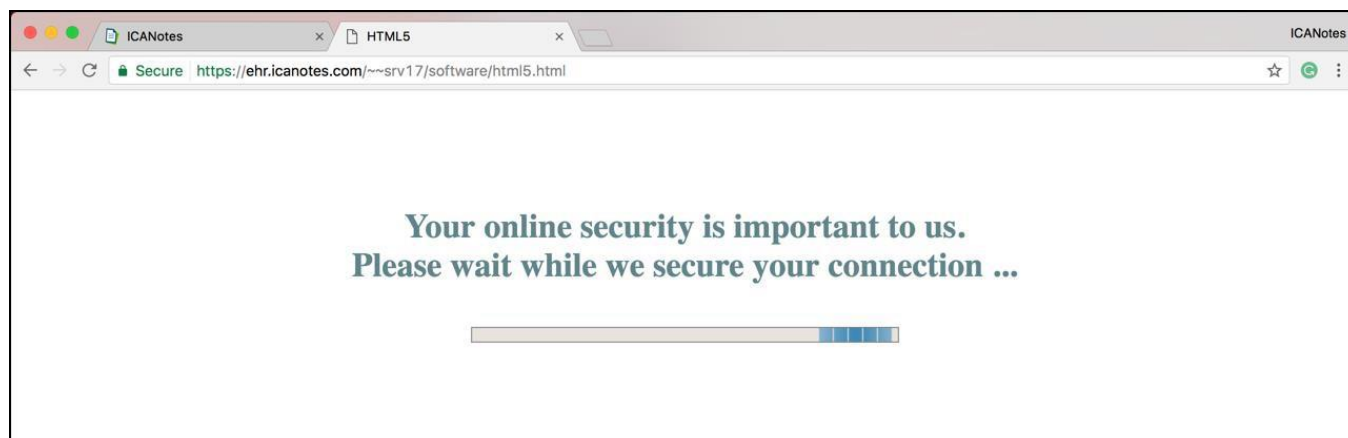
- Go to <https://ehr.icanotes.com> from any browser (Chrome browser works the best). This will bring you to the Log on screen.



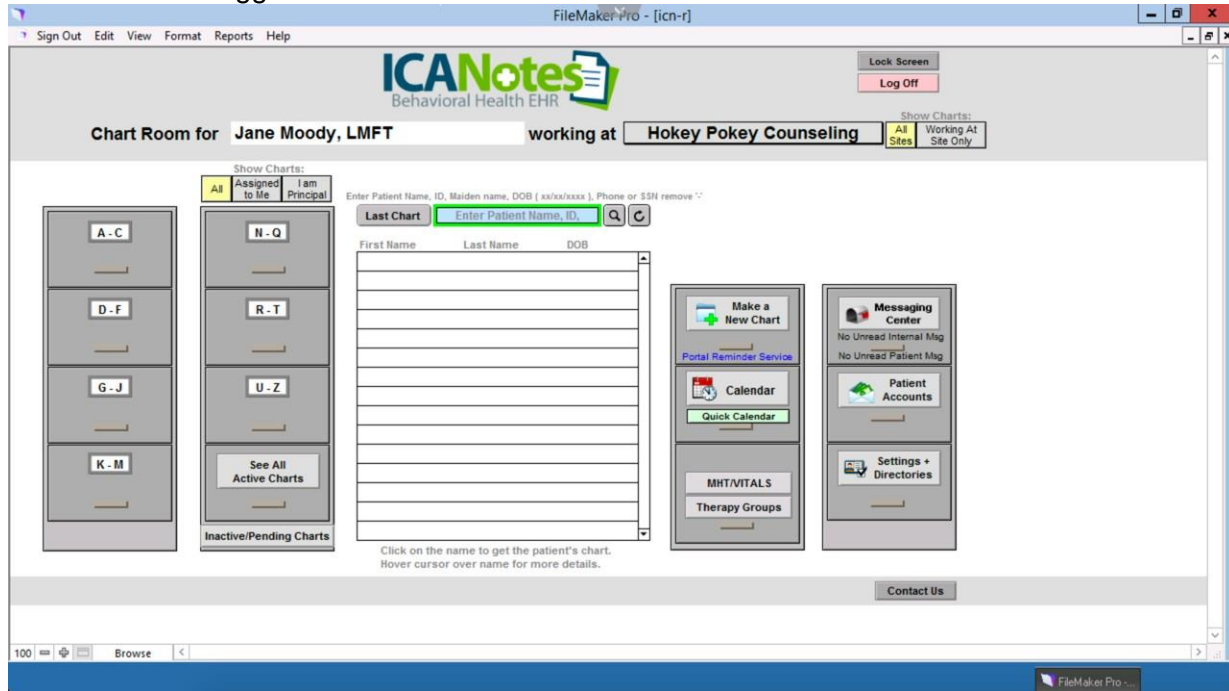
- From the Log on screen, you can:
  - Log into ICANotes.
  - Access the Upload Site by clicking the **Upload Site** button.
  - Go to the ICANotes support website by clicking the **Support** button.
  - Visit the Patient Portal by clicking the **Patient Portal** button.
- Enter your ICANotes username and password. Click **Log on**.



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



- You will now be logged into ICANotes.

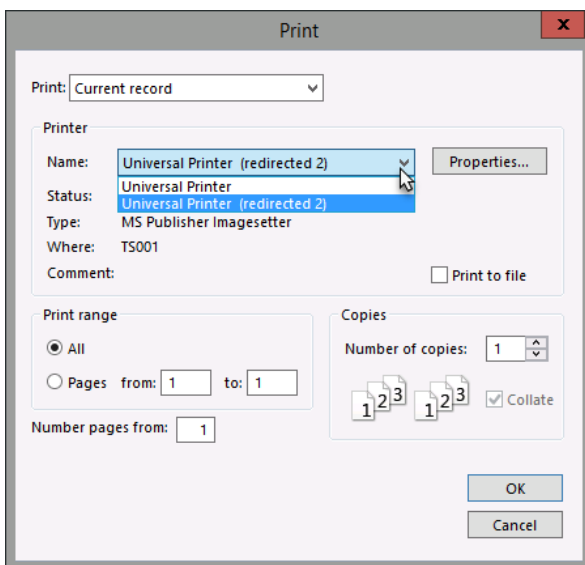


If you use a Topaz Pad for signature capture on a PC or are trying to export a very large amount of data from ICANotes, please review this [Knowledge Base article](#).

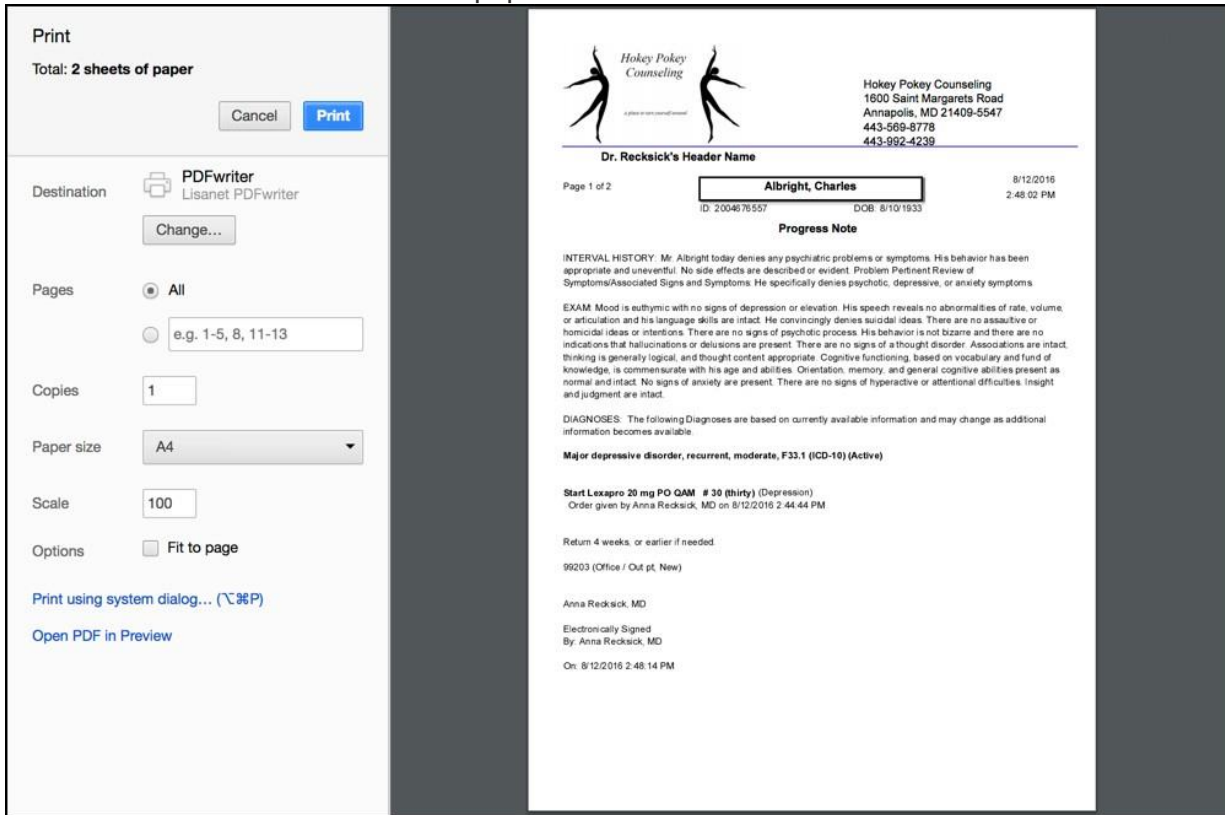
**Forgot your password? Locked out?** If the wrong username/password combination is entered three times in a row, ICANotes will prevent further login attempts for 20 minutes. If this happens, or if you cannot remember your password, contact your group's security administrator or call ICANotes Support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

## PRINTING

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



- Click . This window will populate.



**Print**  
Total: 2 sheets of paper  
Cancel Print

Destination: PDFwriter (Lisanet PDFwriter)  
Change...

Pages: All (selected)  
e.g. 1-5, 8, 11-13

Copies: 1

Paper size: A4

Scale: 100

Options:  Fit to page

Print using system dialog... (⌘P)  
Open PDF in Preview

**Hokey Pokey Counseling**  
Hokey Pokey Counseling  
1600 Saint Margarets Road  
Annapolis, MD 21409-5547  
443-569-8778  
443-992-4239

**Dr. Recksick's Header Name**

Page 1 of 2  
Albright, Charles  
ID: 2004676557 DOB: 8/10/1933  
8/12/2016 2:48:02 PM

**Progress Note**

**INTERVAL HISTORY:** Mr. Albright today denies any psychiatric problems or symptoms. His behavior has been appropriate and uneventful. No side effects are described or evident. Problem Pertinent Review of Symptoms/Associated Signs and Symptoms. He specifically denies psychotic, depressive, or anxiety symptoms.

**EXAM:** Mood is euthymic with no signs of depression or elevation. His speech reveals no abnormalities of rate, volume, or articulation and his language skills are intact. He convincingly denies suicidal ideas. There are no assaultive or homicidal ideas or intentions. There are no signs of psychotic process. His behavior is not bizarre and there are no indications that hallucinations or delusions are present. There are no signs of a thought disorder. Associations are intact. Thinking is generally logical, and thought content appropriate. Cognitive functioning, based on vocabulary and fund of knowledge, is commensurate with his age and abilities. Orientation, memory, and general cognitive abilities present as normal and intact. No signs of anxiety are present. There are no signs of hyperactive or attentional difficulties. Insight and judgment are intact.

**DIAGNOSES:** The following Diagnoses are based on currently available information and may change as additional information becomes available.



**Major depressive disorder, recurrent, moderate, F33.1 (ICD-10) (Active)**

**Start Lexapro 20 mg PO QAM # 30 (thirty) (Depression)**  
Order given by Anna Recksick, MD on 8/12/2016 2:44:44 PM

Return 4 weeks, or earlier if needed.

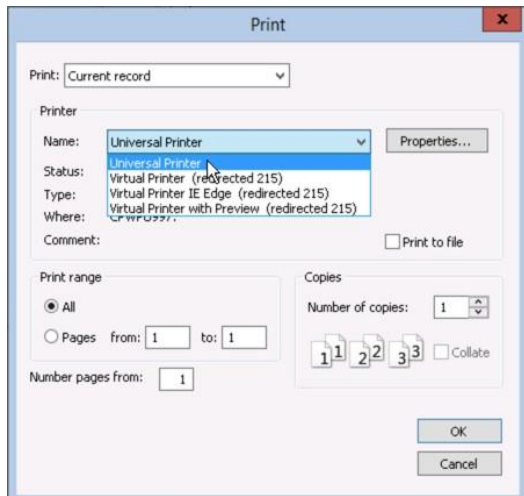
99203 (Office / Out pt, New)

Anna Recksick, MD  
Electronically Signed  
By: Anna Recksick, MD  
On: 8/12/2016 2:48:14 PM

- By clicking the  button in the top left under Destination you can change what printer the document will print from.
- Once you have made your selection(s), click  in the top left.

## SAFARI BROWSER PRINTING

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



Print: Current record

Printer Name: Universal Printer (selected)  
Status: Universal Printer  
Type: Virtual Printer (redirected 215)  
Where: Virtual Printer IE Edge (redirected 215)  
Comment:  Print to file

Print range: All (selected)  
Pages from: 1 to: 1

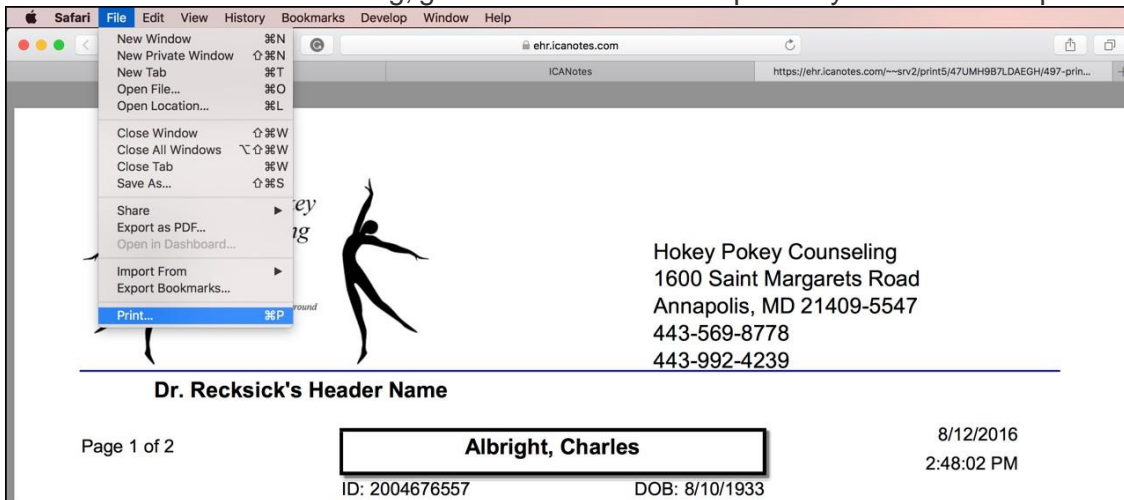
Number pages from: 1

Copies: Number of copies: 1  
 Collate

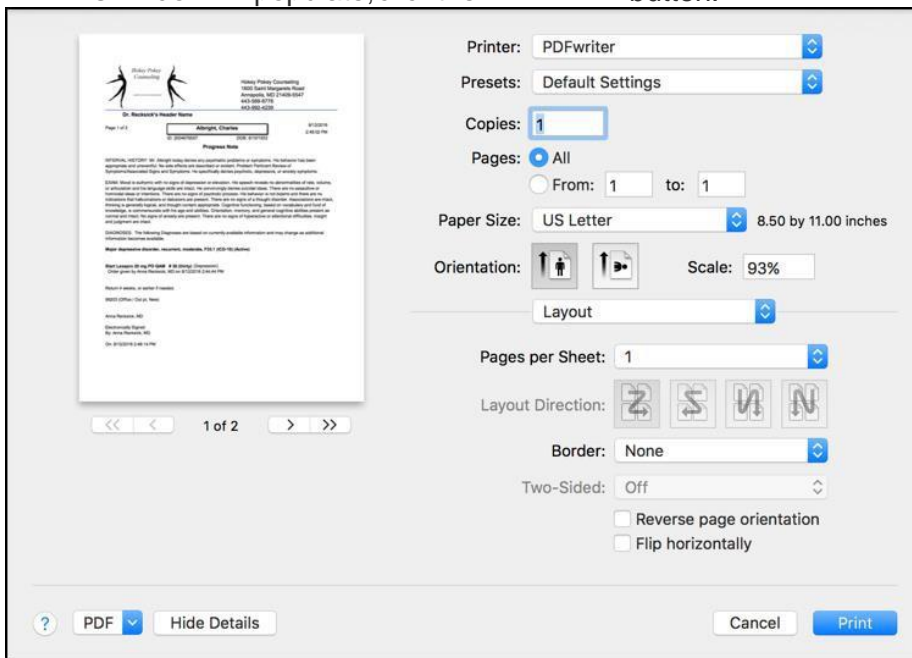
OK Cancel

Action complete - click to view PDF

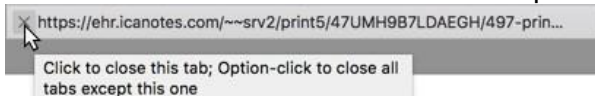
- When this message appears in the middle of the window, click to view the PDF. This will open another tab in your web browser.
- With the document showing, go the File menu in the top left of your Mac desktop and select Print.



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



- Close the tab once the document has printed.





## CHANGING YOUR PASSWORD

From within ICANotes:






- In the main ICANotes Chart Room, click on the  drawer in the lower right-hand corner of the screen.
- Click on the  button in the bottom middle of this screen.
- Enter your current password in the first field. In the second field, enter your desired new password and then enter it again in the "Confirm Password field"

A dialog box titled "Password Change" with a blue background. It contains three input fields: "Current password:", "New password:", and "Confirm password:". Below the fields are two buttons: "Cancel" and "OK".

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

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

From the Upload Site:

- You can access the upload site by going to <https://upload.icanotes.com> or clicking the  button from the Log on screen.

A login page titled "Welcome to ICANotes Documents". It features a blue background with white text. At the top, it says "Welcome to ICANotes Documents". Below that is a warning message: "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." Below the warning is a notice: "Notice: Every Friday night from 12:00am to 1:00am Eastern time access to ICANotes may be limited due to scheduled maintenance." At the bottom, there are two input fields: "Username:" and "Password:". Below the password field is a "Forgot Password?" link and a circular arrow icon. At the very bottom, it says "You will receive an email when your password has been reset."

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

### Set up Security Questions and Answers

ICANotes now offers an online password reset service for users who have forgotten their password. In order to take advantage of this service, you will need to provide a unique e-mail address that belongs ONLY to you as well as answers to three security questions below. Once you have saved this information, you will need to log back in to the upload site. If you do not want to provide this information at this time, you can click cancel and go directly to your upload site.

Please provide your email address and the answers to the following security questions.

Username:

Email:

Security Question 1: 1. What was your childhood nickname?

Answer:

Security Question 2: 2. In what city did you meet your spouse/significant other?

Answer:

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

Answer:

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

Security Question 1: 1. What was your childhood nickname?

Answer:

Security Question 2: 2. In what city did you meet your spouse/significant other?

Answer:

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

Answer:

1. What was your childhood nickname?

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

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

4. What street did you live on in third grade?

5. What is your oldest sibling's birthday month and year?

6. What is the middle name of your oldest child?

7. What is your oldest sibling's middle name?

8. What school did you attend for sixth grade?

9. What was your childhood phone number including area code?

10. What is your oldest cousin's first and last name?

11. What was the name of your first stuffed animal?

12. In what city or town did your mother and father meet?

13. Where were you when you had your first kiss?

14. What is the first name of the boy or girl that you first kissed?

15. What was the last name of your third grade teacher?

16. In what city does your nearest sibling live?

17. What is your oldest brother's birthday month and year?

18. What is your maternal grandmother's maiden name?

19. In what city or town was your first job?

20. What is the name of the place your wedding reception was held?

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

Please provide your email address and the answers to the following security questions.

Username:

Email:

Security Question 1: 1. What was your childhood nickname?

Answer:

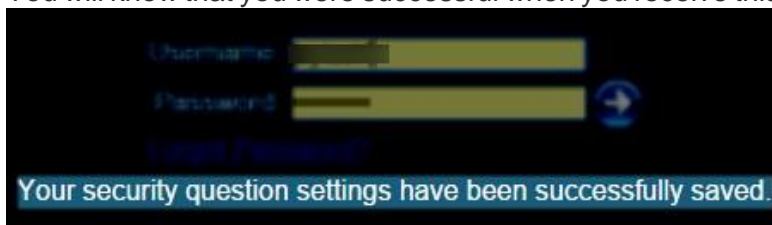
Security Question 2: 8. What school did you attend for sixth grade?

Answer:

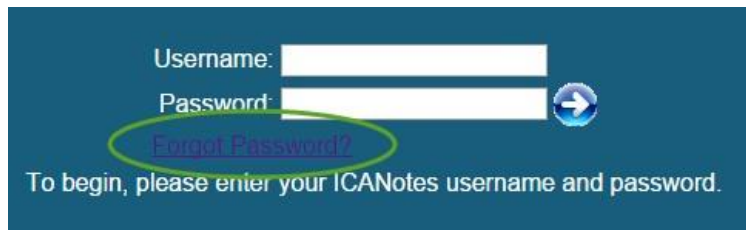
Security Question 3: 13. Where were you when you had your first kiss?

Answer:


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



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



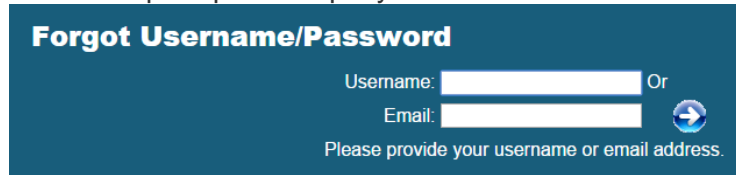
Username:

Password:  

[Forgot Password?](#)


To begin, please enter your ICANotes username and password.

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



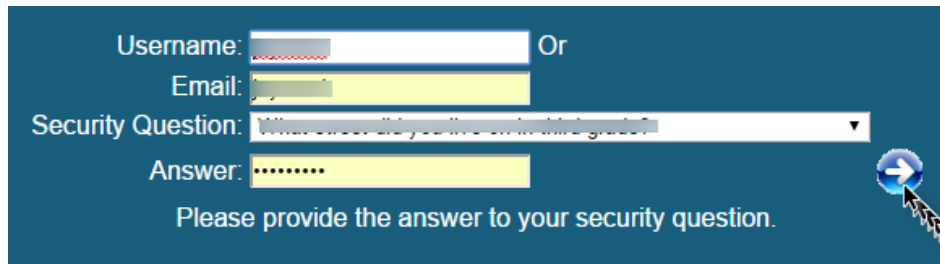
**Forgot Username/Password**

Username:  Or

Email:  


Please provide your username or email address.

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




Username:  Or

Email:

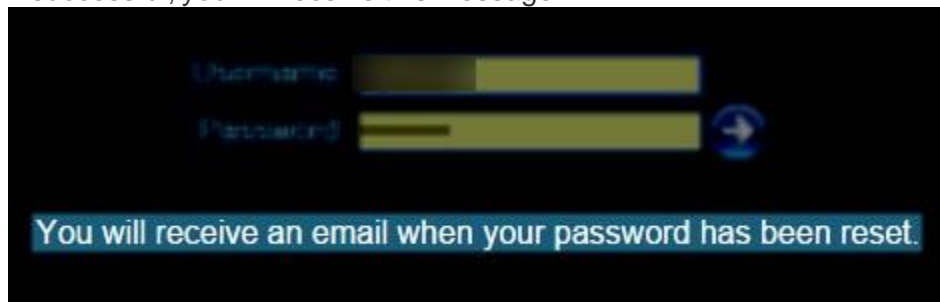
Security Question:  

Answer:

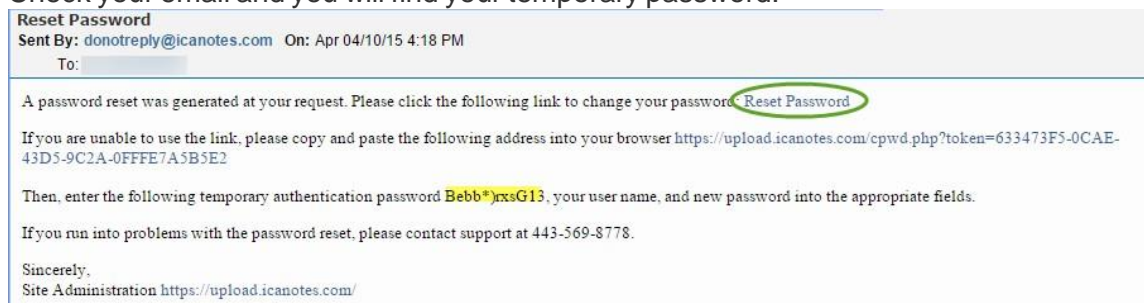


Please provide the answer to your security question.

- If successful, you will receive this message:



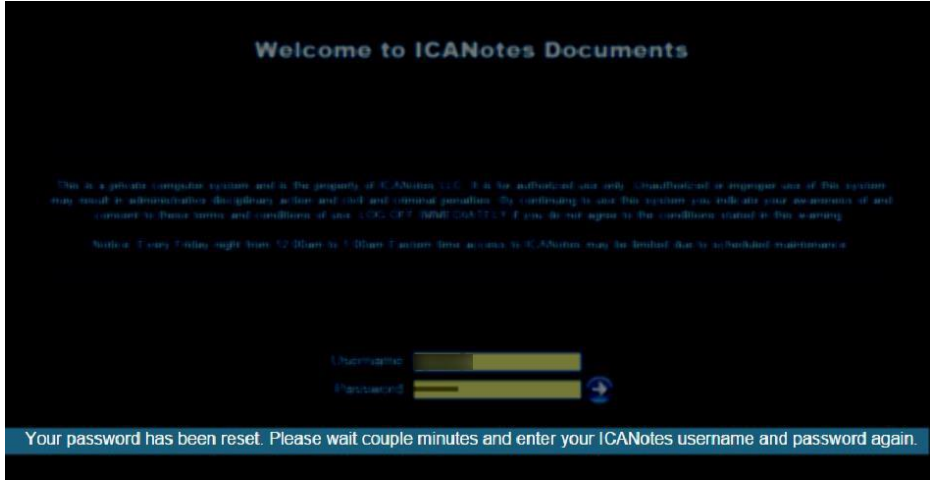
- Check your email and you will find your temporary password.



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



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



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

## IMPORTING PATIENT DEMOGRAPHICS

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

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

[https://upload.icanotes.com/files/Patient%20Demographics\\_GroupName.xls](https://upload.icanotes.com/files/Patient%20Demographics_GroupName.xls)

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

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

After your Excel file has been saved according to the following instructions, either fill out the spreadsheet template appropriately or copy and paste the information from another spreadsheet. Many times, your previous software will

provide a demographics export for this purpose. Please note that the ICANotes template formatting is required per our import process. Please see the list of required fields below.

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

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

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

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

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

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

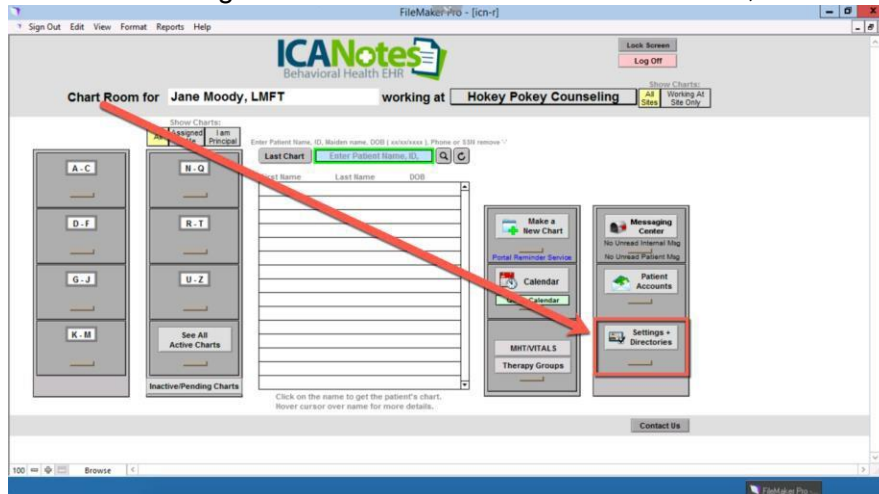
Note: Any field not listed above may be included in the "AdditionalNotes" field by naming your desired data to be imported as "AdditionalNotes\_YourFieldName", e.g., AdditionalNotes\_BalanceDue. When imported, all the fields you name in that fashion will be merged and will be available in the Miscellaneous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

**Please note that all imports are final.**

## CONFIGURING GROUP SETTINGS

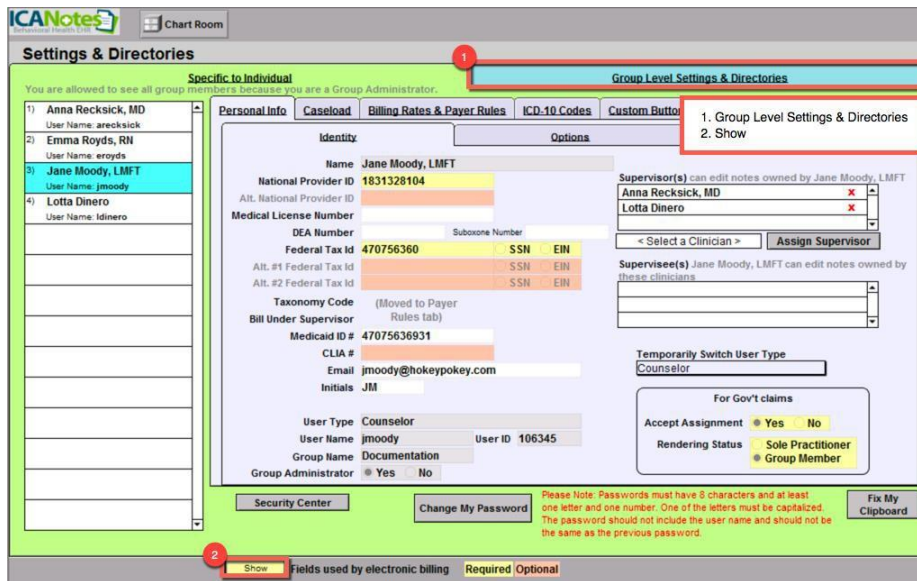
In this section, we will review each of the tabs which appear under '[Group Level Settings & Directories](#)' in Settings + Directories. You must be a Group Administrator in order to make changes on these tabs. These tabs allow you to configure your group's ICANotes settings.

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



- Click on the '[Group Level Settings & Directories](#)' tab.
- Clicking the  button at the bottom of the screen will highlight in yellow those fields that are required for electronic billing. Fields highlighted in pink are optional.





## SITES/LETTERHEADS TAB

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



## FACILITY INFO TAB

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

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

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

## 10. Fax number of facility.

**Settings & Directories**

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

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

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

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

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

Site Name\* [Text Field]  
(or abbreviation - for location & letterhead lists)

Site Type [1] [Dropdown]

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

NPI for Facility [2] [Text Field]

Alternate #1 NPI for Facility [3] [Text Field]

Alternate #2 NPI for Facility [4] [Text Field]

Facility Other ID [5] [Text Field]

Place of Service Code [6] [Dropdown]

Facility Name [7] [Text Field]

Address Line 1 [Text Field]

Address Line 2 [Text Field]

City [Text Field] State [Text Field] Zip (9-digits) [Text Field]

Phone [9] [Text Field] Fax [10] [Text Field]

1. Site Type  
2. NPI  
3. Alternate #1 NPI  
4. Alternate #2 NPI  
5. Facility Other ID  
6. Place of Service Code  
7. Facility Name  
8. Address  
9. Phone  
10. Fax

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

## LETTERHEAD TAB

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

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

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.

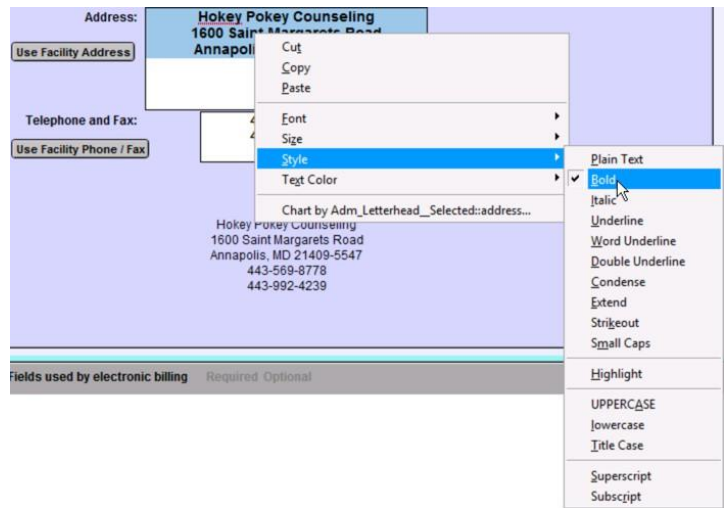
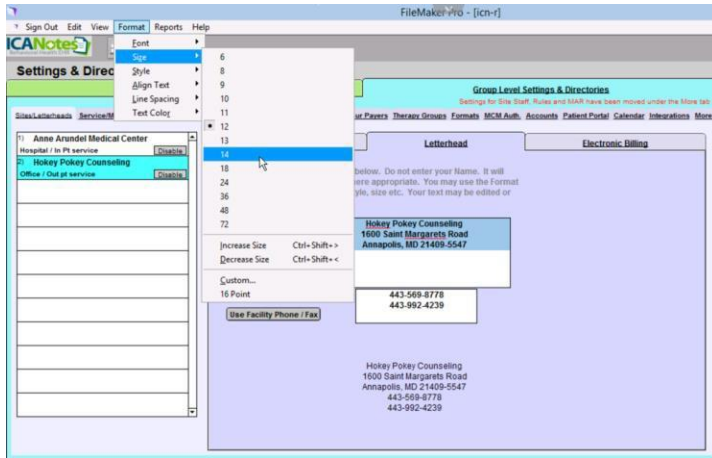
Address: [Text Field]  
**Use Facility Address**

Telephone and Fax: [Text Field] [Text Field]  
**Use Facility Phone / Fax**

Hokey Pokey Counseling  
1600 Saint Margarets Road  
Annapolis, MD 21409-5547  
443-569-8778  
443-992-4239

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

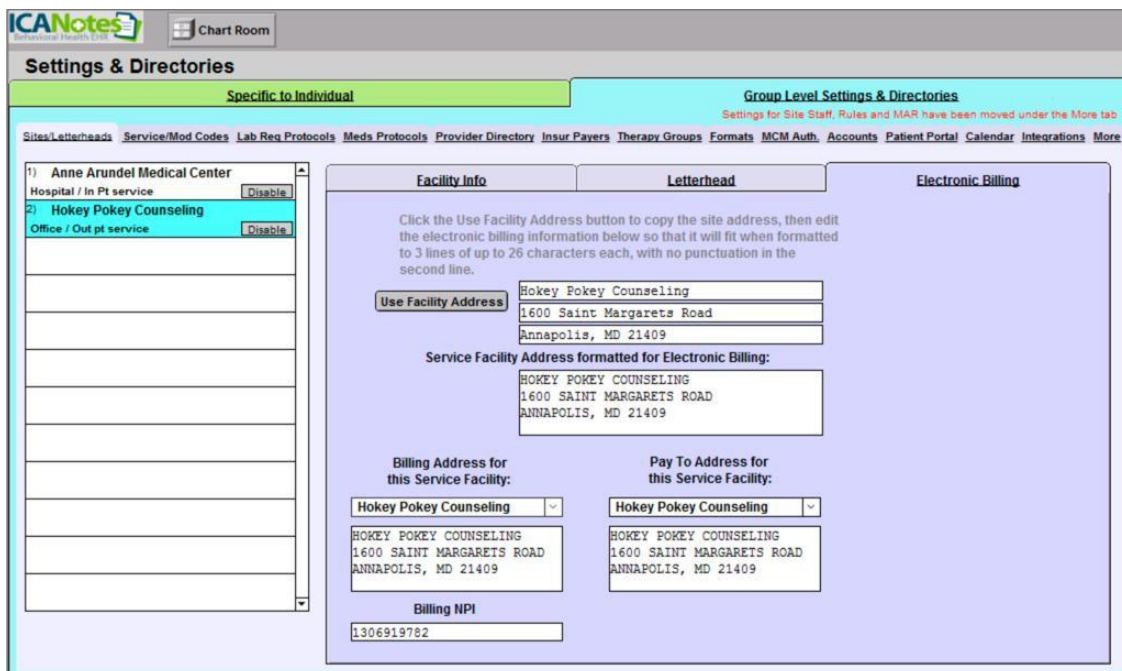




## ELECTRONIC BILLING TAB

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

- Click on the first **Site Name** in the left column that you want to configure.
- Press the **Use Facility Address** button and the address you entered from Facility Info for that site will appear in the address field.
- Click in the box below the field labeled: **Billing Address for this Service Facility**. Select the site from which you send your electronic claims if the billing address is different than the facility address where services were rendered.
- The **Billing NPI #** and the billing address will populate based on the service facility you choose for your billing address.
- You may choose to highlight fields that are required in Settings & Directories for electronic billing using the **Show** button.



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



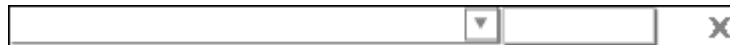
**SERVICE/MODIFIER CODES TAB**

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

The screenshot shows the 'Settings & Directories' window with three main sections:

- Service Code Short List:** A table with columns for Service Code, Revenue Code, and Non-Billable. It lists various codes such as '00000 No Show/Late Cancel', '1036F Non tobacco User', and '90791 Psych Diagnostic Interview'.
- Revenue Codes:** A table with columns for Code, Rate, and Description. It includes a 'Room & Board' section with a table listing codes like '0126 \$900.00 Inpatient Detox' and '0914 Outpatient Psychiatric'.
- Modifier Code Short List:** A table with columns for Code and Description. It lists codes like '25 Use E/M+PSYTX', 'AG Primary Physician', and 'GT Telehealth'.

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



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

The dialog box titled 'Enter Custom Service Code' contains the following fields and buttons:

- Instruction: 'Type in a new custom Service Code (or cancel and press the down arrow to select a standard Service Code).'
- Field: '5-Digit Service Code (required):' with an input box.
- Field: 'Descriptive Text (optional):' with a text area.
- Buttons: 'Cancel' and 'OK'.

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

Code	Rate	Description

If you would like to use modifier codes, you may click on the field in the right column and type in your own codes to create a **Modifier Code Short List**.


Description

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



## LAB REQUISITION PROTOCOLS TAB

The Lab Req Protocols tab can be used to configure a group of lab tests for easier ordering on the Clinical Order Sheet.

- Click on the  **New** button to create a new order protocol.
  - Name the protocol.
  - Pick a test from the drop-down menu or type in the name of test.
  - Indicate the frequency from the drop-down 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 drop-down menu or type in the reason/indication.
  - Save the test newly created.
  - The newly created test will show in this area.
  - Save the protocol.

**Settings & Directories**

**Order Protocols** + New

1)	Admission: (Solutions)
2)	Admission: (Dr. Smith)
3)	Chest X Ray
4)	Depakote Level
5)	FAKE LAB PROTOCOL
6)	FBS
7)	Lithium Level

**Protocol Name** 1 Admission: (Solutions) Delete 11 Save Protocol

**Test Ordered** 2 **Frequency:** 3 **Times X** 4 **Diagnosis** 5

**6**  Fasting **Request Type** 7  Lab  Imaging  EEG

**8** **Reason / Indication** 9 Save Test


10	Test Ordered	Frequency:	Times X	Diagnosis	Delete
1)	CBC & Differential	Routine	Once		X
2)	Comprehensive Metabolic	Routine	Once		X
3)	TSH	Routine	Once		X
4)	T-4	Routine	Once		X
5)	HGC	Routine	Once		X
6)	UDS	Routine	Once		X

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



## MEDICATION PROTOCOLS TAB


The **Meds Protocols** tab can be used to configure a list of medication protocols that will automatically populate a group of medications into the medication list in a nurse or prescriber progress note.

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


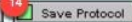
**Settings & Directories**


**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** 

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) SSI: Regular Insulin  
11) Standing Orders: (w / instructions)  
12) STAT Ativan  
13) TB: Aplisol

Protocol Name: Admission Orders  

**Medications** 

Direction	Medicine	Dose	Route Qty	Timing	Comment/Reason	Delete
Start	Prozac	20 mg	PO	QAM	Depression	X
2) Start	Ambien	5 mg	PO	QHS PRN		X
3) Start	Ativan	0.25 mg	PO	q 4 hr PRN	Agitation	X
4) Start	Antabuse	250 mg.	PO	QAM	ETOH Deterrent	X
5) Start	Zyprexa	2.5 mg	PO	QAM	Psychotic Features	X






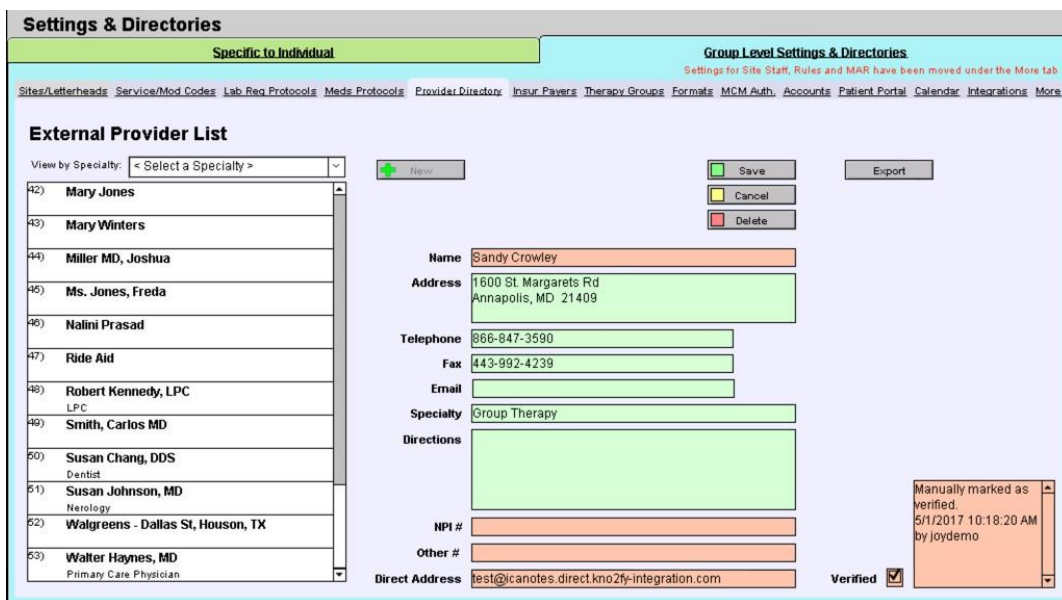
Please click the button below to view a quick tutorial on setting up a **Meds Protocols** tab.



## PROVIDER DIRECTORY TAB

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

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




The screenshot shows the "Settings & Directories" interface. The "Specific to Individual" tab is active, and the "External Provider List" is displayed. The list includes providers such as Mary Jones, Mary Winters, Miller MD, Joshua, Ms. Jones, Freda, Nalini Prasad, Ride Aid, Robert Kennedy, LPC, Smith, Carlos MD, Susan Chang, DDS, Susan Johnson, MD, Walgreens - Dallas St, Houston, TX, and Walter Haynes, MD. The form on the right shows the details for Sandy Crowley, including Name, Address (1600 St. Margarets Rd, Annapolis, MD 21409), Telephone (866-847-3590), Fax (443-992-4239), Email, Specialty (Group Therapy), Directions, NPI #, Other #, and Direct Address (test@icanotes.direct.kno2fy-integration.com). The "Verified" checkbox is checked, and a note indicates the provider was manually marked as verified on 5/1/2017 at 10:18:20 AM by joydemo.

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



## INSURANCE PAYERS TAB

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

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



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

**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

**Insurance Payer Short List**

1) ABCDEF Insurance of AZ	AZ	888-789-7894
2) AdminOne	TX	800-555-5789
3) Aetna CT #1	TX	555-555-5545
4) Aetna NY #2	TX	555-555-5545
5) AMERIGROUP	UT	123-456-7890
6) Amerihealth LA	LA	800-000-0000
7) Anthem BCBS	GA	1-800-ANTHEM
8) BCBS of AL	AL	1-800-BLUEMAN
9) <b>BCBS of ICANotes</b>	MD	800-879-7897
10) BCBS of LA	LA	800-879-7897
11) BCBS of MA	MA	800-879-7897
12) BCBS of Maine (PO Box 111)	ME	999-555-5555

**You are now editing BCBS of ICANotes. Any changes will overwrite this Payer.**

**Name:** 1) BS of ICANotes

**Address:** 2) Box 1999-7894

**City, State, Zip:** 3) Annapolis MD 12345-7894

**Telephone:** 4) 0-879-7897

**Insurance Type:** 5) Group Health Plan

**Insurance Type (Other):** 6) Blue Cross/Blue Shield

**Payer ID:** 7) 08

**Eligibility ID:**

**Notes:**

**Payer ANSINUCC Options**

Professional | Institutional

Exclude Amount Paid on CMS 1500

Send As Group Member

Payer ID Not Required

Variable TaxID Length

Send Contact Name in Submitter Loop

Send As Submitter ID in Header

Always Exclude Payer Name in Subscriber Loop

Exclude Subscriber Address When Not Patient

Remove Payer Name from Subscriber Loop

Include Medical ID in Payer Name Loop

Always Send Rendering Provider Loop

Exclude Rendering Provider Loop

Send Credentials in Rendering Provider Loop

Exclude Rendering Medicaid ID

Always Send Service Facility Loop

Send Taxonomy Code in Service Facility Loop

Always Accept Assignment

Always Reject Assignment

Include Date of Service: To on CMS 1500

Send as Facility for Unlicensed Providers

Send as Facility for All Providers

Exclude COB Data for Unlicensed Providers

Use Rendering Provider NPI for Rendering Provider

Exclude Other Rendering Provider

Add Provider Code to Service Loop

Add Supplemental Info to Service Loop

Exclude Referring Provider Loop

**8** Use Alternate Provider NPI on Claims

Use Alternate Facility NPI on Claims

**9** Use Alternate Tax ID on Claims

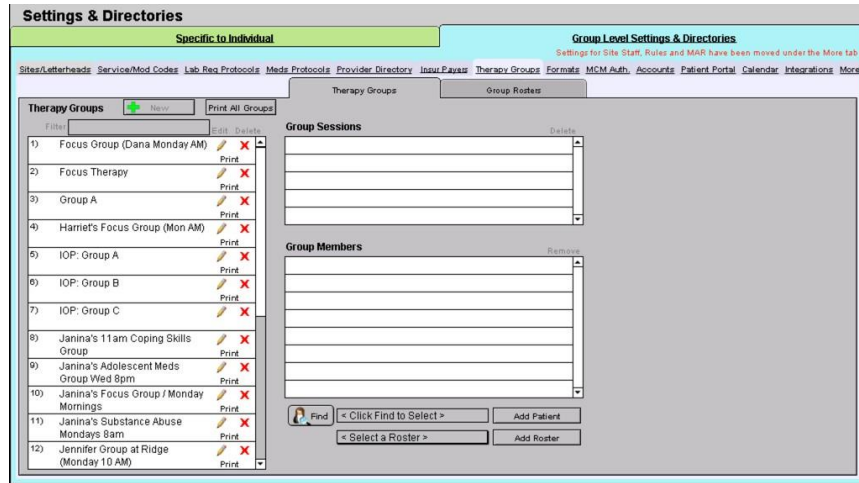
**10** Save



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

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



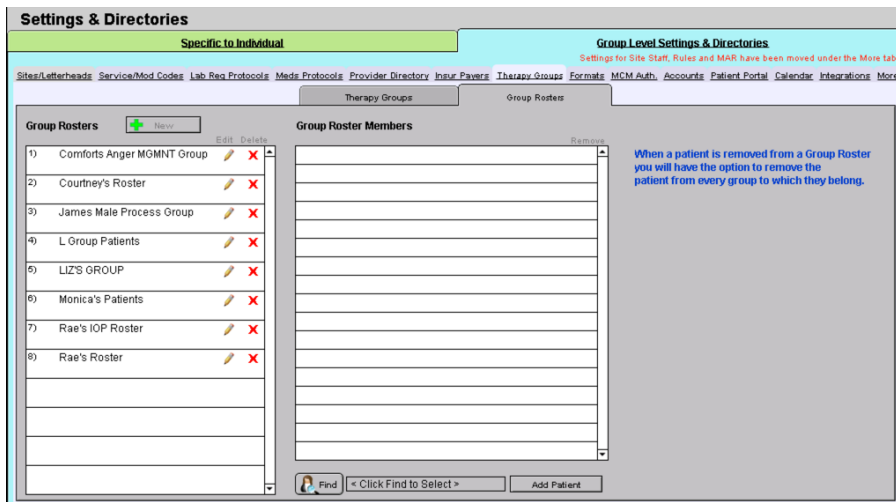
Use the **Therapy Group** tab to create patient therapy groups and to create group therapy note remarks which will be inserted in each participating patient's chart.



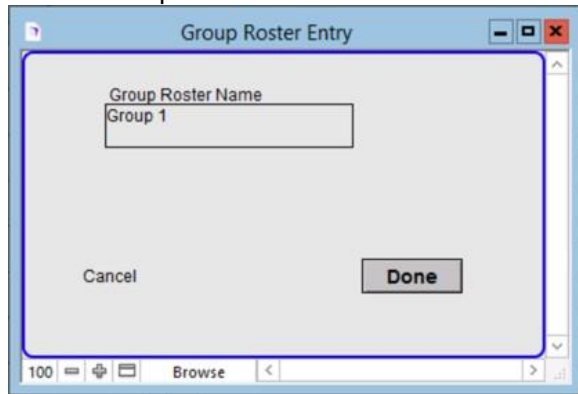
- Click on the  **New** button in the upper left of the window (next to **Therapy Groups**) to start a new therapy group.
- The Therapy Group Entry window will open. Enter a Therapy Group Name and the site/location, and service codes. Click the  **Done** button to create the group.



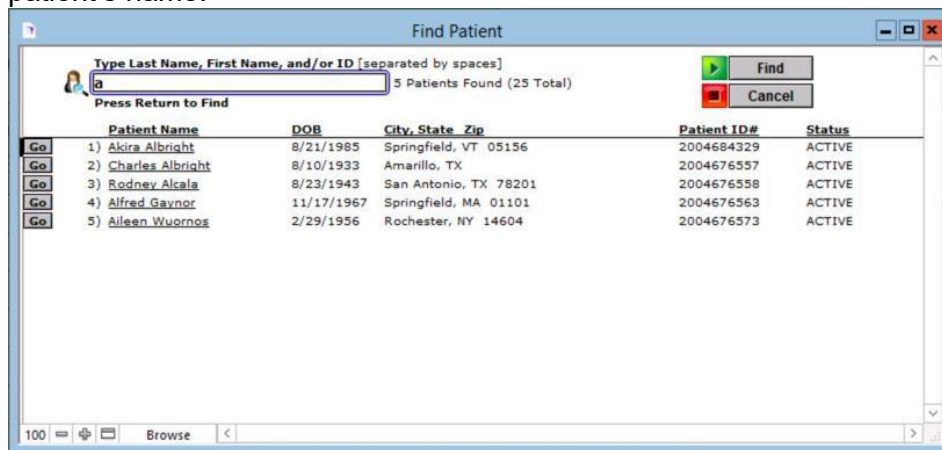
- To create a Group Roster, click the  **New** button in the upper left of the window.



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



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



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



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

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





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

The screenshot shows the 'Settings & Directories' interface. The 'Specific to Individual' tab is active. The 'Finished Notes Font and Printing Styles Group Preferences' section is expanded for the 'ICANotesDemo' group. The configuration includes:

- Group:** ICANotesDemo
- Font:** Arial (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)

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

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

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



## MCM AUTHORIZATION TAB

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

- The Show Only checkboxes  At Threshold and  Non-Expired allow you to show only those patients that are at or past the threshold or those that are non-expired and active respectively. Alternatively, any listing in red needs attention because one of the two alert thresholds set on the patient's chart for managed care authorizations has been reached, either for number of sessions/units or expiration date.

**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 Req Protocols | Meds Protocols | Provider Directory | Insur Payers | Therapy Groups | Formats | **MCM Auth.** | Accounts | Patient Portal | Calendar | Integrations | More

Default Alert Recipient:  Sort by Exp. Date | Print | Export

Show Only:  At Threshold  Non-Expired

	Issued	Authorization #	Expires	Active	Send Alert	Sessions			Units			edit
						Authorized	Used	Remaining	Authorized	Used	Remaining	
Acker, Liz	6/6/2014	12345610	1/21/2015	<input type="checkbox"/>	<input type="checkbox"/>	10	0	10				edit
Acker, Liz	1/8/2013	36356	3/8/2013	<input type="checkbox"/>	<input type="checkbox"/>	10	0	10				edit
Acker, Liz	3/2/2012	123456	9/2/2012	<input type="checkbox"/>	<input type="checkbox"/>	10	1	9				edit
Adams, Annie	9/19/2016	IOP	9/29/2016	<input checked="" type="checkbox"/>	<input type="checkbox"/>	10	1	9				edit
Adams, Annie	7/12/2016	77777777	8/5/2016	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	10	0	10				edit
Adams, Annie	3/16/2016	123456	7/31/2016	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	10	6	4				edit
Alban, Jane	7/7/2016	1234	11/17/2016	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	10	0	10				edit
Alban, Jill	6/17/2014	54321	12/31/2014	<input type="checkbox"/>	<input type="checkbox"/>	10	1	9				edit
Almonte,	1/1/2014	HAPPY NEW YEAR	12/31/2014	<input type="checkbox"/>	<input type="checkbox"/>	10	3	7				edit
Ambers, John	4/1/2017	JJ58413211	7/31/2017	<input checked="" type="checkbox"/>	<input type="checkbox"/>	20	1	19				edit
Appietree, Lori	3/1/2015	IAMIRISH	12/31/2015	<input type="checkbox"/>	<input type="checkbox"/>	20	3	17				edit
Bell, Blue		123456		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>							edit
Brady, Jan	6/17/2014	9995599	12/31/2014	<input type="checkbox"/>	<input type="checkbox"/>	10	1	9				edit
Brown, Ann	4/1/2014	123456789	12/1/2014	<input type="checkbox"/>	<input type="checkbox"/>	10	1	9				edit
Bunny, Easter	4/23/2015	JJ68465216	5/8/2015	<input type="checkbox"/>	<input type="checkbox"/>	15	1	14				edit
Cally, John	8/1/2016	TUESDAY	10/31/2016	<input checked="" type="checkbox"/>	<input type="checkbox"/>	10	0	10				edit
Cally, John	8/1/2016	GONE WITH THE	11/30/2016	<input checked="" type="checkbox"/>	<input type="checkbox"/>	15	2	13				edit
Carole, Kent	1/1/2014	MAGIC123456789	12/31/2014	<input type="checkbox"/>	<input type="checkbox"/>	10	2	8				edit
Cassares,	12/1/2016	4884484	3/1/2017	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	12	1	11				edit
Cheeks, Rosey	4/25/2016	589752685	12/1/2016	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	12	1	11				edit

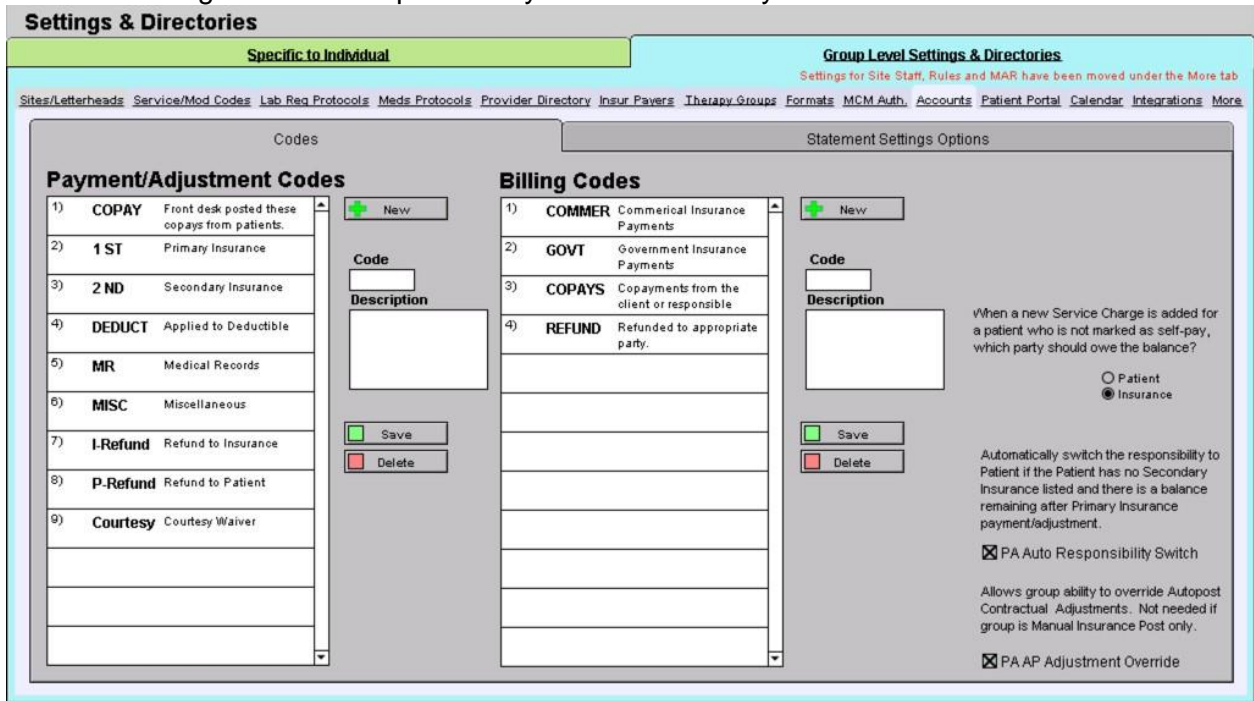
- The **edit** button will allow you to edit the MCM authorization for the patient specified.
- The **Sort by Exp. Date** button will list the patients by expiration date.
- The **Print** button will print the list.
- You may export this list for printing or electronic transmission by clicking on the **Export** button.

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

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

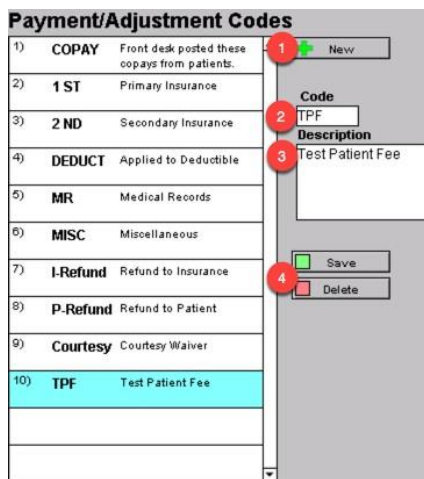


If you are using Patient Accounts to keep track of charges and payments, you can set up codes under the **Accounts** tab to link to a patient or a charge in order to report on any of the codes that you create.



- On the left of the Codes tab, the **Payment/Adjustment Codes** section can be used to set up a payment code. When you go to post a payment in Patient Accounts, you can link these codes to a payment in order to report on them at a later time. The codes must be linked to a payment in order to report on them.

- Click the **+ New** button to create a new code.
- Enter the Code you would like to use.
- Enter the Description for the code.
- Select the **Save** button to save the code or **Delete** to delete the entry highlighted.



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

- Click the **+ New** button to create a new code.

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

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

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 listed and there is a balance remaining after Primary Insurance payment/adjustment.

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

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

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



## MORE TAB

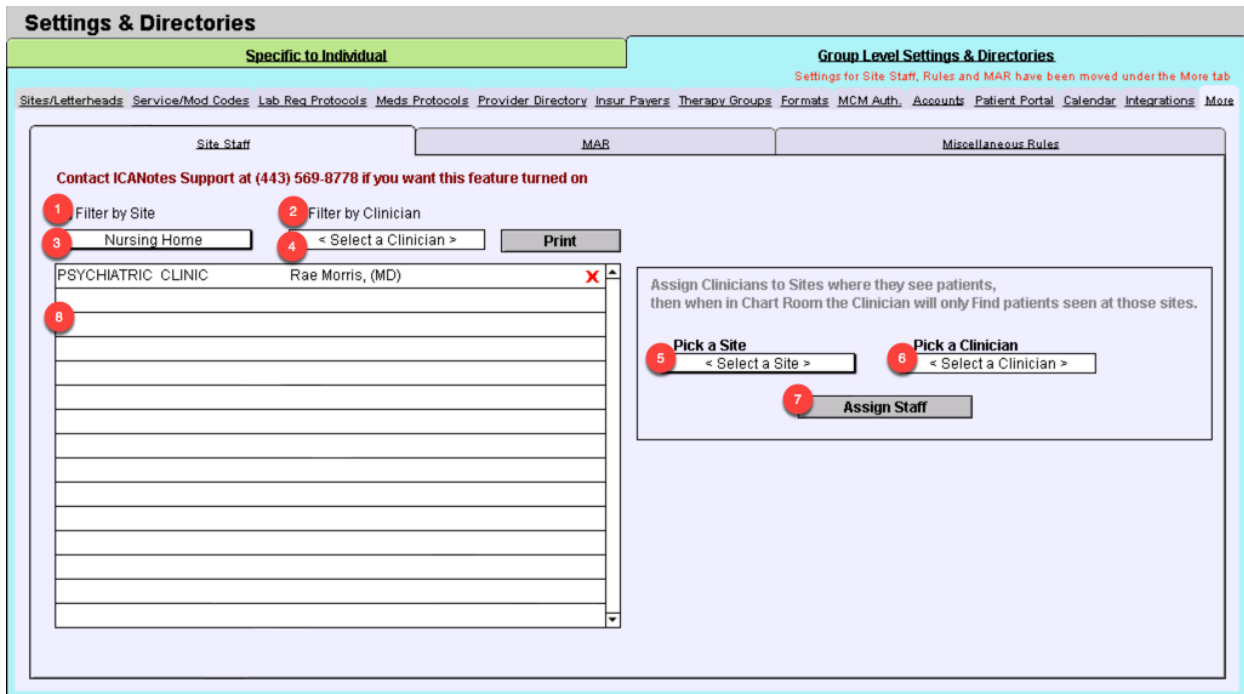
On the **More** tab, you can make further changes to your group level settings and directories.

## SITE STAFF TAB

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

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

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



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



## MAR TAB

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

**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 Req Protocols](#) | [Meds Protocols](#) | [Provider Directory](#) | [Insur Payers](#) | [Therapy Groups](#) | [Formats](#) | [MCM Auth](#) | [Accounts](#) | [Patient Portal](#) | [Calendar](#) | [Integrations](#) | [More](#)

**Site Staff** | **MAR** | **Miscellaneous Rules**

Assign Times to Administer Medications

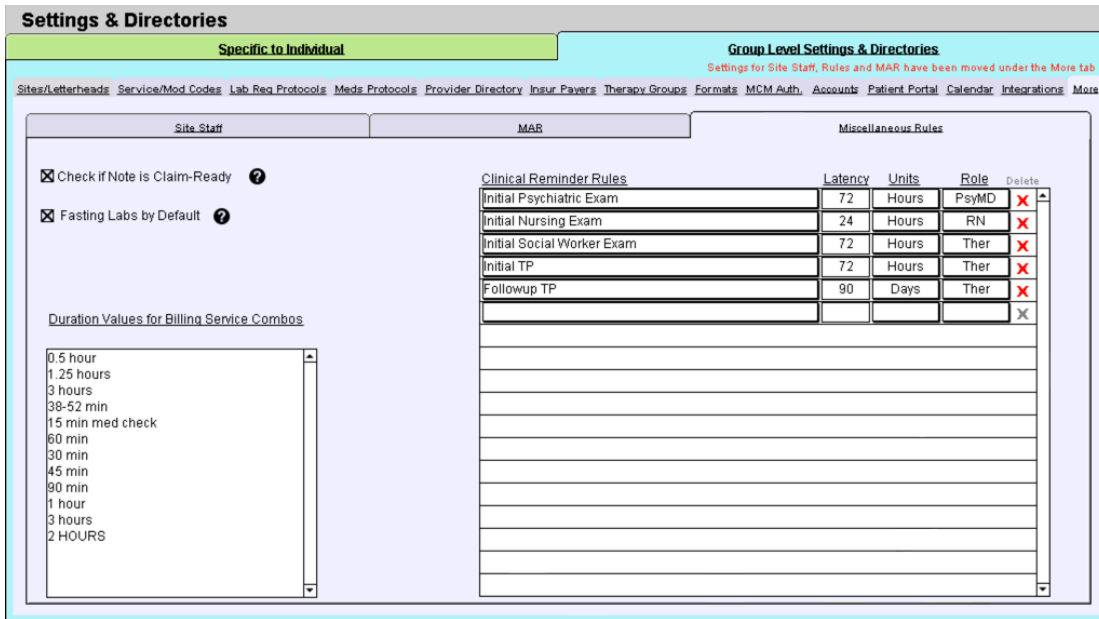
Medication Timing	Administer At:				
	1	2	3	4	5
QAM	0900				
QPM	2200				
Daily	0900				
Every Other Day	0900				
QHS	2200				
at Hour of Sleep	2200				
BID	0900	1600			
TID	0900	1600	2200		
QID	0900	1300	1700	2100	
every 8 hrs	0600	1400	2200		

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



## MISCELLANEOUS RULES TAB

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



- On the left, you will see **Check if Note is Claim-Ready** checkbox option. If you check the box, each time a note is compiled ICANotes will automatically check to ensure that all fields required to submit an electronic claim have been populated.
- The **Fasting Labs by Default** can be checked to include fasting labs by default.
- **Duration Values for Billing Service Combos** field is a type in field where values can be input for billing.
- On the right, there are a number of rules that can be configured to control the timing of due dates for various patient documents from the time of admission. Once these time intervals have been established, overdue documents will appear on each clinician's Clinician Reminder Sheet for easy visibility into items which need their attention.

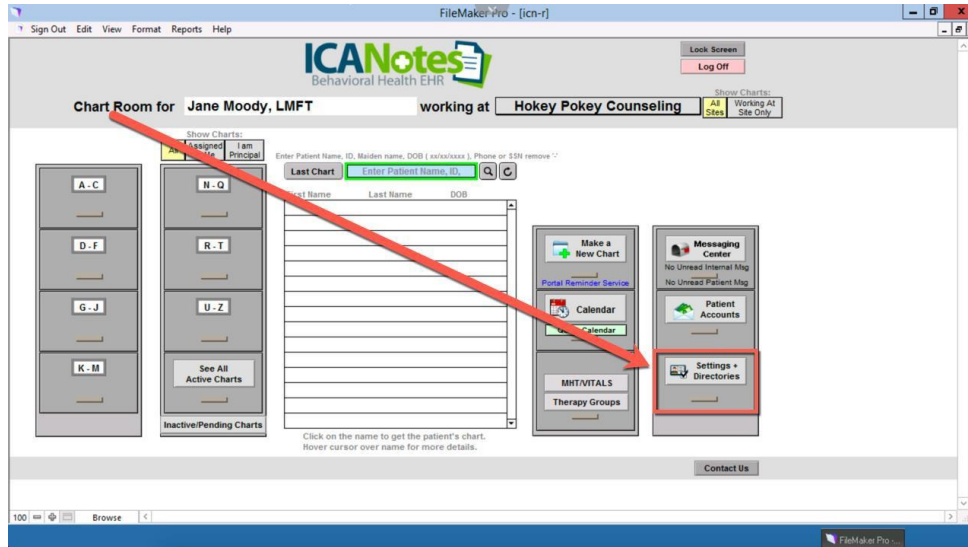
Note: This feature must be enabled by the ICANotes Support Team. Please call 443-569-8778 or submit a ticket via [ticket@icanotes.com](mailto:ticket@icanotes.com) to request that this feature be enabled for your group.

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

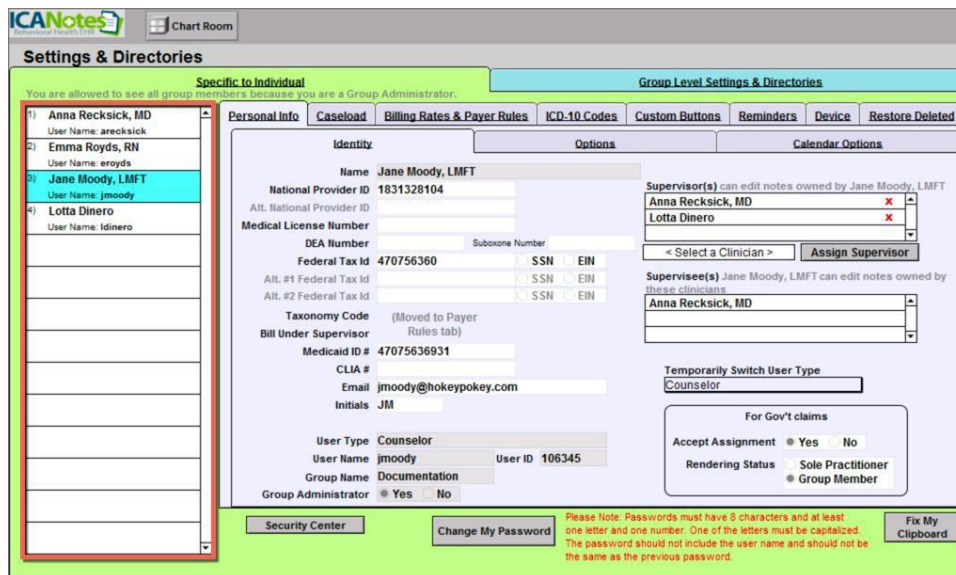
## CONFIGURING INDIVIDUAL SETTINGS

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

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



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



*\*group administrator view*



*\*non-administrator view*

## PERSONAL INFO TAB

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

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

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

Video Tutorial  
Personal Info

## IDENTITY TAB

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

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

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

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

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

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

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

## OPTIONS TAB

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

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

7. **Finished Note Header Name** – Enter your name or practice name here as you would like it to display at the top of each note, above the letterhead.
8. **Default Note Titles Button** – Choose your default letterhead from a dropdown list of all sites/letterheads that have been created in the **Group Level Settings & Directories**.

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

Yes Default Note Titles

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

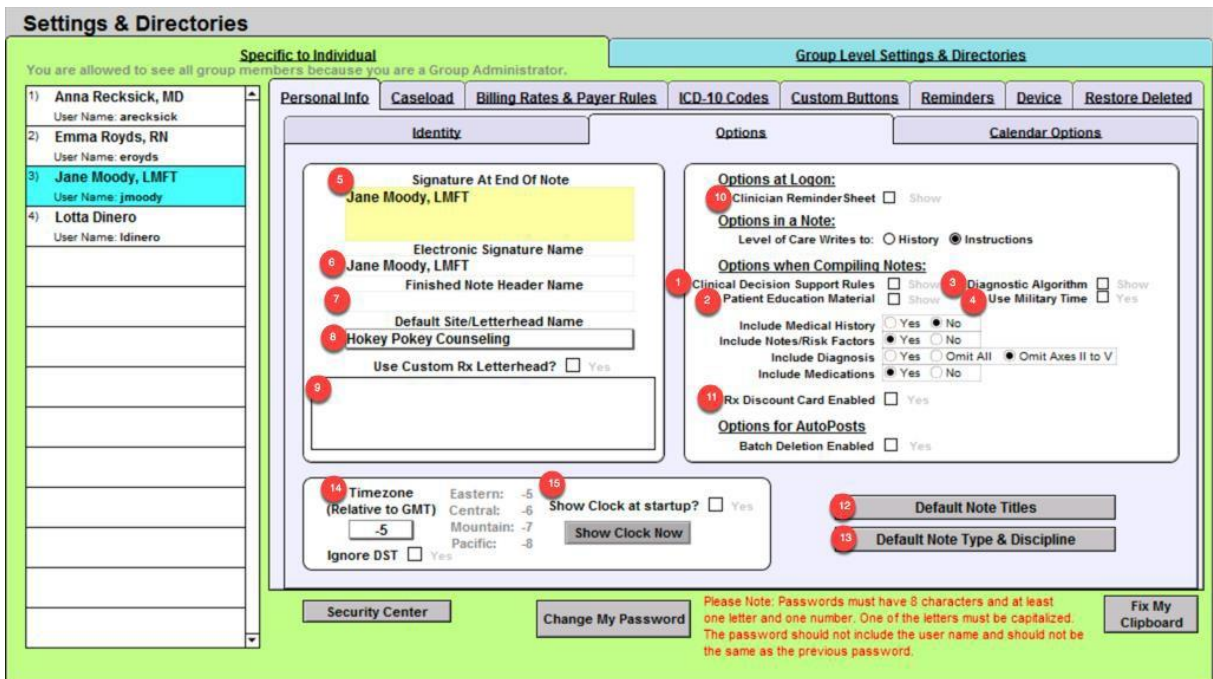
**Default for Complete Assessment or when Changing Note Title:**

Type (CE Only) Complete Evaluation

Discipline Psychiatrist

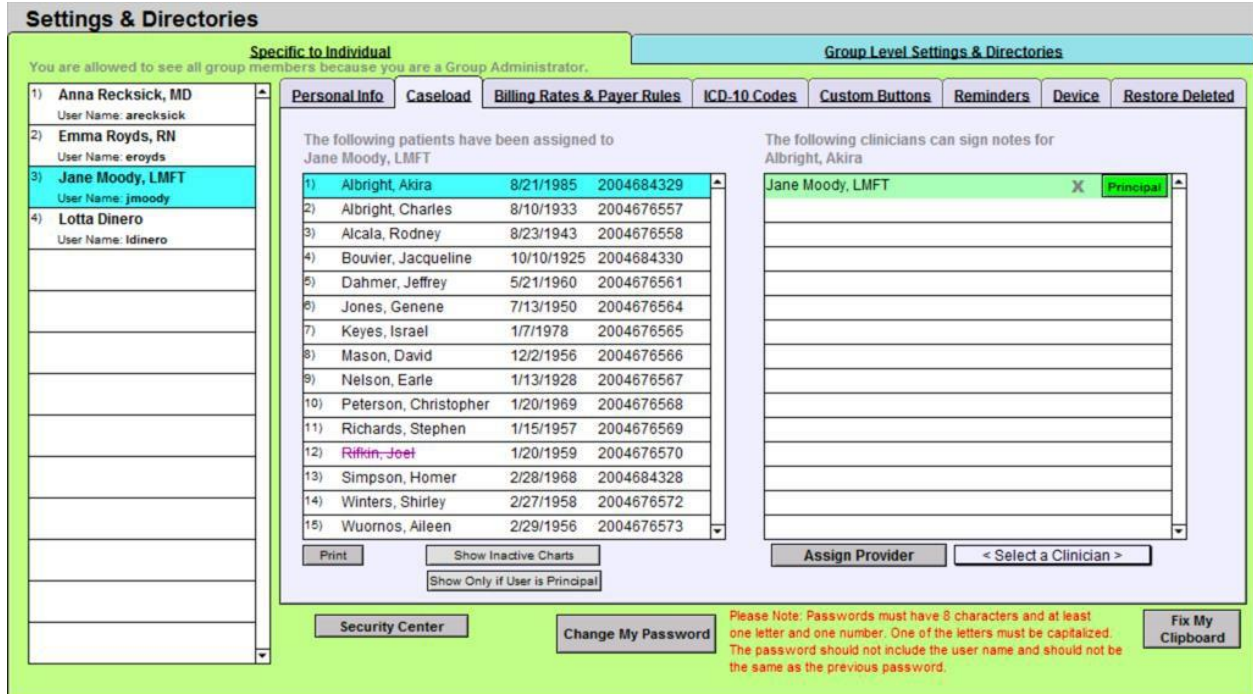
Default Note Type & Discipline

10. **Options at Logon** – Click the Show box to display the Clinician Reminder Sheet at logon (instead of the Chart Room).
11. **Rx Discount Card Enabled** – Choose this checkbox if you would like to enable the Rx discount card. Contact ICANotes Support to have this enabled for your group.
12. **Default Title for Notes** – If you prefer another title, click in the field and enter the title you want to appear on your notes. The Progress Note, non-Rx does have a drop-down menu option – you can double click inside the field to free text another title.
13. **Default Discipline when Changing Note Title** – If you want your credentials to be included in the note title should you decide to change note title while compiling a note, enter your credentials here and you will not have to enter them manually each time you change the title of a note.
14. **Timezone (Relative to GMT)** – Please enter the number which corresponds to your local time zone in this field. Changing this number will only change the time on notes and other timestamps going forward.
15. **Show Clock at Startup** – Some clinicians may have ICANotes maximized which blocks the view of the clock on your local desktop. We offer a small clock that will display on the lower right of your screen when you are using ICANotes. You can check the check box to have the clock start automatically when you login or you can come to this screen and press the Show Clock Now button to display the clock.



## CASELOAD TAB

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



- The column in the middle displays patients assigned to the clinician selected on the left. If the total number of patients is needed, scrolling to the end of the list will provide the total as the list of patients is numbered.
- The right column lists any additional clinicians that are assigned to the patient selected in the middle column. This includes clinicians that were assigned to a patient in the demographics tab of the patient's chart; however, if any clinicians are assigned to a patient chart via this screen, that designation will not appear on the demographics tab



of the patient's chart. Further, this will not reflect any supervisors that have been set up under the **Personal Info** tab.

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



## BILLING RATES AND PAYER RULES TAB

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

The screenshot shows the 'Settings & Directories' window. On the left, a list of users is shown, with 'Jane Moody, LMFT' selected. The main area is titled 'Billing Rates for Services (for jmoody)'. It contains a table with columns for Procedure Code, +/- Modifier, +/- Insurance Payer, and Enter billing rate. The table lists various services with their corresponding rates and checkboxes for modifiers and payers.

Procedure Code	+/- Modifier	+/- Insurance Payer	Enter billing rate	
00000 non-billable			\$0.00	X
36410 Blood Draw			\$35.00	X
80304 Drug Screen			\$65.00	X
90833 Psychotherapy 30 min. with EM services			\$125.00	X
90836 Psychotherapy 45 min. with EM services			\$150.00	X
90838 Psychotherapy 60 min. with EM services			\$175.00	X
90885 Review of Records			\$25.00	X
90887 Meeting/Conference			\$37.50	X
90889 Report Preparation			\$25.00	X
96372 Injection			\$50.00	X

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



## BILLING RATES

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

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

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

- To enter billing rates, select a code using the dropdown arrow in the left column titled Procedure Code.
- Enter a Modifier (as needed).
- Enter an Insurance Payer if you want to assign a specific billing rate to a specific insurance carrier.
- Enter the billing rate for that service in the last column on the right.
- To delete a CPT code/billing rate, just press the red **X** to the right of the code.
- Select **Copy** to copy the entire list of CPT codes and billing rates.
- Select **Paste** to paste the previously copied list of CPT codes and billing rates onto this user.
- Select **Print** to print the entire list of CPT codes and billing rates.

Procedure Code	+/- Modifier	+/- Insurance Payer	Enter billing rate	
00000 non-billable			\$0.00	X
36410 Blood Draw			\$35.00	X
80304 Drug Screen			\$65.00	X
90833 Psychotherapy 30 min. with EM services			\$125.00	X
90836 Psychotherapy 45 min. with EM services			\$150.00	X
90838 Psychotherapy 60 min. with EM services			\$175.00	X
90885 Review of Records			\$25.00	X
90887 Meeting/Conference			\$37.50	X
90889 Report Preparation			\$25.00	X
96372 Injection			\$50.00	X

## PROVIDER PAYER RULES

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

1. Since all fields except for the Bill Under Supervisor are blank in the example below, Jane Moody, LMFT is the default supervisor for this user, meaning that Jane Moody LMFT's billing information will be present on all claims if no other supervisors are defined.
2. Anna Recksick, MD's information will be present on claims when Medicare is the payer, and the Billing Taxonomy and Modifier specified in that row will also be on the claim.

Insurance Payer	Rendering Taxonomy	Billing Taxonomy	Code	Modifier	Bill Under Supervisor	
(Leave blank for default)					Jane Moody, LMFT	X
Cigna	X Taxonomy/Ins					X
Medicare	X	P123456789		HF	Anna Recksick, MD	X
						X

## 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.

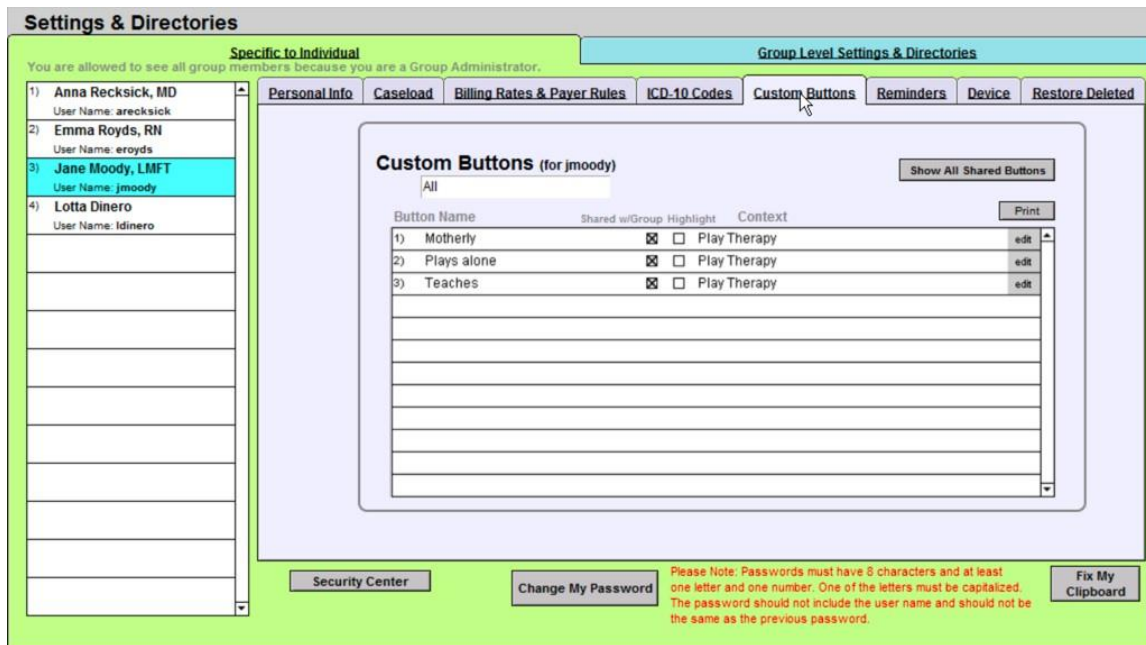
The screenshot shows the 'Settings & Directories' interface. On the left, a list of users is shown, with 'Jane Moody, LMFT' selected. The main area displays the 'ICD-10 Codes' tab for user 'jmoody'. It features a table with columns 'ICD-10 By Code' and 'ICD-10'. The table contains four entries: F30.3 (Manic episode in partial remission), F33.1 (Major depressive disorder), F60.0 (Paranoid personality disorder), and F39 (Unspecified mood [affective] disorder). Each entry has an 'edit' button and a red 'X' delete button. Above the table are 'Copy', 'Paste', and 'Print' buttons. At the bottom, there are 'Security Center', 'Change My Password', and 'Fix My Clipboard' buttons. A note at the bottom right states: 'Please Note: Passwords must have 8 characters and at least one letter and one number. One of the letters must be capitalized. The password should not include the user name and should not be the same as the previous password.'

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

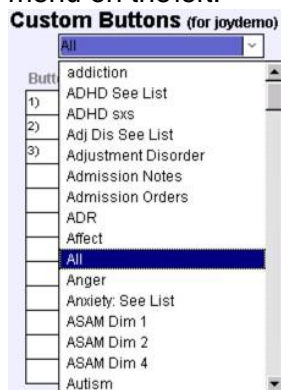
This screenshot shows a dialog box titled 'Customize ICD-10 Description' overlaid on the ICD-10 Codes interface. The dialog box prompts the user to 'Enter text that will replace the description "Unspecified mood [affective] disorder, F39 (ICD-10) "'. It includes a text input field with the text 'Unspecified mood [affective] disorder, F39 (ICD-10)', a 'Cancel' button, and a 'Change' button.

## CUSTOM BUTTONS TAB

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



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

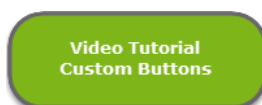


- You may choose to highlight a button on the list with a color or share it with your entire group by checking the boxes next to a custom button on the list:



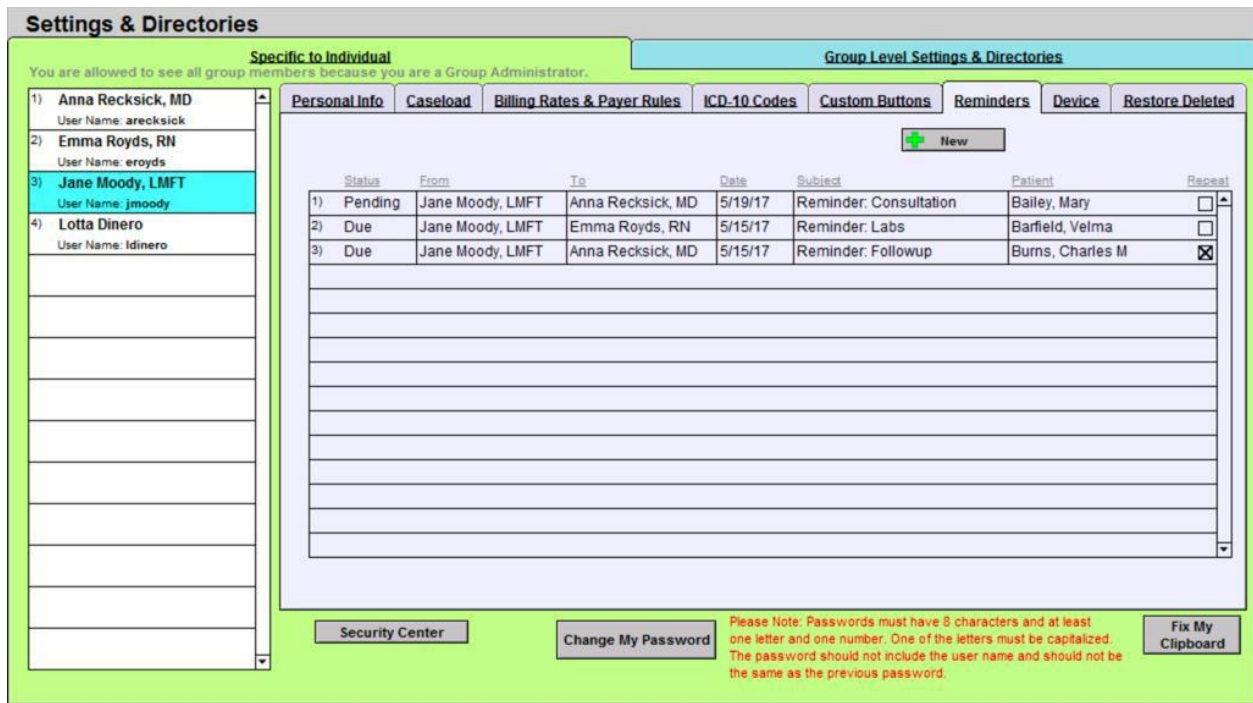
- By clicking the button next to a custom button, you can edit the name and content of a button, share it with specific users (or all users) in your group, or delete the button.
- If you want to review the list of all shared buttons in your group, click the **Show All Shared Buttons** in the upper right-hand corner.
- Please note that if you are a Security Administrator, you can review custom buttons created by other users which have not been shared with the group.

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





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



- You may start a new reminder by clicking the **New** button.
- This brings up a new window that allows you to select from four preset reminder types: Patient, Clinician, Staff, or Perform AIMS Exam.

**For a Clinician Reminder:**

- Select the clinician you want the reminder sent to (**Recipient**).
- Select the **Date** it should be sent, and whether the reminder should be repeated and at what interval.
- Enter a **Subject** for the reminder.
- Type your **Message**.
- **Link to this Patient?** Check yes or no.
  - If yes, click on the <Type Last Name to Select> field to select the patient you want linked to the reminder. After you select a patient, their ID# and DOB will appear. You will then have the option of clicking on the field labeled Contact via to select how the patient wants to be contacted.
  - When you link to a patient, an icon will appear in the reminder message. If you click on the icon, you will be able to open the patient's chart.

**For a Staff Reminder:**

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

**For a Patient Reminder:**

- Select the clinician or staff person who will receive the reminder to contact the patient (**Recipient**).
- Select the **Date** the reminder should be sent and whether it should be repeated and at what interval.
- Enter a **Subject** for the reminder and type your reminder Message.
- **Link to this Patient?** Select yes or no.
  - If yes, click on the <Type Last Name to Select> field to select the patient you want linked to the reminder. After you select a patient, their ID# and DOB will appear. You will then have the option of clicking on the field labeled **Contact via** to select how the patient wants to be contacted.

- When you link to a patient, an icon will appear in the reminder message. If you click on the icon, you will be able to open the patient's chart.

**For AIMS Exam:**

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

**Once the reminder has been created:**

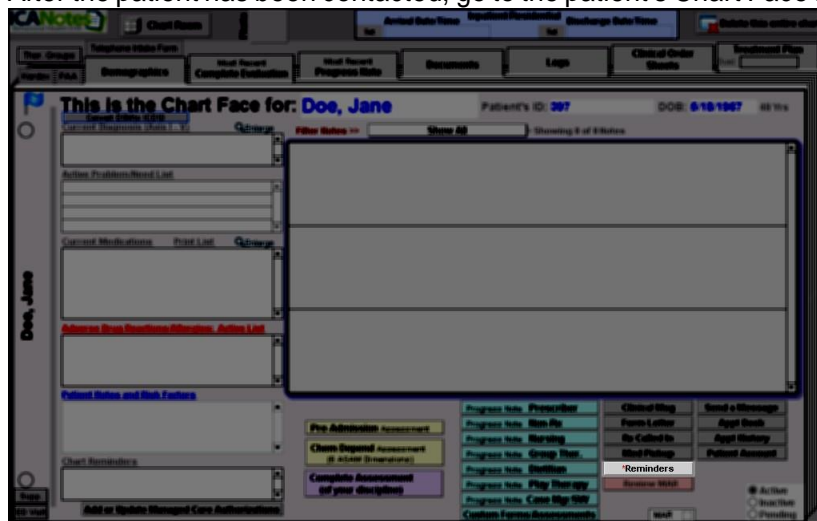
- You will notice that the Patient Reminder box is now checked at the bottom of the Reminder dialog box.



- 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	<input type="checkbox"/>

- 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.

Reminders						
Reminders are sent automatically via the Messaging Center when they become Due						
Status	From	To	Date	Subject	Patient	Repeat
1) Pending	Joy Test2	Joy Test4	3/16/16	Reminder: Copy Insurance Card	Doe, Jane	<input checked="" type="checkbox"/>

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

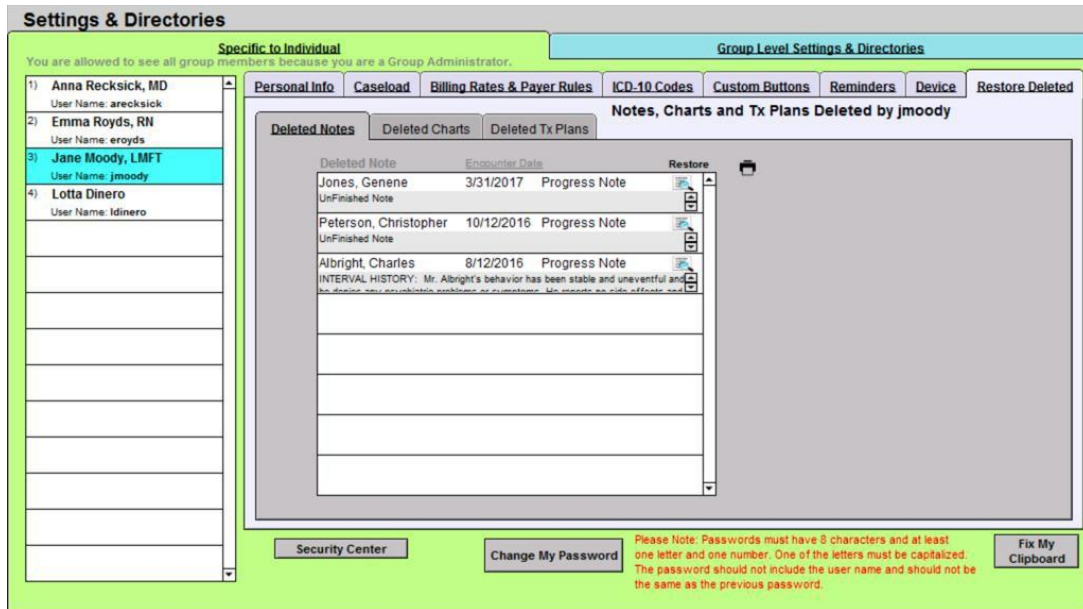


Please click the button below to view a quick tutorial on how to use the **Reminders** tab.





## RESTORE DELETED TAB


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



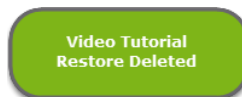
**Note:** Because deleted charts and notes are viewed by the user that took the delete action, it is necessary to know who deleted a chart or note in order to restore it. The permission to delete a chart or note may be granted or restricted within the **Security Center**.

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

Deleted Note	Encounter Date	Restore
White, Snow Z UnFinished Note	4/20/2017 Complete Evaluation	

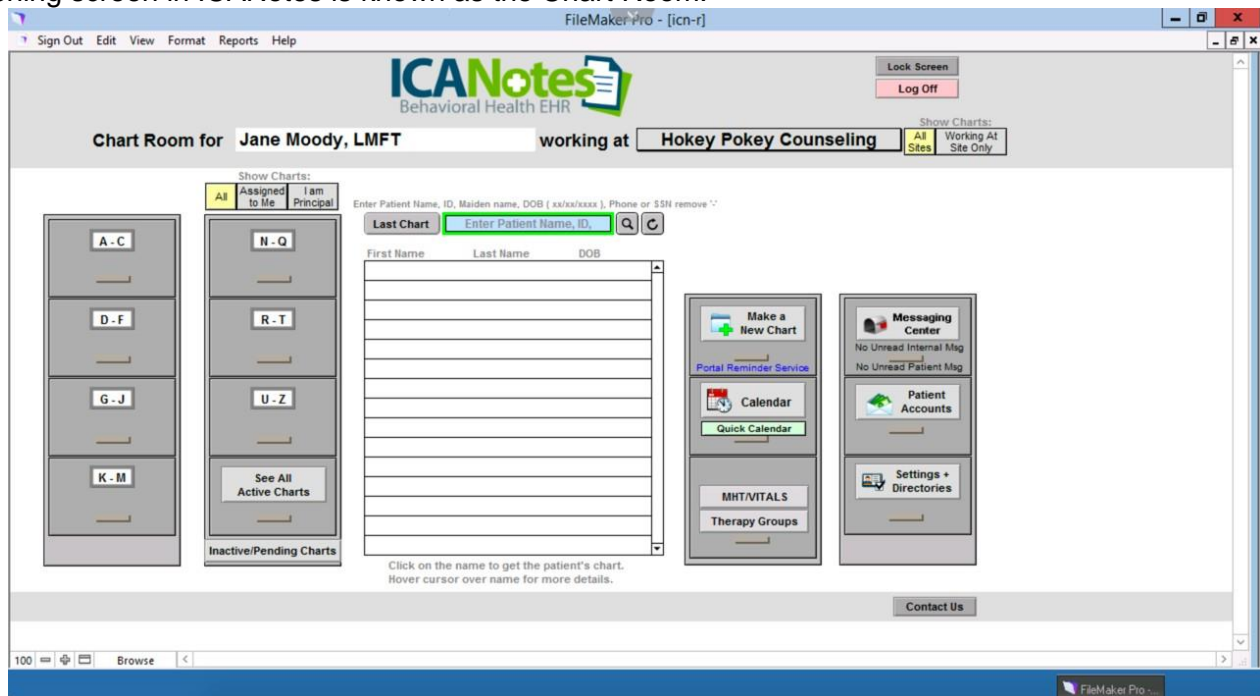
You can print a list of the Deleted Notes, Deleted Charts, or Deleted Tx Plans by clicking the  icon.

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



## CREATING AND ACCESSING CHARTS

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



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


Show Charts:



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


Enter Patient Name or ID or Phone



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

## CREATING A NEW CHART



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

**New Patient**

Please enter the new patient's name and date of birth.

First Name  
Alice

Last Name  
Doe

Date of Birth  
8/19/1984

Cancel Continue

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

**New Patient Warning**

There is already a patient with this name and DOB. Do you still want to add a new patient?

Click View to go to the existing patient chart.

View Yes No

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

FileMaker Pro - [icn-r]

File Edit View Format Help

ICANotes Behavioral Health EMR

Save and go back to Chart Room Save and go to Chart Face Cancel/Delete this Record and return to Chart Room Chart Details Doe, Alice Patient's Name 2004684621 Patient's ID 32 Yrs Patient's ID Audit Log

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

**Patient Information** \*Name (F,M,L,Suffix) Alice Doe \*Date of Birth 8/19/1984 Age: 32 Unique Patient ID 2004684621 \*Gender woman Refer to patient as Ms. Doe Date Created 5/15/2017

Address County City, State, Zip Home Phone Cell Phone Work Phone Email Email 2 Portal

**Insurance Information** Homeless  Bad Address  Sample Addr 2 / Appt # County City, State, Zip Home Phone Cell Phone Work Phone Country US Maiden/Other Name Alt. Patient ID Room: MAR  Disable eRX  Extra Privacy

**Other Contacts** Telephone Intake

**Patient Status** Active  Inactive  Pending

OK to send Appt Reminders via:  Email  Text Message  Phone Message

**Employment Status** School or Employer Grade Marital Status \*Ethnicity Religion Annual Household Income Family Size Veteran  Y  N

**Patient's Condition** Date of Current Illness Onset Date of Similar Illness Date of Current Admission: From To Dates Unable to Work: From To Condition Related To Employment? Condition Related To Auto Accident? Condition Related To Other Accident? In treatment Previously? If yes, where? Date of Death Preliminary Cause

Assigned Providers are allowed to sign Notes for this Patient

Where Seen Med Record # Skip Initial; create a Group Therapy Note Skip Initial; create a Progress Note

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

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



- If you will be utilizing the e-prescription feature of ICANotes, you will also need to fill out the Zip Code and Home Phone Number fields for the patient.
- If you are using the Patient Portal, you will need to populate the patient's email address and check Portal (contact the ICANotes Support team to turn on the Patient Portal or the ICANotes Sales team to turn on the Premium Patient Portal).

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

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

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

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

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

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



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

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

The screenshot shows the 'New Patient' form in ICA Notes. The 'Insurance Information' tab is highlighted with a red box. The form includes fields for Patient Name (Doe, Alice), Patient's ID (2004684621), Date of Birth (8/19/1984), Age (32), and Date Created (5/15/2017). There are also buttons for 'Save and go back to Chart Room', 'Save and go to Chart Face', and 'Cancel/Delete this Record and return to Chart Room'.

- If you will be using the billing portion of ICA Notes, it is recommended that you add insurance information to the patient's chart. To do so, click the **Insurance Information** tab.

The screenshot shows the 'New Patient' form with the 'Insurance Information' tab selected. The form is divided into several sections:
 

- Insurance Coverage:** A list showing '1 Cigna' as the active insurance carrier.
- Insurance Details:** Includes Member ID/Policy # (234543212), Group #, Copay (Required), Patient Relationship to Insured (Self), Start Date, Suspend Date, and End Date.
- Insured Party:** Fields for Name (Alice Doe), Address, City, State, Zip, Phone, SSN #, DOB (8/19/1984), and Gender (F).
- Insurance Provider:** Fields for Name (Cigna), Address (1000 Great-West Dr), City, State, Zip (Kennett MO 63857-3749), Phone (1-866-494-2114), and Payer ID (80705).
- Account Information:** Includes checkboxes for 'Patient is Responsible Party', 'EPSDT / Family Plan', 'Account is in Collections', and 'FREEZE ACCOUNT'. It also has fields for '% Discount' and 'MCM Auth. Received'.
- Additional Notes:** A text area for entering notes.
- Assigned Providers:** A list of providers including Anna Recksick, MD (Principal), Emma Royds, RN (Principal), and Jane Moody, LMFT (Principal).
- Where Seen:** Fields for 'Where Seen' and 'Med Record #'.
- Buttons:** 'Add New Location', 'Assign Provider', 'Skip Initial; create a Group Therapy Note', 'Skip Initial; create a Progress Note', and 'CONTINUE to Initial or Complete Exam'.

- Click the **+ New** button and choose the appropriate insurance carrier from the insurance list that appears on the right.

Patient Info **Continue** Photo **Doe, Jane** 397  
 Patient's Name 48 Yrs Patient's ID  
 Demographics **Go to E-Prescribe** Patient Reviewed Demographics  
 Anaphylactic Reaction Reported

**Patient Information** **Insurance Information** **Other Contacts**

Patient: **Doe, Jane**  
 SSN # \_\_\_\_\_ Medicaid ID \_\_\_\_\_  
 (Required for Medicare)

**Insurance Coverage** (click to view, enter details to right >) **New**  
 1 <Enter Carrier>  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 Print All Insurance Information **Delete**

Patient is Responsible Party  Require Auth# in Notes  
 \*If not, use Guarantor info on Other Contacts  
 EPSDT / Family Plan  Self Pay  
 \*If so, Do Not Bill to Insurance  
 \*this is copied to box 24h of the HCFA/1500  
 Account is in Collections  % Discount  
 \*reduce new charges by this %  
 FREEZE ACCOUNT  % Discount  
 \*reduce charges via Adj. by this %  
 MCM Auth. Received  Yes  No  
 Additional Notes:  
 \_\_\_\_\_

**Coverage Details** **Benefits** **Payments**

**Insurance** <Enter Carrier> Full List Short List  
 Member ID/Policy # \_\_\_\_\_  
 Group # \_\_\_\_\_  
 Pat # \_\_\_\_\_  
 1st  
 2nd  
 3rd  
 4th  
 Current  
 Aetna  
 BCBS  
 BCN Service Company  
 Blue Care Network  
 Blue Cross Blue Shield Michigan  
 Chad Coverage  
 CIGNA  
 Daniel Coverage1  
 Danielle Coverage  
 David Coverage  
 Dept of Corrections  
 Elizabeth Coverage  
 Employer: \_\_\_\_\_

**Insured Party** Name \_\_\_\_\_  
 Copy from Patient Info

**Insurance Provider** Name <Enter Carrier>  
 Address \_\_\_\_\_  
 City, State, Zip \_\_\_\_\_  
 Phone \_\_\_\_\_  
 Payer ID \_\_\_\_\_ Eligibility ID \_\_\_\_\_  
 Insurance Type \_\_\_\_\_  
 Insurance Type Other \_\_\_\_\_  
 Add to Short List  
 Use Alt. NPI on claims  
 Use Alt.  Tax ID on claims  
 Check Eligibility for Selected Payer

**Assigned Providers** Joy Test4 Role: X Principal  
 are allowed to sign Notes for this Patient  
 < Select a Clinician >  
 Assign Provider  
 Humor Therapy VT  
 Add New Location X  
 Print Patient Demographics  
 Save As PDF: Demographics **Continue**

- Proceed to fill out the remaining insurance information. You may prefer to use the "Show Fields used by electronic billing" button at the bottom to highlight required fields in yellow.
- After entering the patient's demographic information, you are ready to begin charting on your patient.