Outpatient Prescriber Workflow

	Thing You Want to Do	What is It Called?	☆ Pro Tip
1	See Appointment Schedule, Schedule Appointment, Start Client's Service	Staff Calendar and/or "Appointments for Today" widget on Provider's Dashboard	Save Staff Calendar as a quick link to easily access schedule
2	Send/Review Messages From Other Providers	Messages/Alerts or "New Alerts & Messages" widget on Provider's Dashboard	Through the widget providers can view new/unread messages from other providers. Can also search for messages/alerts under Message/Alert screen. Can attach a document by going to a signed document PDF and sending it as part of a message.
3	Look Up Client	Type into the "Person Search" icon	With Person Search icon, type the first 3 letters of last name and/or their medical record number and it will autofilter. For a more extensive search, under Person Search icon, select Client Search.
4	Review Previous Services/Notes	Services/Notes (Client) and/or Documents (Clients)	Filter "Complete" in services/notes screen. Click hyperlink under "Document" to access a specific note. You can also filter Documents screen by "Signed." If within a note's PDF, use forward or backward arrow to look at notes.
5	Review Previous and Current Programs	Programs (Client)	Filter "enrolled" for current programs and remove date range to see all current enrollments.
6	Review Labs	Lab Result Widget on client/provider dashboard: A quick view of labs Lab Result Review Screen: Complete list of client labs and/or outside lab results that have an appropriate interface with the EHR	Through Client Orders, choose "Review" tab for nurses to see point of care labs results here, as well as scanned documents
7	Review Diagnoses	Diagnosis Document (Client) or within psych note under "Diagnosis" tab	Of note, when clinicians enter problems in their notes, this information will go into "Client Clinical Problems," a separate list from Diagnosis Document.
8	Review/Document Vitals	Flow sheet (Client) Screen and choose Vitals dropdown or within psych note, click "Exam" tab	Using a flow sheet allows you to view recorded data in graph format to track trends.

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9	Start a E&M Psych Note	Services/Notes [Client], Staff Calendar and/or Appointment for Today widget on Provider's Dashboard. In Service tab, change "Scheduled" to "Show."	**Commonly Used Procedures:** **90792-Assessment MD:** Used for formal psychiatric evaluation, including integrated biopsychosocial and medical assessment. **99202-99205-Medication Support New Client:** Used to document E/M medication support services provided to new patients and/or > 3 years since last visit. **99212-99215-Medication Support Existing Client:** Used to document E/M medication support services provided to established patients, if visits within 3 years. **99202-99205 and 99212-99215** are the time-based codes used to document "standard" outpatient psychiatric visits. Choose based on time spent and if patient is new vs. established. These CPT codes use the same psych note template, so previous data will be saved from last use.
10	Document Diagnoses Within a Service/Note	Within Note: "Diagnosis" Tab and/or Billing Diagnosis	Enter descriptive text or an ICD-10 code and it will autofilter. You will need to designate one primary diagnosis for the service and place it as the #1 spot of order.
11	Problem List Within Notes	Within Note: "MDM" Tab	CalMHSA will be developing a different one in the future. When you enter a "Problem" in MDM, it does not save to "Client Clinical Problems," which clinicians will be using. You will need to enter at least 1 problem to complete your note.
12	Order Labs	Client Quick Orders or Within Psych Note: "MDM" Tab	
13	Order Outpatient Medications	Medication Management (Rx) (Client) and/or Within Psych Note, MDM tab: Medications "SmartCare RX"	If prescribing controlled substances, download Identrust's HID mobile app and have a staff signature on file (Your Profile --> My preferences). Rx is also where you can sign any queued medication orders. Save as a quick link for easy access.
14	Calculate Time for Visit	Within Psych Note, "MDM" Tab: Activities Completed	Can enter different time than was scheduled under "Service" tab. This is the official time that will be used for billing purposes.
15	Wrap up a Visit	"Sign" Button on Upper Right	You will get validation pop-up with direction of where an error is if you cannot sign. After care instructions are pending development.
16	Co-sign Notes	Click on "Co-sign" Within the Assigned Documents Widget on Providers Dashboard	You can also search for "batch signature" to sign multiple documents at once.
17	Assessments: PHQ-9 and GAD-7, AIMS	Search PHQ-9 and GAD-7. For AIMS Assessment, see Tab within Psychiatric Note Titled "AIMS"	Within Client Quick Links --> Assessment/Screening Tools to find full list of other available tools
18	Reconcile Medications Within Programs/Systems	No SmartCare Functionality	This is in development for medications ordered within an internal system. For external medication: Medication Management (Rx) --> "Add medications"
19	Record Allergies	Medication Management (Rx) (Client) --> Allergies/Intolerance/Failed Trials	This will autopopulate your note if done prior. Refresh to load into your note.

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