

Medical Review Processer

Set up

CalMHSA v1.0, 11.24.25

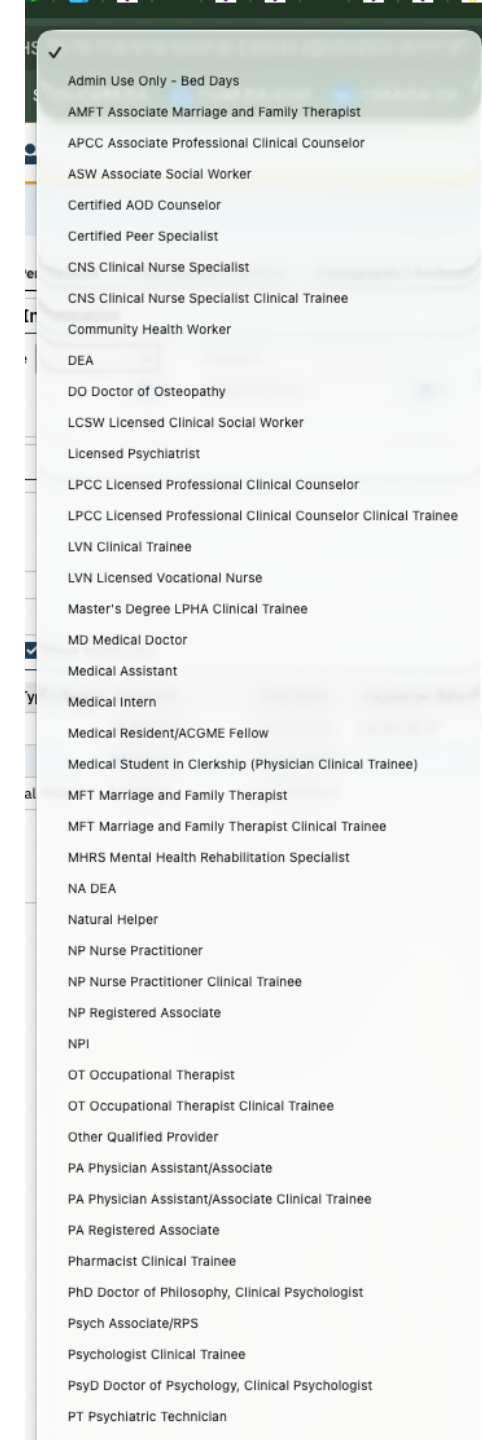
Set up

Summary

This is brief summary of how to set up the Reviewer Process for the medical teams (eg Medical Student, Medical Intern, Medical Resident/ACGME Fellow, Nurse Practitioner trainee, PA Clinical Trainee, CNS clinical nurse specialist trainee, Pharmacist trainee)

This may differ from clinician/therapist trainees because typical in the medical trainee workflow the medical reviewer tends to want to edit the note/document or add addendum directly.

Please contact CalMHSA for additional support.



Document Setup

Find the Document (eg psych medical note) and change permission for "Requires Licensed Signature to" "Yes".

This is per document, NOT per procedure code. *We do not have a solution to change this.*

Document Codes Detail

General
Additional Information

Details

Document Name	1 HR Face-to-Face Assessment for Seclusion or R	Document Type	Native	Service Note	<input type="radio"/> Yes <input checked="" type="radio"/> No
View Document URL	RDLCalMHSA1HrPreventSeclusionRestraint	Image Format Type		Active	<input checked="" type="radio"/> Yes <input type="radio"/> No
View Document RDL	RDLCalMHSA1HrPreventSeclusionRestraint	Initialization Process		Requires Signature	<input checked="" type="radio"/> Yes <input type="radio"/> No
Table List	CustomDocumentCalMHSAOneHrAssessmentSec	Form Collection	1 HR Face-to-Face Assessi	Only Available Online	<input checked="" type="radio"/> Yes <input type="radio"/> No
Document URL		Meta Data Form		Patient Consent	<input type="radio"/> Yes <input type="radio"/> No
Image Folder		Review Form		View Only Document	<input type="radio"/> Yes <input type="radio"/> No
<input type="checkbox"/> ROI		<input type="checkbox"/> Consent Document		Default Healthcare Decision Maker	<input type="radio"/> Yes <input type="radio"/> No
To Be Initialized	<input type="radio"/> Yes <input type="radio"/> No	Diagnosis Document	<input type="radio"/> Yes <input type="radio"/> No	Recreate PDF On Client Signature	<input type="radio"/> Yes <input checked="" type="radio"/> No
Requires Licensed Signature	<input checked="" type="radio"/> Yes <input type="radio"/> No	Multiple Credentials	<input type="radio"/> Yes <input type="radio"/> No	Medication Reconciliation Document	<input type="radio"/> Yes <input type="radio"/> No
Sign Date as Effective Date	<input type="radio"/> Yes <input type="radio"/> No	Allow Document Share	<input type="radio"/> Yes <input type="radio"/> No	Add Client As Co-Signer	<input type="radio"/> Yes <input type="radio"/> No
Default Guardian	<input type="radio"/> Yes <input type="radio"/> No	Editable After Signature	<input checked="" type="radio"/> Yes <input type="radio"/> No	Add Default Staff Co-Signer	<input type="radio"/> Yes <input type="radio"/> No
Need 5 Columns	<input type="radio"/> Yes <input type="radio"/> No	Allow Editing By NonAuthors	<input type="radio"/> Yes <input type="radio"/> No	Family History Document	<input type="radio"/> Yes <input type="radio"/> No
DSMV	<input type="radio"/> Yes <input type="radio"/> No	Exclude From Batch Signing	<input type="radio"/> Yes <input type="radio"/> No	CoSigner RDL	
Days Document Editable After Effective Date		Mobile	<input type="radio"/> Yes <input type="radio"/> No	Regenerate RDL On CoSignature	<input type="radio"/> Yes <input checked="" type="radio"/> No
AllowPortalUserAsAuthor	<input type="radio"/> Yes <input type="radio"/> No	Disclosure Print Order		Disclosure Print Order By Effective date	<input type="radio"/> Ascending <input type="radio"/> Descending

Document Set up: Adding License

Add which licenses (eg Medical intern) that will need a "Reviewer/Attending."

- Any license type (eg MD, DO, NP, PA etc) that is ALLOWED to sign the document/service.
- Anyone NOT listed will require co-signature (eg medical student, medical intern, medical resident/ACGME fellow, nurses etc) which means every time they sign the note, it will ask for a co-signer.
- Currently, if the same license needs review (eg someone remediation), there is no process for this yet, please contact CalMHSA if you need this type of scenario as we may need to add additional "license" to account for this workflow

Document Codes Detail

General Additional Information

Reviewer Licenses

Staff Degree

- ✕ Reviewer/Attending
- ✕ Doesn't require reviewer/attending

User Setup: Permission Designation and Billing Set up

1) License set up for billing

1. For setting up licenses for billing (License/Degree tab) , review this link <https://2023.calmhsa.org/how-to-setup-a-student-intern-as-a-staff-user/>
2. Medical residents and interns do not need a supervisor NPI on their claims.
3. We highly recommend that you **work with CalMHSA RCM Support** assigned to your county to ensure that this is set up properly as each type of license may be have different billing protocol.

2) Supervisor/Supervisee/Proxy designation:

1. For a clinical trainee, you can set up a Supervisor under the 'Supervisor' widget in their User/Staff's profile >> Proc/Prog/Loc/Proxy/Supervisor
2. For the Supervisor/attending, you can set up the trainees as "Supervisees" widget in their User/Staff's profile >> Proc/Prog/Loc/Proxy/Supervisor
3. If Reviewer/Attending wants to be able to directly edit the note after the Trainee (who will listed author eg. Medical resident/fellow), then under the trainee's profile, the Reviewer should be listed as a "proxy".
4. If the trainee (eg medical student, nurses, scribes etc) is writing the document on behalf of the Reviewer/Attending, then the trainee will be listed as the proxy under the Reviewer's profile.

The screenshot displays the 'Proc/ Prog/ Loc/ Proxy/ Supervisor' tab in the CalMHSA user setup interface. The interface is divided into several sections:

- Clinical Data Access Groups:** Includes checkboxes for 'All Clinical Data Access Groups' and 'Only Show Effective CDAGs'. It features a table with columns for 'CDAG Name', 'Start Date', and 'End Date'. A button 'Add CDAG(s)...' is present.
- Procedures:** A section for listing procedures the staff can deliver, with a button 'Add Procedure(s)...'.
- Locations:** A section for listing locations from which staff works, with a button 'Add Location(s)...'.
- Prescriber Proxy:** A section for listing staff who can manage the person's medications, with a button 'Add Staff...'.
- Programs:** A section for listing programs with which staff is associated. It includes a table with columns for 'Program Name' and checkboxes for 'Crisis Residential', 'CSU Program', 'Inpatient Program', 'MH Adult Outpatient', and 'MH Residential Program'. A button 'Add Program(s)...' is present.
- Proxy:** A section for listing staff for whom this person can authorize a clinical document. It includes a table with columns for 'Staff Name' and checkboxes for 'Huang, Nurse Medical Intern' and 'Watson, Chris MD Medical Doctor'. A button 'Add Staff...' is present.
- Supervisees:** A section for listing supervisees of this staff, with a button 'Add Staff...'. It currently shows 'No data to display'.
- Supervisors:** A section for listing supervisors of this staff, with a button 'Add Staff...'. It currently shows 'No data to display'.
- Proxy for Messages:** A section for listing staff for whom this person is a proxy for messages, with a button 'Add Staff...'. It currently shows 'No data to display'.

The 'Programs', 'Proxy', 'Supervisees', and 'Supervisors' sections are highlighted with a yellow border.

User Setup: Default Cosigner

If you always want to have a default co-signer for an individual then can also do this under User (eg Nurse/Resident) Staff Details >> Demographics/Professional.

However, this continues to be LIVE NOTE/CLAIM which means that the service will be billed (regardless of whether a supervisor has reviewed the note yet.)

This is separate of the Reviewer process but maybe helpful to set up for your trainees

Staff Details

General

Roles/ Permissions

Client Access Overrides

Demographic/ Professional

Proc/ Prog/ Loc/ Proxy/ Supervisor

Productivity

Staff Preferences

Licenses / Degrees

Credentialing

Care Management

Contracted Rates

Time Sheet

Highly Qualified Teacher

Reporting

Custom Fields

Demographic Information

Professional

Date Of Birth

Age

Race

Select

Language

Select

SSN

New

Employment Start

Gender

Employment End

Marital Status

License #

123456

Taxonomy Code

National Provider Id

123456

DEA Number

Signing Suffix

Co-Signer

☒ Always Default

Huang, Delphine MD Medical Doctor

Authorized Provider

Narrative

Effective

09/27/2023

Status

Signed

Author

Nurse, Test

Sign

Other Versions

Signed By

Signer

1. 09/27/2023, Test Nu...

1.Test Nurse ON 09/27/2023 (1)

Add Signer(s)...

☒ X Huang, Delphine

Co-Sign

Decline

Document

PdfBytesHandler.axd

1 / 1

171%

Client ID: 1024

Page 1 of 1

User Workflow


Option 1: EHR workflow for Medical Reviewer who wants to edit directly but NOT be the author

- If trainee is the billing author and you have them set up properly in slide 6, AND the reviewer/attending is to directly edit and sign the note after the trainee, see instructions:
- **Key Step:** Ensure that reviewer is set up to be a proxy of the trainee. This is counterintuitive, but this allows the reviewer to be able to directly edit the note.
 - [How to Make a Staff/User a Proxy for Another Staff/User](#)
 - The instructions also go through the steps if the reviewer declines to sign the document.
- Steps for the service note or documents
 - The Trainee will write their service note or document.
 - When the Trainee is done with note, they will click on the "Sign" button, a pop-up will require that they need to assign a Reviewer.
- Reviewer will see this document on their "My Documents" list page (not a link on the widget). Reviewer must have appropriate license that was designated in Document Code.
 - When Reviewer can review, edit and then must sign,
 - When the pdf is created, it will show the trainee's name as the primary author. At the end, it will list the author and reviewer's names.
 - [Reviewer Process Add On for Supervisors and Reviewers](#)
- Document will NOT be considered complete, nor can service be billed, until the document is signed by someone with the appropriate license. *This can delay billing if the reviewer does not complete in a timely manner.*

Option 1: Service notes




For service notes only, in the service note details tab, add the "Attending" field, the name of the reviewer.
Slide 6 billing set up must be done correctly.

Service Note

Effective 12/01/2025  Status New

Service Billing Diagnosis Disposition

Service

Status	Show	▼	Start Date	12/01/2025	
Program	*	▼	Start Time	*	
Procedure		▼	Travel Time		
Location	*	▼	Documentation Time		
Clinician	Huang, Delphine		Service Time	*	
Mode Of Delivery	▼		Attending		
Cancel Reason	▼		Referring		▼
Evidence Based Practices	▼				
Transportation Service	No	▼			

☐ Interpreter Services Needed

Option 1: When a user signs with a certain license, then a pop up will require them to select a user is a Reviewer; Status of document will change "To Be Reviewed."

1 HR Face-to-Face Assessment for Seclusion or Restraints

Effective

Review

What we

test

Patient's

test

Medical

If rele

test

SignaturePage

Staff, Student is signing the 1 HR Face-to-Face Assessment for Seclusion or Restraints

Staff, Student

05/21/2025

11:42 AM

☒ Password
 ☐ Signature Pad
 ☐ Mouse/Touchpad
 ☐ Verbally Agreed

* Staff, Supervisor

Add Reviewer

Clear

Cancel

1 HR Face-to-Face Assessment for Seclusion or Restraints

Effective

05/21/2025

Status

To Be Reviewed

Author

Staff, Student

Sign

Review of patient's conditions/behaviors that led to the use of Seclusion or Restraints

☒ Danger to Self

☐ Danger to Others

☐ Other

What were the interventions/strategies used, including less restrictive measures and the client's reaction?

test

Option 1: Reviewer will see this document on their "My Documents" list page
(it will not appears as a link on the widget)

My Documents (2)



All Clients	All Documents	To Be Reviewed	Due in x days	Other	Apply Filter
All Dates	From	To	<input type="checkbox"/> Include External Documents	All Programs	

Client	Document/Description	Group Name	Effective	Status	Ver.	Due Date	Staff to Sign	Author	Others to Sign	Associated Documents	Program
Asano, Jason (1028)	1 HR Face-to-Face Assessment...		05/21/2025	To Be Review 1			Staff,Superviso	Staff, Stud...		Add	MH Adult Outpatient
Test, Sarika (1124)	Psych/Medical Note (Prescri...		05/06/2025	To Be Review 1			Staff,Superviso	Mohan, Sari...		Add	MH Adult Outpatient

Option 1: Reviewer is able to edit before signing, if they are a proxy for the author. They also will be responsible for signing the document in order to complete the note and if billable, for the billing process to proceed.

1 HR Face-to-Face Assessment for Seclusion or Restraints

Effective

05/21/2025

Status

To Be Reviewed

Author

Staff, Student

←

→

Sign

Review of patient's conditions/behaviors that led to the use of Seclusion or Restraints

☒

Danger to Self

☐

Danger to Others

☐

Other

What were the interventions/strategies used, including less restrictive measures and the client's reaction?

test

supervisor can edit

Option 1: Once reviewer signs, the pdf is created and all signatures are shown

Effective

05/21/2025

Status

Signed

Author

Staff, Student

ToSign

Document

test

Patient was informed of plan and any criteria for release

☒ Yes

☐ No

Additional Comments/Information

test

Staff:

Student Staff, Medical Student

Signature Date:

05/21/2025
11:42AM

Staff:

Supervisor Staff

Signature Date:

05/21/2025
11:57AM

Option 2" EHR workflow for Medical Reviewer/Medical Student, if the Reviewer is the Author

- If reviewer will be the billing author, then the following steps are similar to other scribe/nursing scenarios.
- Key Step: the STUDENT will be the proxy listed for the Reviewer/Attending.
- [How to Make a Staff/User a Proxy for Another Staff/User](#)

Option 2: Proxy access to prescriber notes without access to prescriber role

If you are proxy for another provider (eg prescriber), this will then give you access when you go under the prescriber calendar to click into the note and edit.

It will be a "To-Sign" Document that goes under "To-Sign" AND "In Progress" in Assigned Document widget of prescriber.

This approach does not give access to the Prescriber's procedure codes.

Current functionality gives editing privileges to the Doctor. The Trainee/Nurse will lose any editing privileges after she/he clicks on "To-Sign."

General

Roles/Permissions

Client Access Overrides

Demographic/Professional

Proc/Prog/Loc/Proxy/Supervisor

Productivity

Staff Preference

Licenses / Degrees

Credentialing

Care Management

Contracted Rates

Time Sheet

Highly Qualified Teacher

Reporting

Custom Fields

Clinical Data Access Groups

☐ All Clinical Data Access Groups

Start Date

End Date

Add CDAG(s)...

☒ Only Show Effective CDAGs

Modify

Clear

CDAG Name	Start Date	End Date
<input checked="" type="checkbox"/> 3 - Admin		
<input checked="" type="checkbox"/> 1 - Mental Health		
<input checked="" type="checkbox"/> 2 - Substance Use Diso...		

Procedures

Procedure this staff can deliver.

Add Procedure(s)...

No data to display

Programs

Programs with which staff is associated.

Add Program(s)...

	Program Name
<input checked="" type="checkbox"/>	Crisis Hotline
<input checked="" type="checkbox"/>	Crisis Residential
<input checked="" type="checkbox"/>	CSU Program
<input checked="" type="checkbox"/>	Inpatient Program
<input checked="" type="checkbox"/>	MH Access

Proxy

List of staff for whom this person can author a clinical document.

Add Staff...

Staff Name
<input checked="" type="checkbox"/> Huang, Delphine MD Medical Doctor
<input checked="" type="checkbox"/> Huang, Prescriber MD Medical Doctor
<input checked="" type="checkbox"/> LPHA, Test

Assigned Document(s)

	Notes	ISP	Assessment	ALL
Due Now	0	0	0	0
In Progress	0	0	0	6
Due in 14	0	0	0	0
Co-Sign	0	0	0	2
To-Sign	0	0	0	1
Assigned	0	0	0	0

Psychiatric Note

Effective 09/27/2023

Status In Progress

Author Huang, Delphine

09/27/2023

ToSign

Service

Note

Billing Diagnosis

Add-On Codes

Warnings

Service

Status	Show	Start Date	09/27/2023
Program	MH Adult Outpatient	Start Time	8:45 AM
Procedure	Assessment MD	Travel Time	Minutes
Location	Office		
Clinician	Huang, Delphine	Documentation Time	Minutes

My Documents (6)

All Clients

All Document Types

In Progress

Client	Document/Description	Group Name	Effective	Status
Delphine, David (1024)	Psychiatric Note / Assessment...		09/27/2023	In Progress

Psychiatric Note

Effective 09/27/2023

Status In Progress

Author Huang, Delphine

09/27/2023

ToSign

General

Exam

Medical Decision Making

AIMS

Diagnosis

Chief Complaint/Reason for Visit - Last Visit

07/12/2023 - Having issues with depression

07/12/2023 - depression and alcohol follow up

Today's Chief Complaint/Reason for Visit

TESTING PROXY

History of Present Illness

Proxy Verification

Proxy Tracking

Author: Huang, Delphine

Entered By: Nurse, Test

Password:

Effective Date: 09/27/2023

Entered Date: 09/27/2023 09:11 AM

Agree

Clear

Cancel

Documents (84)

All Authors...

All Documents

All Status

Last 1 Year

Include errored documents

From 09/27/2022

Document/Description	Group Name	Effective
CA ASAM		09/27/2023
Progress Note (Group Therapy)		CalMHSA Chr., 09/26/2023
Progress Note (Psychosocial Rehabilitation Group ...		CalMHSA Fa., 09/22/2023

Psychiatric Note

Effective 09/27/2023



Status In Progress

Author Huang, Delphine

09/27/2023



ToSign



Service **Note** Billing Diagnosis Add-On Codes Warnings

General Exam Medical Decision Making AIMS Diagnosis

Chief Complaint/Reason for Visit - Last Visit

07/12/2023 - Having issues with depression
07/12/2023 - depression and alcohol follow up

Today's Chief Complaint/Reason for Visit

TESTING PROXY

History of Present Illness

Proxy Verification



Proxy Tracking

Author: Huang, Delphine

Effective Date: 09/27/2023

Entered By: Nurse, Test

Entered Date: 09/27/2023 09:11 AM

Password :

.....

Agree

Clear

Cancel

Option #3

- While there is no notification process for the reviewer, an alternative approach is to add an attending/supervisor note/document to a service note.

Documents (54) Create Document...

All Authors... ↕ All Documents ▼ All Statuses ▼ Due in X days ▼ Other ▼ Apply Filter

Last 1 Year ▼ ☐ Include errored documents From 12/01/2024 📅 To 12/01/2025 📅 ☐ Include External Documents All Programs ▼

Document/Description	Group Name	Effective ▼	Status	Ver.	Due Date	Author	To Co-Sign	Others to Sign	Shared	Associated D
Client Orders		11/19/2025	Signed	1		Huang, Delphine			Yes	Add
Authorization Tracking		11/17/2025	Signed	1		Hakusui, Christop			Yes	Add
Authorization Tracking		11/17/2025	Signed	1		Hakusui, Christop			Yes	Add
Diagnosis Document		11/07/2025	Signed	1		Watson, Chris			Yes	Add

Associate Documents (43) OK Cancel

Documents Preview

All Clinicians ▼ All Documents ▼ All Statuses ▼ Apply Filter

Effective From 12/01/2024 📅 Effective To 📅 All Programs ▼ i

Add All	Document	Effective	Status	Author	Program
Add	Client Orders	11/19/2025	Signed	Huang, Delphine	Inpatient Program-03...
Add	Authorization Tracking	11/17/2025	Signed	Hakusui, Christopher	CARE Act (name chang...
Add	Authorization Tracking	11/17/2025	Signed	Hakusui, Christopher	CARE Act (name chang...
Add	Diagnosis Document	11/07/2025	Signed	Watson, Chris	MH Adult Outpatient...
Add	1 HR Face-to-Face Assessment for Seclusion or Restraints	11/06/2025	Signed	Huang, Delphine	Inpatient Program-03...
Add	CalMHSA Discharge Summary	11/04/2025	Signed	Huang, Delphine	Inpatient Program-03...

List of Associated Documents

Document	Effective	Status	Author	Program
No data to display				

Other Tips

- If there are standard templates to be used for the reviewers, consider using Key Phrases to be more efficient.