

MENTAL HEALTH MIS

ASSESSMENTS

VERSION 3

(A.V.3)

Tip Sheets for Clinical Staff



2013

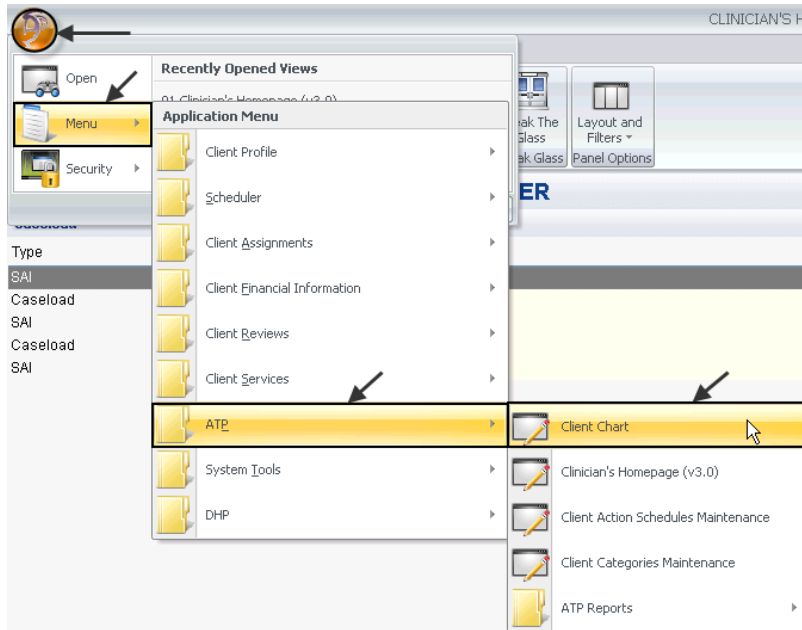
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Accessing the “Face Sheet”

Previously:

- Click on the systems button
- Click “Menu”
- Click “ATP”
- Click “Client Chart”



- The “Client Chart” displays. Access a client by clicking in the “Client” field and entering a case number or sort name, and pressing the “Tab” or “Enter” key on the keyboard

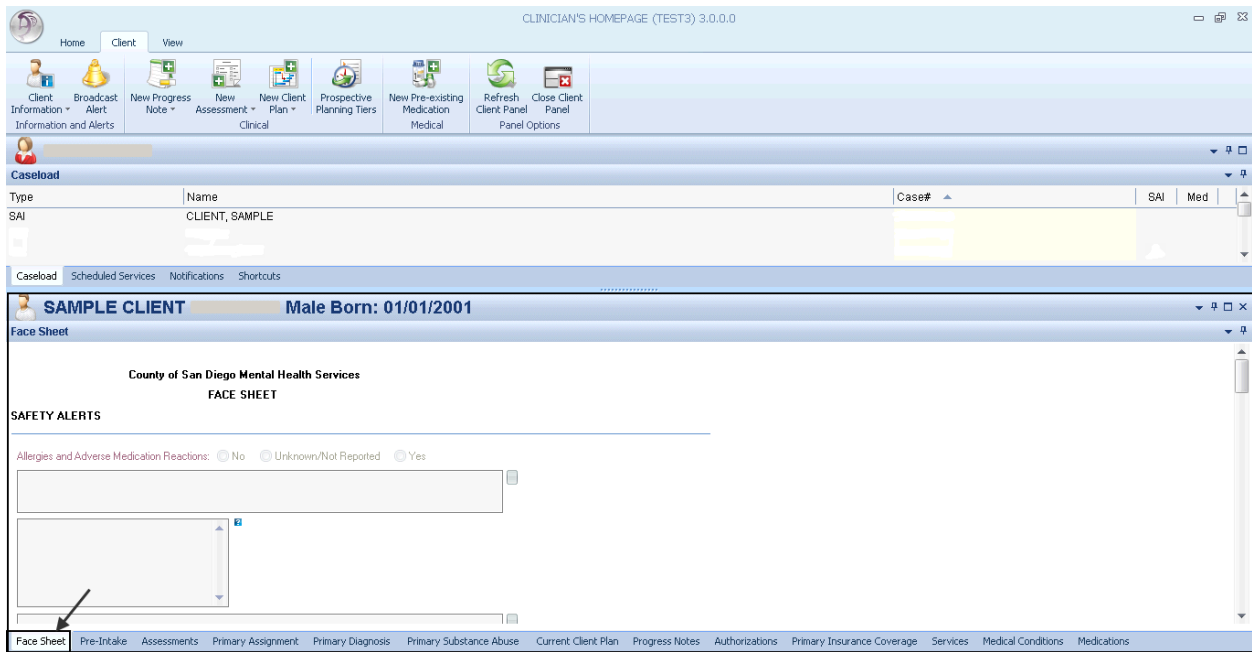
A screenshot of the 'Client Chart (Administrative Access)' window. The 'Client' field contains 'CLIENT_SAMPLE'. Below the field are 'Form Type' and 'Date' fields. The 'Face Sheet' tab is selected, showing the 'County of San Diego Mental Health Services FACE SHEET'. Under 'SAFETY ALERTS', there are radio buttons for 'Allergies and Adverse Medication Reactions: No', 'Unknown/Not Reported', and 'Yes'. Below this are 'Add' and 'Del' buttons.

A.V.3:

- Double click on the desired client on your caseload



- The client panel opens. Single click on the “Face Sheet” pane



Adding a BHA

This Information Can Be Generalized for Any Assessment Type

Previously:

- From the “Face Sheet”, click on the “Form Type” ellipses

The screenshot shows the 'Client Chart (Administrative Access)' window. At the top, there are fields for 'Client' (containing 'CLIENT_NEW'), 'Form Type' (with an ellipsis button), 'Case Number', and 'Date'. Below this is a tabbed interface with 'Face Sheet' selected. The main area is titled 'County of San Diego Mental Health Services FACE SHEET'. Under 'SAFETY ALERTS', there are radio buttons for 'Allergies and Adverse Medication Reactions' with options 'No', 'Unknown/Not Reported', and 'Yes'. Below this is a table with 'Add' and 'Del' buttons. At the bottom, there are fields for 'Primary Unit Assignment' and 'Subunit'.

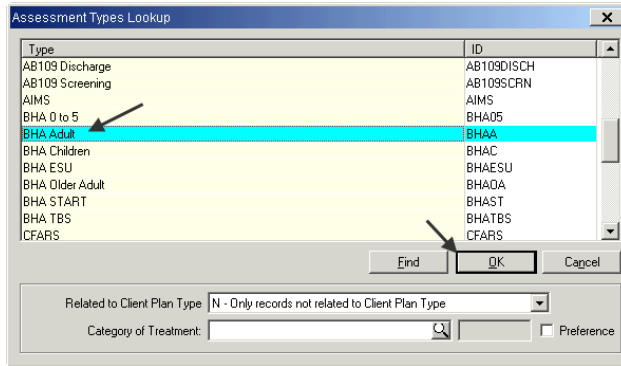
- Click the “Add” button

The screenshot shows the 'Client Chart Lookup' dialog box. It features a table with columns 'Type', 'Date', and 'Status'. Below the table are radio buttons for 'Pending', 'Final Approved', and 'All' (selected), and a 'Voided' checkbox. A row of buttons includes 'Print', 'Add' (highlighted with an arrow), 'Preview', 'Delete', 'Show', 'Find', 'OK', and 'Cancel'. At the bottom, there are input fields for 'Type', 'Category of Treatment', and 'Signed by', each with a magnifying glass icon, and a 'Clear' button.

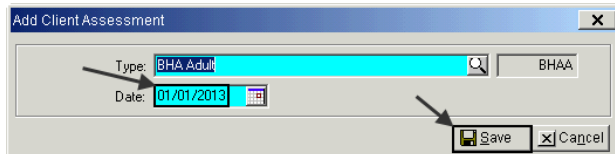
- Click on the magnifying glass to the right of the “Type” field

The screenshot shows the 'Add Client Assessment' dialog box. It has a 'Type' field with a magnifying glass icon (highlighted with an arrow) and a 'Date' field with a calendar icon. At the bottom, there are 'Save' and 'Cancel' buttons.

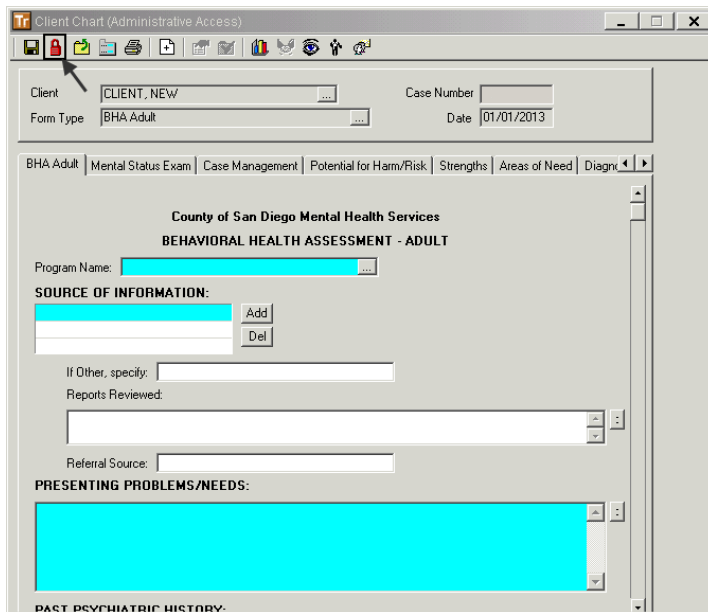
- Either double click on the desired BHA, or single click and click “OK”



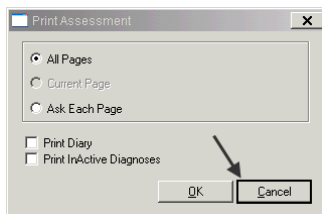
- Enter the date and click “Save”



- Thoroughly complete the fields, complete the signature lines, and click the red lock icon

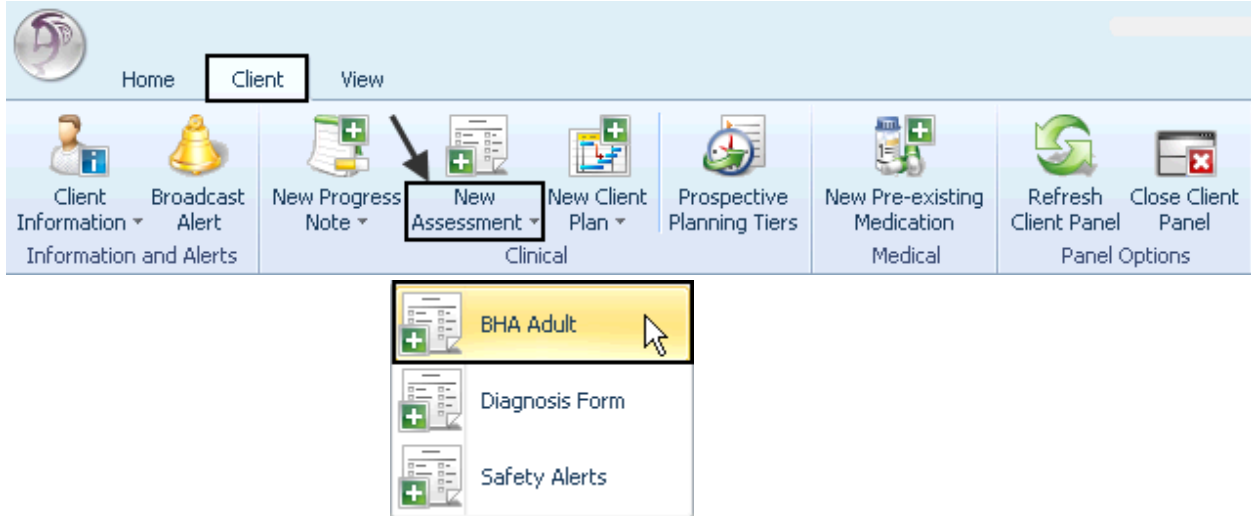


- When asked to print, click “Cancel”

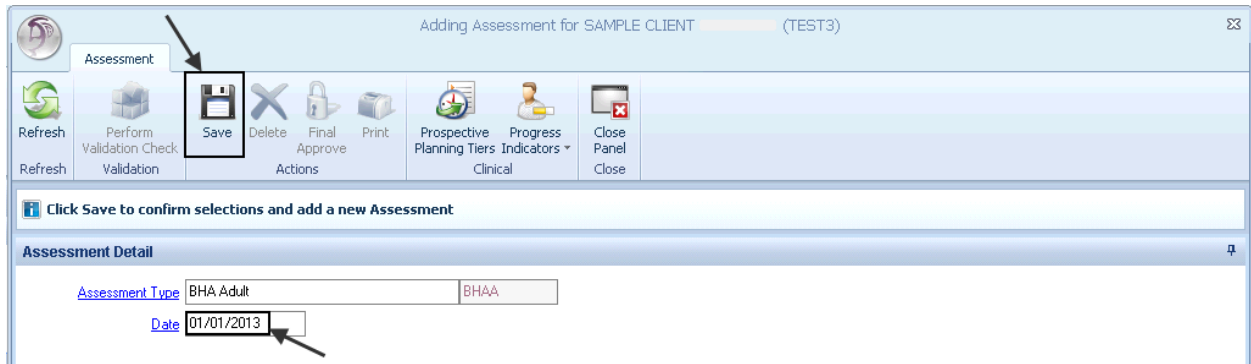


A.V.3:

- After selecting the client, the “Client” tab appears. Click on the words “New Assessment”, and click the BHA



- Enter the date and click “Save”



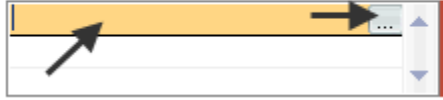
- To access tables, click on the hyperlinks

[Program Name:](#)

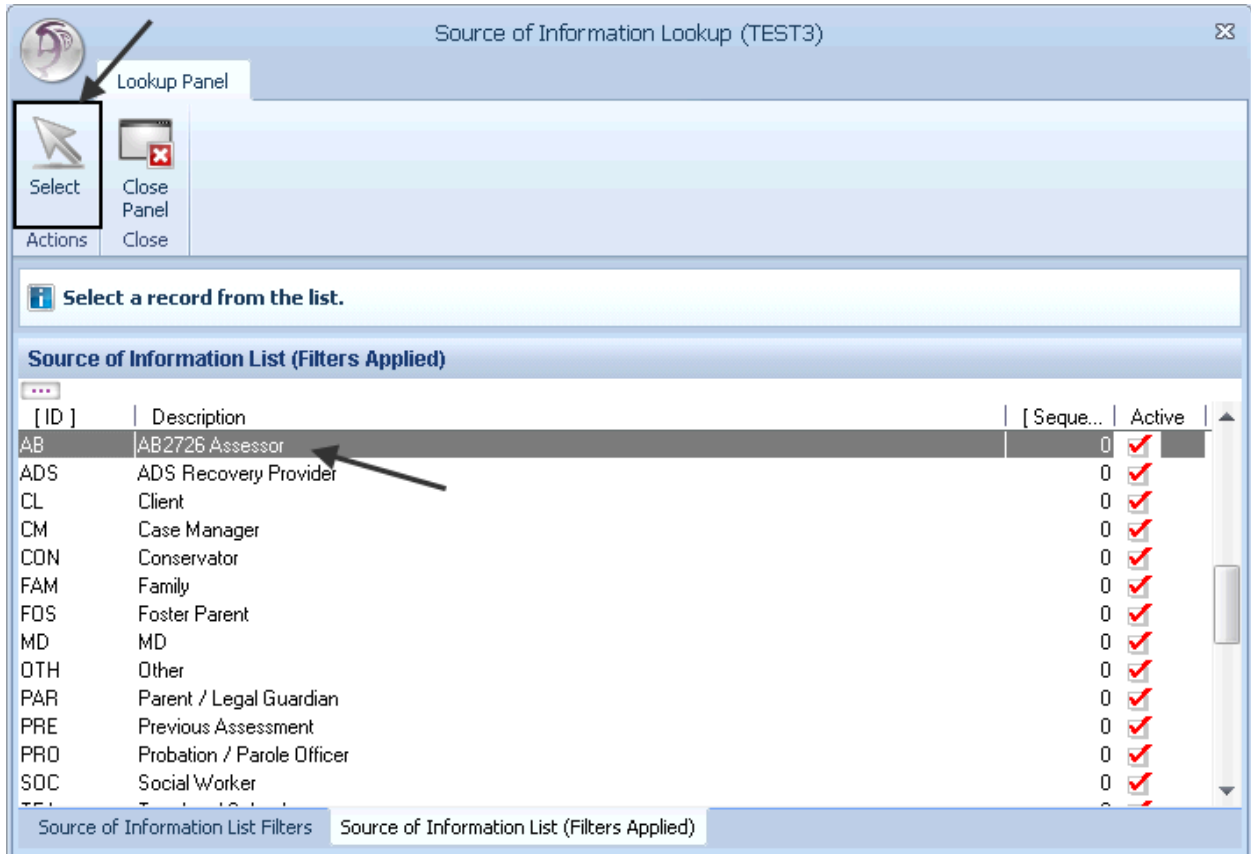
ID	Description	Status
170	7TH AVE CENTER LLC	Active
3990	AB109	Active
3930	ALPINE SPECIAL TREATMENT	Active
9800	ASD	Active
9999	Administration	Active
190	BRIGHTON PLACE	Active
8000	CANYON ACRES	Active
0000	CASA DE AMPARO	Active

- To access multiple entry windows, click in the field, and then click on the ellipses

SOURCE OF INFORMATION:



- Either double click on the selection, or single click and click “Select”



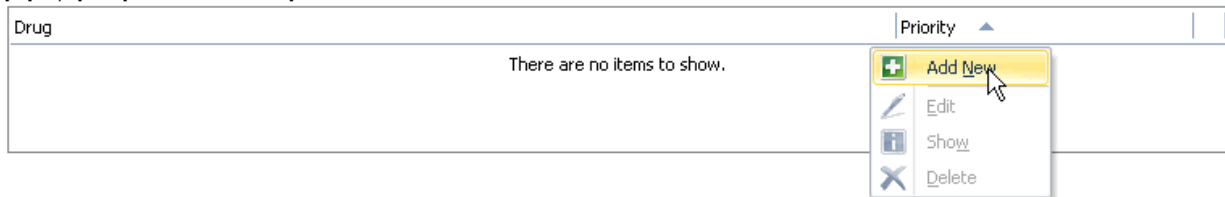
- For “Help” completing fields, click on the question mark icons

PRESENTING PROBLEMS/NEEDS:

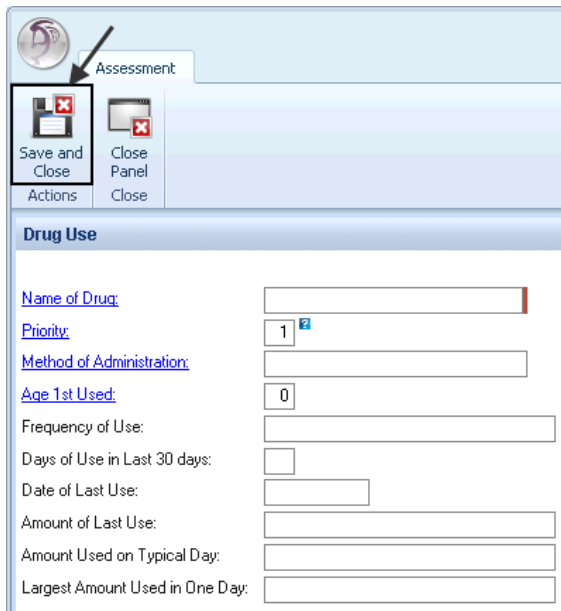


- To add substances or diagnoses, right click in the table and click “Add New”

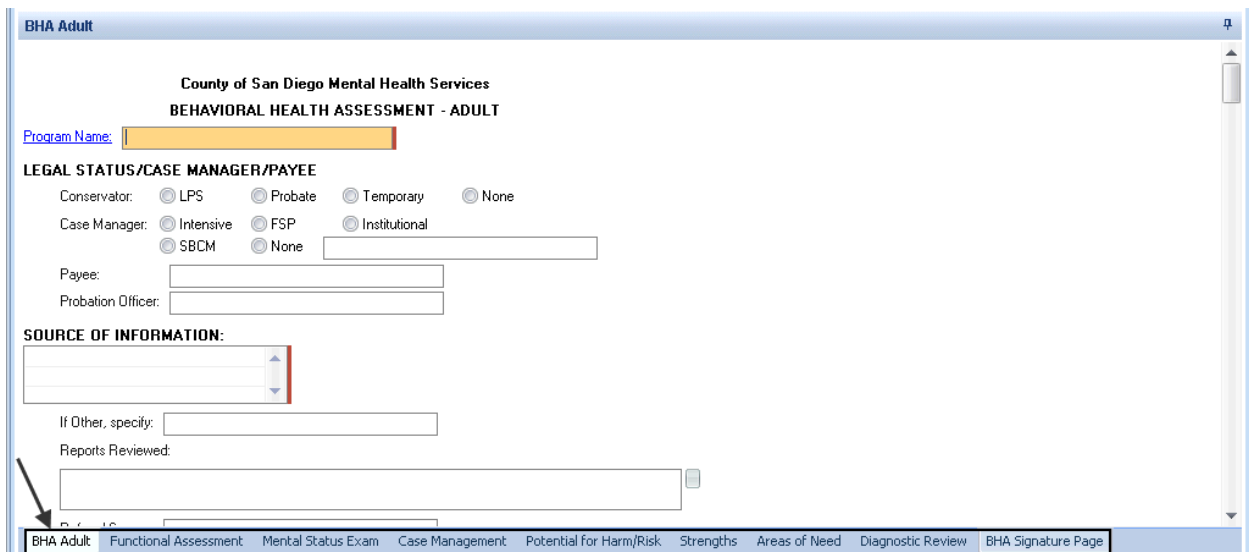
(if yes, specify substances used)



- Enter the information and click “Save and Close”



- Click on the tabs at the bottom to move from section to section



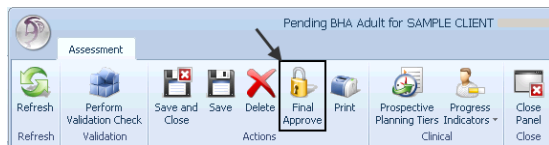
- Complete the signature lines. If you *do not* require a co-signature, the signature lines will look like this:

Signature of Clinician Requiring Co-signature:
 Name Date // Time Electronic Hard Copy Pending N/A

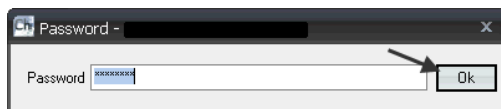
Signature of Clinician Completing/Accepting the Assessment:
 Name Date Time Electronic Pending

Signature of Staff Entering Information (if different from above):
 Name Date // Time Electronic Hard Copy Pending N/A

- Once finished, click “Final Approve”



- Enter your password, and either click “Ok” or press the Enter key on the keyboard



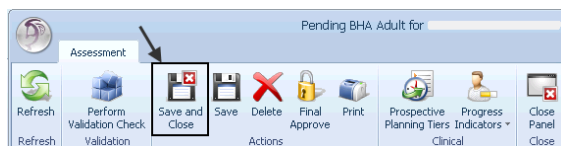
- If you *do* require a co-signature, the signature lines will look like this:

Signature of Clinician Requiring Co-signature:
 Name Date Time Electronic Hard Copy Pending N/A

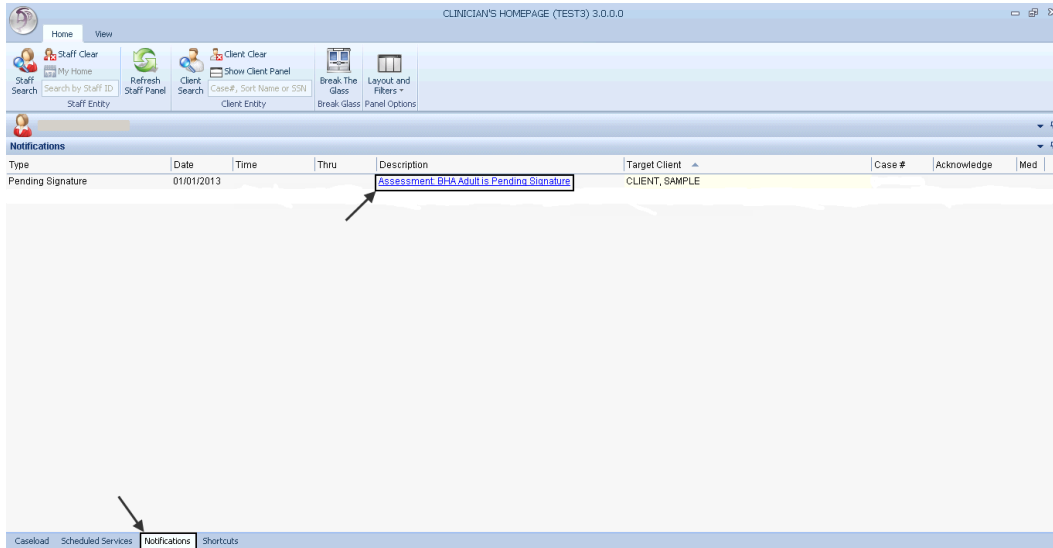
Signature of Clinician Completing/Accepting the Assessment:
 Name Date // Time Electronic Pending

Signature of Staff Entering Information (if different from above):
 Name Date // Time Electronic Hard Copy Pending N/A

- Click the “Save and Close” button



- For those who co-sign for trainees, click on the “Notifications” pane, and then click on the hyperlink for the assessment you wish to co-sign



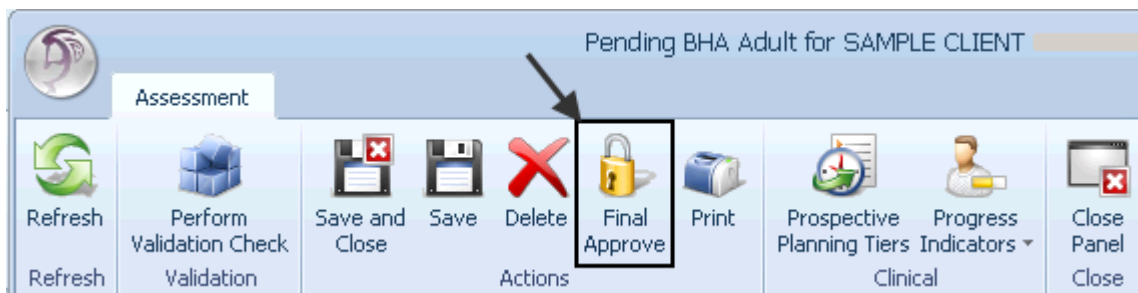
- The signatures will look like this:

Signature of Clinician Requiring Co-signature:
 Name Date Time Electronic Hard Copy Pending N/A

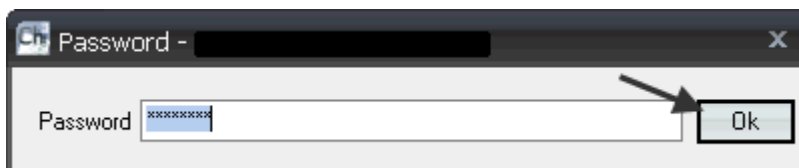
Signature of Clinician Completing/Accepting the Assessment:
 Name Date Time Electronic Pending

Signature of Staff Entering Information (if different from above):
 Name Date Time Electronic Hard Copy Pending N/A

- Once finished, click “Final Approve”



- Enter your password, and either click “Ok” or press the Enter key on the keyboard



Viewing a Historical Assessment

This Information Can Be Generalized for Any Assessment Type

Previously:

- From the “Face Sheet”, click on the “Form Type” ellipses

The screenshot shows the 'Client Chart (Administrative Access)' window. At the top, there are fields for 'Client' (CLIENT_NEW), 'Form Type', 'Case Number', and 'Date'. Below this is the 'Face Sheet' section, which includes 'Client Authorizations' and 'County of San Diego Mental Health Services FACE SHEET'. Under 'SAFETY ALERTS', there are radio buttons for 'Allergies and Adverse Medication Reactions' (No, Unknown/Not Reported, Yes) and a table with 'Add' and 'Del' buttons. At the bottom, there are fields for 'Primary Unit Assignment' and 'Subunit'.

- Either double click on the assessment you wish to view, or single click and click “Show”

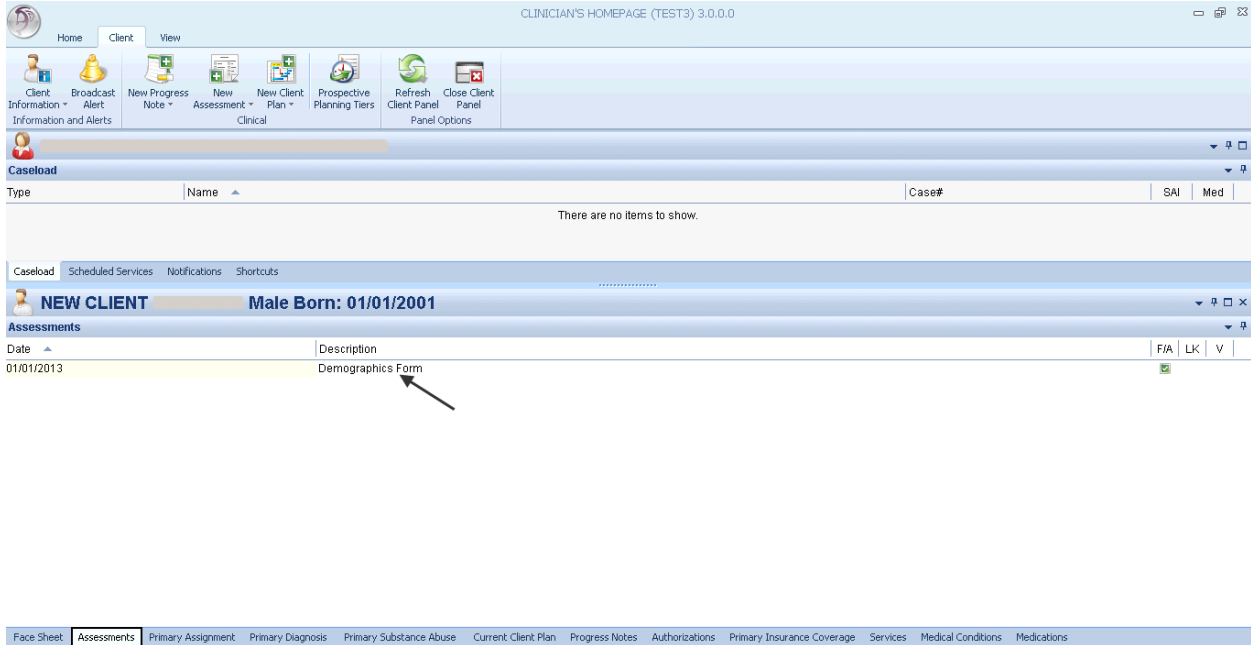
The screenshot shows the 'Client Chart Lookup' window. It features a table with columns 'Type', 'Date', and 'Status'. The first row, 'Demographics Form', is highlighted in cyan. Below the table are radio buttons for 'Pending', 'Final Approved', and 'All', and a 'Voiced' checkbox. At the bottom, there are buttons for 'Print', 'Add', 'Preview', 'Void', 'Show', 'End', 'OK', and 'Cancel'. There are also input fields for 'Type', 'Category of Treatment', and 'Signed by', along with a 'Preference' checkbox and a 'Clear' button.

- When done viewing, click on the yellow folder icon

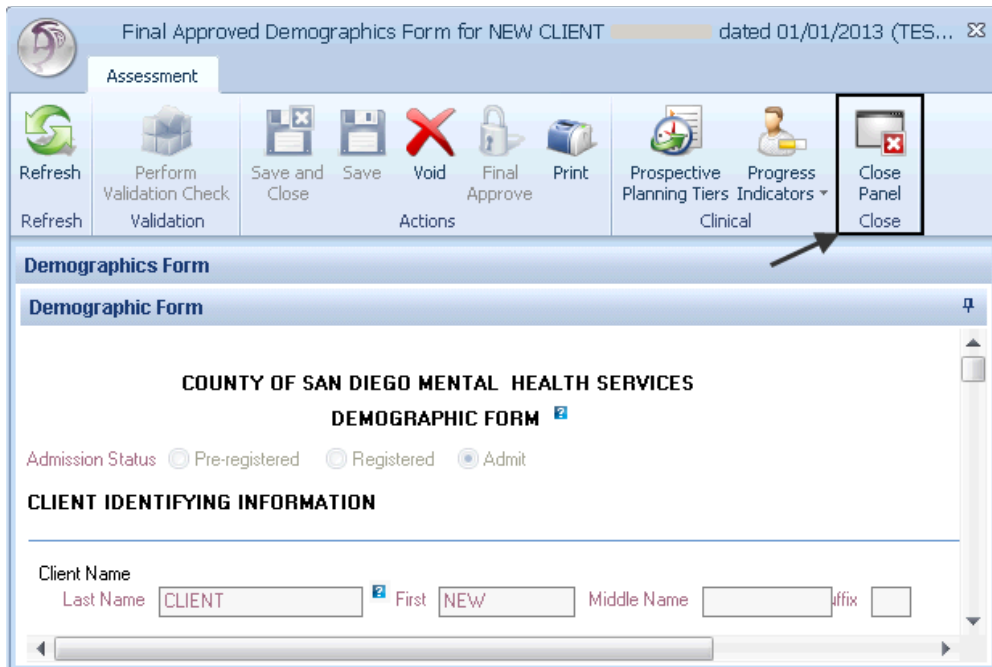
The screenshot shows the 'Client Chart (Administrative Access)' window. At the top, there are fields for 'Client' (CLIENT_NEW), 'Form Type' (Demographics Form), 'Case Number', and 'Date' (01/01/2013). Below this is the 'Demographic Form' section, which includes 'County of San Diego Mental Health Services DEMOGRAPHIC FORM'. Under 'Admission Status', there are radio buttons for 'Preregistered', 'Registered', and 'Admit'. Below that is the 'CLIENT IDENTIFYING INFORMATION' section, which includes fields for 'Client Name' (Last Name: CLIENT, First: NEW, Middle Name, Suffix).

A.V.3:

- After selecting a client, the client panel appears. Click on the “Assessments” pane, and double click on the assessment you wish to view



- When done viewing, click “Close Panel”

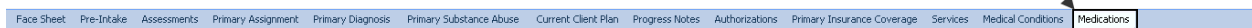


Entering a New Pre-Existing Medication

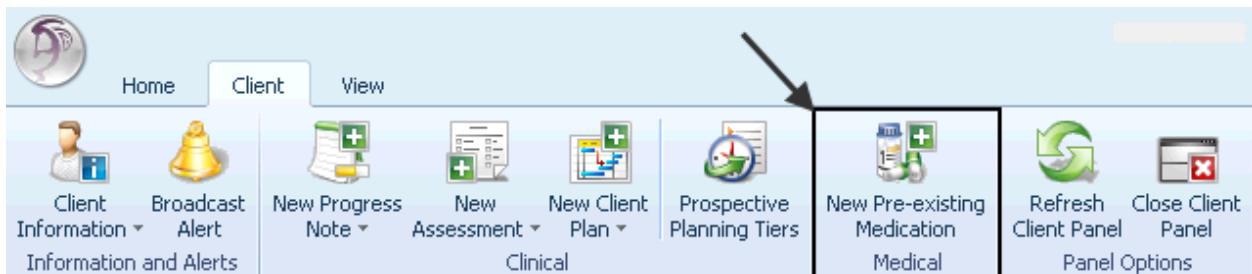
NOTE: Because the “Medications” table, the “Other Prescription Medications” field, and the “Herbals/Dietary Supplements/Over the Counter Medications” field are being removed from the Behavioral Health Assessment, this button is used to enter *any* medication type you would have previously entered in the BHA.

- View the medications listed in the “Medications” pane

SAMPLE CLIENT		Male Born: 01/01/2001																							
Medications																									
Event	Pres...	Date	Type	G...	Med/Str/DF	Medication	Strength	Dose Form	Route	Sig	Addtnl Ins...	Start	Days ...	End	D...	E...	V...	D...	S...	R...	Disp...	Issue ...	Approv...	Staff ID	Staff Name
29539	58108	05/31/...	Pre-exi...		Glucopha...	Glucophage	500 mg	tablet	oral	Take 1 tab...		09/01/...	0									0	05/31/2...		
29540	58109	05/31/...	Pre-exi...		Adderall X...	Adderall XR	20 mg	capsule, e...	oral	Take 1 ca...		01/01/...	0									0	05/31/2...		
29540	58110	05/31/...	Pre-exi...		PROzac 2...	PROzac	20 mg	capsule	oral	Take 1 ca...		03/01/...	0									0	05/31/2...		
29540	58112	05/31/...	Pre-exi...		Invega Su...	Invega Su...	156 mg/mL	suspensi...	intramusc...			10/10/...	0									0	05/31/2...		
29540	58113	05/31/...	Pre-exi...		Benadryl 2...	Benadryl	25 mg	tablet	oral	Take table...		12/12/...	0									0	05/31/2...		
29540	58111	05/31/...	Pre-exi...		Wellbutrin ...	Wellbutrin	100 mg	tablet	oral	Take 1 tab...		06/15/...	0									0	05/31/2...		



- If the client reports taking a medication that is not listed, click the “New Pre-existing Medication” button



- A new window launches. In the “Medication” field, type in the first few letters (at least three) of the medication, and click “Search”

Medications for SAMPLE CLIENT (TEST3)

Medications Maintenance

Add Pre-existing Medication
 Discard Pre-Approved Changes
 Pre-Approve Changes
 Final Approve Changes
 Close Panel

Medication Details: New Pre-existing Medication

Medication Search

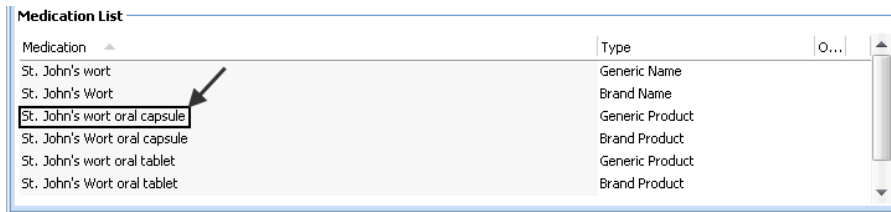
Free Text

Medication

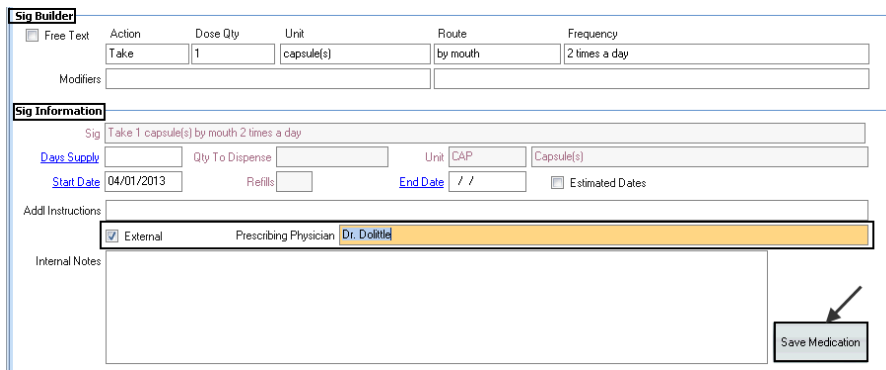
Strength Dose Form Route

Generic
 Dispense as Written
 Sample
 Discontinued
 Internal Formulary

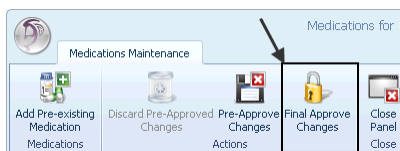
- Locate the appropriate medication from the list, and double click on it



- Once you've double clicked on the medication of your choice, a new window launches. The only other "software required" field is "Start Date"; however, clinically, if you have additional information, enter it into the "Sig Builder" and "Sig Information" fields. If prescribed by an external provider, select the name of the physician in the "Prescribing Physician" field. When finished, select "Save Medication"



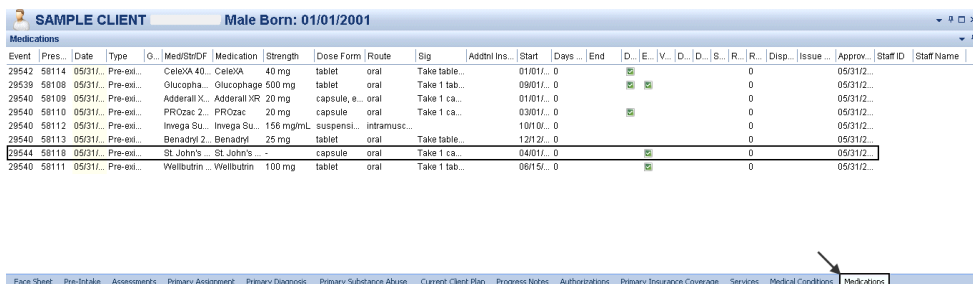
- Click the "Final Approve Changes" button



- Enter your password and click "Ok"



- The medication then displays in the "Medications" pane of the client panel



**Client Lookup and New Client Entry
For Specialty Programs**

Index Card (For Specialty Programs Only)

All Other Programs: Administrative Support Staff Will Complete This Process

NOTE: Before entering a new client, always search to ensure that the client is not already in the system.

Previously:

- From the “Clients Lookup” window, click “Add”

The screenshot shows a window titled "Clients Lookup" with a table of client records. The table has columns: Sort Name, Case Number, S, E, DOB, SSN, Primary Unit, Primary Surt, Ext Case #, and SAI. The first row is highlighted in yellow and contains: CLIENT, FAKE, , M, 3, 01/01/2001, , 9900 9901, , , 11001. Below the table are radio buttons for "Active", "Inactive", and "All", and a set of buttons: "Filters", "Alias", "Add", "Edit", "Show", "Find", "OK", and "Cancel". An arrow points to the "Add" button.

- Enter the “Sort Name”, press the “Tab” or “Enter” key on the keyboard, and enter the “DOB”. If the remaining fields are completed, the information will populate to the Demographics Form. Press “Save Add”

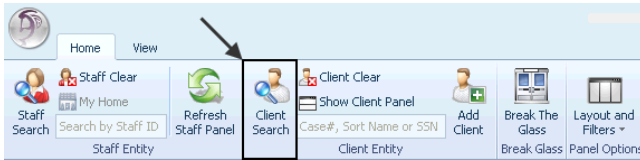
The screenshot shows a form titled "Enter / Edit Client". It has several input fields: "Sort Name" (CLIENT, NEW), "Case Number (0 or blank for Auto Assign)", "Last Name" (CLIENT), "First" (NEW), "Middle Name", "DOB" (01/01/2001), "Soc Sec #", "Ethnicity", "Sex", "Address", "City", "Home Phone", "Work Phone", "Address County", and "Residence County". At the bottom, there are radio buttons for "Client", "Non-Client", and "Generic", and two buttons: "Save Add" and "Cancel". An arrow points to the "Save Add" button.

- When asked about assigning a case number to this client, click “Yes”

The screenshot shows a dialog box titled "Confirmation" with the text: "Case number is optional for Pre-Registered client. Do you want a case number assigned automatically?". At the bottom are three buttons: "Yes", "No", and "Cancel". An arrow points to the "Yes" button.

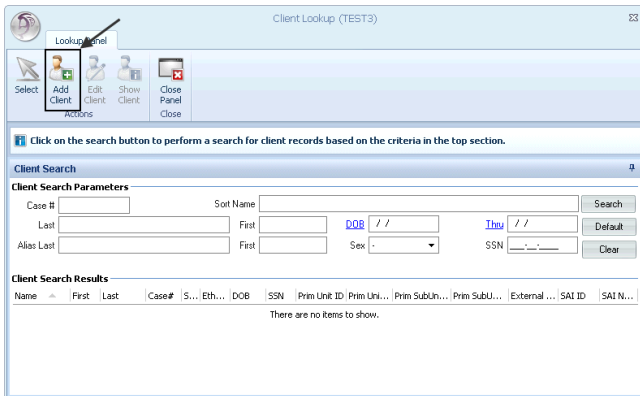
A.V.3:

- Click the “Client Search” button

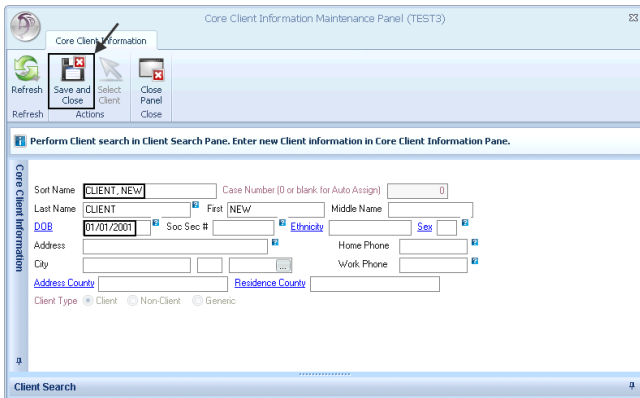


NOTE: Before entering a new client, always search to ensure that the client is not already in the system.

- From the “Client Lookup” window, click “Add Client”



- Enter the “Sort Name”, press the “Tab” or “Enter” key on the keyboard, and enter the “DOB”. If the remaining fields are completed, the information will populate to the Demographics Form. Click “Save and Close”



- When asked about assigning a case number to this client, click “Yes”

