Limited Service Logs

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OVERVIEW OF CLIENT PLANS

There are different ways to hold progress notes in CCBH. You can think of them as "folders" in which to keep your progress notes:

These "folders" may or may not all be used by your program. Each is a "stand alone" folder and they are not sequential (that is to say, you do not need to move from one to the other in order of this listing). Each has a specific purpose, defined below:

The Limited Service Log is intended to be used for short term services by programs (i.e. ESU, walk-in clinic) where a Client Plan will never be completed. If your program does not provide these short term services, you probably won't use this "folder."

The Interim Folder: The standard for completing a Client Plan has not changed – you still have 30 days from the time a client comes to your program to complete a Client Plan. However, CCBH needs a place to "hold" your progress notes, and the Interim Folder performs that function. This is the "folder" where you will document all your services prior to opening the Client Plan.   Can you leave this folder open indefinitely? No! The Interim folder needs to be closed:

1. If the client leaves the program without a Client Plan being started and you are the only provider;
2. If you are ready to begin the Client Plan.

The Interim Folder needs to be closed on a date prior to opening your Client Plan.

(*NOTE: For your existing clients with a valid paper Client Plan, you will open the Interim Folder to store your progress notes until their Client Plan is due to be updated.)*

Interim Folder Day Treatment: The Interim folder Day Treatment is only used for children's day treatment medical staff to store their progress notes. The folder will be opened upon the first date of service with the day treatment program and only closed once they discharge. If the client receives day treatment services for more than 2 years, a new "folder" will need to be opened. Only day treatment medical staff notes should be stored in this folder.

The Client Plan holds all the progress notes written after opening the plan. You do not need to open an Interim Folder before opening a Client Plan if that is your workflow (for example, many programs complete the BHA and Client Plan at the initial appointment). In other words, the Client Plan can be opened immediately as you start seeing your client.

CLINICIAN'S HOMEPAGE PREFERENCES
How to setup and save preferences
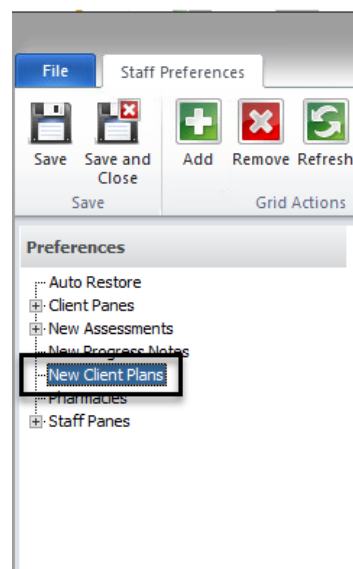
Accessing Preferences:
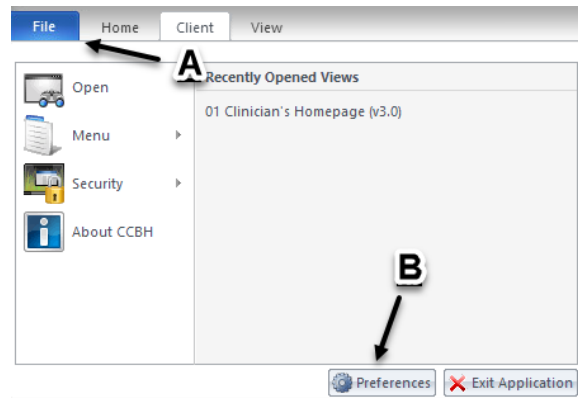
A- From the "Systems Button"
B- Select the "Preferences" icon

This feature allows you to set the Assessments and Client Plans that you use most frequently as preferences for easy access.
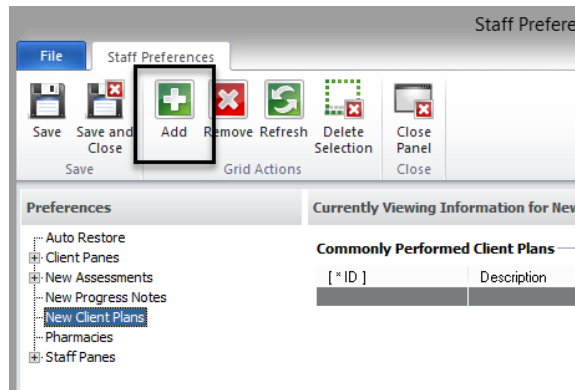
Preferences for New Client Plans:
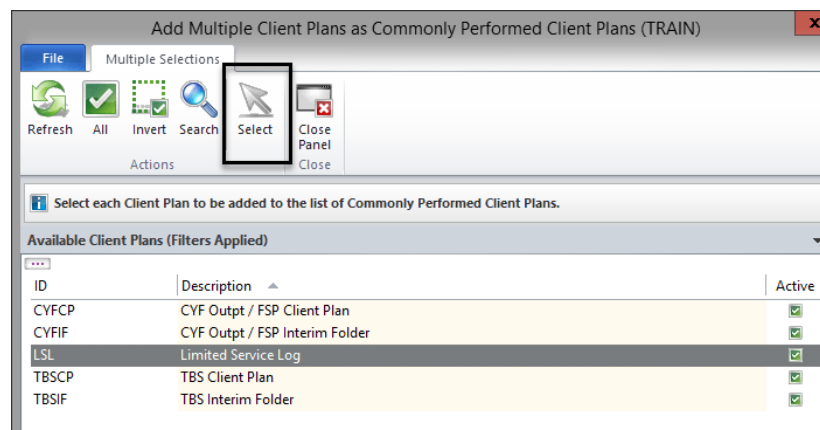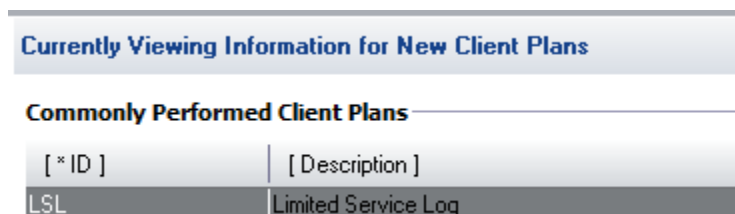
1. Select "New Client Plans."

2. Click on the "Add" button.

3. Select the Limited Service Log. Once you have selected your preferred client plans, click the "Select" button.

5. The client plans chosen as preferences will now display in the "Currently Viewing Information for New Client Plans" window:

Saving Preferences:

6. Select the "Save and Close" icon. This will take you back to the Clinician's Homepage.

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LIMITED SERVICE LOG

Description:
Limited Service Logs (LSLs) are used by programs that do not create Client Plans for their clients. These are predominantly short term emergency service programs such as Walk-in Clinics (for Pre-Intake) and the ESU. LSLs allow progress notes to be entered into CCBH when there is no client plan.

Opening a Limited Service Log:
1. Access your desired client.
2. Find the "New Client Plan" button on the ribbon. The "New Client Plan" button is segmented in two parts. The upper portion of the button is a list of all Client Plans available for entry. The lower portion of the button consists of Client Plans that have been established in "Preferences".
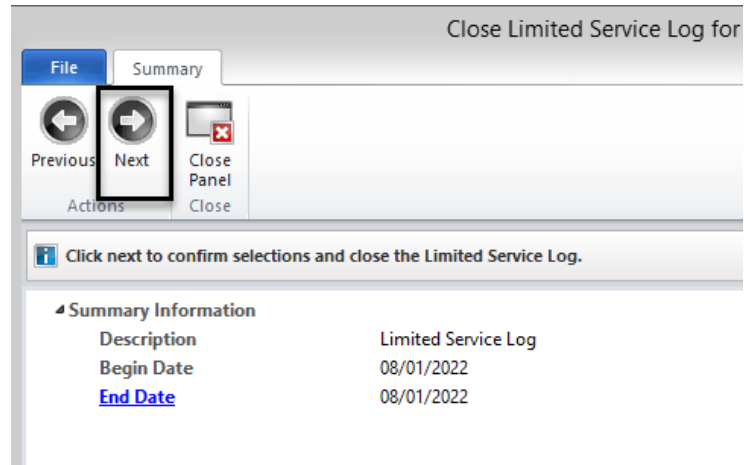3. Select the "Limited Service Log" from the drop down menu.
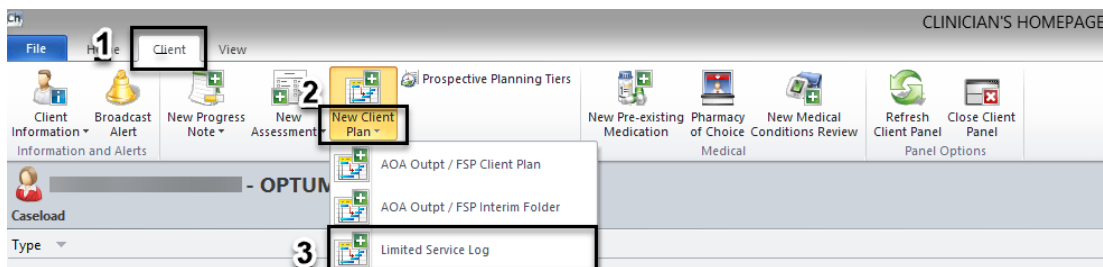
4. On the "Add Limited Service Log for …" screen, click on the desired start date so that it is highlighted in light gray, and click "Next".
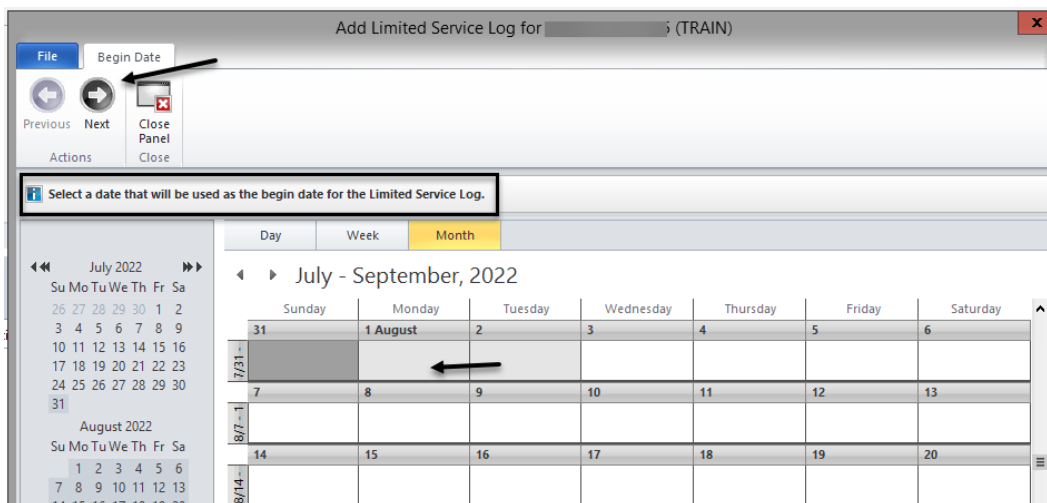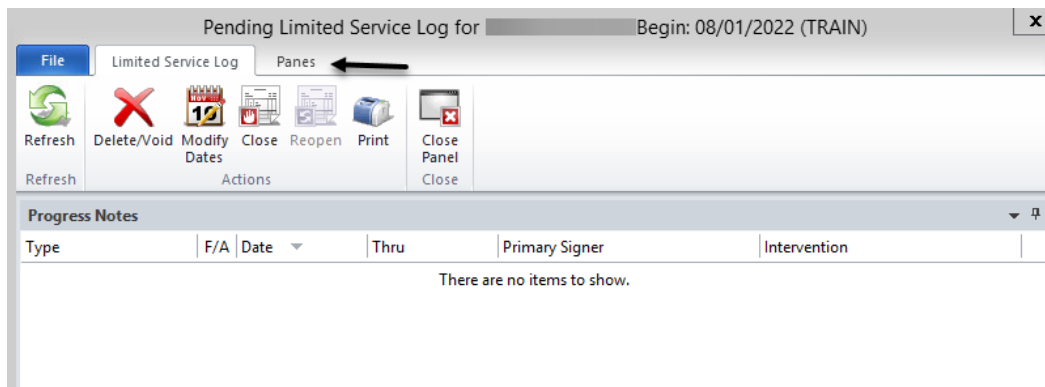
5. The "Add Limited Service Log Summary" screen appears. Verify the information is correct and select "Next".

6. The "Pending Limited Service Log for …" screen appears. Click on the "Panes" tab.

7. Proceed with entering the progress note.

Note: Once you enter a "Progress Note" you will not have the ability to "Delete" and "Void". In case you make a mistake, you may contact the Support Desk to delete or void.
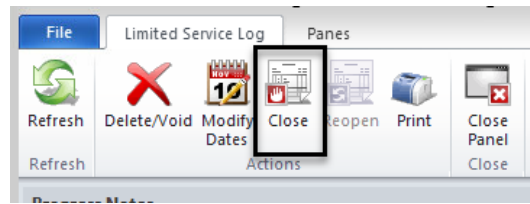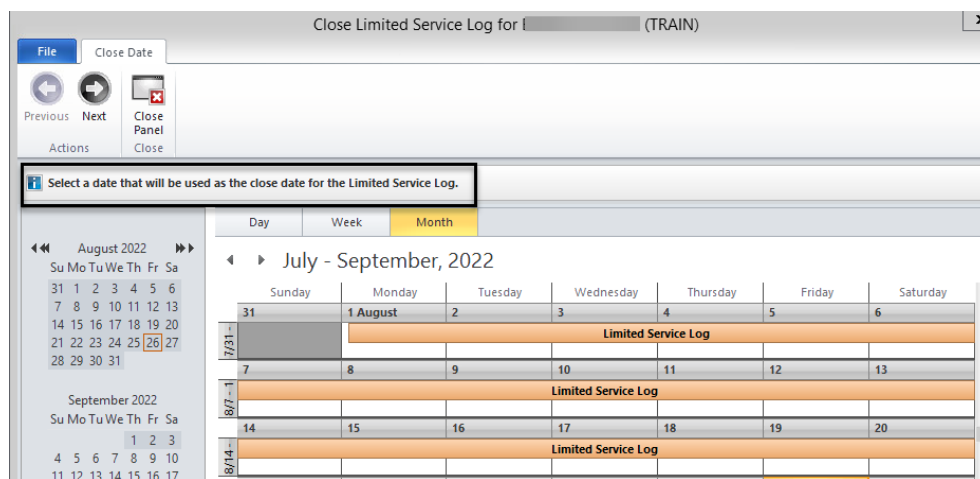
Closing a Limited Service Log:

Once services are complete, the Limited Service Log should be closed. If the client returns to the program at a later date, a new Limited Service Log would then be opened.
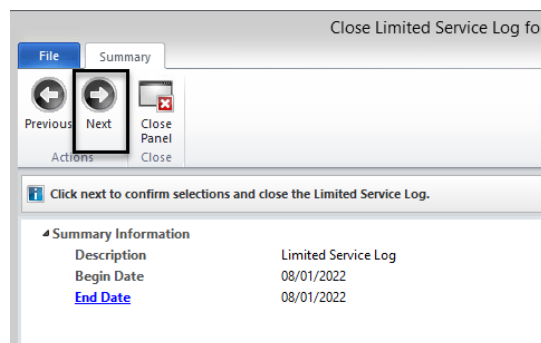
1. To close a Limited Service Log: open the 'LSL' by double clicking on it in the "Client Plan" pane.

2. Select "Close".

3. Select the date that will be used as the close date.

4. Verify the information is correct and select "Next".

5. The Limited Service Log is now closed.

Support Desk Contact Information
sdhelpdesk@optum.com
1-800-834-3792

Monday through Friday (E-mail)

Hours	Services
6:00 am to 6:00 pm	All services except password resets or any service involving PHI

Monday through Friday (Telephone)

Hours	Services
4:30 am to 6:00 am	Resetting passwords (24 hour programs) and reporting system outages*
6:00 am to 6:00 pm	All services
6:00 pm to 11:00 pm	Resetting passwords (24 hour programs) and reporting system outages*
11:00 pm to 4:30 am	Reporting system outages*

Weekends (Telephone)

Hours	Services
4:30 am to 11:00 pm	Resetting passwords (24 hour programs) and reporting system outages*
11:00 pm to 4:30 am	Reporting system outages*

* By definition, a system outage affects multiple users. Examples include when:
  -The system does not respond and appears to be frozen
  -No data can be entered or viewed

Support Desk Suggestions

- Please consult with your program manager and your resource packet prior to contacting the Support Desk.

- When calling for a password reset on weekdays between 4:30-6a or 6-11p, or calling weekends between 4:30a-11p, you must leave a message. Include your name, CCBH staff ID, phone number and the reason for your call.

- You may be given a ticket/tracking number if you call between 6:00a and 6:00p Monday through Friday. Remember to keep this number for future reference.

Additional Contacts

Questions	Where To Go
Clinical Documentation Questions	Documentation Manual/Your Program Manager
Duplicate Clients and Name/DOB/Gender/SSN Changes	Complete Form BHS-025 and Call Medical Records: 619-692-5700 x 3
Financial Questions (UMDAP/Insurance)	Billing Unit: 619-338-2612 Fax- 858-467-9682
Online User Manuals and Forms	www.optumsandiego.com
Service Codes	CCBH (Anasazi) User Manual/QM Unit