

Alameda County Behavioral Health Care Services

Insyst MHS Mini Manual

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Chapter 1

Getting Started

This chapter includes basic instructions for logging on and using InSyst's menus and screens.

Logging Onto the Computer

You must log onto the VAX computer system before beginning work.

To log onto the computer:

1. If you are using a terminal, press Return. If you are using a personal computer, start the terminal emulation program by selecting the INSYST1 or INSYST2 Icon on your Windows Desktop.
2. Your screen displays the prompt: **USERNAME:** Type your Username, and press Return.
3. Then the computer prompts you for your password. Type your password and press Return. To protect its secrecy, your password is not displayed on your screen.
4. InSyst displays its Logo and any notices or messages. Press Return to display your Main Menu.

Using Num Lock (Gold) and Control Keys

When you work with InSyst, you often have to use Num Lock (Gold) (Num Lock) Key sequences and Control Key combinations.

Laptop Users Note: Use the “F9” Key as the Num Lock key.

To use a Num Lock (Gold) Key sequence:

1. Press and release the Num Lock (Gold) Key.
2. Press and release the other key in the sequence.

For example, if the instructions say, “Press Num Lock (Gold)-E”, you should press and release the Num Lock (Gold) key, and then and release press “E”.

To use a Control Key combination:

1. Press the Ctrl key and hold it down.
2. Press and release the other key.

For example, if the instructions say, “Press Control/H”, you should press the Ctrl key and hold it down while you press and release “H”.

Appendix A lists all Num Lock (Gold) Key sequences and Control Key combinations.

Using Menus

An InSyst menu is a list of items that you may select. Figure 1.1 shows a sample Main Menu. The Main Menu is different based on data input requirements. Below is an example of a Opening Main Menu for user who is entering data for both Mental Health Services and Alcohol and Other Drugs Services. Most users don’t have this menu option.

Selection	Description
MHS	MHS Menus
DAS	DAS Menus
UTILITIES	General Utilities Menu

Figure 1.1: Main Menu

The menu structure is virtually the same for the MHS and the DAS systems. Some screens are different for the two systems, and this manual will explain both. The MHS Main Menu is shown in Figure 1.2.

After you make a selection from the Main Menu, the system displays a submenu. For example, if you choose UTILITIES in the Main Menu, you will move to the Utilities Menu, with options that you select to use InSyst utilities.



Note: Based on your User Authorization all menu options may not be activated.

Selection	Description
CLIENTS	Client Maintenance Menu
DDP	DDP Maintenance Menu
APPTS	Appointment Maintenance Menu
EPISODES	Episode Maintenance Menu
SERVICES	Service Maintenance Menu
INDIR_SERV	Indirect Service Maintenance Menu

Figure 1.2: MHS Main Menu

All InSyst menus let you make selections in three ways: by using the list of options in the menu selection area, or by typing an alpha or numeric option directly in the command line.

To select a command in the Menu Selection Area:

1. Press the Tab key and the blinking cursor will move from the Command Line into the list of items in the Menu Selection Area of the screen. Then move the cursor up and down through the menu using the Up and Down Arrow keys.
2. When you have moved the cursor to the item you want, type "X" and press Return.

At the bottom corners of the Menu Selection Area there is often a flashing "V." This indicates that there are more items on your menu than you can see at one time. Press the Down Arrow key and the menu will scroll to display more items.

If you want to return to the Command Line, press Enter.

To select an item from the Command Line:

1. Type the name or number of the item on the Command Line. The command line is the solid bar next to the word Selection, where the cursor is when you first display the menu. You may type the entire name of the item, or just enough make it distinct from the others. For example, if you want to choose SERVICES from the Main Menu, you may type either "SERVICES" or "SER". You may also type the number of the selection. For example, if Client Records Maintenance is the first item on the menu, you can just type "1" to select it.
2. Press Return to display the screen or sub-menu you selected.

Leaving a Menu

Press Num Lock (Gold)-E, or enter a hyphen (-) in the Command line to move back one menu to the previous menu. For example, if you are on the Files Menu, "-" will take you back to the Utilities Menu, and a second "-" will take you back to the Main Menu.

Menu Shortcuts

You can go directly from one menu to a screen that is under another menu, rather than moving through the menu system one menu at a time. In the command line of the current menu, enter the Menu names that you would normally enter in the command lines of one menu after another.

For example, to go from the Main Menu to the Episode Opening screen, you normally enter “EP” in the Main Menu to display the Episode Records Menu, and then enter “OP” to display the screen. As a shortcut, you can enter the command “EP OP” in the Main Menu command line (Figure 1.3).

Selection	Description
CLIENTS	Client Maintenance Menu
DDP	DDP Maintenance Menu
APPTS	Appointment Maintenance Menu
EPISODES	Episode Maintenance Menu
SERVICES	Service Maintenance Menu
INDIR_SERV	Indirect Service Maintenance Menu

Figure 1.3: Using Menu Shortcuts

Using Screens

InSyst’s menu system displays the data screens (Figure 1.4) that let you enter, look up, change and delete information.

In Screens, data is entered or displayed in areas called *fields*. For example, a screen may have a field for a client’s last name and another field for address. Most screens have special fields, called *key fields*, that identify each record, such as the client number field that identifies each client.

Each screen has a different function—*e.g.*, to register a client, review a client’s account, or update episode information. Screens are assigned to you based on your responsibilities.

Insurance Company Maintenance			
Company Name		Company ID	Maintenance Type
A			
Street		City	State Zip
Company ID	Insurance Company Name	Billing Address	
1175 *A A A		P.O. BOX 579570, MODESTO, CA 95357	
1403 A.A.A.T. PLAN ADMINISTRATOR		P.O. BOX 2710, RANCHA CORDOVA, CA 95747	
L 1175 *AAA		P.O. BOX 579570, MODESTO, CA 95357	
1251 AARP		3200 E CARSON ST, LAKEWOOD, CA 90712	
1001 AARP CLAIMS UNIT		P.O. BOX 13999, PHILADELPHIA, PA 19187	
1187 *ADMAR CORP		P O BOX 478, SANTA ANA, CA 92702	
6 records displayed.		USER: SMITH	

Figure 1.4: An InSyst Screen with a List

Here, we will look at the basic keys you must use with screens. For more information on special key sequences, see Appendix A.

Moving through Fields

Use these keys to move through a screen's fields:

- **Tab:** Move the cursor to the next field to enter data. (If you fill a field entirely, the cursor will move to the next field automatically).
- **Control/H: (F12)** Move the cursor back one field.
- **Return:** Skip over optional fields and move to the next required field or to the prompt used to leave the screen.

Moving Through Lists

Many screens have lists, like the list of insurance companies shown in Figure 1.4 above. To move down one item in the list, press the Tab or Down Arrow key. To move up one item in the list, press the Up Arrow key.

If a list has more items than fit in one screen, you can page through it to see more items by pressing:

- **Num Lock (Gold)-M: (More)** View the next page of information.
- **Num Lock (Gold)-D: (Down Two)** Go forward two pages.
- **Num Lock (Gold)-B: (Backup)** View the previous page of information.
- **Num Lock (Gold)-U: (Up Two)** Go back two pages of information.

To speed up performance, lists usually include only two pages of information by default. If you have to see more items than this, you should request unlimited paging by pressing **Num Lock (Gold)-A** before you display the list.

Leaving a Screen

To leave a screen, press:

- **Return:** In most cases, pressing Return moves the cursor to the prompt used to leave the screen. (In some cases, Return skips over optional fields to the next required field.)
- **Num Lock (Gold)-E:** Exits from the current screen and returns to the menu, without saving data entered in the screen.
- **Num Lock (Gold)-S:** Exits from the current screen, and saves the data entered. This sequence retains the current Client and Reporting Unit, so it automatically displays it in the next screen you use.

Client Confidentiality

InSyst helps your staff in maintain confidentiality, as required by federal, state, and local regulations.

Do not let anyone else use your account. Your username is stamped on some records in the database.

Each registered user has a password. Do not give out your password for use by other staff or post it near your terminal.

Do not browse through records looking for friends, acquaintances or known persons. This is illegal. You must have a legitimate purpose for looking-up a person.

Do not release data without authorization. For more information, consult your Medical Records Department.

Logging Off the Computer

To log out of InSyst, enter the word "Exit" on the command line of any menu.

Never turn off your terminal until you have seen a message confirming that you are logged off. The message includes your name, the date and time that you log off the computer.

Chapter 2

Basic Client Information

The Client Number

Before you can work with any client information, the client must have a client number. If a client is new to your program, you must determine whether the client has a number, by using the Client Locator screen, described below. If you cannot find the client number, assign a new client number using the Client Registration Screen, described later in this chapter.

Locating Clients

The Client Locator Screen lets you find out if someone has ever been a client and lets you display information about clients

To use the Client Locator Screen:

1. Choose CLIENTS from the Main Menu.
2. Choose LOCATOR from the Client Maintenance menu to display the Client Locator screen (Figure 2.1).

Client Locator Screen			
Last Name		First Name	
N		Soundex	
Client Number	Social Security No.	Account No.	Other ID Number
Selection:			
EPISODE	Mini Open Episode Status		
FINANCIAL	Mini Financial Status		
Confidential Information			USER: SMITH
Enter information for client location.			

Figure 2.1: Client Locator Screen

Client Information Area

The top section of the screen is the Client Information Area, where you enter criteria to search for a client, and where information is displayed when the client is found.

To search for a client:

1. Make an entry in one or more fields of the Client Information Area.
2. Press Return at any time to search for a client matching the information you have entered.

The Client Information Area has the following fields:

- **Client Name:** Enter the client's full name or only the first few letters of the client's name. For example, if you enter "And" as the last name, you will find clients with the names Anders, Anderson, Andrews, *etc.*
- **Client Number:** If you know the Client Number, the fastest way to look up the client is to press Num Lock (Gold)-C to move to the Client Number field and enter the client's number.
- **Social Security Number:** If you do not have a Client Number, the Social Security Number is the fastest way to find the client. If you have the client's Social Security Number, press the Tab key to skip the other fields and enter the SSN here. You do not need to enter "-" between the numbers.



Note: If you enter the Social Security Number and Client Name, the computer searches on the Social Security Number and returns the client information if it finds a match. This may not be the client name you have entered, if another client has used that Social Security Number. If there is no match on Social Security Number, the search is based on name.

If there is an exact match, all fields on the top half of the screen are filled with information about the client (Figure 2.2).

If there is no match, the system displays the message: Client/Clients not found.

If there is several possible matches, they are listed in the Client Selection Area of the screen, described below.

Client Locator Screen			
GLASS Last Name	BUDDY First Name	N Soundex	
500000040 Client Number	333-44-5555 Social Security No.	0 Account No.	 Other ID Number
STATUS LINES			
Client messages: 3 active messages.			
Selection: 			
EPISODE	Mini Open Episode Status		
FINANCIAL	Mini Financial Status		
Confidential Information			
USER: SMITH			

Figure 2.2: An Exact Match in the Client Information Area

Client Selection Area

The second section of the screen is the Client Selection Area. If there is more than one possible match, records beginning with the first possible match are listed alphabetically here (Figure 2.3).

To use the Client Selection Area:

1. Move through the list using the methods described in the section on Moving Through Lists in Chapter 1.

Client Locator Screen							
GL Last Name First Name				N Soundex			
Client Number		Social Security No.		Account No.		Other ID Number	
First	M	Last	Number	Birth Date	Sex	Eth	SS Number
BUDDY		L GLASS	500000040	08-Jul-1943	M	A	333-44-5555
SEYMOUR		GLASS	500000039	05-Mar-1935	M	A	123-45-3211
WILLIAM		GRUMPY	500000041	29-Oct-1950	M	A	222-33-6666
EMILY		MOTHERSON	500000028	01-Dec-1942	F	A	Unknown
Selection							
EPISODE		Mini Open Episode Status					
FINANCIAL		Mini Financial Status					
Confidential Information				USER: SMITH			
4 clients displayed.							

Figure 2.3: Possible Matches in the Client Selection Area

2. Type "X" next to the client you want, and press Return. Data on that client is displayed in the Client Information Area.

You can select multiple clients on a page by putting "X" next to each, and then pressing Return. Then you display data on them by using the Previous and Next options in the Menu Selection Area (described below).

Aliases are displayed in the Client Selection Box with an asterisk (*) next to the name. They are selected like other names in the list, but the computer displays the client's real name in the Client Information Area.

If you find the target client in this list, note the client number, so you can use it to work with the client. If you do not find the target client, you must register the client into the system.

- **Num Lock (Gold)-F: (Face Sheet)** request the menu to select Face Sheets, then press F6 to complete the request. The Face Sheet is placed in your printer queue ready to print.



Note: Before registering a new client, be sure you have tried all possible spellings of the client's name and aliases. Press Num Lock (Gold)-R to restart the screen and search with other spellings of the client's name. If necessary, press Num Lock (Gold)-A before doing the new search, so the list is not limited to 8 names.

Menu Selection Area

The lowest portion of the Locator screen is the Menu Selection Area, where you can enter commands to find more information on the client who is displayed in the Client Information Area.

As with any InSyst menu, you may select a menu item by entering the first letters of your menu choice (For Example, Figure 2.4 illustrates the choice of “E” for Episodes), or by using Tab key to move to the item you want and typing an “X” next to it.

Client Locator Screen			
GLASS Last Name	SEYMOUR First Name	N Soundex	
500000039 Client Number	123-45-3211 Social Security No.	0 Account No.	Other ID Number
STATUS LINES			
Client messages: 2 active messages. Opened at: Test OP (99999) 30-Dec-86			
Selection: E XXXXXXXXXX			
EPISODE	Mini Open Episode Status		
FINANCIAL	Mini Financial Status		
Confidential Information USER: SMITH			

Figure 2.4: Selecting a Menu Item

The menu gives you the following options:

- **EPISODE Mini Open Episode Status:** Gives you a short listing of all programs (or reporting units) at where the client is currently admitted.
- **FINANCIAL Mini Financial Status:** Displays current account information and charges for the client.
- **STATUS Client Status Summary Report:** Takes you to the Client Status Summary Report Screen, which displays the client's current open episodes, closed crisis episodes, and current account information.
- **NEXT Display Next Client:** If you selected multiple clients in the Client Selection Area, this option will display data on the next one in the Client Information Area.
- **PREVIOUS Display Previous Client:** If you selected multiple clients in the Client Selection Area, this option will display data on the previous one in the Client Information Area.

Some of these options display data in the same area that you used for client selection, as you can see in Figure 2.4, where message status is displayed there.

Registering a New Client

If you cannot find new clients using the Client Locator Screen, you must register them to give them client numbers before you can open episodes and enter services for them.

To register a client:

1. Choose CLIENTS from the Main Menu.
2. Choose REGISTER from the Client Maintenance Menu to display the Client Registration screen (Figure 2.5).

Client Registration (Decentralized)			
Reporting Unit: 99991 PSP OPT			
Last: JOHNSON	First: JOHN	Middle: M	
Generation:	Birthdate: 02/10/2000	Sex: M	SSN: 999-99-9999
CIN: 34667A			
Education: 12	Other Factors:	Other ID:	
Disability: 1	Service Group:	Local Code:	
Language: A	Primary RU: 99995	Program Code:	
Ethnicity: A B	Chart Location:	Research Item:	
Hispanic Origin: 1	Ref. Staff ID: 55555		
Marital Status: 1			
Family Size: 3		Enter Address: N	
Annual Income: 300000		Significant Others: N	
Aliases	Last	First	Middle
Form Ok Y/N: <input checked="" type="checkbox"/> Input required			
Confidential Information		USER: COHEN_LET	

Figure 2.5: Client Registration Screen



Note: Because the information entered in the Client Registration screen establishes the client's identity, it is best to ask the client for a Driver's License, Social Security Card, or other document and copy the information from it. Three critical pieces of information must be entered correctly: client name, birth date, and Social Security Number.

3. Enter data in the following fields:
 - **RU:** Enter the Reporting Unit Number for the program where you are registering the client. This field establishes whether you are using decentralized or centralized registration. With decentralized registration, the system automatically assigns a client number and you can enter episodes and services for the client. With centralized registration, you can register a client and enter episodes, but you cannot to enter services until the registration has been evaluated by a central registration auditor. After you have entered the Reporting Unit, the screen title changes to Client Registration (Centralized) or Client Registration (Decentralized).

- **Last Name:** Enter a last name with up to 16 letters. Leave out apostrophes, dashes and blank spaces. For example “O’Connor” should be typed “OCONNOR”.
- **First Name:** Enter a first name with up to 12 letters.
- **Middle Initial:** Enter one letter as a middle initial, or press the Tab key or space bar to skip this field if there is no middle initial.
- **Client Generation:** Enter a generation title that is part of the client’s name, such as Jr., Sr., or the Roman Numerals II, III, *etc.*
- **Birthdate:** Enter the birth date in MM/DD/YYYY format.
- **Sex:** Enter “F” for female, “M” for male, or “U” for unknown.
- **Social Security Number:** Enter a nine-digit Social Security Number. It is best to copy this key information directly from the client’s Social Security Card if possible. If the client does not have one, enter all 9’s in this field.
- **Client Index Number:** Enter a nine-digit Client Index Number.
- **Education** Enter the number of the highest grade completed. For example, if the client has completed high school, enter “12”. If the highest grade is greater than 20, enter “20”. Enter “99” for unknown.
- **Disability** Add the number codes for all of the client’s physical disabilities, and enter the total in this field. InSyst’s standard disability codes are listed in Appendix C of this manual, but your local agency may use different codes.
- **Language** Has two entries. The first entry is to report the client’s primary language, as reported by the client.. The second entry is to report the language the client prefers to speak, as reported by the client. Language codes are on the back of the Client Registration form.
- **Ethnicity:** There are five ethnicity fields. Enter up to five Ethnicity codes, , as reported by the client. Ethnicity codes are on the back of the Client Registration form.
- **Marital Status:** Enter the Marital Status code. InSyst’s standard codes are listed in Appendix C, but your agency may use different codes. (Note that Code 1, Never Married, is used for a single person who does not live with girlfriend/boyfriend and has never been married.)
- **Enter Address:** This is not a data field; it is a question. The system is defaulted with “Y”, the system will jump to the Address Screen, described later in this chapter. Once you are done with that screen, the system will return you to the Registration Screen.
- **Enter Significant Other** This is not a data field; it is a question. The system is defaulted with “N”, the system will jump to the Significant Other Screen when set to “Y”, described later in this chapter. Once you are done with that screen, the system will return you to the Registration Screen.
- **Aliases:** If the client has ever used aliases, enter them here. As you add information, this section of the screen scrolls upward to allow more information to be entered. You may enter up to six aliases via the Client Registration Screen, and enter more through the Client Maintenance screen if necessary.

4. The system validates the data. Then it prompts you to verify the name by re-keying the last and first names. You need to retype an exact match of the last name, first name, and middle initial. If you make a mistake, you must enter the correct spelling twice to verify the name.
5. If the registration is successful, the system assigns the client a client number, which it displays in the Client Number field at the top of the screen (Figure 2.6). To continue registering clients, enter “Y”. To leave this screen and return to the menu, enter “N”.

Error Messages

If there is a Social Security Number in the system that is the same as the one you just entered, it displays an error message and it does not let you continue. If you’re sure that the number you have entered is correct, refer the case to your supervisor.

If there is a client in the system with the same name and birth date you have just entered, it displays an error message and does not let you continue. Refer the case to your supervisor.

If two different clients do have the exact same name and birth date, a supervisor may use the Num Lock (Gold)-A sequence to override the match, so registration can occur. You cannot override a Social Security Number match.

Maintaining Client Records

To maintain client records:

1. Choose CLIENTS from the Main menu.
2. Choose MANAGEMENT from the Client Maintenance Menu to display the Client Maintenance Screen (Figure 2.7).
3. Use the fields at the top of the screen to identify the client and maintenance type:
 - **Client Number:** Enter the number of the client whose record you want.
 - **Maintenance Type:** If the client number is valid, you can enter the Maintenance Type “L” (for Lookup) or “U” (for Update).

Client Maintenance			
Client Number: <input type="text"/>		Maintenance Type:	
Last:	First:	Middle:	
Generation:	Birthdate: / /	Sex:	SSN: 000-00-0000
CIN:			
Education:	Other Factors:	Other ID:	
Disability:	Service Group:	Local Code:	
Language:	Primary RU:	Program Code:	
Ethnicity:	Chart Location:	Research Item:	
Hispanic Origin:	Ref. Staff ID:		
Marital Status:			
Family Size:			
Annual Income:	Client UR Needed:		
Aliases	Last	First	Middle
Form Ok Y/N:		Confidential Information	
		USER: COHEN_LET	

Figure 2.7: Client Maintenance Screen

Client Lookup

If you enter “L”, InSyst displays the Client Lookup Screen (Figure 2.8). This screen only lets you view information, and so it can be used by people who are not authorized to change client information.

Client Look-up			
Client Number: 100000055		Maintenance Type: L	Last Changed: 8-JUL-2005
Last: ARNON		First: ETTIE	Middle:
Generation:	Birthdate: 1 /1 /2000	Sex: F	SSN: 099-99-9999
CIN: 19904467			
Education:	10	Other Factors:	0
Disability:	0	Service Group:	0
Language:	A	Primary RU:	Local Code:
Ethnicity:	A	Chart Location:	Program Code:
Hispanic Origin:	1	Ref. Staff ID:	0
Marital Status:	1		
Family Size:	0		
Annual Income:	0		Client UR Needed:
Aliases	Last	First	Middle

Continue:

Confidential Information

USER: COHEN_ET

Page aliases or continue.

Figure 2.8: Client Look-up Screen

If the client has aliases listed, you may use Num Lock (Gold) key sequences to page through them, as described in the section on Moving Through Lists in Chapter 1.

When you are done, enter “Y” to continue looking up more clients, or press Num Lock (Gold)-S to leave the Maintenance Screen and save the client number, so it is entered automatically in the next screen you use.

Client Update

If you enter “U”, InSyst displays the Client Update Screen (Figure 2.10).

To modify client data:

1. Press Tab to move through the fields, and edit them as necessary.
2. Tab to the Form OK prompt, and enter “Y” to save the changes, or “N” to discard them.

The data in all these fields was described in the section on the Client Registration Screen, earlier in this chapter.

The Client Number cannot be changed.

Client Update			
Client Number: 100000055		Maintenance Type: U	Last Changed: 3-NOV-2005
Last: ARNON		First: ETTIE	Middle:
Generation:	Birthdate: 1 /1 /2000	Sex: F	SSN: 099-99-9999
CIN: 19904467			
Education: 10	Other Factors: 0	Other ID: 0	
Disability: 0	Service Group:	Local Code:	
Language: A	Primary RU:	Program Code:	
Ethnicity: A	Chart Location:	Research Item:	
Hispanic Origin: 1	Ref. Staff ID: 0		
Marital Status: 1			
Family Size: 0			
Annual Income: 0		Client UR Needed:	
Aliases	Last	First	Middle
Form Ok Y/N:		Confidential Information	USER: COHEN_LET
Update client information or add/delete aliases.			

Figure 2.10: Client Update Screen

The Registration Approved field only applies to systems using centralized registration, and it can only be changed by the Central Registrar. The Client UR Needed field can only be changed by authorized staff.

Aliases cannot be changed, but any user can add new aliases or can delete an alias by entering "D" on its line.

Client Last Name, First Name, Middle Initial, Social Security Number, Birthdate, Sex can only be changed by a Supervisor. If you are authorized as a supervisor, you can press Num Lock (Gold)-A to display the Client Update Screen in Supervisor mode (Figure 2.11).

Client Update

New Client Number: 113403 Reporting Unit:

Client Birth Name:

Last: ARNON First: ETTIE Middle:

Generation: Birth place: 38 CA US Mother first name: MAM

Form Ok Y/N: Confidential Information USER: COHEN_ET

Input required

Figure 2.11: Client Update Screen: Supervisor Mode

Registration Approved

If the Client was registered using centralized Client Registration and the registration has not yet been approved, this screen will include a Registration Approved field. If you are sure the client registration information is correct, enter “Y” in this field.

Entering a New Client Address

Any authorized user can enter a new address for a client with an open episode.

To enter a new address:

1. Choose ADDRESS from the Client Maintenance Menu to display the Address Maintenance Selection Screen, as described above.
2. Press Num Lock (Gold)-I (I stands for Insert) to display the Client Address Insert Screen
3. Enter data in the following fields:
 - **Client Number:** Enter the number for the client whose address you want to enter. If you are already viewing a list of the client’s addresses when you press Num Lock (Gold)-I, the Client Number is entered automatically.
 - **Reporting Unit:** Enter the Reporting Unit Number for the program that has an open episode for the client. The Effective Date of the address you are entering must fall within this episode.
 - **Effective Date:** By default, the Effective Date is today’s date. Only Supervisors can

alter it.

- **Street Number:** Enter a street number with up to five (5) digits.
- **Street Direction:** If the address has one, enter a street direction, such as “N”, “NE”, “E”, “SE”, “S”, “SW”, “W”, “NW”.

Client Address Insert																											
Client Number: XXXXXXXXXX		Effective Date: 05/26/87																									
Reporting Unit:																											
<table border="1"> <tr> <td colspan="2">Street</td> <td colspan="2">City:</td> </tr> <tr> <td>Number:</td> <td></td> <td>State:</td> <td>Zip Code: 00000+0000</td> </tr> <tr> <td>Direction:</td> <td></td> <td colspan="2"></td> </tr> <tr> <td>Name:</td> <td colspan="3"></td> </tr> <tr> <td>Type:</td> <td>Phone Number: () - Ext.:</td> <td colspan="2"></td> </tr> <tr> <td>Apartment:</td> <td>Census Tract: .</td> <td colspan="2"></td> </tr> </table>				Street		City:		Number:		State:	Zip Code: 00000+0000	Direction:				Name:				Type:	Phone Number: () - Ext.:			Apartment:	Census Tract: .		
Street		City:																									
Number:		State:	Zip Code: 00000+0000																								
Direction:																											
Name:																											
Type:	Phone Number: () - Ext.:																										
Apartment:	Census Tract: .																										
Bad Address																											
County of Responsibility:																											
Form OK Y/N:	Confidential Information	USER: SMITH																									

Figure 2.15: Client Address Insert Screen

- **Street Name:** Enter a street name with up to twenty characters. (Do not enter “Street”, “Road”, or other street type here.)
 - **Street Type:** Enter an abbreviation for the street type, such as “St”, “Bl”, “Rd.”, “Av”.
 - **Apartment:** Enter up to four characters. Do not enter the symbol “#”, and do not enter a period at the end.
 - **City:** Enter a city name with up to twenty characters.
 - **State:** Enter the two letter abbreviation for the state name.
 - **Zip Code:** Enter the first five numbers of the Zip Code, and the cursor moves to the plus-four digits, which you can enter if available.
 - **Phone Number:** Enter the telephone number, if available. If you do not want to enter the Area Code, you must type three blank spaces in its place.
 - **Extension:** Enter an extension for the telephone number, if there is one.
 - **County of Responsibility:** If you do not make an entry here, InSyst will use your county’s code when it reports to state client data systems. To report to the state that another county is responsible, enter the two-digit county code in this field. (This section is generally used by California Mental Health Programs.)
4. Enter “Y” at the Form OK prompt to validate and save the data.

Maintaining Addresses

The Address Maintenance Selection screen is used to maintain either Client addresses or Account Addresses, the addresses that bills are sent to.

To maintain Addresses:

1. Choose ADDRESS from the Client Maintenance Menu to display the Address Maintenance Selection Screen, as described above.
2. Use the fields at the top of the screen to display a list of addresses:

- **Client Number:** Enter a Client Number to display that client's addresses.

The screen lists all addresses for the client or account (Figure 2.17), with the most recent listed first.

Address Maintenance Selection		
Client Number: 500000006 HOLDEN CAUFIELD		
Account Number:		
Effective	Address	
21-May-87	9999-5	45 NE TAYLOR RD Apt. 1 SAN FRANCISCO, CA 94124
01-May-87	9999-9	135 E DUCK AV Apt. 202 SAN FRANCISCO, CA 94118
-	-	
-	-	
-	-	
-	-	

Confidential Information USER: SMITH

2 records displayed. Last page displayed.

Figure 2.17: Address Maintenance Selection Screen

3. Move through the list using the methods described in the section on Moving Through Lists in Chapter 1. Select address records to maintain by typing "L" (lookup), "U" (update), or "D" (delete) next to them. When you have finished selecting records, press Return.

Client Address Lookup

If you entered a Client Number and entered "L" next to the address, it is displayed in the Client Address Lookup screen (Figure 2.18). You cannot change the data. Press Return to display the next address, or press "N" and Return to exit.

Client Address Delete

If you entered a Client Number and entered “D” next to the address, it is displayed in the Client Address Delete screen (Figure 2.19). Enter “Y” at the Delete OK prompt and “Y” again at the confirm prompt to delete the address.

Client Address Update

If you entered a Client Number and entered “U” next to the address, it is displayed in the Client Address Update screen (Figure 2.20).

Client Address Lookup													
Client: 500000006	HOLDEN CAUFIELD												
RU: 999905	45 NE TAYLOR RD Apt. 1												
	SAN FRANCISCO, CA 94124												
Effective Date: 05/21/87 Address Stamp: 21-May-87													
<table border="1"> <tr> <td colspan="2">Street</td> </tr> <tr> <td>Number: 245</td> <td>City: SAN FRANCISCO</td> </tr> <tr> <td>Direction: NE</td> <td>State: CA Zip Code: 94124+0000</td> </tr> <tr> <td>Name: TAYLOR</td> <td></td> </tr> <tr> <td>Type: RD</td> <td>Phone Number: (415) 752-3333 Ext.: 0</td> </tr> <tr> <td>Apartment: 1</td> <td>Census Tract: .00</td> </tr> </table>		Street		Number: 245	City: SAN FRANCISCO	Direction: NE	State: CA Zip Code: 94124+0000	Name: TAYLOR		Type: RD	Phone Number: (415) 752-3333 Ext.: 0	Apartment: 1	Census Tract: .00
Street													
Number: 245	City: SAN FRANCISCO												
Direction: NE	State: CA Zip Code: 94124+0000												
Name: TAYLOR													
Type: RD	Phone Number: (415) 752-3333 Ext.: 0												
Apartment: 1	Census Tract: .00												
Bad Address													
County of Responsibility: 0													
Continue: <input checked="" type="checkbox"/>	Confidential Information												
Press <Return> to continue or <N><Return> to exit.													
USER: SMITH													

Figure 2.18: Client Address Lookup Screen

Client Address Delete													
Client: 500000006	HOLDEN CAUFIELD												
RU: 999905	135 E DUCK AV Apt. 202												
	SAN FRANCISCO, CA 94118												
Effective Date: 05/01/87 Address Stamp: 22-May-87													
<table border="1"> <tr> <td colspan="2">Street</td> </tr> <tr> <td>Number: 135</td> <td>City: SAN FRANCISCO</td> </tr> <tr> <td>Direction: E</td> <td>State: CA Zip Code: 94118+0000</td> </tr> <tr> <td>Name: DUCK</td> <td></td> </tr> <tr> <td>Type: AV</td> <td>Phone Number: (415) 752-3333 Ext.: 0</td> </tr> <tr> <td>Apartment: 202</td> <td>Census Tract: .00</td> </tr> </table>		Street		Number: 135	City: SAN FRANCISCO	Direction: E	State: CA Zip Code: 94118+0000	Name: DUCK		Type: AV	Phone Number: (415) 752-3333 Ext.: 0	Apartment: 202	Census Tract: .00
Street													
Number: 135	City: SAN FRANCISCO												
Direction: E	State: CA Zip Code: 94118+0000												
Name: DUCK													
Type: AV	Phone Number: (415) 752-3333 Ext.: 0												
Apartment: 202	Census Tract: .00												
Bad Address													
County of Responsibility: 0													
Delete OK: <input checked="" type="checkbox"/>	Confidential Information												
Okay to delete this record (Y/N)?													
USER: SMITH													

Figure 2.19: Client Address Delete Screen

You can change most of its data. However, you cannot change the Client Number, the


Reporting Unit, the Effective Date, or the Address Stamp (which shows when the Address was entered). Because you cannot change the Reporting Unit, if the wrong program has been entered for an address, you must delete the record and enter a new one.

Client Address Update													
Client: 500000006	HOLDEN CAUFIELD												
RU: 999905	45 NE TAYLOR RD Apt. 1												
	SAN FRANCISCO, CA 94124												
Effective Date: 05/21/87 Address Stamp: 21-May-87													
<table><tr><td colspan="2">Street</td></tr><tr><td>Number: 245</td><td>City: SAN FRANCISCO</td></tr><tr><td>Direction: NE</td><td>State: CA Zip Code: 94124+0000</td></tr><tr><td>Name: TAYLOR</td><td></td></tr><tr><td>Type: RD</td><td>Phone Number: (415) 752-3333 Ext.: 0</td></tr><tr><td>Apartment: 1</td><td>Census Tract: .00</td></tr></table>		Street		Number: 245	City: SAN FRANCISCO	Direction: NE	State: CA Zip Code: 94124+0000	Name: TAYLOR		Type: RD	Phone Number: (415) 752-3333 Ext.: 0	Apartment: 1	Census Tract: .00
Street													
Number: 245	City: SAN FRANCISCO												
Direction: NE	State: CA Zip Code: 94124+0000												
Name: TAYLOR													
Type: RD	Phone Number: (415) 752-3333 Ext.: 0												
Apartment: 1	Census Tract: .00												
Bad Address													
County of Responsibility: 49													
Continue: Y	Confidential Information												
Successful update. Update total = 1.													
USER: SMITH													

Figure 2.20: Client Address Update Screen

When you have made all changes, press Return. The next record you selected to maintain is displayed. If there are no more selected records, you return to the Address Maintenance Selection Screen.

Client Messages

 **Tip:** If you are using the Client Locator Screen and have a client selected, you can go directly to the Client Message Selection screen by entering “M” at the Selection prompt. Then it automatically displays messages for that client.

The Client Message screens let staff write messages about the particular needs of clients. Messages are noted on the Locator and Client Message screens, and active Client Messages can be displayed on some reports (such as the Morning Report, Report MHS 120).

To work with client messages:

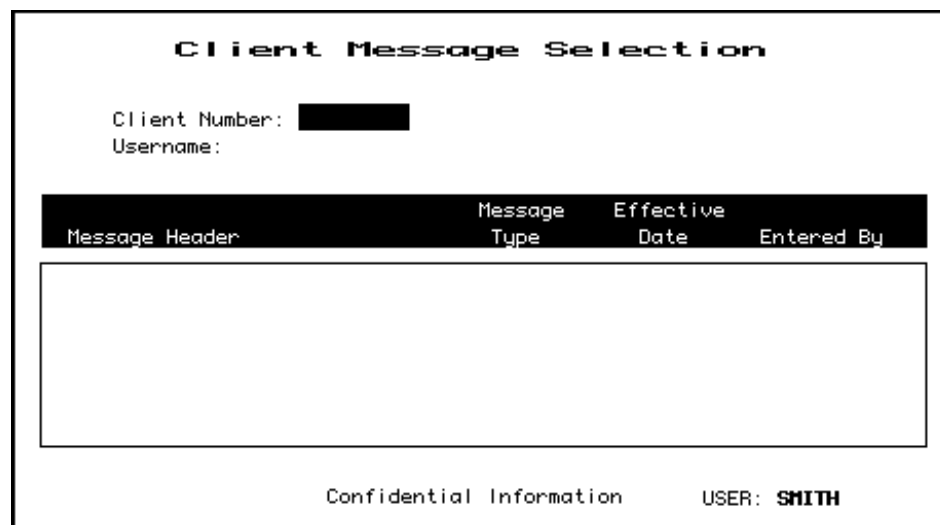
1. Choose CLINICAL from the Main Menu.
2. Choose CLIENT_MSG from the Clinical Menu to display the Client Message Selection Screen (Figure 7.1).

You can view messages for a particular client, or messages entered by a particular user at this point, or enter new client messages.

Entering New Client Messages

To enter new client messages:

1. Choose CLIENT_MSG from the Clinical Menu to display the Client Message Selection Screen, as mentioned above.
2. Press Num Lock (Gold)-I to insert new messages for a client. The system displays the Client Message Insert Screen, shown in Figure 7.2.



Message Header	Message Type	Effective Date	Entered By

Confidential Information USER: SMITH

Figure 7.1: Client Message Selection Screen

Client Message Insert

Client: XXXXXXXXXX

Header: _____

Author: _____

Effective Date: 11/06/97

Expiration Date: / /

Message Type		
<input type="checkbox"/> Case Management Incident	<input type="checkbox"/> Clinical Other	<input type="checkbox"/> Fiscal Correspondence

Form OK Y/N: _____

Confidential Information

USER: SEIGEL_C

Figure 7.2: Client Message Insert Screen

3. Enter data in the following fields:

- **Client:** Enter the Client Number of the client the message describes.
 - **Message Header:** Enter a title for the message, up to 40 characters long.
 - **Author:** Enter the name of the person who is the author of the message. This may be different from the username of the person entering the message. The author might be a clinician who asked a data entry person to enter the message.
 - **Effective Date:** Enter the date the message will begin to appear on the system. The default entry is the current date. You cannot enter a date before the current date.
 - **Expiration Date:** Enter the date that the message will no longer appear as an active message in the Client Locator Screen. Only staff with Supervisor Authorization will be able to see the message. For most message types, the default is 45 days from the current date. You can blank the field, so there is no expiration date.
 - **Message Type:** Type “X” next to your choice. Local Operations Staff sets up Message Types. Some common Message Types are: CLINICAL (used by clinical staff to coordinate treatment for the client), CASE MANAGEMENT (used to support the client in the community), FISCAL (used to describe the client’s account), INCIDENT (used to report incidents), OTHER (General Messages used by the entire staff).
4. Enter “Y” at the Form OK prompt to record this information about your message and to move to the Client Message text editor (Figure 7.3).

MHS Client Messages	
JAMES TESTCASE	1000483 Crisis Alert
Recent decompensation started about the same time as brother died. James has been withdrawn at the day treatment center and has not participated in any groups. It appears as though he discontinued his medications. If he appears at Crisis Center, please contact Dr. Williams regarding medication plan changes.	
----- Last Line -----	
<div> INSERT NEW MESSAGE Insert Forward </div>	
Command: EXIT	Confidential Information

Figure 7.3: Client Message Text Editor

- At first, the text editor screen has the Client Number and Message Header you specified at the top of the screen, and "--Last Line--" in the text editing section. Type the message, and these words scroll downward make room for it.
- As you enter your message, do not press Return at the end of a line; the text wraps to the next line automatically. The highlighted bar at the bottom of the screen will say INSERT NEW MESSAGE to show that the screen is in Insert Mode. It may also say "Char" (Character), "Insert" or "Forward" to show the text editing mode you are using.
- When you have completed your message, press the Control/Z to stop editing. The word EXIT will be displayed at the prompt, and you can press Return to save your message. If you do not want to save the Client Message, erase the word EXIT, replace it with QUIT and press Return.

The Client Message text editor is the same editor used for MAIL and FILES. It is covered in detail in Chapter 15, which also discusses these utilities, but the features described there are not usually needed for client short messages.



Note: When you are using the Client Message Insert screens, you can return to the Client Message Selection Screen by pressing Num Lock (Gold)-R.

Maintaining Client Messages

To maintain client messages:

- Choose CLINICAL from the Main Menu.
- Choose CLIENT_MSG from the Clinical Menu to display the Client Message Selection Screen.
- Enter search criteria in the fields at the top of the screen:
 - Client Number:** Enter a Client Number to search for messages about that client.
 - Username:** Enter a Username to search for messages written by that user.

4. You can enter search criteria in either or both of these fields, then press Return to list messages that match.
5. Move the cursor through the list of messages. (See the section on Moving Through Lists in Chapter 1.) Select the ones you want to maintain by entering “L” (lookup), “U” (update), or “D” (delete) next to them. Press Return when you have finished selecting messages.

Client Message Selection

Client Number: **1000483** **JAMES** **TESTCRSE**
 Username:

Message Header	Message Type	Effective Date	Entered By
Medication Warning	Clinical	17-Nov-89	SMITH

Confidential Information USER: **SMITH**

1 record displayed. Last page displayed.

Figure 7.4: Client Message Selection Screen After Searching by Client

If you searched by client, as in Figure 7.4, the list includes:

- **Message Header:** A Message Title of up to 40 characters.
- **Message Type:** The type of message (*e.g.* Clinical, Fiscal, Incident, *etc.*).
- **Effective Date:** The date the message first began appearing.
- **Entered By:** The person who created the message.

If you searched by Username only, list includes:

- **Message Header:** A Message Title of up to 40 characters.
- **Message Type:** The type of message (*e.g.* Clinical, Fiscal, Incident, *etc.*).
- **Client Number:** The Client Number for each Message.
- **Client Last Name:** The Client Name for each Message.

The Message Display area shows up to six messages. You can press Num Lock (Gold)-M to view one additional page of messages.



Note: To list more than 12 messages, you must type Num Lock (Gold)-A before entering a Client Number to request unlimited paging

Client Message Lookup

If you entered “L”, the message is displayed on the same screens used to enter messages. First the screen lists Client, Header, Author, Effective and Expiration Dates, and Message Type. Press Return to display the text editing screen with the message. You can not edit either the title screen or the message.

After reading the message, type Control/Z to move to the next message or return to the Client Message Selection Screen.

Client Message Delete

If you entered “D”, the Text Editing Screen is displayed, as described above, with the prompt, “Are you sure you want to delete this message?” Enter “Y” to delete the message.



Note: You may only delete your own messages. Remember to type Control/Z and press Return to save the changes.

Client Message Update

If you entered “U”, the title screen is displayed and you may change the Message Header, Message Type, Effective or Expiration Date. Press Return to display the message in the text editing screen and make changes (Figure 7.5). Type Control/Z and press Return to save the changes.



Note: You may only update your own messages.

The screenshot displays the 'NHS Client Messages' interface. At the top, it shows 'JAMES TESTCASE' and '1000483 | Medication Warning'. Below this, a message body reads: 'This client has severe reactions to haloperidol in dosages over 5mg. Please contact Dr. Williams at West County Outpatient. ----- Last Line -----'. At the bottom, there is a black bar with 'UPDATE MESSAGE' and 'Insert | Forward' options. Below the bar, it says 'Update/Insert message', 'Confidential Information', and 'USER: SMITH'.

Figure 7.5: Client Message Update

Supervisor Authorization

Supervisor Mode lets you update or delete any message regardless of its author, and it lets you see expired messages. If you are authorized to use Supervisor Mode, press Num Lock (Gold)-A twice when the Client Message Selection Screen first appears.

Supervisory Staff and Operations Staff have a responsibility to monitor and service the

Client Messages system. If you have Supervisor authorization, you should use Supervisor Mode.

Entering New Messages during Maintenance

If you press Num Lock (Gold)-I while you are using the Editing screen to update, look up, or delete a message, the screen will split to let you enter a new message for the client whose message you were maintaining (Figure 7.6).

After entering the new message, press Control/Z. You will be able to enter the Message Header, Type, and Dates, as described above.

Chapter 3

CSI Periodic Screens

The CSI Periodic Screens streamline the entering periodic updates of client information that change over time such as education, care giver status, living situation, employment status and legal consent. California State Department of Mental Health requires these data elements be reported at time of opening, closing and on the date of the annual review for anyone receiving mental health services.

In addition to entering new CSI Periodic data, you will be able to update, delete and look up client information using the CSI Periodic Screens.

Accessing the Screens

Access the CSI Periodic Screens in order to update the required CSI information.

To work with CSI Periodic Records:

1. Choose CLIENTS from the Main Menu.

The screenshot displays the InSyst MAIN MENU interface. At the top, it shows the date and time as 07-Mar-00 01:20 PM. Below this, the text 'MAIN MENU' and 'INSYST Merged Product V07.001' are visible. A 'Selection: 1' field is present. A table with two columns, 'Selection' and 'Description', lists several menu options. The 'CLIENTS' option is highlighted with an 'X' in the Selection column.

Selection	Description
X CLIENTS	Client Maintenance Menu
DDP	DDP Maintenance Menu
APPTS	Appointment Maintenance Menu
EPISODES	Episode Maintenance Menu
SERVICES	Service Maintenance Menu
INDIR_SERV	Indirect Service Maintenance Menu

Figure 1.6: Selecting CLIENTS from the Main Menu

- Choose CSI_PERIODIC and press enter. You will need to TAB down to find this screen on the Menu.

I n S y s t

27-Jul-99 03:58 PM

**INSYST Merged Product V06.0
Client Maintenance Menu**

Selection:

Selection	Description
SIG_OTHER	Significant Other Maintenance
ECI	Electronic Client Information
ADDRESS	Address Maintenance
LOCATOR	Retrieval of Client Information
X CSI_PERIOD	CSI Periodic Maintenance
SUPPLEMENT	Supplemental Client Data Menu

Figure 1.7: Selecting CSI Periodic screens

- InSyst displays the CSI Periodic Maintenance screen (Figure 1.8).

CSI Periodic Data Maintenance

Client Number: XXXXXXXXXX

Periodic Date Completed	Axis 5	Legal Consent	Other Factors	Last CSI Reporting Date
- -	-	-	-	- -
- -	-	-	-	- -
- -	-	-	-	- -
- -	-	-	-	- -
- -	-	-	-	- -

Confidential Information USER: MCBRIDE_M

Figure 1.8: CSI Periodic Data Maintenance Screen

Entering New CSI Periodic Data

1. **Press the NumLock-I sequence** at the CSI Periodic Maintenance Screen to access the data entry screen (Figure 1.9).

```

CSI Periodic Data Entry

Client Number: 112211221   DEE           DWIDDLE

Periodic date completed: █ / █           Employment status: 12
Education: 4                 Axis 5: 55
Other Factors: 2             Legal Consent: 9
                               Living Situation: 6

Form Ok Y/N:                Confidential Information      USER: MCBRIDE_M
  
```

Figure 1.9: CSI Periodic Data Entry Screen

2. **Client:** Enter the Client Number of the client for whom you are entering data.
If the client is in the system and there are previous Periodic Data, InSyst will populate the entry screen with the most recent periodic data for this client.
If there is no periodic data, InSyst populates the fields with entries from the Client's Registration.
InSyst will alert you if the Client Number is not in the system.
3. Enter or edit data in the following fields: (the State has made it mandatory that the following fields are updated annually)
 - **Periodic Date Completed:** Enter the date when the information you are entering was obtained from the client (date of episode opening/closing/annual review).
 - **Education:** Enter the current education level in years. This is a number; the maximum value is 20.
 - **Care Give Status:** Enter the number of persons the client cares for or is responsible for at least 50% of the time, under the age of 18 and over the age of 18.
 - **Employment Status:** Enter the code for the client's Employment status. See the sample values for this field in the CSI Appendix at the end of this document.
 - **Legal Consent:** Enter the code for the client's legal consent. See the sample values for this field in the CSI Appendix at the end of this document.
 - **Living Situation:** Enter the code for the client's Living Situation. See the sample values for this field in the CSI Appendix at the end of this document.
4. Enter "Y" at the Form OK prompt to validate and save the data.

Chapter 3

Client Episodes

An Episode is a period of treatment for a client at a program. Before you can enter services for a client, there must be an open Episode for the client in the program providing the service.

Episode Screens are different in InSyst's Mental Health and Drug and Alcohol systems. The first half of this chapter covers the screens for Mental Health programs. The second half of the chapter covers the screens for Drug and Alcohol programs.

Episodes in Mental Health Programs

First, we look at Episodes in Mental Health programs.

Opening New Episodes, Mental Health Programs

To open an Episode for a client:

1. Choose EPISODES from the Main Menu.
2. Choose OPEN from the Episode Maintenance Menu to display the Episode Opening screen (Figure 4.1).
3. To identify the record, fill in the fields at the top of the screen:
 - **Client Number:** Enter a Client Number
 - **RU:** Enter a Reporting Unit number representing a Mental Health program.
4. The system validates the data. It will not let you open an episode unless the Client and RU numbers exist, and it will not let you open two episodes for the same client in the same reporting unit. If these identifying fields are valid, you can enter data in the following fields:
 - **Opening Date:** Enter today's date or an earlier date. The system will not accept a future date. Remember that you cannot enter services that occurred before the episode's opening date.

Episode Opening					
Client Number: XXXXXXXXXX			RU:		
Street No.:	Direction:	Name:	Type:	Apt:	
City:	State:	Zip Code: 00000+0000	Ph #:	()	-
Opening Date: / /		Referral From:		Legal:	
Initial Diagnostic Impression					
Axis 1:	Axis 2:	Axis 3:	Axis 4:	Axis 5:	Past:
Axis 1:	Axis 2:	Axis 3:			
Clinician ID:	Living Situation:	Admission Hour: 99 Scheduled: N			
Physician ID:	Employment Status:	Legal Consent:			
Source of Income:	Type of Employment:	Research Item:			
Patient Location:		Effective: / /			
Form Ok Y/N:		Confidential Information		USER: SEIGEL_C	
Enter a client and reporting unit.					

Figure 4.1: Episode Opening Screen

- **Referral From:** If you have the code for the reporting unit or agency that referred the patient, enter it here. Otherwise, you can enter a one or two-digit generic code numbers. Standard codes are listed in Appendix D, but you should check with your Operations Staff to find which codes are used locally.
- **Legal:** Enter a Legal Status code. These codes are listed in Appendix D.

Next, the cursor moves to the fields in the Diagnostic area. This area has two lines, the first for the main diagnoses and the second for alternative diagnoses.

To enter the main Diagnoses (line 1):

1. Press the Tab key to move through the Axis fields in line one of the Diagnostic area, and enter diagnosis numbers in them.
2. The Tab key will also move the cursor to the Principle/Secondary field next to the Axis 1 and Axis 2 fields. By default, Axis 1 is the primary and Axis 2 is the secondary diagnosis, but you can change this by pressing the Space Bar to clear these fields, and then typing "P" next to the Primary diagnosis and "S" next to the Secondary Diagnosis. Every episode must have one Primary and one Secondary Diagnosis.

The Axis fields hold the following data:

- **Axis 1 and Axis 2:** Enter five-digit diagnostic codes with a decimal point (period) between the third and fourth digits: for example, 296.44. Some codes have a "V" as the initial digit: for example, V71.09. Ask your system manager for the codes. You must enter data in these fields. (These two fields have "P" and "S" to their right, to indicate which is the primary and which is the secondary diagnosis.)
- **Axis 3:** Enter an Axis 3 ICD 9 diagnosis code (optional).
- **Axis 4:** Enter a code determined by the local agency. Ask your system manager for the codes. You must enter data in this field.
- **Axis 5 and Past 5:** Enter assessments of the client's current and past functioning using the Spitzer GAF Scale. Numbers from 00 to 90 are valid. You must enter data in these fields: if unknown, enter "UK".

To enter alternative diagnoses (line 2):

1. Press the Tab key to move through the fields in line two of the Diagnostic Area.
2. Fill out these fields like the fields in line one of the Diagnostic Area. These fields can hold the same codes as the Axis 1, Axis 2, and Axis 3 fields of line one, and you indicate the primary and secondary diagnosis in the same way. However, you must enter different values in these fields than you entered in line 1, since these are alternative diagnoses.

All the fields on line two are optional.

To enter data in the remaining fields:

1. After you Tab through the diagnostic fields, you enter data in the following fields:
 - **Clinician ID:** Enter the primary clinician's identification number. This number must be in the STAFF_MASTER table.
 - **Physician ID:** Enter the physician's identification number. This number must be in the STAFF_MASTER table.
 - **Source of Income:** Enter a one-digit code for the client's largest single source of family income. These codes are listed in Appendix D.
 - **Living Situation:** Enter the code for the client's living situation. These codes are listed in Appendix D.
 - **Employment Status:** Enter the code for the client's Employment Status. These codes are listed in Appendix D.
 - **Type of Employment:** Enter the one-digit code for the occupation of the family's primary wage earner. These codes are listed in Appendix D.
 - **Admission Hour:** Enter hour of admission, using a number from 0-23. If you skip this field, the default 99 (Unknown) is used.
 - **Legal Consent:** Indicate what authority you have to treat minors. This field is also used for some adults. These codes are listed in Appendix D.
 - **Research Item:** This field can be defined by your local agency. If necessary, ask your supervisor for more information.
 - **Scheduled:** Enter "Y" or "N", depending on whether this opening was scheduled.
 - **Patient Location:** This field used primarily by inpatient hospital or other 24 hour facilities to indicate the room and or bed the client occupies. Its use depends on local policy.
 - **Effective:** Enter date the client began occupying bed or room shown in Patient Location field. If the client moves, use Update to enter new bed/room number and effective date of new bed/room number.

- **Address:** For a new client, enter the client's address in the Address fields. If the client has an address on file, it will be displayed in these fields. Correct it if necessary. (Most address fields are self-explanatory. The direction field holds N, NW, or some other compass direction that is part of the address. The Street Type field holds an abbreviation such as "St", "Bl", "Rd".)
2. At the Form OK prompt, enter "Y" to save the record (Figure 4.2).

Episode Opening		
BUDDY L GLASS		Test OP
Client Number: 500000004		RU: 999901
Street No.: 123 Direction: NE Name: Wilson Type: ST Apt: City: San Jose State: CA Zip Code: 12345+9999 Ph #: (415) 123-9999		
Opening Date: 12/05/86 Referral From: 01 Legal: W60000		
Initial DSM-3 Diagnostic Impression		
Axis 1: 296.44 P Axis 2: V71.09 S Axis 3: Axis 4: 4 Axis 5: 64 Past 5: 44 Axis 1: Axis 2: Axis 3:		
Clinician ID: 99999	Living Situation: 01	Admission Hour:
Physician ID: 99990	Employment Status: 1	Legal Consent:
Source of Income:	Type of Employment:	Research Item:
Patient Location:	Effective: / /	
Form Ok Y/N:		Confidential Information
Validation of opening data in progress...		USER: SMITH

Figure 4.2: Episode Opening Screen with Data

Closing Episodes, Mental Health Programs

To close an episode for a client in a reporting unit:

1. Choose EPISODES from the Main Menu.
2. Choose CLOSE from the Episode Maintenance Menu to display the Episode Closing screen (Figure 4.3). This screen is similar to the Client Episode Opening Screen, with a few exceptions. In addition to Opening Date, it has Closing Date. Instead of Referral From, you can enter Referral To codes. A number of fields are not included, since that data is collected at Episode Opening only.

Episode Closing					
Client Number:			RU: XXXXXX		
Street No.:	Direction:	Name:	Type:	Apt:	
City:	State:	Zip Code: 00000+0000	Ph #:	(< > -)	
Opened:	Closing Date: / /	Discharge Hour:	Legal: W60000		
Last Service: Final DSM-3 Diagnostic Impression					
Axis 1:	Axis 2:	Axis 3:	Axis 4:	Axis 5:	Past:
Axis 1:	Axis 2:	Axis 3:			
Clinician ID:	Living Situation:	Referrals:	/	/	
Physician ID:	Employment Status:	Reason For Discharge:			
			Research Item:		
Form OK Y/N: Confidential Information User: SMITH					
Enter a client and reporting unit.					

Figure 4.3: Episode Closing Screen



Note: Some 24 Hour programs cannot close an episode unless there is a recorded service for every day of the episode. Ask your Operations Staff for more information about this.

3. Use the fields at the top of the panel to identify the record:
 - **Client Number:** Enter the Client Number
 - **RU:** Enter the Reporting Unit Number for the program.
4. The system displays an error message if it cannot find an open episode for this client in this reporting unit, or if you are not authorized to close episodes in this reporting unit. If it finds the open episode for the client, it displays the current data as defaults for closing. You use the following fields:
 - **Closing Date:** You must enter a closing date, and you cannot enter a future date or a date before the last service. The current date as the default.
 - **Last Service Date:** This field is displayed, but you cannot edit it. Usually, will want make the Closing Date the same as the Last Service Date.
 - **Diagnostic, Clinician, Physician, Living Situation and Employment:** Update these fields if necessary, or just press the Tab key to move through them.
 - **Referrals:** Enter codes for up to three referral destinations. Use one or two-digit generic codes or the codes for programs or agencies.

- **Reason For Discharge:** Enter a Reason for Discharge code. Appendix D lists these codes.
 - **Research Item:** Make an entry here only if you are authorized. Ask your supervisor for information on this field.
 - **Address Fields:** Update these fields if necessary, or press the Tab key to move through them.
4. Enter “Y” at the Form OK prompt to save the data. After validating the data, the system closes the episode (Figure 4.4).

Episode Closing			
SEYMOUR GLASS		Test OP	
Client Number: 500000039		RU: 999901	
Street No.: 401 Direction: NE Name: Wilson		Type: ST Apt:	
City: Riverside State: CA Zip Code: 00000+0000		Ph #: (415) 123-9999	
Opened: 30-Dec-86 Closing Date: 12/31/86 Discharge Hour: 99 Legal: 460000			
Last Service: - -			
Final DSM-3 Diagnostic Impression			
Axis 1: 296.44 P Axis 2: 071.09 S Axis 3: A Axis 4: 5 Axis 5: 50 Past:			
Axis 1: Axis 2: Axis 3:			
Clinician ID: 99999 Living Situation: 1 Referrals: 01 / /			
Physician ID: 99990 Employment Status: 1 Reason For Discharge: 1			
		Research Item:	
Form OK Y/N: Y		Confidential Information	
Closing episode... █		User: SMITH	

Figure 4.4: Episode Closing Screen with Data

Maintaining Episodes, Mental Health Programs

To maintain Episode records:

1. Choose EPISODES from the Main Menu.
2. Choose MANAGEMENT from the Episode Maintenance Menu to display the Episode Maintenance Selection screen (Figure 4.5).

Episode Maintenance Selection

Client Number:
 Reporting Unit: (Optional)
 Opening Date: / / (Optional)

Reporting Unit	Opening Date	Closing Date	Clinician	Physician

Confidential Information USER: SMITH

Please enter a client number. A provider number may also be entered.

Figure 4.5: Episode Maintenance Selection Screen

3. Enter search criteria in the fields at the top of the screen:
 - **Client Number:** You must enter a Client Number.
 - **Reporting Unit:** Optionally, you can enter a Reporting Unit number to display only the client's episodes in that program.
 - **Opening Date:** Optionally, you can enter a date to display only episodes that were open at that time. (Enter just a month and year to get a list of episodes with opening dates in that month.)
4. Press Return, and the screen lists all Episodes that match the search criteria, with the most recent Episodes first.
5. To select episodes on the list for maintenance, move the cursor through the list (as described in the section on Moving Through Lists in Chapter 1). Next to the records you want to maintain, enter "L" (lookup), "D" (delete), or "U" (update), as shown in Figure 4.6.

Episode Maintenance Selection

Client Number: 153201 PAUL PASTEL
 Reporting Unit: (Optional)
 Opening Date: / / (Optional)


	Reporting Unit	Opening Date	Closing Date	Clinician	Physician
U	HCPC	21861	20-Apr-93	STAFF	Staff
L	DCI-HCPI	22651	20-Apr-93	SMITH	Staff
	MOBILE CRISIS	22531	19-Apr-93	CUMINGS	Staff
D	HCPC	21861	18-Mar-93	22-Mar-93	STAFF
	PSP OPT	22271	18-Mar-93	05-May-93	LAMBERSON
	DCI-HCPI	22651	18-Mar-93	18-Mar-93	VILLERE

Confidential Information USER: SMITH_LD

Figure 4.6: Episode Maintenance Selection Screen with Episodes Listed

6. Select up to sixteen records. Then press Return to display these records for maintenance.

Episode Lookup

 **Tip:** For a detailed history of a client, it is usually best to use Report MHS 118, the Client Episode History report, which is described in the Reports Manual.

If you entered “L”, the system displays the Episode Lookup Screen (Figure 4.7). You can view the data for the Episode but cannot change it.

Press Return to display the next record selected for maintenance. Type “N” and press Return to go back to the Client Episode Maintenance Selection Screen.

Episode Delete

If you entered “D”, the system displays the Episode Deletion Screen (Figure 4.8). If you are authorized, you can enter “Y” at the Delete OK prompt and again at the confirm prompt to delete all information about this episode.

Episode Look-up			
HOLLY	HAMMERSTEIN	PSP OPT	Entered By: HAMLIN
Client Number:	1000140	RU: 99991	Last Changed: 04-Mar-93
			Last Service: 20-Jul-94
Opening: 02/24/93		Closing Date: / /	
Axis 1: 300.00 P	Axis 2: 071.09 S	Axis 3:	Axis 4: 4 Axis 5: 55 Past: 70
Axis 1:	Axis 2:	Axis 3:	
Clinician ID: 10000	Living Situation Entry: 1	Referral Source: 1	
Physician ID: 10000	Living Situation Exit:	Admit Hr: 99 Disch Hr:	
Legal Entry: W60000	Employment Status Entry: 2	Legal Consent:	
Legal Exit: W60000	Employment Status Exit:	Reason For Discharge:	
Source of Income: 0	Referrals: / /	Research Item:	
Type of Employ: 0		Scheduled: N	
Patient Location:		Effective: / /	
Continue: <input checked="" type="checkbox"/> Confidential Information USER: SEIGEL_C			
Press <Return> to continue.			

Figure 4.7: Episode Look-up Screen

Episode Deletion			
PAUL	PASTEL	HCPC	Entered By: MILLER_LJ
Client Number:	153201	RU: 21861	Last Changed: 23-Mar-93
			Last Service: 21-Mar-93
Opening: 03/18/93		Closing Date: 03/22/93	
Axis 1: 298.90 P	Axis 2: 071.09 S	Axis 3:	Axis 4: 4 Axis 5: 40 Past: 40
Axis 1:	Axis 2:	Axis 3:	
Clinician ID: 10000	Living Situation Entry: 99	Referral Source: 01	
Physician ID: 0	Living Situation Exit: 99	Admit Hr: 12 Disch Hr: 0	
Legal Entry: 1	Employment Status Entry: 16	Legal Consent: 9	
Legal Exit: 1	Employment Status Exit: 16	Reason For Discharge: 0	
Source of Income: 0	Referrals: 01 / /	Research Item:	
Type of Employment: 0	Patient Location:	Effective: / /	
Delete OK: <input type="checkbox"/> Confidential Information USER: SMITH_D			

Figure 4.8: Episode Deletion Screen

If services have been recorded for a client, the Episode may not be deleted. The screen displays the message “Services found for this Episode. No deletion possible”.

Episode Update

If you entered “U”, the system displays the Episode Update Screen (Figure 4.9). Only Supervisors can change the episode boundaries (e.g., Opening Date). Any authorized user can change the data below these fields.

Episode Update			
PAUL	PASTEL	HCPC	Entered By: MILLER_J
Client Number:	153201	RU: 21861	Last Changed: 03-May-93
			Last Service: 01-May-93
Opening: 04/20/93		Closing Date: / /	
Axis 1: 298.90 P Axis 2: U71.09 S Axis 3: Axis 4: 4 Axis 5: 40 Past: 40			
Axis 1:		Axis 2: Axis 3:	
Clinician ID: 10000 Living Situation Entry: 99 Referral Source: 01			
Physician ID: 0		Living Situation Exit: Admit Hr: 99 Disch Hr:	
Legal Entry: 1		Employment Status Entry: 16 Legal Consent: 9	
Legal Exit: 1		Employment Status Exit: Reason For Discharge:	
Source of Income: 0		Referrals: / / Research Item:	
Type of Employment: 0		Patient Location: Effective: / /	
Form OK: <input type="checkbox"/>			
Confidential Information			
USER: SMITH_D			

Figure 4.9: Episode Update Screen

Press Tab to move through the fields and edit the data. Press Return at any time to move to the Form OK prompt, and enter “Y” to save the changes. The system validates the data: if there are errors, it displays a message and returns the cursor to the field that needs to be corrected.

After you have updated the record, press Return to display the next Episode selected for maintenance, or if none are left, to return to the Client Episode Maintenance Selection screen.

Episode Update, Supervisor Authorization

Authorized users can display the screen in Supervisor mode (Figure 4.10).

Episode Update Supervisor			
PAUL	PASTEL	HCPC	Entered By: MILLER_LJ
Client Number: 153201	RU: 21861		Last Changed: 03-May-93
			Last Service: 01-May-93
Opening: 4/20/93	Closing Date: 05/20/93	Re-open Episode: Y	
Axis 1: 298.90 P	Axis 2: U71.09 S	Axis 3:	Axis 4: 4 Axis 5: 40 Past: 40
Axis 1:	Axis 2:	Axis 3:	
Clinician ID: 10000	Living Situation Entry: 99	Referral Source: 01	
Physician ID: 0	Living Situation Exit:	Admit Hr: 99 Disch Hr:	
Legal Entry: 1	Employment Status Entry: 16	Legal Consent: 9	
Legal Exit: 1	Employment Status Exit:	Reason For Discharge:	
Source of Income: 0	Referrals: / /	Research Item:	
Type of Employment: 0	Patient Location:	Effective: / /	
Form OK: Confidential Information USER: SMITH_LD			
Supervisor authorization in effect.			

Figure 4.10: Episode Update Screen, Supervisor Mode

To display the screen in Supervisor mode:

1. Display the Episode Update screen, as described above.
2. Press Num Lock (Gold)-A to display the screen in Supervisor mode.

With this screen, you can change the opening and the closing date of the episode.

If the episode is closed, you can enter "Y" in the Re-open Episode field to open it. Do this if you have closed an episode for a client and then find that the client receives more services after the closing date.

Episode Look-up			
LONNIE	BANNON	DTX	Entered By: SMITH
Client Number: 1000047		RU: 9999DT	Last Changed: 07-Jul-93
			Last Service: - -
Opening: 07/07/93		Closing Date: / /	
Axis 1: 295.10 P Axis 2: 071.09 S Axis 3: Axis 4: 4 Axis 5: 50 Past: 50			
Axis 1: Axis 2: Axis 3:			
Clinician ID: 99999 Living Situation Entry: 1 Referral Source: 01			
Physician ID: 0 Living Situation Exit: Admit Hr: 99 Disch Hr:			
Legal Entry: W60000 Employment Status Entry: 1 Legal Consent:			
Legal Exit: W60000 Employment Status Exit: Reason For Discharge:			
Source of Income: 1 Referrals: / / Research Item:			
Type of Employment: 0 Patient Location: Effective: / /			
Continue:		Confidential Information	
USER: SMITH			
FACE		COPY	TRANS

Figure 4.11: Function Key Map of Episode Maintenance Functions

This map corresponds to function keys F6-F14 on a Digital Equipment Corporation terminal. It means that you can press F6 to print a Client Face.

If you are not using a DEC terminal, you may have to use different keys instead of these Function keys. Ask your System Manager or Operations Staff how your keyboard is mapped to the DEC keyboard.

Chapter 4

Direct Services

This chapter covers the different ways to record services provided by programs directly to clients. It ends with a section on substance abuse services, which use some additional data entry screens. All of these screens are on the Service Maintenance Menu.

Before services can be recorded, the client must be registered and there must be an Episode open for the client in the program providing the service on the date being recorded. See Chapter 2 for information on registering clients, and see Chapter 4 for information on opening episodes.

Entering New Direct Services

InSyst gives you based on your User Authorization and Program Site several ways of entering services:

- Single Service Entry for all programs
- Daily Service Entry for day programs and 24-hour programs
- Weekly Service Entry for day programs and 24-hour programs
- Multiple Service Entry to enter the same information for a number of services

Single Service entry is most common, and the other methods can sometimes save you time in data entry.

Single Service Entry

Most programs enter services daily using single service entry.

To do single service entry:

1. Choose SERVICES from the Main Menu.
2. Choose SINGLE from the Service Maintenance Menu to display the Single Service Entry Screen (Figure 5.1).

Single Service Entry			
PSP Clinic			
Client Number: 	Service Date: / /	RU: 999989	
<div style="border: 1px solid black; padding: 5px; margin: 5px 0;"> Procedure: Staff: Staff Duration: : Number in Group: 01 Co-Staff: Co-Staff Duration: : Location: 1 </div>			
Form OK Y/N:		Confidential Information	
Enter service data.		USER: SMITH	

Figure 5.1: Single Service Entry Screen

3. Enter data in the following fields:

- **RU:** Enter the reporting unit number for your program and press Return. The system validates the number and displays the program's name.
- **Client Number:** Enter the Client Number. When all the data has been entered, the system will display the name of the client. At that time, review the client name to be sure you are entering services for the correct client.
- **Date:** Enter a date in the format MM/DD/YY. You cannot enter a future date. You must enter a date when the client's episode is open and the program operates.
- **Procedure:** Enter a three-digit procedure code. It must be a valid procedure for the program.
- **Staff:** Enter a staff identification number. The staff number will be validated for authorization to perform the services you are entering.
- **Co-Staff:** If there was co-staff, enter the staff identification number. You may only enter one co-staff in this system.
- **Staff Duration:** Enter the number of hours and minutes this staff person spent in this service. Enter up to twenty-three hours and up to fifty-nine minutes in the two portions of this field. There is a fixed minimum and maximum time for some services.
- **Co-Staff Duration:** If there was co-staff, enter the time they spent on the service, in the same way as Staff Duration.
- **Number in Group:** Enter a number from 1 to 99 indicating how many *clients* were involved in the service. The default is 01, for an individual service. If you are recording group services, enter the number of clients in the group. (For example, if Staff Person A and B have a group with 10 members that met today for 1 hour with all members present, enter 10 here. InSyst will record a service for each client number, with the staff numbers of A and B, the procedure code for a group, a group count of 10, and the time each staff person spent in the service. Each client will be billed correctly for the group service, and each staff person will be credited correctly for the time spent in the service.)

- **Location:** Enter a location code from 1 to 6: 1 = Office, 2 = Field, 3 = Phone, 4 = Home, 5 = Satellite School, 6 = Satellite Clinic, 9 = Inpatient. The default is 1 for Office.

You MUST use location “9” entering Inpatient Services on the Multiple or Single Entry screens.

4. When you are done, enter “Y” at the Form OK prompt. The system validates the data and displays the client’s name. If there are incorrect values in any field, it will display an error message and return the cursor to that field.
5. Once the data is correct, the system will ask for confirmation before saving it (Figure 5.2). Enter “Y” at the Confirm prompt to save the entry.

Single Service Entry															
BUDDY	GLASS	PSP Clinic													
Client Number: 500000040	Service Date: 03/10/87	RU: 999909													
<table border="1"> <tr> <td colspan="4">Procedure: 341</td> </tr> <tr> <td>Staff: 99999</td> <td>Staff Duration: 1:</td> <td colspan="2">Number in Group: 01</td> </tr> <tr> <td>Co-Staff:</td> <td>Co-Staff Duration: :</td> <td colspan="2">Location: 1</td> </tr> </table>				Procedure: 341				Staff: 99999	Staff Duration: 1:	Number in Group: 01		Co-Staff:	Co-Staff Duration: :	Location: 1	
Procedure: 341															
Staff: 99999	Staff Duration: 1:	Number in Group: 01													
Co-Staff:	Co-Staff Duration: :	Location: 1													
Confirm: Okay to write service for OPEN episode for BUDDY GLASS?		Confidential Information USER: SMITH													

Figure 5.2: Single Service Entry Screen with Data

If you are using the Utilization Control system, the system will display messages for clients who are Medicaid eligible, which say whether the client has a current Utilization Control authorization and whether the service is authorized.

After service entry has ended, the cursor returns to the Client Number field. You may enter a new Client Number and Date to continue entering services. If you want to enter services for another reporting unit, press Num Lock (Gold)-P to move to the RU field.

Special Authorizations for the Single Service Entry Screens

Authorized personnel can use these special features of the Single Service Entry Screen.

- **Late Entry:** Press Num Lock (Gold)-A once to invoke Late Entry authorization. For example, if data entry for April is closed on May 10, Late Entry authorization lets you enter services after that time.
- **Supervisor:** Press Num Lock (Gold)-A twice to invoke Supervisor authorization, which lets you override system validations in the Staff, Co-Staff, Group Count, Staff

Duration, Co-Staff Duration and Location fields, but not episode boundaries. This is useful for recording unusual services.

- **Supervisor and Late Entry:** Press Num Lock (Gold)-A three times to invoke both Supervisor and Late Entry authorization.

Using the Single Service Entry Screen for Day Treatment

Day Treatment services are normally entered using the Weekly or Daily Entry Screen, but sometimes you should use the Single Service Entry screen.

In InSyst, Day Treatment days or services are not associated with a particular staff member, and your system will not let you enter a staff person, but will let you enter a "0" for Staff Number.

Some Day Treatment programs can bill Medicare for incident-to services, and sometimes they are required to enter some outpatient-type services. These can be entered using the Single Service Entry Screen.

Using the Single Service Entry Screen for Inpatient and other 24 Hour Programs

Inpatient services are normally entered using the Daily Entry Screen, but sometimes you should use the Single Service Entry screen.

In InSyst, inpatient days or services are not associated with a particular staff member, and are assumed to be twenty-four hours in length. In most cases, your system will not let you enter a staff person, but will let you enter "0" for Staff Number. For duration, the system may make you enter 24 hours. You can enter staff numbers and other durations using the Single Service Entry Screen.

Daily Service Entry

You can enter services for all the clients in Inpatient and Residential programs using a single screen.

To do daily service entry:

1. Choose SERVICES from the Main Menu.
2. Choose DAILY from the Service Maintenance Menu to display the Daily Service Entry screen.
3. Fill in the fields at the top of the screen:
 - **Service Date:** The default is the current date, but you can also use a past date if there are services still to be entered for that day.



Note: It is best to use this screen is to enter services every day, but there may be times when you put off data entry and then enter several days at a time. ***When you do this, you must enter services chronologically.*** For example, if you need to enter data for Tuesday, March 1, Wednesday, March 2, and Thursday, March 3, then you must enter services for Tuesday first, then for Wednesday, then for Thursday. If you accidentally enter services for March 3, you cannot use this screen for March 1 and 2; you must use the Single Service Entry Screen.

- **RU:** Enter a Reporting Unit Number. If it can enter services using this Screen, the name of the program is displayed above the number.

When you press Return, the system lists all clients open on this date in this program, twenty-five clients at a time, in alphabetical order. If there are more than twenty-five clients, it displays the message: "Enter services for 25 clients. More clients may exist". After you enter the first twenty-five services, the cursor returns to the date field: press Return to accept the date and reporting unit for a second time (or more) and display the next 25 clients.

Depending on local policy, the program may display the screen without a column to enter time, as shown in Figure 5.3 below, or the screen with a column to enter time, as shown in Figure 5.4 below. Many residential programs use the screen without a column to enter time.



Note: Some Programs use the Weekly Service Entry Screen (covered below) instead of the Daily Service Entry Screen.

Daily Service Entry without Time

If local policy for this Reporting Unit is not to enter time, the screen is displayed as shown in Figure 5.3.

Daily Service Entry			
Service Date: 03/05/87		PSP ACUTE RU: 999908	
Client Number	Client Name	Opening Date	Procedure
500000065	FLASH, JACK	02-Mar-87	100
500000068	FRAUNING, SIDNEY	01-Mar-87	100
500000017	GLASS, BESSIE	03-Mar-87	100
500000002	GLASS, LES	02-Mar-87	100
500000082	GLASS, ZOOEY	05-Mar-87	100
500000070	JACKSON, CARL	01-Mar-87	100
500000055	KENT, CLARK	03-Mar-87	100
500000042	KIRK, JAMES	05-Mar-87	100
500000083	MARCH, AUGIE	04-Mar-87	100
500000071	ROURKE, HOWARD	(PENDING) 05-Mar-87	100
Form Ok Y/N: Confidential Information User: SMITH			
Please enter services for first 25 clients. More clients may exist.			

Figure 5.3: Daily Service Entry Screen without Time

To do daily service entry without time:

1. The Client Number, Name, and Opening Date is listed for each client. For each client, you must enter:
 - **Procedure Code:** Enter one of the twenty-four hour type procedures codes authorized by your local agency. A default procedure code is displayed if specified by local policy. The user can accept or change this default, or can enter "000" to skip this client; later, you can use the Single Service Entry Screen to record services for clients you skipped by entering "000".

2. After you have entered the last procedure code, enter “Y” at the Form OK prompt to save your entries.

If there are clients who have a Pending registration, they are noted, but you cannot enter services until the registration has been updated. For more information on Pending Registration, see the section on Client Registration in Chapter 2.

If there are clients whose services have already been entered for the Service Date (for example, through the Single Entry Screen), they are not listed on the screen. This screen does not allow duplicate services.

If you have skipped over clients during your data entry, you can redisplay them by pressing Num Lock (Gold)-E key to leave the screen. Then use the menu to display the screen, re-enter the date and reporting unit number, and the skipped clients are included in the list.

Daily Service Entry with Time

If local policy for this Reporting Unit is to enter time, the screen is displayed as shown in Figure 5.4.

To do daily service entry with time:

1. The Client Number, Name, and Opening Date is listed for each client, and you must enter:
 - **Procedure Code:** The screen displays the default procedure code for your program; no other entry is valid in this field. If your program can give clients two different kinds of service in one day—for example, a program that has an rehabilitative day care service and a vocational rehabilitative service—you can enter only one service for each client. You must use the Single Service Entry Screen to enter the second service.
 - **Duration:** Enter the number of hours and number of minutes the client attended the program.
 - **OK:** If the client was present, type “W” in this field to write the service. If the client was not present, or you wish to skip over the patient for now, type “S”.
2. After you have entered the last procedure code, enter “Y” at the Form OK prompt to save your entries.

Daily Service Entry					
Service Date: 03/10/87			PSP DAY RU: 999907		
Client Number	Client Name	Opening Date	Procedure	Duration	OK
500000060	CAUFIELD, HOLDEN	08-Mar-87	200	:	
500000069	FREUD, ANNA	08-Mar-87	200	:	
500000079	GLASS, BOO BOO (PENDING)	10-Mar-87	200	:	
500000040	GLASS, BUDDY	01-Mar-87	200	:	
500000078	GLASS, FRANCES (PENDING)	02-Mar-87	200	:	
500000081	GLASS, WAKER	02-Mar-87	200	:	
500000080	GLASS, WALT	05-Mar-87	200	:	
500000051	GORDON, FLASH	01-Mar-87	200	:	
500000041	GRUMPY, WILLIAM	02-Mar-87	200	:	
500000016	HENDERSON, EUGENE	01-Mar-87	200	:	

Form Ok Y/N: Confidential Information User: SMITH
Please enter services for first 25 clients. More clients may exist.


Figure 5.4: Daily Service Entry Screen with Time

Multiple Service Entry

The Multiple Service Entry Screen makes it easy to enter repetitive data—for example, to enter a number of services for one client or one staff person, or to enter all of one type of service for a day. It lets you create user-defined defaults that enter the repetitive data automatically.

To do multiple service entry:

1. Choose SERVICES from the Main Menu.
2. Choose MULTIPLE from the Service Maintenance Menu to display the Multiple Service Entry screen (Figure 5.10). This screen resembles the Single Service Entry screen.

 Tip: There is also a Multiple Service Entry screen without a column for Co-Staff, which is used like the screen described. Local Operations Staff decides which screen is displayed.

Multiple Service Entry							
							RU:
Client	Service Date	Proc	Staff	Dur	Co Staff	Group	Loc
Defaults							
	/ /			:			
	/ /			:			
	/ /			:			
	/ /			:			
	/ /			:			

Form Ok Y/N: Confidential Information User: LEON
Enter a reporting unit.

Figure 5.10: Multiple Service Entry Screen

3. To identify the program you are doing data entry for, enter:
 - **Reporting Unit:** Enter the Reporting Unit Number for the program, and the screen displays its name. (To enter services for a different program during the same session, press Num Lock (Gold)-P to move the cursor back the RU field, or press Num Lock (Gold)-R to restart the screen.)
4. The cursor moves to the Defaults box (Figure 5.11). Data you enter here will be repeated for every service you enter in the list below, until you enter new defaults. You can enter default data for one or more of the following fields:
 - **Client Number:** Enter a client number.

Multiple Service Entry							
RU: 99991 PSP OPT							
Client	Service Date	Proc	Staff	Dur	Co Staff	Group	Loc
	Defaults						
	12/22/93			:		1	1
	//			:			
	//			:			
	//			:			
	//			:			
	//			:			

Form Ok Y/N: Confidential Information User: LEON
Enter a reporting unit.

Figure 5.11: Multiple Service Entry Screen, Entering Defaults

- **Service Date:** Enter a date in the format MM/DD/YY.
- **Procedure:** Enter a three-digit procedure code. The field accepts only direct service procedure codes that are valid for your program.
- **Staff:** Enter a staff identification number. It will be validated for authorization to perform the services you enter.
- **Duration:** Enter the number of hours (up to 23) and minutes (up to 59) the staff person spent in this service. Counties set fixed time ranges for some services.
- **Co-Staff:** Enter the Co-staff identification number, if there is one. It will also be validated for authorization to perform the services you enter. (Your screen may not include this column.)
- **Number in Group:** Enter a number from 1 to 99 indicating how many *clients* were involved in the service. The default is “01” for an individual session.
- **Location:** Enter the location code, from the following options: 1 = Office, 2 = Field, 3 = Phone, 4 = Home, 5 = Satellite School, 6 = Satellite Clinic, 9 = Inpatient. Use the location where the most basic component of the service occurred. The default is “1” for office.

You **MUST** use location “9” entering Inpatient Services on the Multiple or Single Entry screens.

5. After you have entered defaults, enter “Y” at the Form OK prompt (Figure 5.12). The system validates data and prompts you to correct any errors.

Multiple Service Entry							
RU: 99991 PSP OPT							
Client	Service Date	Proc	Staff	Dur	Co Staff	Group	Loc
Defaults							
111111141	11/30/93	331	90000	01:00		1	1
<div style="border: 1px solid black; height: 50px; width: 100%;"></div>							
Form Ok Y/N: <input checked="" type="checkbox"/> Confidential Information User: LEON							

Figure 5.12: Multiple Service Entry Screen, Defaults Entered

6. Now, you can use the defaults to enter up to 20 services using the default information. The information you entered in the default box is displayed automatically as you enter data in the screen's service entry lines (Figure 5.13). You can modify the default data, if necessary, or just press Tab to accept the default value and move to the next field. At the end of each line you want to save, you must enter "W" to write the service.

Multiple Service Entry							
Assessment KIRK, JAMES							
RU: 99991 PSP OPT							
Client	Service Date	Proc	Staff	Dur	Co Staff	Group	Loc
Defaults							
111111141	AKIABANA, ALLADIN	11/30/93	331	90000	1 :	1	1
111111141	AKIABANA, ALLADIN	11/30/93	331	90000	1 :	1	1
111111141	AKIABANA, ALLADIN	11/30/93	331	90000	1 :	1	1
111111141	AKIABANA, ALLADIN	11/30/93	331	90000	1 :	1	1
111111141	AKIABANA, ALLADIN	11/30/93	331	90000	1 :	1	1
111111141	AKIABANA, ALLADIN	11/30/93	331	90000	1 :	1	1
111111141	AKIABANA, ALLADIN	11/30/93	331	90000	1 :	1	1
Form Ok Y/N: Confidential Information User: LEON							

Figure 5.13: Multiple Service Entry Screen, Data Entry Using Defaults

7. When you are done entering service data, press Return to move to the Form OK prompt and enter "Y" to accept the data. After the system validates the data, enter "Y" at the Confirm prompt to save the data.

The screen is cleared and the cursor moves back to the defaults line, so you can enter additional services or change the defaults.

You can imagine how useful this screen would be, for example, if you had to enter the same service for a client for a large number of service dates. You could just change the date and accept the defaults for all the other fields.

Maintaining Direct Services

To maintain direct services:

1. Choose SERVICES from the Main Menu.
2. Choose MANAGEMENT from the Service Maintenance Menu to display the Service Maintenance Selection Screen (Figure 5.15).
3. To display a list of services, enter:
 - **Client Number:** You must enter the number of the client who received the services.
 - **Reporting Unit:** To narrow the search, you may also enter a Reporting Unit number.
 - **Service Date:** To narrow the search, you may also enter a complete date or a partial date that is just a month or year. If you leave out the year, the system uses the current year.

Service Maintenance Selection

Client Number:

Reporting Unit:

Service Date:

Service Date	Reporting Unit	Procedure	Therapist	Time HH:MM	Service Cost
-	-				
-	-				
-	-				
-	-				
-	-				
-	-				

Confidential Information USER: SMITH

Figure 5.15: Service Maintenance Selection Screen

4. The Screen displays the Client Name and all the services for the client that match the criteria entered, listed with the most recent services first (Figure 5.16). Move through the list using the methods described in the section on Moving Through Lists in Chapter 1. Enter “L” (lookup), “D” (delete), or “U” (update) next to the services you want to maintain (Figure 5.17).

Service Maintenance Selection

Client Number: 500000045 JERSEY GLASS
 Reporting Unit:
 Service Date: / /

Service Date	Reporting Unit	Procedure	Therapist	Time HH:MM	Service Cost
31-Mar-87	PSP Crisis	999904 CRISIS	370 GORODEZKY	03:00	75.00
27-Mar-87	PSP Clinic	999909 INDIVIDUAL	340 KOSINSKY	01:00	50.00
26-Mar-87	PSP Clinic	999909 INDIVIDUAL	340 KOSINSKY	01:00	50.00
25-Mar-87	PSP Clinic	999909 INDIVIDUAL	340 KOSINSKY	01:00	50.00
22-Mar-87	PSP Crisis	999904 CRISIS	370 SMITH	03:00	75.00
19-Mar-87	PSP Clinic	999909 INDIVIDUAL	340 GORODEZKY	02:00	50.00

Confidential Information USER: SMITH

6 services displayed.

Figure 5.16: Service Maintenance Selection Screen with Services Listed

5. You may select up to 24 services. When you are done, press Return to display them for maintenance.

Service Maintenance Selection

Client Number: 500000045 JERSEY GLASS
 Reporting Unit:
 Service Date: / /

Service Date	Reporting Unit	Procedure	Therapist	Time HH:MM	Service Cost
U 31-Mar-87	PSP Crisis	999904 CRISIS	370 GORODEZKY	03:00	75.00
L 27-Mar-87	PSP Clinic	999909 INDIVIDUAL	340 KOSINSKY	01:00	50.00
D 26-Mar-87	PSP Clinic	999909 INDIVIDUAL	340 KOSINSKY	01:00	50.00
25-Mar-87	PSP Clinic	999909 INDIVIDUAL	340 KOSINSKY	01:00	50.00
22-Mar-87	PSP Crisis	999904 CRISIS	370 SMITH	03:00	75.00
19-Mar-87	PSP Clinic	999909 INDIVIDUAL	340 GORODEZKY	02:00	50.00

Confidential Information USER: SMITH

6 services displayed.

Figure 5.17: Service Maintenance Selection Screen, Selecting Services for Maintenance

Direct Service Lookup

If you entered “L” next to a service, it is displayed in the Service Look-up screen (Figure 5.18). The data cannot be changed.

Service Look-up											
JERSEY GLASS											
Client: 500000045		RU: 999909									
Last Changed: 03-Apr-87	Cost: \$50.00	Service Stamp: 26-MAR-87									
<table><tr><td colspan="2">Service Date: 03/26/87</td><td>Procedure: 340 INDIVIDUAL</td></tr><tr><td>Staff: 99999</td><td>Staff Duration: 1 :0</td><td>Number in Group: 1</td></tr><tr><td>Co-Staff: 0</td><td>Co-Staff Duration:</td><td>Location: 1</td></tr></table>			Service Date: 03/26/87		Procedure: 340 INDIVIDUAL	Staff: 99999	Staff Duration: 1 :0	Number in Group: 1	Co-Staff: 0	Co-Staff Duration:	Location: 1
Service Date: 03/26/87		Procedure: 340 INDIVIDUAL									
Staff: 99999	Staff Duration: 1 :0	Number in Group: 1									
Co-Staff: 0	Co-Staff Duration:	Location: 1									
Continue: Y Confidential Information USER: SMITH											
Press <Return> to continue or <N><Return> to process a new records.											

Figure 5.18: Service Look-up Screen

In addition to the data in the Service Maintenance selection screen, this screen displays:

- **Last Changed:** The date that the displayed record was last modified by a user or system program.
- **Cost:** The amount charged for the displayed service.
- **Service Stamp:** The date that the service was originally entered into the system.

Press Return to display the next record selected in the Service Maintenance Selection Screen. Type “N” and press Return to go back to the Service Maintenance Selection Screen.

Direct Service Delete

If you entered “D” next to a service, it is displayed in the Service Delete Screen (Figure 5.19). If you are authorized, you can enter “Y” at the Delete OK prompt and “Y” again at the confirm prompt to delete the service.

Service Delete											
JERSEY GLASS											
Client: 500000045		RU: 999909									
Last Changed: 03-Apr-87	Cost: \$50.00	Service Stamp: 26-MAR-87									
<table><tr><td colspan="2">Service Date: 03/26/87</td><td>Procedure: 340 INDIVIDUAL</td></tr><tr><td>Staff: 99999</td><td>Staff Duration: 1 :0</td><td>Number in Group: 1</td></tr><tr><td>Co-Staff: 0</td><td>Co-Staff Duration:</td><td>Location: 1</td></tr></table>			Service Date: 03/26/87		Procedure: 340 INDIVIDUAL	Staff: 99999	Staff Duration: 1 :0	Number in Group: 1	Co-Staff: 0	Co-Staff Duration:	Location: 1
Service Date: 03/26/87		Procedure: 340 INDIVIDUAL									
Staff: 99999	Staff Duration: 1 :0	Number in Group: 1									
Co-Staff: 0	Co-Staff Duration:	Location: 1									
Confirm: <input type="checkbox"/>	Confidential Information	USER: SMITH									
Are you sure you want to delete this service? (Y/N)											

Figure 5.19: Service Delete Screen

If a service has been posted in the billing system, the service may not be deleted unless you have the correct authorization. If this occurs, tell your supervisor.

Late Entry, and Supervisor Authorization

Late Entry and Supervisor Authorization are available in all three of the Maintenance Screens.

In the Update screen (Figure 5.21), Supervisor Authorization lets you change Service Date and Procedure.

In the Lookup and Update Screens, Supervisor Authorization lets you view these additional fields:

- **Service/Client Acct:** The Service and/or Client Account to which this service has been billed. Because of Client Merge Adjustments and other Client/Account Adjustments the service could be posted to an Account different from the Client's current Account.
- **Posting Status:** The service status within the billing system.
- **UR Status:** Whether or not this service has been authorized by a Utilization Review Action. Unauthorized services are "99".

Service Update Supervisor										
JERSEY GLASS										
Client: 500000045		RU: 999909								
Last Changed: 01-Apr-87 Cost: \$50.00 Service Stamp: 1-Apr-87 19:59:59.77										
<table border="1"> <tr> <td>Service Date: 03/18/87</td> <td>Procedure: 350 GROUP</td> </tr> <tr> <td>Staff: 99994</td> <td>Staff Duration: 3:0</td> </tr> <tr> <td>Co-Staff: 99996</td> <td>Co-Staff Duration: 3:0</td> </tr> <tr> <td>Number in Group: 8</td> <td>Location: 1</td> </tr> </table>			Service Date: 03/18/87	Procedure: 350 GROUP	Staff: 99994	Staff Duration: 3:0	Co-Staff: 99996	Co-Staff Duration: 3:0	Number in Group: 8	Location: 1
Service Date: 03/18/87	Procedure: 350 GROUP									
Staff: 99994	Staff Duration: 3:0									
Co-Staff: 99996	Co-Staff Duration: 3:0									
Number in Group: 8	Location: 1									
Service/Client Acct: 101001/535087	Original FRC: 31	Clearances: 0								
Posting Status: 5	Potent FRC: 31	Screen Source: 1								
UR Status: 0	Tried FRC: 0	CDS Date: 17-NOV-58								
UR Posted:	Actual FRC: 0									
Contact UID:	Episode Stamp: 3/31/87 09:13:59.35									
Form OK:	Confidential Information	USER: SMITH								
Supervisor authorization in effect.										

Figure 5.21: Service Update Screen, Supervisor Mode

- **UR Posted:** The date when Utilization Review action authorized the service. You can use this date to find the correct UR Action using the UR Status Inquiry Screen.
- **Component UID:** The identification number for this service if it is a contact-based service entered on the Component Service Entry Screen.
- **Original FRC:** All payor sources (Medicaid, Medicare, County, Insurance, Patient) that can be billed for this type of service in your system.
- **Potential FRC:** All payor sources (Medicaid, Medicare, County, Insurance, Patient) that can be billed for this particular service.
- **Tried FRC:** Payor sources (Medicaid, Medicare, County, Insurance, Patient) that you have tried to bill for the service.
- **Actual FRC:** Payor sources (Medicaid, Medicare, Short-Doyle, Insurance, Patient) that have actually been billed for the service.

- **Episode Stamp:** The Episode to which the Service is attached. Episodes can be positively identified by their Key Entry Date which is referred to here as Episode Stamp.
- **Clearances:** The Clearances Flagword in the database. This code will identify which systems have processed this service (POSTING, BILLING, CDS, UR, POE).
- **Screen Source:** The screen used to enter the service.
- **CDS Date:** The date the service was reported to the state.

In the Delete Screen, the Supervisor Authorization lets you delete a service that has been posted by the billing system. In this case, the Delete Screen deletes the service and also writes an adjustment to the client's account. Supervisor Authorization alone does not allow you to delete a service that has been claimed to a payor source: you must also have additional authorization.

To use late entry and Supervisor authorization:

1. Display the Service Lookup, Delete or Update screen.
2. Press Num Lock (Gold)-A to display the screen in Late Entry mode, to enter data for a time period whose deadline has passed.
3. Press Num Lock (Gold)-A a second time to display the screen in Supervisor mode.
4. Press Num Lock (Gold)-A a third time to display the screen in both Supervisor and Late Entry mode.

Chapter 5

Utilities

Use the Utilities Menu to send and receive e-mail, manipulate files, manage the printer queue, and maintain your logon password.

E-Mail



Tip: To learn more about Mail, at the **MAIL>** prompt, enter "Help" or press the Help key. The system displays a list of topics. At the Topic Prompt, enter the subject you want information on.

When you log on or when you are working on the computer system, your terminal may display a message such as, "You have 3 new Mail messages". This section covers the basics of sending, reading, and deleting Mail.

To use e-mail:

1. Choose UTILITIES from the Main Menu.
2. Choose MAIL from the Utilities Menu to display the prompt: "**MAIL>**".
3. At this prompt, enter the commands described below.

Reading Mail

To read mail:

1. Choose MAIL from the Utilities Menu.
2. Enter "Read" at the **MAIL>** prompt.

If you have new messages, they are displayed in the order they were received. If you have no new messages, old messages are displayed in the order they were stored. If a message is too long to display on one screen, press Return to display the next screen of text.

To read only one message:

1. Enter "Directory" or "Dir" at the **MAIL>** prompt. The system displays a list of messages: each has a number and the author, date, and subject of the message.
2. Enter the Read command with the number of the message you want to read. For example, enter "Read 2" to read message number 2.

Sending Mail

To send mail:

1. Enter “Send” at the **MAIL>** prompt. The system prompts you for the recipient and the subject and then lets you type the text, as follows:
2. At the TO prompt, type the Username of the person the message is going to. To send a message to more than one user, list multiple Usernames separated by commas. If you give a name that is not a Username (which might mean that you have misspelled the Username) the system displays an error message.
3. At the SUBJ prompt, type a title for the message, which will be listed in the recipient’s directory of Mail messages, and will help him/her to know what a message contains without reading the whole message.
4. The system displays the End Of File mark when you are using the editor. Type the message, and this line moves down to make room for what you type. The editor’s advanced features are discussed at the end of this chapter, but you can just type an e-mail message without using these features.
5. When you finish your message, type Control/Z. Then enter the word “Exit” to send the message, or the word “Quit” to discard the message. In either case, you are returned to the **MAIL>** prompt.

Replying to a Message

To reply to a message:

1. Enter “Reply” at the **MAIL>** prompt.
2. The system displays the editor to let you send the message. Use this the same way you do to send a message, as described above. The only difference is that you do not need to enter a recipient or subject.

Forwarding a Message

To forward the message you are reading to someone else:

1. Enter “Forward” at the **MAIL>** prompt.
2. The system displays the TO and SUBJ prompts. Use them to enter the recipient and subject, in the same way you do to send a message, as described above.

The whole message is sent, including the Header information (FROM, TO, and SUBJ) on the message you received, and the new Header information that you entered at the TO and SUBJ prompts.

Deleting a Message

To prevent your mailbox from getting crowded, you should delete mail messages as soon as you know you will not need them again.

To delete a message while you are reading it:

1. Enter “Delete” at the **MAIL>** prompt.

To delete a message you are not reading:

1. Enter “Directory” or “Dir” at the **MAIL>** prompt. The system displays a list of messages: each has a number and the author, date, and subject of the message.
2. Enter the Delete command with the number of the message you want to delete. For example, enter “Delete 2” to delete message number 2.

To delete a group of messages

1. Use the Select command with the /BEFORE or /SINCE qualifier to define a group of messages to delete, as follows:
 - **MAIL> SELECT /BEFORE= <date>** Selects those messages received before the date specified. Dates are specified like this: 2-FEB-85, 10-APR-85.)
 - **MAIL> SELECT /SINCE= <date>** Selects those messages received since the specified date.
2. After selecting a group of messages, enter the command DELETE /ALL qualifier to delete them.

For example, the two commands:

```
MAIL> SELECT /BEFORE=2-APR-97
```

```
MAIL> DELETE /ALL
```

delete all messages in the Mail file which were received before April 2, 1997.

Customizing Your Mailbox

You may find these commands helpful:

- **MAIL> SET PERSONAL_NAME <My Name>** Includes your personal name in all mail messages.
- **MAIL> SET COPY_SELF SEND REPLY FORWARD** Sends yourself a copy of the e-mail you send.
- **MAIL> SET CC_PROMPT** Displays a prompt that lets you send a CC to someone else.
- **MAIL> SET QUEUE <Printer Queue Name>** Lets you print your mail. Messages can be printed at your local clinic printer.

Passwords



Warning! If you log on to the system after your Password has expired you will be prompted for a new Password. If you bypass these prompts, you will not be able to log on again and will need call the Support Services at (510)567-8181

When you log on to the computer system, you must enter your Username and your Password. Passwords are vital to system security. Passwords expire every sixty days. Two or three days earlier, you will receiving warnings that your Password is about to expire.

To change your Password:

1. Choose UTILITIES from the Main Menu.
2. Choose PASSWORD from the Utilities Menu to display the Password Menu. This has only two options: Primary Password and Secondary Password.

You may have only one password, the Primary Password. Only change your Primary Password.

To change your Primary Password:

1. Choose PASSWORD from the Utilities Menu.
2. Choose Primary Password from the Password Menu.
3. The system displays the prompt: **CHANGE PRIMARY LOGON PASSWORD Allow system to generate a password? <yes>:** If you enter "Yes" or press Return, the system will asks you for your old password and then displays a list of nonsense words. You can use one of these options as your password or ask the system to generate another list of words. If you enter "No", the system lets you enter your own new password later.
4. The system displays the prompt: **old Password:** Enter your current Password.
5. The system displays the prompt: **New Password:** Enter your new password.
6. The system displays the prompt: **verification:** Re-type your new password. If this is not the same as the new password you entered originally, the system displays the message "password verification error", and returns you to the previous menu. To change your password, you must start again.

Passwords that you type are not displayed on the screen. After you change your password successfully, you are returned to the previous menu with no message.

To exit, type Control/Z at any time.

Printer and Queue Management

The Department assigns a name to the printer attached to your terminal, such as PQ_CHILDRENS, or SONOMA. The *queue* refers to the waiting line for the printer. If there are no items to be printed, the queue is empty. When you print an item, it is sent to your printer queue.

The Printer and Queue Management menu lets you manage print jobs.

Show Queue

To view the printer queue:

1. Choose UTILITIES from the Main Menu.
2. Choose PRINTER from the Utility Menu.
3. Choose SHOW from the Printer and Queue Management Menu to display the Show Queue Screen.
4. Use the field at the top to identify the queue:
 - **Queue Name:** Enter the name of a print queue, or press Return to select your print queue. The screen lists all the jobs waiting in your queue to be printed, in the order that they will be printed. (Figure 15.9).
5. After viewing the Queue, press Return to go back to the Printer and Queue Management Menu.

The statuses of jobs in the queue are:

- **Pending:** a job waiting to be printed.
- **Holding:** a job put on hold, or delayed. In some cases, a time can be associated with this status, *e.g.* "holding until 15-Jun-1987 02:00".
- **Printing:** a job now printing.
- **Paused:** a job delayed in the midst of printing.
- **Aborted:** a job deleted in the midst of printing.

Queues Utility

Show Queue

Queue Name: PQ_SUNSET

Terminal queue PRINT_TXA0, stopped, on TXA0:, mounted form DEFAULT,
 /BASE_PRIORITY=4/DEFAULT=(FEED,FORM=DEFAULT)/LIBRARY=SYSDEVCTL_LA100
 Lowercase/RETAIN=ERROR/SCHEDULE=(NOSIZE)/SEPARATE=(RESET=RESET_CONDENSE)

Jobname	Username	Entry Status
ACCOUNT_DOCUMENT	SMITH	1642 Pending
- ACMS	SMITH	1643 Pending
- DATABASE_OSCAR	SMITH	1644 Pending
- DX_REPORT	SMITH	1645 Pending
-		
-		

USER: SMITH

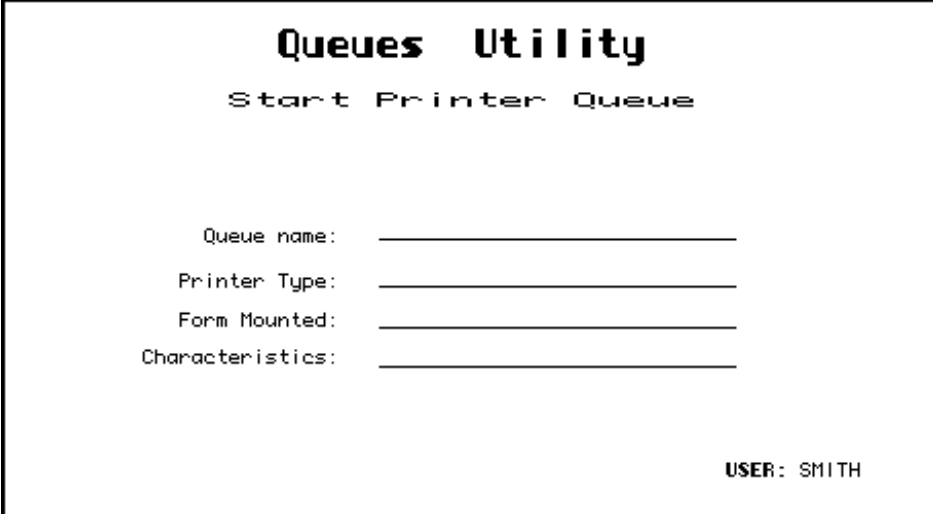
Figure 15.9: Show Queue Screen

Start Printer Queue

Use Start Printer Queue to print everything that waiting to be printed is printed, in the order that it is listed. If there is nothing to be printed, the printer readies itself.

To start the printer queue:

1. Choose UTILITIES from the Main Menu.
2. Choose PRINTER from the Utility Menu.
3. Choose START from the Printer and Queue Management Menu to display the Start Printer Queue screen (Figure 15.10). It has the following fields:



The screenshot shows a terminal window titled "Queues Utility" with the subtitle "Start Printer Queue". Below the title, there are four input fields with labels: "Queue name:", "Printer Type:", "Form Mounted:", and "Characteristics:". Each label is followed by a horizontal line for text entry. In the bottom right corner of the window, the text "USER: SMITH" is displayed.

Figure 15.10: Start Printer Queue Screen

- **Queue Name:** To start your printer, enter its name here, or just press Return to accept the default printer.
4. After you have indicated which printer you are using, the system displays the message shown in Figure 15.11. Make sure the paper is properly aligned. Then type "C" to Continue, "S" to Stop printing, or "R" to retry the page.

Queues Utility

Start Printer Queue

Queue name:

PQ_SUNSET

Printer Type:

DEC

Form Mounted:

DEFAULT

Characteristics:

Stop, Retry, Continue ?:

USER: SMITH

Check that the first print line is correct.

Figure 15.11: Start Printer Queue Screen Asks for Confirmation

The system continues printing all jobs on the queue.

To stop the printer:

1. Press the Spacebar key. Do not press Spacebar more than once. Do not turn off your printer. If several people are using the computer system, it can take a couple of minutes to stop printing.
2. After you have stopped the printer, the system displays a message asking what it should do with the current print job. You must choose one of the options within 30 seconds, or the system will continue printing the current job. You have the following options:
 - **Delay:** Moves the current job to the end of the queue. The next job begins printing. When the delayed job starts printing again, it begins on the page it was printing when the Delay command was given.
 - **Delete:** Deletes the current job without it being completed. The job is removed from the printer queue. The next job begins printing.
 - **Restart:** Restarts the current job at the beginning.
 - **Stop:** Stops the printer. When you start the printer again, the job continues printing.
 - **Wait:** Stops the printer temporarily.
 - **Continue:** Continues printing the current job to continue printing where it left off.

Restarting Stopped Print Jobs

If you use the Stop Command while printing a file, the printer is stopped and you are returned to the menu.

To continue printing that job:

1. Choose START from the Printer and Queue Management Menu.
2. Use the Start Printer Queue screen to start the printer, as described above.

3. The system displays the prompt: Stop before next entry. Press Return to accept the default “N” to print all jobs on the queue, or enter “Y” to print only this job and stop again. The system displays the prompt: Continue printing this entry. Press Return to continue the job.

Chapter 6

The Report Menu

Reports available are based on your User Authorizations and Program Site. The main two types of Reports available are Caseload and Service.

To run a report:

1. Choose REPORTS from the Main Menu.
2. Choose one of the submenu options of the Report Menu (Figure 17.1). As you can see, this menu lets you choose submenus with reports that are used for different purposes.

Selection	Description
ACCOUNT	Account Reports
CASELOAD	Caseload Reports
CLINICAL	Clinical Reports
INSURANCE	Insurance Reports
OPERATIONS	Special Reports For Operations
REVENUE	Revenue Reports
SERVICE	Service Reports

Figure 17.1: A Typical Report Menu

3. Choose the report from the submenu.

Your local Operations Staff controls how these submenus are organized, and you should ask them which menus you should have and where specific reports are.

The standard InSyst package includes these submenus for reports:

- **Caseload Reports:** contains reports on the management of the workload at the clinic level: staff caseload reports, clinic caseload reports, productivity reports, etc.
- **Service Reports:** contains staff productivity, service audit and program productivity reports.

Running Reports

Once you select a report from one of the Reports Menu, you may be prompted for information needed to produce the report. First the system will ask you questions about when the report will be created, or where the report will be printed. After that, it will ask you questions that control the content of the report, such as client number, reporting unit number, or date range that it will report on.

The following example (Figure 17.2) shows the dialogue similar to what you may see on the screen when you produce a report. The symbol <RETURN> means that pressing Return will accept the default answer to the question.

```

REPORT_PSP118
This report may only be run in "BATCH" mode
Specify when the report generation should start up:
time      = hold until specified date/time (DD-MMM-YYYY:HH:MM)
<RETURN>  = start up immediately
?
Specify print destination
NOPRINT   = do not print report (save as disk file)
queue name = name of printer queue (e.g.. COMMON)
<RETURN>  = print on the default printer: pq_myprinter
?
Specify number of copies
number    = number of times to print this report
<RETURN>  = 1 copy
?
Specify print setup/form
examples:
CONDENSE  = print 132 columns on 80 column paper
DRAFT     = print in normal 'FAST' mode
LETTER    = print in slower 'LETTER QUALITY' mode
<RETURN>  = print using the default
?
Send mail notification when report has completed?:
YES/NO    = send mail/do not send mail
<RETURN>  = do not send mail
?
Parameters selected:
Send to batch (release terminal)
, start report generation immediately
, use printer: CHANATE
, print 1 copy of report
, default printer form/setup
, no mail notification
OK to continue? <Y/N> Y
Enter Case Number for Episode History Report
? 10000015
Submitting report REPORT_PSP118 to run in batch mode on REPORT_MHS$BATCH
Job REPORT_PSP118 SMITH (queue REPORT_MHS$BATCH, entry 1) started on REPORT_MHS$BATCH
Jobname      Username      Entry  Blocks  Status
-----
REPORT_PSP118 SMITH
                SP_SNMHS_RPT      1      Executing
                On batch queue REPORT_MHS$BATCH
***** all done *****
press <RETURN> to return to Menu

```

Figure 17.2: Sample Report Dialogue



Note: You can terminate your report request at any time by typing Control/Z. The report dialogue will terminate itself if you do not respond after a short time. After you finished the dialog, the system displays all the options you have chosen and displays the prompt: OK to continue. Enter “Y” to produce the report, or if an option is incorrect, enter “N” to use the dialog again.

Report Dialog Questions

This section explains some questions the system may ask you. Which questions are displayed depends on the report and your level of authorization. Here is an explanation of some questions commonly used in dialogs.

Specify when the report generation should start up:

Enter a date and time, such as 19-SEP-1997:18 (September 19th at 6:00 PM), or just a time, such as 19 (today at 7:00 PM).

Some reports can be run at any time during the day. Some reports that use system resources heavily, can only be run in the evening or weekends. If you try to run a report immediately, the system may display a message with the times you can run the report.

Automatically distribute reports to program printers?:

Some reports are automatically sent to the correct printer for each reporting unit. Instead of the printer section of the dialogue show above, the dialog might say:

```
Automatically distribute reports to program printers?:  
YES/NO    = distribute reports/do not distribute reports  
<RETURN> = distribute reports?
```

If you select this option, the system will send the needed version of the report to the printer for each reporting unit.

Specify print destination

Enter a printer name. If the report is set up to print at the printer assigned to the person requesting it, this printer's name will be displayed as the default. If the report is set up to print at a specific printer, this question is not asked.

Specify number of copies

Enter a number to print more than one copy of the report.

Send mail notification when report has completed?:

Enter Yes to have the system send you e-mail message when the report is completed and ready for printing. Because you generally are only notified of mail messages when you log on, this option may not be effective for most users.

Enter the Reporting Unit Number for your program

Enter the six digit reporting unit number for your program, or enter "*" for all reporting units.

Enter a starting date for the report

For service and productivity reports, you enter a date range. At this prompt, enter the first day of the range.

Enter an ending date for the report

For service and productivity reports, you enter a date range. At this prompt, enter the last day of the range.

Enter a client number

For client oriented reports, enter the client number.

Report PSP 100

Primary Staff Caseload Report

Report Description:

This report shows all clients currently assigned to each clinician in a reporting unit. It lists client name and number, episode opening date, age, primary diagnosis, last service date, and primary physician if one has been assigned. It also lists other reporting unit and staff who have open episodes for each client. It provides a total count for each staff member.

Running the Report:

Operations Staff should use the Report menu to run this report regularly—monthly or more frequently as needed—and to send the output to each Reporting Unit's printer. If you do not receive this report regularly, contact your local Operations Staff.

Using the Report:

This report gives clinicians a list of all clients for whom they are primary therapist, with basic information on each client.

Review it for accuracy. It is very important to keep the clients' Primary Therapist up to date, so reports go to the correct staff person.

Output File:

MHS_OUTPUT_REPORT:

STAFF_CASELOAD_PSP100.*****_LIS.

Primary Staff Active Caseload

20-May-1993

Page 1

Report PSP 100
 Vineland County Mental Health
 VLD OUPATIENT (89027)

Caseload for: AGUILAR ADELIA
 Cases active as of: 3-Jan-1993

Client Name	Client Number	Opening Date	A G E	Primary Diagnosis	Last Service Date	Physician	Other RU Staff
RHONDA BARILETT	000987605	2/08/85	39	308.30	9/29/92	BRYSON	
PAULINE BERGGREN	009876284	5/27/92	64	295.62	2/04/93	DAVIS	
Also Open At: VLD CMT		5/20/92		295.62	11/03/92		AGUILAR
Also Open At: VLD ADT		6/04/92		295.62	1/28/93		MERCADO
LINDA BOEDING	000987787	8/18/92	53	295.92	9/18/92	BRYSON	
LOUISE BORDEN	000988871	5/07/91	25	296.60	1/22/93	STAFF	
Also Open At: VLD CMT		12/07/92		296.60	2/04/93		AGUILAR
ELLA BRINKLEY	000656648	10/06/92	47	296.60	1/20/93	BRYSON	
THOMAS BUTTERFIELD	000656614	7/02/92	45	296.45	2/24/93	BRYSON	
Also Open At: VLD CMT		11/01/92		296.45	11/02/92		AGUILAR
CHRIS CARADCHECK	006566642	10/01/90	25	295.32	7/09/92	WILLIAMS	
Also Open At: VLD CMT		1/03/91		295.32	1/04/93		AGUILAR
MARY COX	000656689	9/05/90	23	300.40	12/15/92	BRYSON	
FRANK EDDINGTON	000656566	8/11/92	32	295.32	1/13/93	BRYSON	
GARY FOWLER	007878003	3/06/90	30	295.30		DAVIS	
Also Open At: WSOP		3/18/92		296.44	9/11/92		NOLAN
JENNIFER GERBIL	000788534	2/04/92	25	295.90	1/18/93	STAFF	
MARY HARDESTY	008775670	12/06/90	42	295.70	2/09/93	WILLIAMS	
Also Open At: VLD CMT		12/06/90		295.70			AGUILAR
Also Open At: VLD ADT		1/28/91		295.32	1/25/93		MERCADO
IRIS HARRIS	000788895	8/31/90	77	290.20	11/17/92	STAFF	
Also Open At: CMT-SUPPORT		11/02/90		290.20			AGUILAR
Also Open At: VLD CMT		6/05/90		290.20	1/13/93		AGUILAR
JESUS HERRERA	008788254	9/08/92	35	295.92	2/18/93	BRYSON	
KIMBERLY HILLEY	008788083	6/29/92	30	296.46	2/11/93	DAVIS	
DAVID HUMPHRIES	000878833	3/01/89	51	296.40	1/12/93	STAFF	
Also Open At: VLD CMT		6/27/91		296.70	7/13/92		AGUILAR
Also Open At: VLD ADT		10/13/92		296.70	1/12/93		MERCADO

 Confidential Information

Report PSP 101

Service Detail Report

Report Description:

This report shows the services that each clinician provided during the specified time period. It lists clinician, clients served, client's address, Axis I, II and III diagnoses, procedures, service date, service date, service cost and treatment location. It is formatted differently for outpatient programs and inpatient programs.

Running the Report:

Operations Staff runs this report regularly, usually monthly, and enters the starting and ending dates that the report covers. The output for each Reporting Unit is sent to that Unit's printer.

Using the Report:

Review the report for accuracy, and make needed corrections. For example, update or enter new services if necessary.

This report can also be used by contract programs as a basis for tracking services and submitting monthly claims.

Output File:

MHS_OUTPUT_REPORT:

SERVICE_DETAIL_PSP101A.*****_LIS

(for Outpatient and Case Management programs)

SERVICE_DETAIL_PSP101B.*****_LIS

(for Day Treatment, Residential and Inpatient programs)

Service Detail Report For Mode 15, 50, and 60 Programs

21-Mar-1994

Page 1

Report PSP101A
 PSP Outpatient (99991)
 From: 1-Jan-1993
 To: 31-Dec-1993

Primary Therapist: ARNOLD SMITH

Client Name: RUIH TESTA	Birth Date: 12-Dec-1935	Sex: F	Ethnicity: White
Case #: 1000013	SSN: 113456789	Account Number: 0	
Medicaid :	Address: 1700 BROADWAY #800	OAKLAND, CA 94612-2116	

Diagnosis codes for the following services: Dx I: 296.44 Bipolar Disorder, Manic w/Psych
 Dx II: V71.09 No current diagnosis Dx III: A Unknown label

Service Date	Proc code	Service Procedure	Primary Staff	Primary Staff Time	Co - Staff	Co Staff Time	Cost of Service	Tnt Loc
10/19/93	351	CM Monitoring w/Coll	SMITH (55555)	03:00	(0)	00:00	96.00	1

Sub Total For RUIH TESTA = 1

96.00

Client Name: RYDER TESTB	Birth Date: 15-Aug-1948	Sex: M	Ethnicity: Other Spanish
Case #: 1000018	SSN: 118901234	Account Number: 0	
Medicaid :	Address: 1700 BROADWAY #800	OAKLAND, CA 94612-2116	

Diagnosis codes for the following services: Dx I: 307.60 functional enuresis
 Dx II: 315.90 SPECIFIC DEV'TAL DISORDER NOS Dx III: Unknown label

Service Date	Proc code	Service Procedure	Primary Staff	Primary Staff Time	Co - Staff	Co Staff Time	Cost of Service	Tnt Loc
10/19/93	351	CM Monitoring w/Coll	SMITH (55555)	03:00	(0)	00:00	96.00	1

Sub Total For RYDER TESTB = 1

96.00

Client Name: BLABBER TESTC	Birth Date: 16-Aug-1942	Sex: M	Ethnicity: White
Case #: 1000020	SSN: 111569841	Account Number: 0	
Medicaid :	Address: 1700 BROADWAY #800	OAKLAND, CA 94612-2116	

Diagnosis codes for the following services: Dx I: 307.23 movement disorder - Tourette's
 Dx II: 315.90 SPECIFIC DEV'TAL DISORDER NOS Dx III: Unknown label

Service Date	Proc code	Service Procedure	Primary Staff	Primary Staff Time	Co - Staff	Co Staff Time	Cost of Service	Tnt Loc
10/19/93	351	CM Monitoring w/Coll	SMITH (55555)	03:00	(0)	00:00	96.00	1

Sub Total For BLABBER TESTC = 1

96.00

 Confidential Information

Service Detail Report For Mode 10 and Mode 5 Programs

21-Mar-1994

Page 2

Report PSP101B

Mythic County

Harbor View Day Care Center (99996)

From: 1-Jan-1993

To: 31-Dec-1993

Client Name: GIBREEL TESID

Birth Date: 7-Oct-1948

Sex: M

Ethnicity: Other Asian

Case #: 1000036

SSN: 210987654

Account Number: 1055

Medicaid :

Address: 1700 BROADWAY

#800

OAKLAND, CA 94612-2116

Diagnosis codes for the following services:

Dx I: 295.10

Schizophrenia, Disorganized

Dx II: V71.09 No current diagnosis

Dx III:

Unknown label

Date		Service Procedure	Hours	Cost of Service	Tnt Loc
10/14/93	291	DAY TREATMENT DAY	04:00	75.00	1
10/18/93	291	DAY TREATMENT DAY	06:00	75.00	1
10/19/93	291	DAY TREATMENT DAY	08:00	75.00	1
10/20/93	291	DAY TREATMENT DAY	08:00	75.00	1
10/21/93	291	DAY TREATMENT DAY	04:00	75.00	1
10/25/93	291	DAY TREATMENT DAY	08:00	75.00	1
10/26/93	291	DAY TREATMENT DAY	00:08	75.00	
Sub Total For GIBREEL TESID = 7				525.00	

 Confidential Information

Report PSP 121

Program Caseload Report

Report Description:

This report lists all the clients with open cases for each reporting unit. It includes client number, name, opening date, age, primary diagnosis, and primary staff.

Running the Report:

Operations Staff runs this report monthly or more frequently if needed. It is routed to each Reporting Unit's printer. If you do not receive this report, contact local Operations Staff.

Users can also run this report using the Report menu.

It prompts you to enter a Reporting Unit (or enter "*" for all units) and to enter a target date. The report finds all clients open on the target date.

Using the Report:

The report is used as a management tool by program managers, to balance the work among staff or to quickly review the types of client being served. It is also used to direct the distribution of other reports, such as the Utilization Review reports.

The report might also show that it is necessary to improve the data entry process. Any duplicate clients should be reported to Operations Staff.

Output File:

MHS_OUTPUT_REPORT:

PROGRAM_CASELOAD_PSP121.*****_LIS

Program Caseload

25-Dec-1992

Page 1

Report PSP121
 Day Treatment (99433)
 Cases active as of: 25-Dec-1992

Client Name	Client Number	Opening Date	A G E	Primary Diagnosis	Primary Staff	Physician	Account Status
SHEILA A CLIENT	90200122	7/24/92	21	295.92	ANDERSON	MILLER	748828
PHILLIP B CLIENT	90200192	12/01/86	21	296.70	ARGOINT	ROBERTSON	752885
JAMES C CLIENT	90000015	7/01/92	26	295.40	ARGOINT	ROBERTSON	756104
MICHAEL D CLIENT	90000001	9/01/92	31	295.35	ANDERSON	MILLER	1029321
MAXINE CLIENT	95700048	9/11/92	28	295.92	ANDERSON	MILLER	1033654
IRENE CLIENT	90000045	9/01/92	22	295.40	ANDERSON	STAFF	1038133
BERNADETTE CLIENT	91900031	9/01/86	38	295.90	ARGOINT	ROBERTSON	1010425
ANDREW CLIENT	90000070	9/24/92	55	296.60	ANDERSON	MILLER	756612
MIKE CLIENT	02390198	7/10/92	22	302.20	ARGOINT	STAFF	0
JOSEPH CLIENT	00390027	4/10/86	57	295.92	ARGOINT	MILLER	320539
LESTER CLIENT	00290094	9/01/92	31	V71.09	ANDERSON	ROBERTSON	0
JAMES CLIENT	00390044	2/03/86	28	309.00	ARGOINT	MILLER	1041720
JENNIFER CLIENT	00190684	11/09/92	22	V71.09	ANDERSON	ROBERTSON	0
BEVERLEY CLIENT	01890045	10/23/85	43	309.00	ARGOINT	MILLER	279031
JULIE CLIENT	05490041	9/15/92	18	296.30	ANDERSON	MILLER	1022032
SAMUEL CLIENT	00290089	6/01/92	42	V71.09	ARGOINT	MILLER	545379
JAMIE CLIENT	50090051	9/15/92	22	295.33	ANDERSON	STAFF	278568
ESTHER CLIENT	02190047	7/01/86	52	296.34	ARGOINT	ROBERTSON	272225
THOMAS CLIENT	00290184	10/29/92	35	V71.09	ANDERSON	STAFF	275543
PHILLIP CLIENT	07990051	10/20/92	25	V71.09	ANDERSON	ROBERTSON	1026089
DANIEL CLIENT	90200012	9/01/92	30	295.70	ANDERSON	STAFF	1026950
DORIS CLIENT	90000014	8/28/85	51	295.92	ARGOINT	MILLER	434453
ISMAEL CLIENT	90100188	10/23/85	35	295.32	ARGOINT	MILLER	419336
LAWRENCE CLIENT	92300056	3/02/92	31	295.92	ARGOINT	ROBERTSON	726227
RICK CLIENT	90000047	8/05/92	31	295.90	ANDERSON	MILLER	1021222
GARY CLIENT	96000080	8/06/92	20	309.00	ANDERSON	ROBERTSON	0
JEFFREY CLIENT	90200094	9/11/92	27	V71.09	ANDERSON	MILLER	728083
ARIURO CLIENT	93400082	10/23/92	24	V71.09	ANDERSON	MILLER	733184
JOANNE CLIENT	90200199	7/01/86	44	295.70	ARGOINT	ROBERTSON	647054
STEFANIE CLIENT	90900015	4/01/92	21	799.90	ARGOINT	MILLER	1000268
ROSEMARY CLIENT	90200060	7/15/86	45	295.62	ARGOINT	ROBERTSON	459088
LINDA CLIENT	97400024	3/01/92	38	295.95	ARGOINT	STAFF	0
ROGER CLIENT	90200070	6/01/92	22	296.60	ARGOINT	STAFF	455572
PAULINE CLIENT	90000073	12/10/92	51	V71.09	ANDERSON	ROBERTSON	1012258
DONNA CLIENT	95700065	9/11/92	30	295.70	ANDERSON	ROBERTSON	1026356
HORTENSIA CLIENT	90100185	4/30/92	57	295.32	ARGOINT	STAFF	604091
SAMUEL CLIENT	90300033	5/22/86	32	295.32	ARGOINT	MILLER	1016237
MANUEL CLIENT	90000032	7/29/92	21	295.40	ANDERSON	MILLER	463778
DENNIS CLIENT	00100691	8/07/92	36	295.30	ANDERSON	ROBERTSON	1007220

TOTAL OPEN CASES FOR Day Treatment

39

 Confidential Information

Report PSP 131

Reporting Unit Service Summary by Provider

Report Description:

This report shows the total services by type for the specified reporting unit during the specified time period. This is a single-reporting-unit version of Report PSP 130. It generates a comma-delimited file as well as a printed report.

Running the Report:

Use the Report menu to run this report as needed. You are prompted to enter the reporting unit, time period, and printer. Enter Reporting Unit number or "*" for all Reporting Units.

Using the Report:

Use this report as a planning tool, to audit service entry and program productivity. If your county uses Management by Objectives, it can use this as a monthly report of how the program is meeting its objectives. You can download the comma-delimited file to a PC for further analysis.

Technical Notes:

This report does count services with a 00 Service Function Code, representing No Shows and other non-standard services. Therefore the total of services in this report will not match totals in Reports 126, 142, or 206, which do not count services with a 00 Service Function Code.

This report will not match totals with Report PSP 117. Report PSP 117 counts the services and/or groups provided by each staff person. This report counts total client services for the reporting unit.

This report does not count 900 series adjustment procedures.

Output File:

MHS_OUTPUT_REPORT:

```
RU_SERVICE_SUMMARY_PSP131.*****_LIS  
REPORT_PSP131_FILE.LIS
```

Service Summary
Direct and Indirect Services16-Dec-1992
Page 1Report PSP131
Reporting Period: From 01-Nov-1992 to 30-Nov-1992

Service Site	Service Total	Total Hours
WESTSIDE OUTPATIENT (832021)		
310 Collateral	10	13.80
330 Assessment	84	123.40
340 Individual	318	330.50
350 Group	176	581.50
360 Medication	218	102.80
Sub Total for Direct Services	806	1152.10
421 Community Client Contact	3	3.33
Sub Total for Indirect Services	3	3.33
Total Services for 832021	809	1155.43

Report MHS 442

Service Audit Report

Report Description

This shows all services (based on services stamp) entered into the computer for each clinician for the day of the report run. Information includes service date, clinician, client served, procedure, number in group, service duration, service location, and co-staff. “# in Group” and Co-staff” contain an asterisk for non-group procedures.

How to Get the Report

The report generated and queued to your printer automatically the day after services are input.

How to Use the Report

Review for accuracy. The report is intended as a data entry management tool to assist a manager in making sure all the services performed in a clinic are being entered on a timely basis. If service entry is abnormally low, an audit of the data collection and service entry process may be needed. If there is incorrect information, episode and service updating may be required.

File Directory: MHS_OUTPUT_REPORT

File Name: SERVICE_AUDIT_MHS442.*****_LIS

Service Audit Report

Page 1

REPORT MHS442

Provider: OAKLAND MHS (89681)

Input Date: 10-Mar-2000

Service Audit Date: 8-Mar-2000

Primary Therapist: ALICE HAROLD

Staff #: 1028

Case #	Client Name	Procedure	#Group	HH:MM	Location	Co-staff
0747292001	HEWLETT JOHN	130	**	24:00	9	*****

Service Audit Date: 9-Mar-2000

Primary Therapist: MARY SMITHSON

Staff #: 1238

Case #	Client Name	Procedure	#Group	HH:MM	Location	Co-staff
005359901	HALSON SANDRA	131	**	24:00	9	*****
003725401	SMITH JEFF	131	**	24:00	9	*****

Chapter 7

Utilization Control

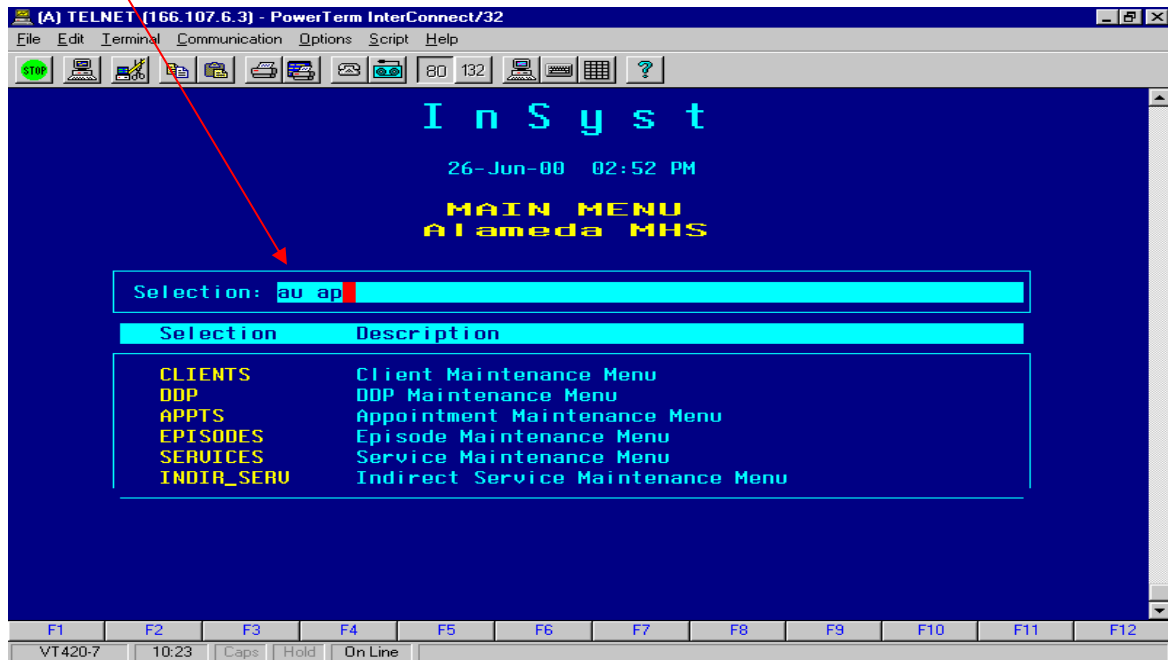
Utilization Control Procedures for All Mental Health Providers

Enter Plan Approval (TPR)

Utilization Control regulations require a treatment plan completed within thirty days from the episode opening date.

When the treatment plan is completed go to the Approval Screen and enter that the treatment plan has been done:

From Main Menu type AU AP, press return-



Enter Plan Approval (TPR)-continued

At UC Approval Screen:

Enter Staff #

Enter "A" to approve and "S" to skip

Reporting Unit: 99991 WEST MHS

Client Number	Client Name	Opening Date	Primary Therapist	Primary DX	Staff	OK
75053807	TESTCASE, C	26-JUN-2000	DEFAULT	309.9	1221	A

Form Ok Y/N:

Confidential Information User: SMITH_P

F1 F2 F3 F4 F5 F6 F7 F8 F9 F10 F11 F12

VT420-7 23:15 Caps Hold On Line

Enter Y and press Return

6 Month Review Cycles:

TPR/Chart Reviews are required every six months based on the month of episode opening. Upon completion of the TPR/Chart Review an action is entered in INSYST (Note: the action can be input up to two weeks prior to the end of the cycle):

From Main Menu type "AU MA" press return-

Enter AU MA and press Return

Selection	Description
CLIENTS	Client Maintenance Menu
DDP	DDP Maintenance Menu
APPTS	Appointment Maintenance Menu
EPISODES	Episode Maintenance Menu
SERVICES	Service Maintenance Menu
INDIR_SERV	Indirect Service Maintenance Menu

From Utilization Control Maintenance Screen type NUM LOCK (GOLD) I (for insert)-

Action	Start	End	Action	Appr	Used	Staff	UC Period	Start	End
26-JUN-00	25-JUN-00	OPT Init		24	0	1221	01-JUN-00	30-NOV-00	
26-JUN-00	30-NOV-00	OPT Reg Ext		48	0	1221	01-JUN-00	30-NOV-00	

Confidential Information USER: SMITH_P

2 records displayed. Last page displayed.

6 Month Review Cycles:-continued

For 6 Month Cycle Reviews done by 1st day of new cycle:

At Outpatient UC Entry Screen enter:

Enter Reporting Unit #,
Enter Client #
Enter Effective Date

Reporting Unit: 99991 WEST MHS

Client: 75053807 CINDY U TESTCASE Opened: 26-JUN-2000

Effective: 10/1 /2000

Approved: 0 Authorized By: 1221

Select UC ACTION

- ☒ OPT Treatment Review
- ☐ OPT Interim
- ☐ OPT Plan Extension
- ☐ OPT Retro Crisis
- ☐ OPT Regular Extension
- ☐ OPT Retro Disallow
- ☐ OPT PreAuthorization

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ALWAYS enter "0"

Enter approving Clinician #

ALWAYS mark "OPT Treatment Review" with an "X"

6 Month Review Cycles:-continued

For *Late* 6 Month Cycle Reviews:

For Cycle Reviews *not* completed by the 1st day of new cycle period, use the date approved by the committee

Outpatient UC Entry

Reporting Unit: 99991 WEST MHS

Client: 25853667 SINDY U TESTCASE Opened: 26-JUN-2000

Effective: 10/12/2000

Approved: 0 Authorized By: 1221

Select UC ACTION

<input checked="" type="checkbox"/> OPT Treatment Review	OPT Regular Extension
OPT Interim	OPT Retro Disallow
OPT Plan Extension	OPT PreAuthorization
OPT Retro Crisis	

Confidential Information USER: SMITH_P

VT420-7 15.4 Caps Hold On Line

Start Inbox - Microsoft Outlook Microsoft Word - UC MH ... (A) TELNET (166.10... FullShot 97 3:13 PM

Appendix A

Special Key Sequences

The Num Lock (Gold) key sequences, Control key combinations, and Special Function keys used in InSyst are listed below.

Num Lock (Gold) Key Sequences

The Num Lock (Gold) Key is the PF1 Key on Digital Equipment Corporation terminals, and is the NumLock key on PCs. Other keys may be used on other terminals.

To use Num Lock (Gold) Key sequences, press the Num Lock (Gold) Key, release it, then press the next key. For example, if the instructions say you should press Num Lock (Gold)-E, it means you should press the Num Lock (Gold) key, release it, and then press “E” and release it.

Num Lock (Gold) Key sequences used in InSyst are:

- **Num Lock (Gold)-A: (All / Authorize)** gives you additional functions in entry and maintenance screens, such as All Clients/Services, Supervisor Mode and Late Entry Mode.
- **Num Lock (Gold)-B: (Backup)** makes the screen page back one page, to display records in a list that cannot fit on a single screen.
- **Num Lock (Gold)-C: (Client #)** moves the cursor to the Client Number field on some screens.
- **Num Lock (Gold)-D: (Down Two)** makes the screen page forward two pages, to display records in a list that cannot fit on a single screen.
- **Num Lock (Gold)-E: (Exit)** exits from the current screen and returns to the menu, without saving data entered in the screen, or returns to the previous menu.
- **Num Lock (Gold)-F: (Face Sheet)** request the menu to select Face Sheets, then press F6 to complete the request.
- **Num Lock (Gold)-H: (Home)** moves the cursor to its home position on the current screen, the field on the screen where data entry began.
- **Num Lock (Gold)-I: (Insert)** inserts a new record when you are using the Maintenance Selection screens.
- **Num Lock (Gold)-M: (More)** makes the screen page forward one page, to display records in a list that cannot fit on a single screen.
- **Num Lock (Gold)-R: (Refresh)** restarts the screen, with no values entered. This is useful if you made mistakes in data entry.
- **Num Lock (Gold)-S: (Save and Exit)** leaves the current data entry or maintenance screen, and saves the data entered. This sequence retains the current Client and Reporting Unit, so it automatically displays it in the next screen you use.
- **Num Lock (Gold)-U: (Up Two)** makes the screen page back two pages, to display records in a list that cannot fit on a single screen.

Control Key Combinations

To use Control Key combinations, continue holding down the Ctrl Key while you press the next key in the sequence. For example, if the instructions say to press Control/W, you should press the Ctrl Key, keep holding it down while you press “W”, and then release both.

Control Key combinations used in InSyst are:

- **Control/H: (Hop Back)** moves the cursor back one field.
- **Control/J: (Junk)** clears a field.
- **Control/W:** repaints or refreshes the screen. Use it if the screen display has been disturbed.
- **Control/Z:** ends an editing session in the Mail, Files, and Client Message utilities.

County Codes

Alameda	01	Placer	31
Alpine	02	Plumas	32
Amador	03	Riverside	33
Butte	04	Sacramento	34
Calaveras	05	San Benito	35
Colusa	06	San Bernardino	36
Contra Costa	07	San Diego	37
Del Norte	08	San Francisco	38
El Dorado	09	San Joaquin	39
Fresno	10	San Luis Obispo	40
Glenn	11	San Mateo	41
Humboldt	12	Santa Barbara	42
Imperial	13	Santa Clara	43
Inyo	14	Santa Cruz	44
Kern	15	Shasta	45
Kings	16	Sierra	46
Lake	17	Siskiyou	47
Lassen	18	Solano	48
Los Angeles	19	Sonoma	49
Madera	20	Stanislaus	50
Marin	21	Sutter	51
Mariposa	22	Tehama	52
Mendocino	23	Trinity	53
Merced	24	Tulare	54
Modoc	25	Tuolumne	55
Mono	26	Ventura	56
Monterey	27	Yolo	57
Napa	28	Yuba	58
Nevada	29	Unknown California County	99
Orange	30	Not California County	00

State Codes

Alabama	AL	Nebraska	NE
Alaska	AK	Nevada	NV
Arizona	AZ	New Hampshire	NH
Arkansas	AR	New Jersey	NJ
California	CA	New Mexico	NM
Colorado	CO	New York	NY
Connecticut	CT	North Carolina	NC
Delaware	DE	North Dakota	ND
District of Columbia	DC	Ohio	OH
Florida	FL	Oklahoma	OK
Georgia	GA	Oregon	OR
Hawaii	HI	Pennsylvania	PA
Idaho	ID	Rhode Island	RI
Illinois	IL	South Carolina	SC
Indiana	IN	South Dakota	SD
Iowa	IA	Tennessee	TN
Kansas	KS	Texas	TX
Kentucky	KY	Utah	UT
Louisiana	LA	Vermont	VT
Maine	ME	Virginia	VA
Maryland	MD	Washington	WA
Massachusetts	MA	West Virginia	WV
Michigan	MI	Wisconsin	WI
Minnesota	MN	Wyoming	WY
Mississippi	MS		
Missouri	MO	Unknown State	UN
Montana	MT	Not US State	00

Country Codes

AFGHANISTAN	AF	BENIN	BN
ALBANIA	AL	BERMUDA	BD
ALGERIA	AG	BHUTAN	BT
AMERICAN SAMOA	AQ	BOLIVIA	BL
ANDORRA	AN	BOSNIA/HERZEG OVINA	BK
ANGOLA	AO	BOTSWANA	BC
ANGUILLA	AV	BOUVET ISLAND	BV
ANTARCTICA	AY	BRAZIL	BR
ANTIGUA AND BARBUDA	AC	BRITISH INDIAN OCEAN TERRITORY	IO
ARGENTINA	AR	BRITISH VIRGIN ISLANDS	VI
ARMENIA	AM	BRUNEI	BX
ARUBA ISLANDS	AA	BULGARIA	BU
ASHMORE/CAR TIER ISLANDS	AT	BURKINA	UV
AUSTRALIA	AS	BURMA	BM
AUSTRIA	AU	BURUNDI	BY
AZERBAIJAN	AJ	CAMBODIA	CB
BAHAMAS	BF	CAMEROON	CM
BAHRAIN	BA	CANADA	CA
BAKER ISLAND	FQ	CAPE VERDE	CV
BANGLADESH	BG	CAYMAN ISLANDS	CJ
BARBADOS	BB	CENTRAL AFRICAN REPUBLIC	CT
BASSAS DA INDIA	BS	CHAD	CD
BELARUS	BO	CHILE	CI
BELGIUM	BE	CHINA	CH
BELIZE	BH	CHRISTMAS ISLAND	KT
CLIPPERTON	IP	EUROPA ISLAND	EU
COCOS (KEELING) ISLANDS	CK	FALKLAND ISLANDS/MALVIN AS	FK
COLOMBIA	CO	FAROE ISLANDS	FO

COMOROS	CN	FEDERATED STATES OF MICRONESIA	FM
CONGO	CF	FIJI	FJ
COOK ISLANDS	CW	FINLAND	FI
CORAL SEA ISLANDS	CR	FRANCE	FR
COSTA RICA	CS	FRENCH GUIANA	FG
COTE D'IVOIRE	IV	FRENCH POLYNESIA	FP
COUNTRY NOT LISTED	00	FRENCH SOUTHERN/ANTARCTIC	FS
CROATIA	HR	GABON	GB
CUBA	CU	GAMBIA	GA
CYPRUS	CY	GAZA STRIP	GZ
CZECH REPUBLIC	EZ	GEORGIA	GG
DENMARK	DA	GERMANY	GM
DJIBOUTI	DJ	GHANA	GH
DOMINICA	DO	GIBRALTAR	GI
DOMINICAN REPUBLIC	DR	GLORIOSO ISLANDS	GO
ECUADOR	EC	GREECE	GR
EGYPT	EG	GREENLAND	GL
EL SALVADOR	ES	GRENADA	GJ
EQUATORIAL GUINEA	EK	GUADELOUPE	GP
ERITREA	ER	GUAM	GQ
ESTONIA	EN	GUATEMALA	GT
ETHIOPIA	ET	GUERNSEY	GK
GUINEA	GV	KAZAKHSTAN	KZ
GUINEA-BISSAU	PU	KENYA	KE
GUYANA	GY	KINGMAN REEF	KQ
HAITI	HA	KIRIBATI	KR
HEARD ISLAND/MCDONALD ISLANDS	HM	KOREA DEMOCRATIC REPUBLIC	KN
HONDURAS	HO	KOREA, REPUBLIC OF	KS
HONG KONG	HK	KUWAIT	KU
HOWLAND	HQ	KYRGYZSTAN	KG

ISLAND			
HUNGARY	HU	LAOS	LA
ICELAND	IC	LATVIA	LG
INDIA	IN	LEBANON	LE
INDONESIA	ID	LESOTHO	LT
IRAN	IR	LIBERIA	LI
IRAQ	IZ	LIBYA	LY
IRELAND	EI	LIECHTENSTEIN	LS
ISRAEL	IS	LITHUANIA	LH
ITALY	IT	LUXEMBOURG	LU
JAMAICA	JM	MACAU	MC
JAN MAYEN	JN	MACEDONIA	MK
JAPAN	JA	MADAGASCAR	MA
JARVIS ISLAND	DQ	MALAWI	MI
JERSEY	JE	MALAYSIA	MY
JOHNSTON ATOLL	JQ	MALDIVES	MV
JORDAN	JO	MALI	ML
JUAN DE NOVA ISLAND	JU	MALTA	MT
MARSHALL ISLANDS	RM	NIUE	NE
MARTINIQUE	MB	NORFOLK ISLAND	NF
MAURITANIA	MR	NORTHERN MARIANA ISLANDS	CQ
MAURITIUS	MP	NORWAY	NO
MAYOTTE	MF	OMAN	MU
MEXICO	MX	PAKISTAN	PK
MIDWAY ISLANDS	MQ	PALAU	PS
MOLDOVA	MD	PALMYRA ATOLL	LQ
MONACO	MN	PANAMA	PM
MAN, ISLE OF	IM	NIGERIA	NI
MONGOLIA	MG	PAPUA NEW GUINEA	PP
MONTENEGRO	MW	PARACEL ISLANDS	PF
MONTSERRAT	MH	PARAGUAY	PA
MOROCCO	MO	PERU	PE
MOZAMBIQUE	MZ	PHILIPPINES	RP

NAMIBIA	WA	PITCAIRN ISLANDS	PC
NAURU	NR	POLAND	PL
NAVASSA ISLAND	BQ	PORTUGAL	PO
NEPAL	NP	PUERTO RICO	RQ
NETHERLANDS	NT	QATAR	QA
NETHERLANDS	NL	REUNION	RE
NEW CALEDONIA	NC	ROMANIA	RO
NEW ZEALAND	NZ	RUSSIA	RS
NICARAGUA	NU	RWANDA	RW
NIGER	NG	SAN MARINO	SM
SAO TOME AND PRINCIPE	TP	SWITZERLAND	SZ
SAUDI ARABIA	SA	SYRIA	SY
SENEGAL	SG	TAIWAN	TW
SERBIA	SR	TAJIKISTAN	TI
SEYCHELLES	SE	TANZANIA	TZ
SIERRA LEONE	SL	THAILAND	TH
SINGAPORE	SN	TOGO	TO
SLOVAKIA/SLOVENIA	LO	TOKELAU	TL
SOLOMON ISLANDS	BP	TONGA	TN
SOMALIA	SO	TRINIDAD AND TOBAGO	TD
SOUTH AFRICA	SF	TROMELIN ISLAND	TE
SOUTH GEORGIA/SANDWICH ISLANDS	SX	TUNISIA	TS
SPAIN	SP	TURKEY	TU
SPRATLY ISLANDS	PG	TURKMENISTAN	TX
SRI LANKA	CE	TURKS AND CAICOS ISLANDS	TK
ST. HELENA	SH	TUVALU	TV
ST. KITTS AND NEVIS	SC	UGANDA	UG
ST. LUCIA	ST	UKRAINE	UP
ST. PIERRE AND MIQUELON	SB	UNITED ARAB EMIRATES	TC

ST. VINCENT/THE GRENADINES	VC	UNITED KINGDOM	UK
SUDAN	SU	UNITED STATES	US
SURINAME	NS	URUGUAY	UY
SVALBARD	SV	UZBEKISTAN	UZ
SWAZILAND	WZ	VANUATU	NH
SWEDEN	SW	VATICAN CITY	VT
VENEZUELA	VE	WESTERN SAMOA	WS
VIETNAM	VM	YEMEN	YM
VIRGIN ISLANDS	VQ	ZAIRE	CG
WAKE ISLAND	WQ	ZAMBIA	ZA
WALLIS AND FUTUNA	WF	ZIMBABWE	ZI
WEST BANK	WE		
WESTERN SAHARA	WI	Unknown Country	99

Client Registration & Episode Data Entry Codes

**Refer to INSYST FORMS page
on the BHCS Provider Website**

@

www.acbhcs.org/providers

INSYST MENU SHORTCUT & COMMANDS

CLIENT SCREENS

Screen	Alpha Menu Commands	Numeric Menu Commands
Client Locator	CLIE LO	1 7
Client Registration	CLIE RE	1 1
Client Management (Maintenance/Update)	CLIE MA	1 2
Client Address	CLIE AD	1 6
Client Periodic Data (MHS ONLY)	CLIE CSI	1 8

EPISODE SCREENS

Screen	Alpha Menu Commands	Numeric Menu Commands
Episode Open	EP OP	4 1
Episode Close	EP CL	4 2
Episode Management (Maintenance/Update)	EP MA	4 4

SERVICE ENTRY SCREENS

Screen	Alpha Menu Commands	Numeric Menu Commands
Service Single Entry	SER SI	5 1
Service Multiple Entry	SER MU	5 4
Service Management (Maintenance/Update)	SER MA	5 9

MOST USED COMMANDS

Clear Field	Ctrl J
All Clients (Continuous Paging) Authorization (Supervisor & Late Entry)	Num Lock (Gold) A
Insert new data (Address, CSI & Utilization Control data entry screens)	Num Lock (Gold) I
Move Cursor forward one Field	TAB Key
Move Cursor backward one Field	F12 Key
Move Down to next Page (i.e. list of clients)	Num Lock (Gold) M
Move Back to last Page (i.e. list of clients or services)	Num Lock (Gold) B
Exit Screen (go back to last screen/menu)	Num Lock (Gold) E
Refresh Screen (Clear a screen without leaving the screen)	Num Lock (Gold) R
Save the client information and go back one screen	Num Lock (Gold) S

PRINTER COMMANDS

Show Printer Queue	UT PR SH
Start Printer Queue	UT PR ST