

Grouping Session Types Code for Reporting

Problem: How can we set up progress notes after a 1-hour session has completed to also show a separate 10-minute progress note that will accompany it to show up as a connected group of notes in a data query report?

Solution: Part #1 – Create matching session type codes. One with the description of the 1-hour session. The other with a description of 10-minute documentation.

In this example, I have created 2 matching sets of type codes for one Billable note I have a corresponding Documentation note. For every billable note that requires matching documentation create system type code (***for example***) with 800 series numbers or any series of numbers not being used in Session Type. This will make it easy to find when the user looks up the needed session type to record.

The screenshot shows the AccuCare software interface for setting up session types. The title bar reads "Setup > Add, Edit or Delete Type of Session". Below the title bar is a table with the following columns: Select, Session Type Code, Session Type Description, Hourly Rate (\$), NDW Export, and Archived. The table contains several rows, with the last four rows highlighted in yellow and green. Below the table is a form with fields for Hourly Rate, Service Code, NDW Export, and Archived, and a text field for Session Type Description.

Select	Session Type Code	Session Type Description	Hourly Rate (\$)	NDW Export	Archived
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>	800A	Documentation Session 1	0.00	No	No
<input type="checkbox"/>	800A	Billable Session 1	0.00	No	No
<input type="checkbox"/>	810A	Documentation Session 2	0.00	No	No
<input type="checkbox"/>	810A	Billable Session 2	0.00	No	No

Hourly Rate: Service Code: NDW Export: Archived:

Session Type Description:

Solution: Part #2 – Use Progress Notes to record a billable note and a documentation note for each client who has completed respectively 1-hour session with a 10-minute note.

In these examples, you can see I have created a pair of matching progress notes for each client

File > Progress Notes

Select by: Client Group

Search by: Last Name

Begins with or matches: short

Retain Filters

Name	SSN	Client Reference #
Short, Tom	111223333	TS19763333

Note Selection	Session Date	Code	Description	File/Sign Status	Print/File Selection
<input checked="" type="checkbox"/>	10/02/2020	800A	Documentation Session 1	--	<input type="checkbox"/>
<input type="checkbox"/>	10/01/2020	800A	Billable Session 1	--	<input type="checkbox"/>

File > Progress Notes

Select by: Client Group

Search by: Last Name

Begins with or matches: long

Retain Filters

Name	SSN	Client Reference #
Long, Sally	333224444	SL19654444

Note Selection	Session Date	Code	Description	File/Sign Status	Print/File Selection
<input type="checkbox"/>	11/02/2020	810A	Documentation Session 2	--	<input type="checkbox"/>
<input checked="" type="checkbox"/>	11/01/2020	810A	Billable Session 2	--	<input type="checkbox"/>

Here what a user would be presented when to record both a billable service with a matching documentation Session Type.

File > Progress Notes > Add Note

Note Info

Client: Short, Tom

Level of Care: No Episode Assigned

Clinician: Ronald S. Adams, MSW,LSW

Co-Facilitator:

Session Type: [Dropdown Menu]

Session Date: [Calendar Icon] to End: [Calendar Icon] Duration: [Text Field]

Diagnosis: [Text Field]

Note: [Text Area]

Sort by Description

Diagnosis View Tx Plans

100 - Individual Session

105 - Group Session

110 - Adult Crisis Intervention

112 - Youth Crisis Intervention

115 - AfterCare

120 - Anger Management

800A - Billable Session 1

800A - Documentation Session 1

810A - Billable Session 2

810A - Documentation Session 2

Solution: Part #3 – Super Admin or Admin would run the following Query parameters to create a list for Billers to review billing actions:

Open Data Query

- 1) Select Progress Notes
- 2) All Questionnaires
- 3) Create a New Query

Data Definitions for Data Query

Data Query

Query Type: [Dropdown Menu]

Sub Type: [Dropdown Menu]

Saved Queries: [Dropdown Menu]

New Query: [Text Field]

Preview Print Save to Excel Save to Text Next >> Exit

1

2

3

Discharge Summaries

Follow-ups

MHSIP Survey

Placement Analysis

Progress Notes

All Questionnaires

New Query

Progress Note Biller Report

Next Screen

- 1) Highlight a data filename from the Available list
- 2) Click the [Select] button to add
- 3) Here is a list and the order of the data files to pull for this report

The screenshot displays the AccuCare software interface for configuring a report. At the top, the AccuCare logo is visible. Below it, the breadcrumb navigation shows "Reports > Data Query".

The main configuration area includes:

- Name of the Query:** Progress Note Biller Report
- Type of Query:** Progress Notes
- SubType of Query:** All Questionnaires

The interface is divided into two main sections for field selection:

- Available (1):** A list of fields that can be added to the report, including "Address line one from Client Intake", "Address line two from Client Intake", "Agency ID", "Archived", "Category Code 1" through "5", and "Category Description 1" through "5".
- Selected (3):** A list of fields that have been added to the report, including "Client's first name", "Client's last name", "Client Reference Number", "Note type name", "Type code", "Time of Session", and "Note Date".

Between these two lists are four buttons: "Select", "Select All", "Remove", and "Remove All". A red arrow labeled "2" points from the "Select" button to the "Selected" list. A red circle labeled "3" highlights the "Selected" list.

At the bottom of the interface, there are two buttons: "Next >>" and "Cancel".

Instructions at the bottom of the field lists read: "Double click on Field name to move----->" and "<-----Double click on Field name to move".

Last Screen (before running the report)

Set Criteria

- a) Select Note Date – Beginning Date
- b) Select Note Date – Ending Date
- c) Select Type Code – Begins or match code of session Type you wish to focus the report output on

Set Sort Order

- d) Sort Order 1 – Client last name / Ascending
- e) Sort Order 2 – Note type name / Ascending
- f) Sort Order 3 – Type code / Ascending

Reports > Data Query

Name of the Query: Progress Note Biller Report

Type of Query: Progress Notes Sub Type of Query: All Questionnaires

Criteria

Column Name	Select	Criteria	Value (Seperate values with pipe " " for multiple criteria)
Note Date	<input type="checkbox"/>	Greater than or equal to	01/01/2000
Note Date	<input type="checkbox"/>	Less than or equal to	12/01/2020
Type code	<input type="checkbox"/>	Begins with or match	8

Sort Order

Sort Order	Column Name	Direction	Group by (Select one)
Sort Order 1:	Client's last name	Ascending	<input type="checkbox"/>
Sort Order 2:	Note type name	Ascending	<input type="checkbox"/>
Sort Order 3:	Type code	Ascending	<input type="checkbox"/>

Buttons: Preview, Print, Save to Excel, Save to Text, Save, Reset, Exit

Output view – Preview

Client's first name	Client's last name	Client Reference Number	Note type name	Type code	Time of Session	Note Date
Anna	Able	AA19659222	Billable Session 1	800A	1	9/15/2020
Anna	Able	AA19659222	Documentation Session 1	800A	0.1	9/17/2020
Jack	Able	JA19853333	Billable Session 2	810A	1	10/14/2020
Jack	Able	JA19853333	Documentation Session 2	810A	0.1	10/15/2020
Jack	Knight	JK19765634	Billable Session 1	800A	1	11/17/2020
Jack	Knight	JK19765634	Documentation Session 1	800A	0.1	11/17/2020
Sally	Long	SL19654444	Billable Session 2	810A	1	11/1/2020
Sally	Long	SL19654444	Documentation Session 2	810A	0.1	11/2/2020
Tom	Short	TS19763333	Billable Session 1	800A	1	10/1/2020
Tom	Short	TS19763333	Documentation Session 1	800A	0.1	10/2/2020

For additional questions, contact AccuCare Support at 800-324-7966 or email support@orionhealthcare.com and we will be happy to assist you!