



**Department of Health Care Services
Children's Medical Services Network**



Case Notes

**User Manual
(Step-by-Step)**
Revised: November 20, 2008

TABLE OF CONTENTS

TABLE OF CONTENTS	ii
1 Case Notes Module.....	6
1.1 CASE NOTE TYPES AND DEFINITIONS	6
1.2 ACCESSING CASE NOTES.....	6
2 Search Case Notes	7
2.1 CASE NOTES DEFAULT SEARCH SCREEN.....	7
2.1.1 Search for patient by name	9
2.1.2 Search for patient by unique identifiers – CCS, CIN, SSN.....	11
2.1.3 Search for patient using combination – DOB, Gender, and County.....	12
2.2 CASE NOTES SEARCH RESULTS SCREEN	13
3 View / Print Selection	17
4 Add New Case Note.....	19
4.1 ADD CASE NOTE TO FIRST PATIENT LISTED.....	19
4.2 DRAFT CASE NOTE	21
5 Edit a Case Note	23
6 Send via Web Message	27
7 Delete Case Note	30
8 System-generated Case Notes	32
8.1 SAR CASE NOTES.....	32
8.1.1 SAR Hyperlinks	37
9 System Administration Functionalities	41
9.1 TRANSFER CASE NOTE	41
9.2 FLAG AS ERROR	45
9.3 PRINT ALL CASE NOTES IN A PATIENT RECORD	48
10 Appendix A.....	49

List of Figures

Figure 1-2, Accessing Case Notes	6
Figure 2-2, Search User Screen	7
Figure 2-3, Advanced Search options.....	8
Figure 2-4, Search for patient	9
Figure 2-5, Date range is recalculated based on selected patient(s).....	10
Figure 2-6, Search by unique identifier – CCS, CIN, or SSN.....	11
Figure 2-7, Combination search – DOB, Gender, and County	12
Figure 3-8, Begin searching for case notes	14
Figure 2-9, Search results screen.....	16
Figure 3-10, Select case notes to view	17
Figure 3-11, PDF of selected case notes.....	18
Figure 4-12, Add new dialog box	19
Figure 4-14, Select the draft case note to view.....	21
Figure 4-15, Draft disclaimer is displayed on all new case notes	22
Figure 5-16, Click on subject description hyperlink.....	23
Figure 5-17, Case notes preview screen	24
Figure 5-18, Save the edits made to the case note	25
Figure 5-19, Preview display of corrected case note	26
Figure 6-20, Select case notes to attach to a Web Message	27
Figure 6-21, Attaching case notes to a web message	28
Figure 6-22, View a case note attachment	29
Figure 7-23, Select case note to edit	30
Figure 7-24, Delete a draft case note	31
Figure 8-25, Enter pending SAR.....	32
Figure 8-26, Automatic case note entry	33
Figure 8-27, Select automatic case note to view	34
Figure 8-28, Print display of automatic case note.....	36
Figure 8-29, Click SAR hyperlink to view pending SAR.....	37
Figure 8-30, Navigate to SAR module to view pending SAR.....	38
Figure 8-31, Click SAR hyperlink to view PDF display	39
Figure 8-32, Print display of cancelled SAR	40
Figure 9-33, State system administrators functionalities	41
Figure 9-34, Transfer case note to correction patient record.....	42
Figure 9-35, Select transferred case note to view	43
Figure 9-36, View transferred case note.....	44
Figure 9-37, Select case note to flag as error.....	45
Figure 9-38, Enter comments prior to flagging the case note as error.....	46
Figure 9-39, Include error case notes in search results.....	47

List of Tables

Table 3-1, Case Note Indicators 13
Table 3-2, Hyperlinks with Case Notes..... 13
Table 10-3, Proper Case Notes Subject Code usage..... 49

OVERVIEW

The CMS Net Narratives module is converted to the CMS Web system and renamed Case Notes. However, the terminology *narrative* and *case note* can be used synonymously the way *client* and *patient* terminology is used.

Listed are features and functionalities of the Case Notes module:

- Add new case notes
- Use subject codes for each selected subject description
- Read and print existing CMS Legacy narratives and case notes from a .PDF format
- Search by using a criteria with multiple patients, users, and subject descriptions
- Authors can edit or delete case notes the same day they're created
- Make corrections to case notes anytime after the first day. The new correction case note will be associated to the original corrected case note that displays with a strikethrough format (example: ~~strikethrough~~).
- Transfer case notes between patients within the same county when case notes are known to have been entered in the wrong patient. The transfer feature must be requested through State system administrators.
- Attach a hyperlink of case notes to a web message.
- Flag a case note as an error. This feature must be requested through State system administrators.
- View narratives from the Case Notes module and vice versa – view case notes from the CMS Net Narratives module.

1 Case Notes Module

1.1 CASE NOTE TYPES AND DEFINITIONS

There are three types of case notes and they are listed and defined as follows:

1. **Manually entered free-text** – A case note that is created by using the ‘Add New’ function
2. **Automatic case note** – A case note that is pre-populated with some system generated information, but the user has the ability to enter free-text. These case notes occur after certain events like a case closure, issued letter, or authorized SAR.
3. **System-generated case note** – A case note that is created by the system and is automatically filed without the user’s visual knowledge. Users do not have the opportunity to enter additional text to it at the time it is saved.

[Please see Appendix A to view the case notes subject descriptions for manually entered free-text case notes.](#)

1.2 ACCESSING CASE NOTES

1. **Step 1.** Access the Case Notes module by hovering the mouse pointer over the ‘CCS Modules’ option to display the menu drop-down list. Click on the ‘Case Notes’ option as shown in Figure 1-1.



Figure 1-1, Accessing Case Notes

2 Search Case Notes

2.1 CASE NOTES DEFAULT SEARCH SCREEN

Figure 2-2 displays the default case notes search screen. A common way to search for case notes is by date and patient. However, there are multiple ways to search for case notes by using the Advanced Search options which allows searches by a patient, user, and specific subject.

A new feature to be aware is the 'Add new case note' button. It is used for adding new case notes to a patient record that is listed on the patient list.

The screenshot shows the 'Case Notes' search interface. At the top, there is a navigation bar with links: Home Page | CCS Modules | Provider | Reports | Administration. Below this is the title 'Case Notes' and a sub-header 'Search Case Note'. A blue bar contains 'Search - Case Notes'. A red message states: 'Required fields are marked in *. Patient or User is required.' Below this is a section 'ENTER DATE RANGE AND TYPE' with 'Begin Date *' set to 10/07/2008 and 'End Date *' set to 11/06/2008. The next section is 'SEARCH FOR PATIENT' with a 'Search Client' table. The table has columns: Patient Name, CCS#, CIH, SSN, DOB, Gender, and County. A 'find >' button is to the right. A callout box labeled 'New feature' points to the 'Add new case note' button in the 'Advanced Search Options' section at the bottom, which also includes 'Search' and 'Reset' buttons.

Patient Name	CCS#	CIH	SSN	DOB	Gender	County	
<input type="text"/>	Select	<input type="button" value="find >"/>					

Advanced Search Options

Figure 2-2, Search User Screen

Figure 2-3 displays the Advanced Search options where case notes can be searched by user, subject description, and include case notes marked as an error.

A new feature to be aware of is the placement of the 'Display error and deleted case notes' check box. It is included in the Advanced Search options.

Case Notes

Search Case Note

Search - Case Notes

Required fields are marked in *. Patient or User is required.

ENTER DATE RANGE AND TYPE

Begin Date * 10/07/2008 End Date * 11/06/2008

SEARCH FOR PATIENT

Search Client

<input type="checkbox"/> Patient Name	CCS#	CIH	SSII	DOB	Gender	County	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Select	Select	find

Click here to expand the Advanced Search options

Advanced Search Options

(Combination of fields may be used, although not required)

Search User

<input type="checkbox"/> User Name	County	Regional Office	User Status	
<input type="text"/>	Select	Select	Select	find

Select Subject

<input type="checkbox"/>	Group Description	Subject Code	Subject Line	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	find

New feature
Case note error and deleted filter checkbox displays in the Advanced Search options

Display error and deleted case notes:

Add new case note Search Reset

Figure 2-3, Advanced Search options

2.1.1 Search for patient by name

- Step 1.** Enter the patient name in the 'Patient Name' field. Partial names are allowed. Press <ENTER> key or click the 'Find' button. A pop-up screen appears and displays the search results.
- Step 2.** Select the patient and click the 'Continue' button. The selected patient is added to the patient list.

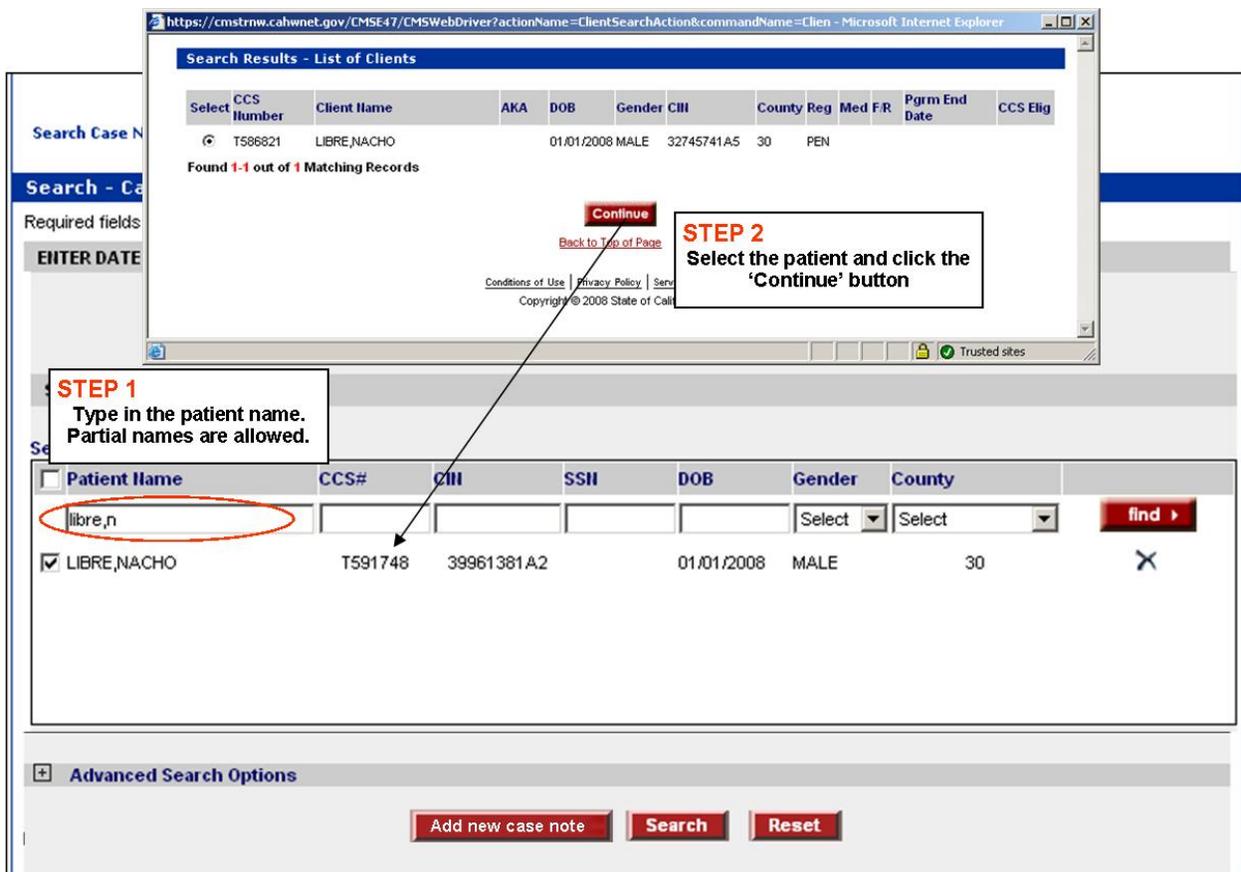


Figure 2-4, Search for patient

A new feature to be aware of is the date range recalculating to the very first and most recent entry dates of existing case notes and narratives for the selected patient(s).

Case Notes

Search Case Note

Search - Case Notes

Required fields are marked in *. Patient or User is required.

ENTER DATE RANGE AND TYPE

Begin Date * 07/23/2008 End Date * 11/05/2008

SEARCH FOR PATIENT

Search Client

<input type="checkbox"/> Patient Name	CCS#	CIII	SSII	DOB	Gender	County	
<input type="checkbox"/>					Select	Select	find ▶
<input checked="" type="checkbox"/> LIBRE,NACHO	T591748	39961381.A2		01/01/2008	MALE	30	X

+ Advanced Search Options

Add new case note Search Reset

New feature
When a patient is added to the patient list, the system recalculates the date range to display the very first and most recent entry dates of existing case notes and narratives for the patient.

Figure 2-5, Date range is recalculated based on selected patient(s)

2.1.2 Search for patient by unique identifiers – CCS, CIN, SSN

- Step 1.** Enter the CCS# and press the <ENTER> key. If there is an exact match, the system adds the patient to the patient list. This works similarly when searching by CIN or SSN.

Case Notes

Search Case Note

Search - Case Notes

Required fields are marked in *. Patient or User is required.

ENTER DATE RANGE AND TYPE

Begin Date * End Date *

SEARCH FOR PATIENT

STEP 1
Enter a unique identifier such as CCS#, CIN, or SSN

Search Client

<input type="checkbox"/> Patient Name	CCS#	CIN	SSN	DOB	Gender	County	
<input type="text"/>	<input type="text" value="4056355"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Select	<input type="button" value="find"/>
<input checked="" type="checkbox"/> LIBRE,NACHO	T586821	32745741A5		01/01/2008	MALE	30	<input type="button" value="X"/>
<input checked="" type="checkbox"/> SPECHT,BOY	4056355	31927012A5		01/01/2008	MALE	30	<input type="button" value="X"/>

Advanced Search Options

Figure 2-6, Search by unique identifier – CCS, CIN, or SSN

2.1.3 Search for patient using combination – DOB, Gender, and County

- Step 1.** Enter a DOB, select Gender, and County. Press <ENTER> key or click the 'Find' button.
A pop-up screen appears and displays the search results.
- Step 2.** Select the patient and click the 'Continue' button. The selected patient(s) are added to the patient list.

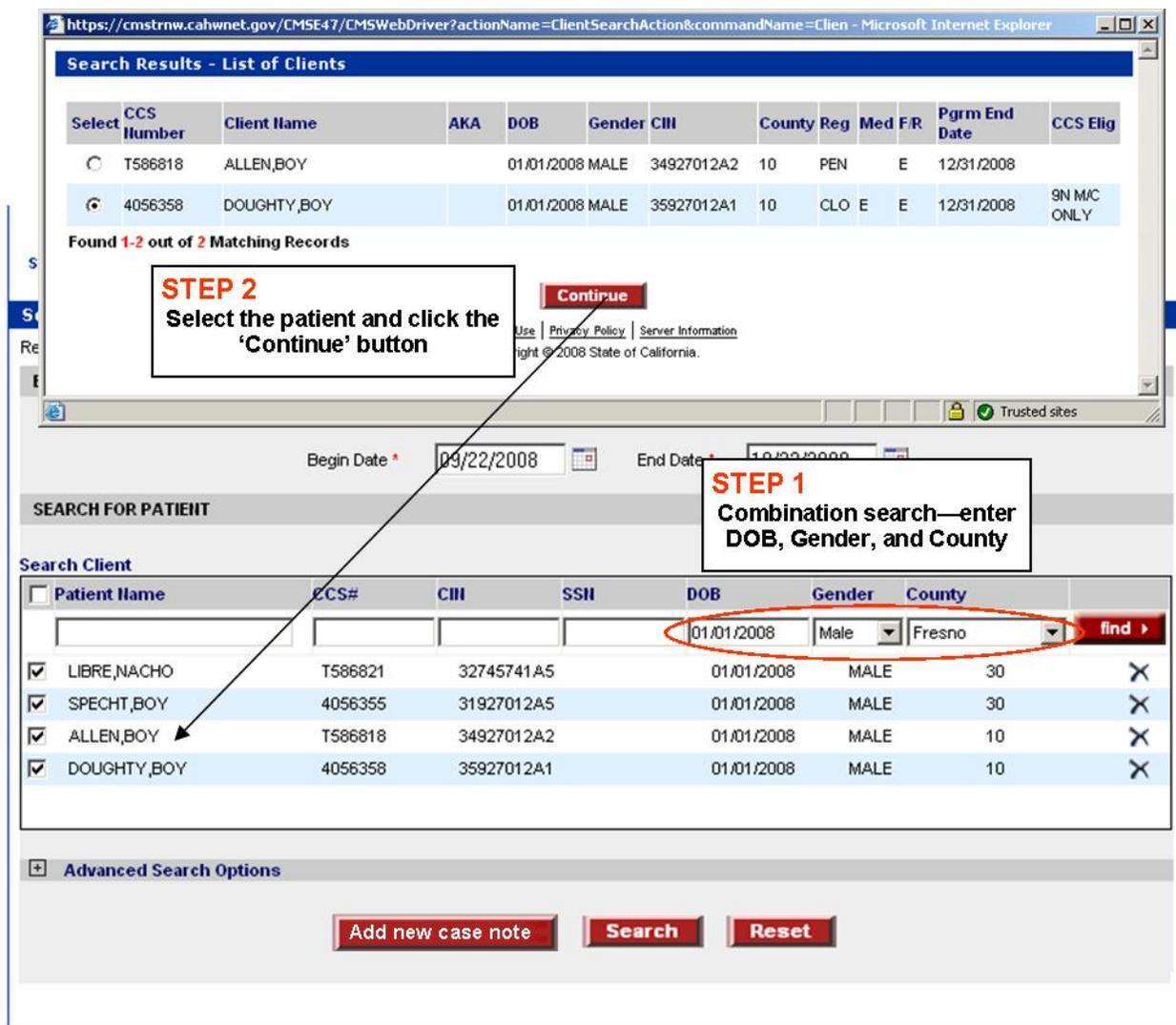


Figure 2-7, Combination search – DOB, Gender, and County

This example continues in the next section [3.2 Case Notes Search Results](#) screen.

2.2 CASE NOTES SEARCH RESULTS SCREEN

Listed are tables that identify certain case note indicators and use of hyperlinks.

Table 3-1, Case Note Indicators

Indicator Name	Indicator Definition and Details
1. **DRAFT**	This indicates the case note was entered today and is subject to change by the creator anytime today. This is useful when users do take action based on a case note because they need to keep in mind the content of the case note may change will may affect the action they're taking.
2. **TCN**	TCN stands for transferred case note. When users enter a case note or narrative in the wrong patient record, they can request the County or State system administrators to transfer the case note to the correct patient within the same legal county.
3. **CORRECTION**	This indicates the original case note had corrections made to it.
4. **ERROR**	This indicates the case note was entered error and the original creator is no longer around to make a correction. Users can request the County or State system administrators to flag a case note as an error.

Table 3-2, Hyperlinks with Case Notes

Module	SAR / Letter Status	Hyperlink Action
SAR	<ul style="list-style-type: none"> • Authorized SAR • Cancelled SAR 	Display .PDF format of SAR
SAR	<ul style="list-style-type: none"> • Pending SAR • Denied SAR • Request Approval • Approved-Y • Approved-N 	<p>Navigate to the SAR module and display the SAR.</p> <p>There will be a confirmation message to ask if the user wants to navigate to the SAR module and will exit the Case Notes module.</p>
Web Correspondence	<ul style="list-style-type: none"> • Sent letter • Cancelled letter 	Display .PDF format of letter

New feature:

By default, case notes are sorted in reverse chronological order – newest to oldest. However, the case notes can be sorted by clicking on the column headings. Hard copy printouts are based on sort order when printing from the search results screen.

- Step 1.** Click the 'Search' button to begin searching for the case notes.
The search results screen appears with the matching records.

California Home | DHCS Home | DHCS Organization | Wednesday, October 22, 2008

Training
Caring for Children with Special Medical Needs... | Contact Us | Help | Logout | Web Messages(0)

Home Page | CCS Modules | Provider | Reports | Administration

Case Notes

Search Case Note

Search - Case Notes

Required fields are marked in *. Patient or User is required.

ENTER DATE RANGE AND TYPE

Begin Date * End Date *

SEARCH FOR PATIENT

Search Client

<input type="checkbox"/>	Patient Name	CCS#	CIH	SSN	DOB	Gender	County	
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	01/01/2008	Male	Fresno	<input type="button" value="find"/>
<input checked="" type="checkbox"/>	LIBRE,NACHO	T586821	32745741A5		01/01/2008	MALE	30	<input type="button" value="X"/>
<input checked="" type="checkbox"/>	SPECHT,BOY	4056355	31927012A5		01/01/2008	MALE	30	<input type="button" value="X"/>
<input checked="" type="checkbox"/>	ALLEN,BOY	T586818	34927012A2		01/01/2008	MALE	10	<input type="button" value="X"/>
<input checked="" type="checkbox"/>	DOUGHTY,BOY	4056358	35927012A1		01/01/2008	MALE	10	<input type="button" value="X"/>

Advanced Search Options

STEP 1
Click the 'Search' button to start searching for case notes

Figure 3-8, Begin searching for case notes

On the Case Note results screen, there are several new features:

1. 'Select All' check box
2. Case Notes subject description hyperlink
3. Status column
4. Page selectors
5. 'Transfer case note' button

Case Notes

New feature
Select All check box

New feature
Subject description is a hyperlink

New feature
Case notes status

<input type="checkbox"/>	Date	Subject Code	Subject	CCS#	Client Name	County	Entered By	Status
<input type="checkbox"/>	11/05/2008	App-Letter1 Corres# 984852-2008	Application Status: 1st Letter: Sent Status: Sent	T591748	Libre,Nacho	30	Phavisith,Sone	
<input type="checkbox"/>	11/06/2008		Test narrative entry date	T591749	Munky,Drunkn Curious	34	Phavisith,Sone	Draft
<input type="checkbox"/>	11/06/2008	App-Letter2 Corres# 895575-2008	Application Status: 2nd Letter: Sent Status: Sent	T591748	Libre,Nacho	33	Cardona Technician,Margarita	Draft
<input type="checkbox"/>	10/06/2008	App-Letter2	Application Status: 2nd Letter sent	T591749	Munky,Drunkn Curious	33	Cardona Technician,Margarita	TCN
<input type="checkbox"/>	07/31/2008	Misc	Renewal process complete	T591748	Libre,Nacho	33	Verzosa Oa,Karen	Corrected
<input type="checkbox"/>	07/30/2008	Rpt-ChartRouted	Chart Routed	T591749	Munky,Drunkn Curious	33	Paredes Ccs Supervisor,Caridad	Deleted
<input type="checkbox"/>	07/30/2008	SAR-Authrzd SAR# 97014418800	Service Authorization status: Authorized	T591748	Libre,Nacho	33	Paredes Ccs Supervisor,Caridad	Error

191 Records found, displaying 1 to 20.
[First/Prev] 1, 2, 3, 4, 5, 6, 7, 8 [Next/Last]

New feature
Page selectors

New feature
'Transfer Case note' button

Buttons: Back, Print, Attach, Transfer case note

Figure 2-9, Search results screen

3 View / Print Selection

- Step 1.** Select the case note to view by placing a check mark in the check box.
- Step 2.** Click the 'Print' button

Case Notes

[Search Case Note](#)

Search Results - Case Notes

<input type="checkbox"/>	Date	Subject Code	Subject	CCS#	Client Name	County	Entered By	Status
<input type="checkbox"/>	11/06/2008	2-2008	Application Status: 1st Letter: Sent Status: Sent	T591748	Libre,Nacho	30	Phavisith,Sone	
<input type="checkbox"/>	11/06/2008		Test narrative entry date	T591749	Munky,Drunkn Curious	34	Phavisith,Sone	Draft
<input checked="" type="checkbox"/>	11/06/2008	App-Letter2 Corres# 895575-2008	Application Status: 2nd Letter: Sent Status: Sent	T591748	Libre,Nacho	33	Cardona Technician,Margarita	Draft
<input checked="" type="checkbox"/>	10/06/2008	App-Letter2	Application Status: 2nd Letter sent	T591749	Munky,Drunkn Curious	33	Cardona Technician,Margarita	TCN
<input checked="" type="checkbox"/>	07/31/2008	Misc	Renewal process complete	T591748	Libre,Nacho	33	Verzosa Oa,Karen	Corrected
<input type="checkbox"/>	07/30/2008	Rpt-ChartRouted	Chart Routed	T591749	Munky,Drunkn Curious	33	Paredes Ccs Supervisor,Caridad	Deleted
<input type="checkbox"/>	07/30/2008	SAR-Authorzd SAR# 97014418800	Service Authorization status: Authorized	T591748	Libre,Nacho	33	Paredes Ccs Supervisor,Caridad	Error

191 Co [P] and, displaying 1 to 20.
7, 8 [Next/Last]

STEP 2
Click the 'Print' button

Back
Print
Attach
Transfer case note

Figure 3-10, Select case notes to view

Step 3. Click the printer icon to print the selected case notes. **Note:** This printing option may vary depending on the .PDF software program and version. The example in Figure 3-11 uses Acrobat Reader 8.0.

The case notes format has a new design as shown in Figure 3-11.

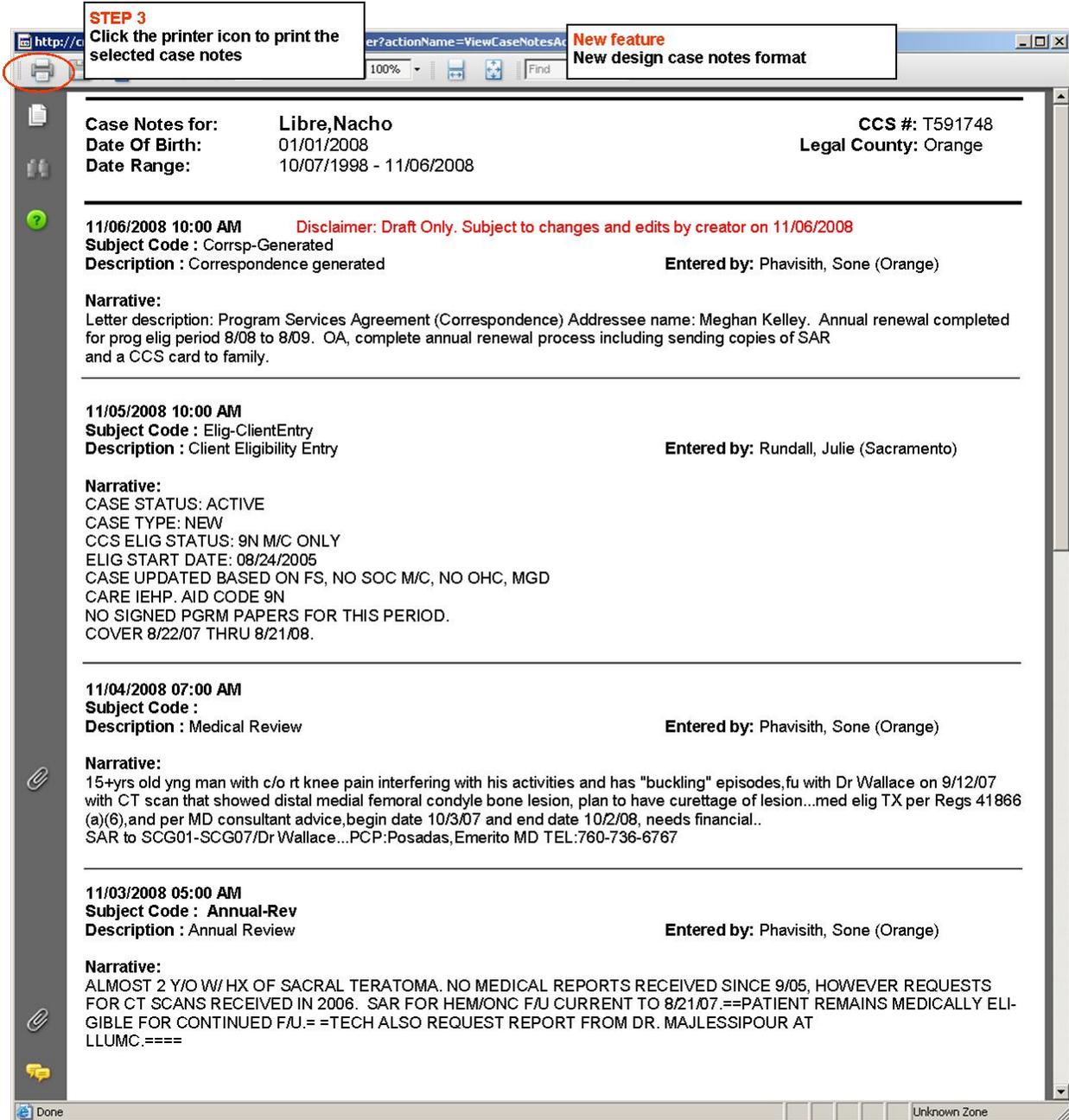


Figure 3-11, PDF of selected case notes

4 Add New Case Note

Using the 'Add New' option creates a manual free-text case note.

4.1 ADD CASE NOTE TO FIRST PATIENT LISTED

Step 1. Add and select a patient on the patient list

Step 2. Click the 'Add new case note' button

Case Notes

Search Case Note

Search - Case Notes

Required fields are marked in *. Patient or User is required.

ENTER DATE RANGE AND TYPE

Begin Date * 07/23/2008 End Date * 11/05/2008

SEARCH FOR PATIENT

STEP 1
Add a patient to the patient list

<input type="checkbox"/>	Patient Name	CCS#	CII	SSI	DOB	Gender	County	
<input type="checkbox"/>						Select	Select	find ▶
<input checked="" type="checkbox"/>	LIBRE,NACHO	T591748	39961361A2		01/01/2008	MALE	30	X

STEP 2
Click the 'Add new case note' button

Advanced Search Options

Figure 4-12, Add new dialog box

- Step 3.** Select a subject description using the drop-down list. For this example, select 'Application – other information or issues' subject. The system automatically assigns the associated subject code (App-misc) which is read-only.
- Step 4.** Enter a more descriptive description in the 'Other' text box.
- Step 5.** Type in the free-text narrative.
- Step 6.** Click the 'Save' button and the system saves the new case note.

The screenshot shows the 'Case Notes' form with the following content:

Case Notes

Search Case Note | Add New | Edit/Delete

Case Notes

Required fields are marked in *

CLIENT INFORMATION

Client Name: NACHO LIBRE	F/R Elig:	Reg Status: PENDING
CCS Number: T591748	Med Elig Status:	Application Status: 1ST LETTER SENT
Date Of Birth: 01/01/2008	Diagnostic Only:	PSA Status:
Clll: 39961381A2	CCS Elig Status:	Program Begin Date:
Gender: MALE	County: ORANGE	Program End Date:

STEP 4
Enter a more descriptive subject description

Entry Date: 11/18/2008

Subject: App-misc

Other: Application is out-dated

STEP 3
Select the subject description

Application - other information or issues

STEP 5
Enter free text in the narrative section

Narrative: The patients application contains information for the former county. A new application has been sent to the family to complete.

STEP 6
Click the 'Save' button

Back Save

Figure 4-13, Confirm adding a new case note to the patient record

4.2 DRAFT CASE NOTE

- Step 1.** Select the draft case note by placing a check mark in the check box.
- Step 2.** Click the 'Print' button.

Case Notes

Search Case Note

STEP 1
Select the new case note which has the Draft status

<input type="checkbox"/>	Date	Subject Code	Subject	CCS#	Client Name	County	Entered By	Status
<input checked="" type="checkbox"/>	11/18/2008	App-misc	Application is out-dated	T591748	Libre,Nacho	30	Phavisith,Sone	Draft

1 Records found

Back Print Attach Transfer case note

STEP 2
Click the 'Print' button

Figure 4-14, Select the draft case note to view

Step 3. Click the printer icon to print the selected case notes. **Note:** This printing option may vary depending on the .PDF software program and version. The example in Figure 4-15 uses Acrobat Reader 8.0.

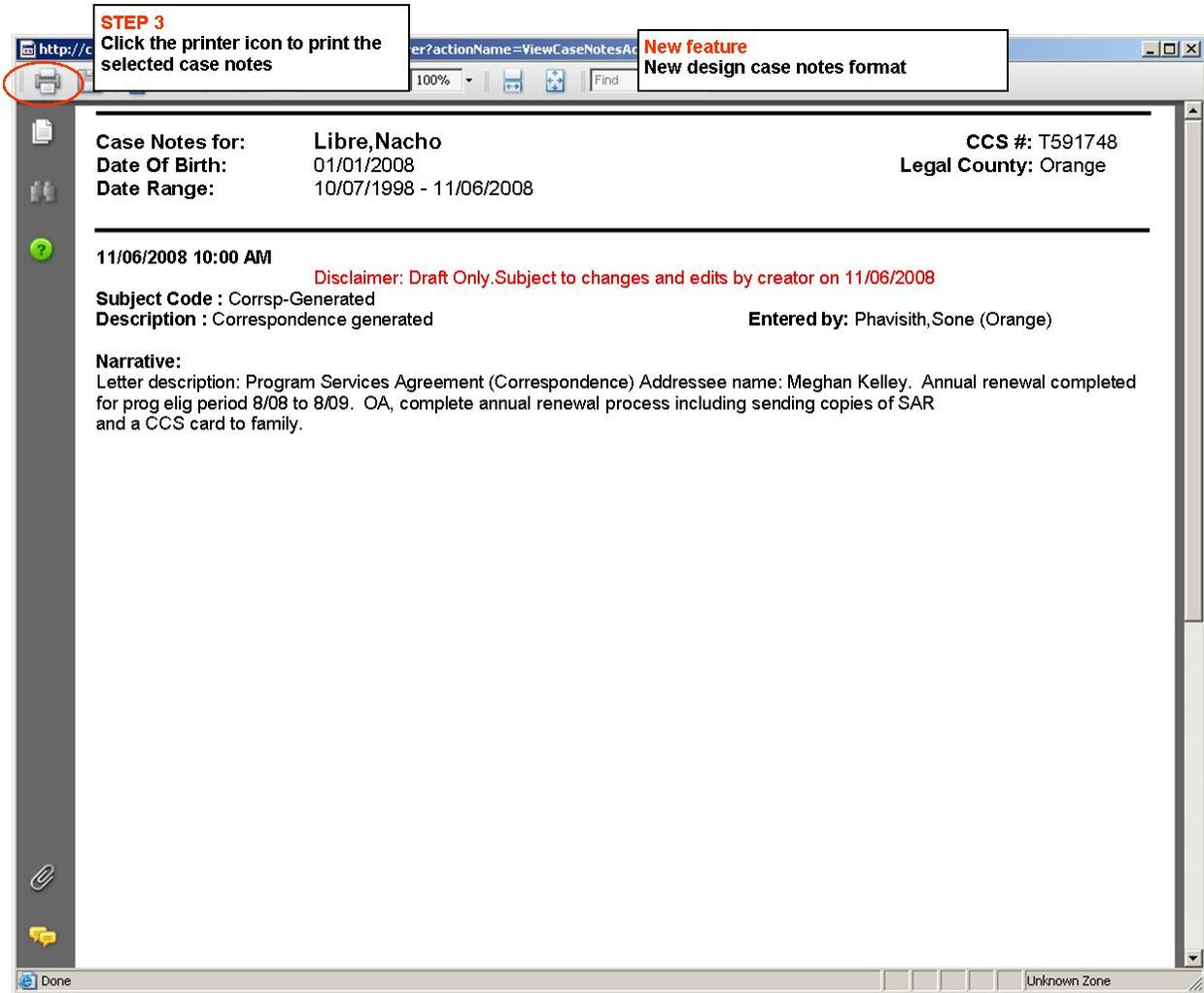


Figure 4-15, Draft disclaimer is displayed on all new case notes

5 Edit a Case Note

Step 1. Click on the subject description hyperlink.

Case Notes

Search Case Note

Search Results - Case Notes

STEP 1
 Click on the subject description hyperlink

<input type="checkbox"/>	▲ Date ▼	Subject Code	Subject	▲ CCS# ▼	▲ Client Name ▼	▲ County ▼	▲ Entered By ▼	▲ Status ▼
<input type="checkbox"/>	11/05/2008	App-Letter1 Corres# 984852-2008	Application Status: 1st Letter: Sent Status: Sent	T591748	Libre,Nacho	30	Phavisith,Sone	
<input type="checkbox"/>	11/06/2008	Misc	Test narrative entry date	T591749	Libre,Nacho	34	Phavisith,Sone	
<input type="checkbox"/>	11/06/2008	App-Letter2 Corres# 895575-2008	Application Status: 2nd Letter: Sent Status: Sent	T591748	Libre,Nacho	33	Cardona Technician,Margarita	Draft
<input type="checkbox"/>	10/06/2008	App-Letter2	Application Status: 2nd Letter sent	T591749	Munky,Drunkn Curious	33	Cardona Technician,Margarita	TCN
<input type="checkbox"/>	07/31/2008	Misc	Renewal process complete	T591748	Libre,Nacho	33	Verzosa Oa,Karen	Corrected
<input type="checkbox"/>	07/30/2008	Rpt-ChartRouted	Chart Routed	T591749	Munky,Drunkn Curious	33	Paredes Ccs Supervisor,Caridad	Deleted
<input type="checkbox"/>	07/30/2008	SAR-Authorzd SAR# 97014418800	Service Authorization status: Authorized	T591748	Libre,Nacho	33	Paredes Ccs Supervisor,Caridad	Error

191 Records found, displaying 1 to 20.
[\[First/Prev\]](#) [1](#), [2](#), [3](#), [4](#), [5](#), [6](#), [7](#), [8](#) [\[Next/Last\]](#)

Back
Print
Attach
Transfer case note

Figure 5-16, Click on subject description hyperlink

Figure 5-17 displays the preview screen of the case note.

Step 2. Click on the 'Edit' button to be redirected to the edit case notes screen.

Case Notes

Search Case Note

Case Notes

Required fields are marked in *

CLIENT INFORMATION

Client Name:	NACHO LIBRE	F/R Elig:		Reg Status:	PENDING
CCS Number:	T591748	Med Elig Status:		Application Status:	1ST LETTER SENT
Date Of Birth:	01/01/2008	Diagnostic Only:		PSA Status:	
CIH:	39961381A2			Begin Date:	
Gender:	MALE			End Date:	

Preview

Case Notes for: Libre, Nacho CCS #: T591748
Date Of Birth: 01/01/2008 Legal County: Orange
Date Range: 10/07/1998 - 11/06/2008

11/06/2008 10:00 AM
Subject Code : Misc
Description : Test narrative entry date **Entered by:** Phavisith, Sone (Orange)

Narrative:
Test testing the narrative entry date for this case note. Test testing the narrative entry date for this case note.
This case note will be edited. The correction feature has been merged with the edit feature. The strikethrough format still displays for edits made to non-draft case notes.

Comments: *

*Comments are required when using 'Flag as error'

STEP 2
Click on the 'Edit' button

Back Edit Delete Print Attach Flag as error

Figure 5-17, Case notes preview screen

- Step 3.** Replace the entire original narrative with a new narrative
- Step 4.** Click the 'Save' button. A dialog box will appear to confirm the correction. The system returns to the preview screen with the updated case note.

The screenshot displays the 'Case Notes' application interface. At the top, there is a search bar labeled 'Search Case Note'. Below this is a blue header bar with the text 'Case Notes'. A note indicates 'Required fields are marked in *'. The main content is divided into two sections: 'CLIENT INFORMATION' and 'CASE NOTE DETAILS'. The 'CLIENT INFORMATION' section contains fields for Client Name (NACHO LIBRE), CCS Number (T591748), Date Of Birth (01/01/2008), CII (39961381A2), Gender (MALE), F/R Elig, Med Elig Status, Diagnostic Only, CCS Elig Status, County (ORANGE), Reg Status (PENDING), Application Status (1ST LETTER SENT), PSA Status, Program Begin Date, and Program End Date. The 'CASE NOTE DETAILS' section shows the 'Entry Date' as 11/18/2008. The 'Subject' field contains 'Misc' and a dropdown menu with 'Other information or issues'. The 'Other' field contains 'Test narrative entry date'. The 'Narrative' field contains the text: 'This are my corrections to the case note. These corrections were made after the day it was entered. The original entry displays with the strikethrough format.' Two callout boxes are present: one labeled 'STEP 3' with the instruction 'Replace the original narrative entry with some new text.' pointing to the narrative text, and another labeled 'STEP 4' with the instruction 'Click the 'Save' button' pointing to the 'Save' button. At the bottom of the form are 'Back' and 'Save' buttons.

Figure 5-18, Save the edits made to the case note

Figure 5-19 displays the replacement case note with the correction indicator.

Case Notes

Search Case Note

Case Notes

Required fields are marked in *

CLIENT INFORMATION

Client Name:	NACHO LIBRE	F/R Elig:	PENDING
CCS Number:	T591748	Med Elig Status:	Application Status: 1ST LETTER SENT
Date Of Birth:	01/01/2008	Diagnostic Only:	PSA Status:
CIII:	39961381A2	CCS Elig Status:	Program Begin Date:
Gender:	MALE	County:	ORANGE
			Program End Date:

Preview

Print Save Refresh 1 / 10 81.3% Find

Case Notes for: Libre,Nacho	CCS #: T591748
Date Of Birth: 01/01/2008	Legal County: Orange
Date Range: 10/07/1998 - 11/06/2008	

11/18/2008 1:00 PM *Correction / Draft*

Subject Code : Misc

Description : Test narrative entry date **Entered by:** Phavisith,Sone (Orange)

Narrative:
This are my corrections to the case note. These corrections were made after the day it was entered. The original entry displays with the strikethrough format.

11/06/2008 10:00 AM *Corrected*

Subject Code : Misc

Description : Test narrative entry date **Entered by:** Phavisith, Sone (Orange)

Narrative:
~~Test testing the narrative entry date for this case note. Test testing the narrative entry date for this case note.~~
This case note will be edited. The correction feature has been merged with the edit feature. The strikethrough format still displays for edits made to non-draft case notes.

*Comments are required when using 'Flag as error'

Comments: *

Back Edit Delete Print Attach Flag as error

Figure 5-19, Preview display of corrected case note

If edits are made to a *draft* case note, the replacement narrative displays only. The original narrative is over-written.

6 Send via Web Message

Case notes can be sent to other users in any county. Users can attach a hyperlink of a case note to a Web Message.

- Step 1.** Select the case note(s) to attach to a web message.
- Step 2.** Click the 'Attach' button. A web message pop-up screen appears with the selected case notes attached.

Case Notes

Search Case Note

Search Results - Case Notes

<input type="checkbox"/>	Date	Subject Code	Subject	CCS#	Client Name	County	Entered By	Status
<input type="checkbox"/>		2-2008	Application Status: 1st Letter: Sent Status: Sent	T591748	Libre,Nacho	30	Phavisith,Sone	
<input type="checkbox"/>	11/06/2008		Test narrative entry date	T591749	Munky,Drunkn Curious	34	Phavisith,Sone	Draft
<input checked="" type="checkbox"/>	11/06/2008	App-Letter2 Corres# 895575-2008	Application Status: 2nd Letter: Sent Status: Sent	T591748	Libre,Nacho	33	Cardona Technician,Margarita	Draft
<input checked="" type="checkbox"/>	10/06/2008	App-Letter2	Application Status: 2nd Letter sent	T591749	Munky,Drunkn Curious	33	Cardona Technician,Margarita	TCN
<input checked="" type="checkbox"/>	07/31/2008	Misc	Renewal process complete	T591748	Libre,Nacho	33	Verzosa Oa,Karen	Corrected
<input type="checkbox"/>	07/30/2008	Rpt-ChartRouted	Chart Routed	T591749	Munky,Drunkn Curious	33	Paredes Ccs Supervisor,Caridad	Deleted
<input type="checkbox"/>	07/30/2008	SAR-Authrzd SAR# 970144.18800	Service Authorization status: Authorized	T591748	Libre,Nacho	33	Paredes Ccs Supervisor,Caridad	Error

191 Correspondence [First/Prev] 1 [Next/Last]

Back
Print
Attach
Transfer case note

STEP 1
Select the case notes to view by placing a check mark in the check box

STEP 2
Click the 'Attach' button

Figure 6-20, Select case notes to attach to a Web Message

Please refer to the [Web Message user manual](#) on how to send, receive, and read Web Messages.

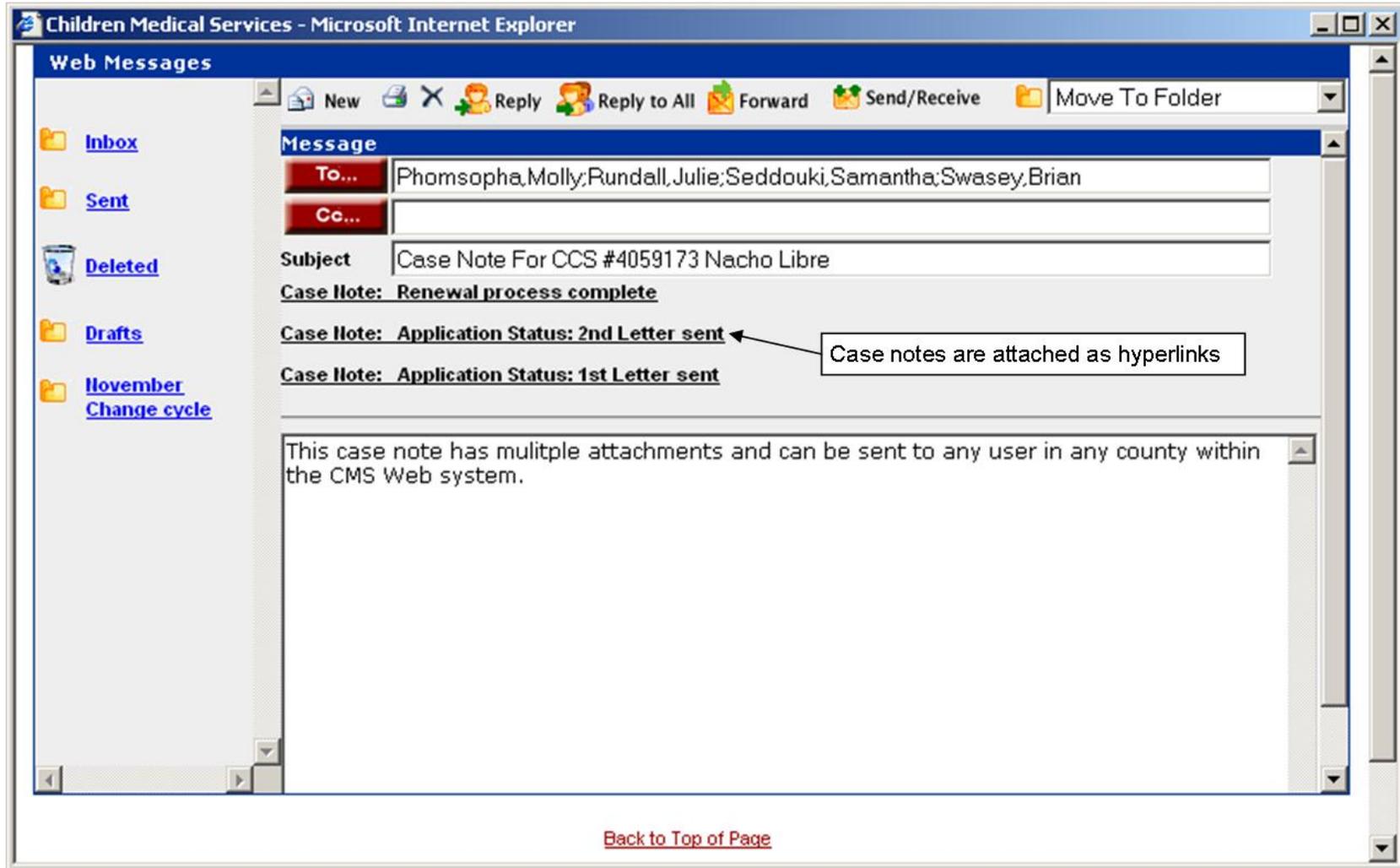


Figure 6-21, Attaching case notes to a web message

Figure 6-22 displays the case note when the attached case note hyperlink is clicked.

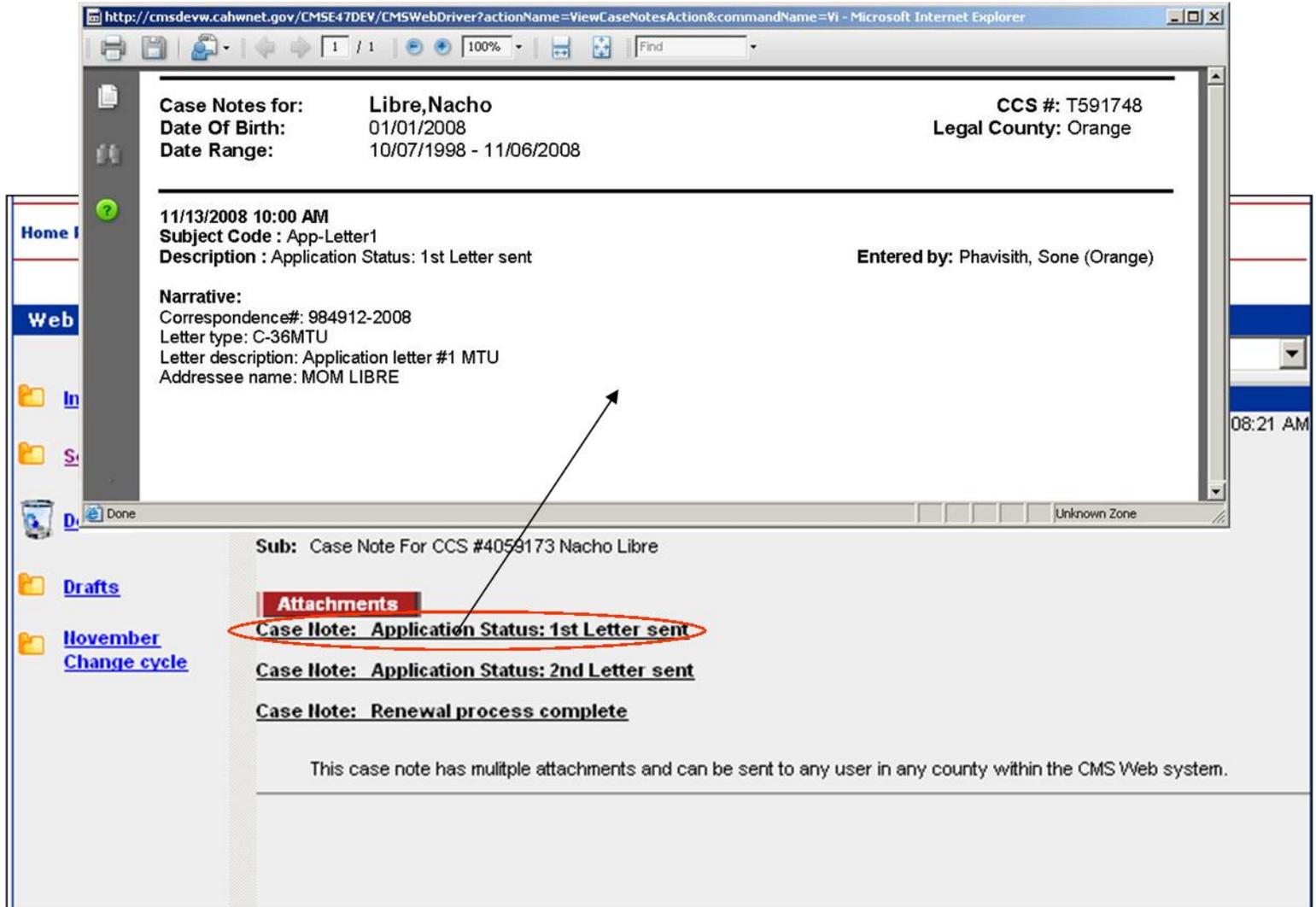


Figure 6-22, View a case note attachment

7 Delete Case Note

Case notes can be deleted the same day they're created. Case notes can be deleted by the Creator only and must be done one at a time.

Step 1. Click the subject description hyperlink of the draft case note.

Case Notes

Search Case Note

STEP 1
Select a draft case note using the subject description hyperlink

Search Results - Case Notes

<input type="checkbox"/>	Date	Subject Code	Subject	CCS#	Client Name	County	Entered By	Status
<input type="checkbox"/>	11/05/2008	App-Letter1 Corres# 984852-2008	Application Status: 1st Letter: Sent Status: Sent	T591748	Libre,Nacho	30	Phavisith,Sone	
<input type="checkbox"/>	11/06/2008	Misc	Test narrative entry date	T591749	Munky,Drunkn Curious	34	Phavisith,Sone	Draft
<input type="checkbox"/>	11/06/2008	App-Letter2 Corres# 895575-2008	Application Status: 2nd Letter: Sent Status: Sent	T591748	Libre,Nacho	33	Cardona Technician,Margarita	Draft
<input type="checkbox"/>	10/06/2008	App-Letter2	Application Status: 2nd Letter sent	T591749	Munky,Drunkn Curious	33	Cardona Technician,Margarita	TCN
<input type="checkbox"/>	07/31/2008	Misc	Renewal process complete	T591748	Libre,Nacho	33	Verzosa Oa,Karen	Corrected
<input type="checkbox"/>	07/30/2008	Rpt-ChartRouted	Chart Routed	T591749	Munky,Drunkn Curious	33	Paredes Ccs Supervisor,Caridad	Deleted
<input type="checkbox"/>	07/30/2008	SAR-Authorzd SAR# 97014418800	Service Authorization status: Authorized	T591748	Libre,Nacho	33	Paredes Ccs Supervisor,Caridad	Error

191 Correspondence Records found, displaying 1 to 20.
[First/Prev] 1, 2, 3, 4, 5, 6, 7, 8 [Next/Last]

Back
Print
Attach
Transfer case note

Figure 7-23, Select case note to edit

The preview screen appears and displays the draft case note. This forces the user to see the narrative of the case note prior to deleting. *System-generated case notes cannot be deleted such as letters and SAR case notes.*

- Step 2.** Click the 'Delete' button. The 'Delete' button appears if the case note status is draft and if the current user is the Creator of the case note.

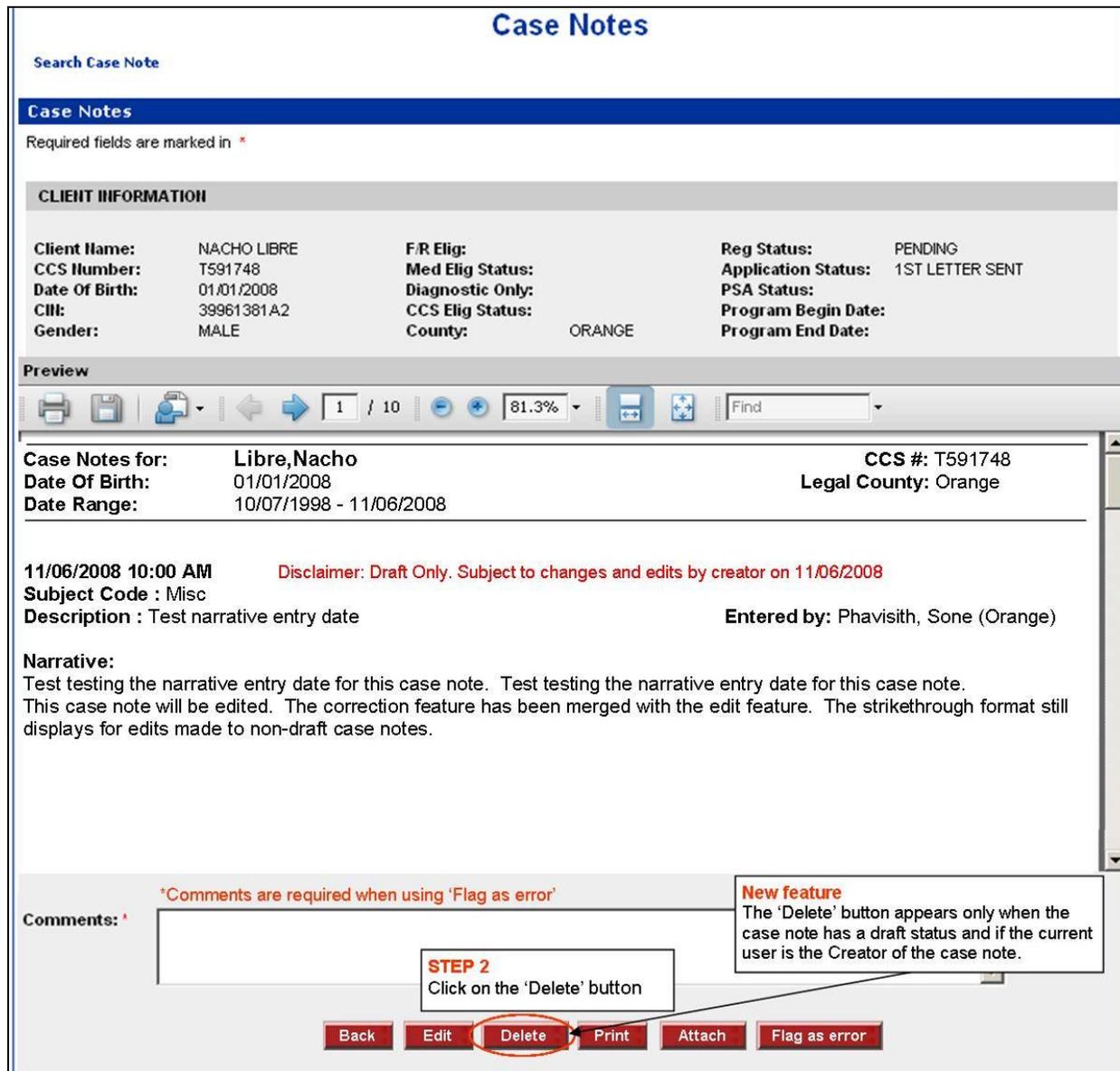


Figure 7-24, Delete a draft case note

After the case note is deleted, the system returns to the case notes search screen.

8 System-generated Case Notes

A system-generated case note is pre-populated with some system generated information, but the user has the ability to enter free-text. These case notes occur after certain events like a case closure, sent letters, or authorized SAR.

8.1 SAR CASE NOTES

Step 1. Create a pending SAR

Enter SAR

NACHO LIBRE, 3868101

STEP 1
 Create a pending SAR

SEARCH MED

Required fields are marked in *

CLIENT INFORMATION

Client Name: NACHO LIBRE	F/R Elig: ELIGIBLE	Reg Status: CLOSED
Alias:		
CCS Number: 3868101	Med Elig Status: ELIGIBLE	Application Status: 2ND LETTER SENT
Date of Birth: 01/01/2007	Diagnostic Only: NO	PSA Status: SIGNATURE
CI#: 32481471A0	CCS Elig Status: 9K CCS	Program Begin Date: 01/01/2008
Gender: FEMALE	County: SACRAMENTO	Program End Date: 07/01/2008

PROVIDER INFORMATION

Provider Name: COOK, AARON C MD	Provider Number: 1174601850
Provider Type: PHYSICIAN	
Address 1: 2025 MORSE AVE	Address 2:
City: SACRAMENTO	County: Sacramento
State: CA	Zip: 95825 find >
Phone No.:	Paneled Non PMF Provider: find >

Change Provider
Edit Provider

SAR INFORMATION

SAR Number		SAR Status	
Service Begin Date: 01/01/2008	Service End Date: 06/30/2008		
Service Request Date: 01/01/2008	Number of Days:		
EPSDT-SS: <input type="checkbox"/>	Category: Select		
CCS SS: <input type="checkbox"/>	State Approved: <input type="radio"/> Yes <input type="radio"/> No		
State Funded: <input type="checkbox"/>			
Primary Diagnosis: 110.0 DERMATOPHYTOSIS OF SCALP AND BEARD	find >		
Secondary Diagnosis: 003.8 OTHER SPECIFIED SALMONELLA INFECTION	find >		

SERVICE CODE INFORMATION

Remove	Service Code	Modifier	Type	Alternate Code	Service Description	Alternate Description	Units	Quantity	Amount
<input type="checkbox"/>	01	KC NU OE			PHYSICIAN		1		

SPECIAL INSTRUCTIONS

Special Instructions

Add Services
Submit
Undo

Figure 8-25, Enter pending SAR

Figure 8-26 displays the automatic case notes screen that has the system generated information and an area for users to add additional free-text.

- Step 2.** Enter additional free-text information then click the 'Save' button. The system will save the case note and return to the SAR module. Navigate back to the Case Notes module and find the new automatic case note.

California Home | DHCS Home | DHCS Organization Sunday, April 20, 2008

Children's Medical Services

Caring for Children with Special Medical Needs...

Contact Us | Help | Logout

Web Messages(0)

CCS Modules | Provider | Reports | Administration

Case Notes

Search Case Note | Add New | Edit/Delete

CASE NOTES

Required Fields are marked with *

CLIENT INFORMATION

Client Name: NACHO LIBRE	F/R Elig: ELIGIBLE	Reg Status: CLOSED
CCS Number: 3868101	Med Elig Status: ELIGIBLE	Application Status: 2ND LETTER SENT
DOB: 01/01/2007	Diagnostic Only: NO	PSA Status: SIGNATURE PENDING
CIID: 32481471A0	CCS Elig Status: 9K CCS	Program Begin Date: 01/01/2008
Gender: FEMALE	County: SACRAMENTO	Program End Date: 07/01/2008

CASE NOTE DETAILS

Entry Date: 04/20/2008

Subject: SAR-Pending Service Authorization status: Pending

Details:

SAR #: 97011486390

Provider: COOK, AARON C MD

Service Begin Date: 01/01/2008

Service End Date: 06/30/2008

Comments: Enter my case notes free text here

STEP 2
Enter additional free-text information to the automatic case note then click the 'Save' button

Save **Continue**

Figure 8-26, Automatic case note entry

- Step 3.** Select the system generated case note to view.
- Step 4.** Select the 'View/Print Selection' option then click the 'Continue' button

Case Notes

Search Case Note

Search Results - Case Notes

<input type="checkbox"/>	Date	Subject Code	Subject	CCS#	Client Name	County	Entered By	Status
<input type="checkbox"/>	11/05/2008	App-Letter1 Corres# 984852-2008	Application Status: 1st Letter: Sent Status: Sent	T591748	Libre,Nacho	30	Phavisith,Sone	
<input type="checkbox"/>	11/06/2008	Misc	Test narrative entry date	T591749	Libre,Nacho	34	Phavisith,Sone	
<input type="checkbox"/>	11/06/2008	App-Letter2 Corres# 895575-2008	Application Status: 2nd Letter: Sent Status: Sent	T591748	Libre,Nacho	33	Cardona Technician,Margarita	
<input type="checkbox"/>	10/06/2008	App-Letter2	App-Letter		rious	33	Cardona Technician,Margarita	
<input type="checkbox"/>	07/31/2008	Misc	Renewal process complete	T591748	Libre,Nacho	33	Verzosa Oa,Karen	
<input type="checkbox"/>	07/30/2008	Rpt-ChartRouted	Chart Routed	T591749	Munky,Drunkn Curious	33	Paredes Ccs Supervisor,Caridad	
<input type="checkbox"/>	07/30/2008	SAR-Authorzd SAR# 97011486390	Service Authorization status: Authorized	T591748	Libre,Nacho	33	Paredes Ccs Supervisor,Caridad	

191 Records found, displaying 1 to 20.
[\[First/Prev\]](#) 1, 2, 3, 4, 5, 6, 7, 8 [\[Next/Last\]](#)

Back
Print
Attach
Transfer case note

Figure 8-27, Select automatic case note to view

Figure 8-28 displays the system-generated case note. The free-text portion displays below the system-generated text.

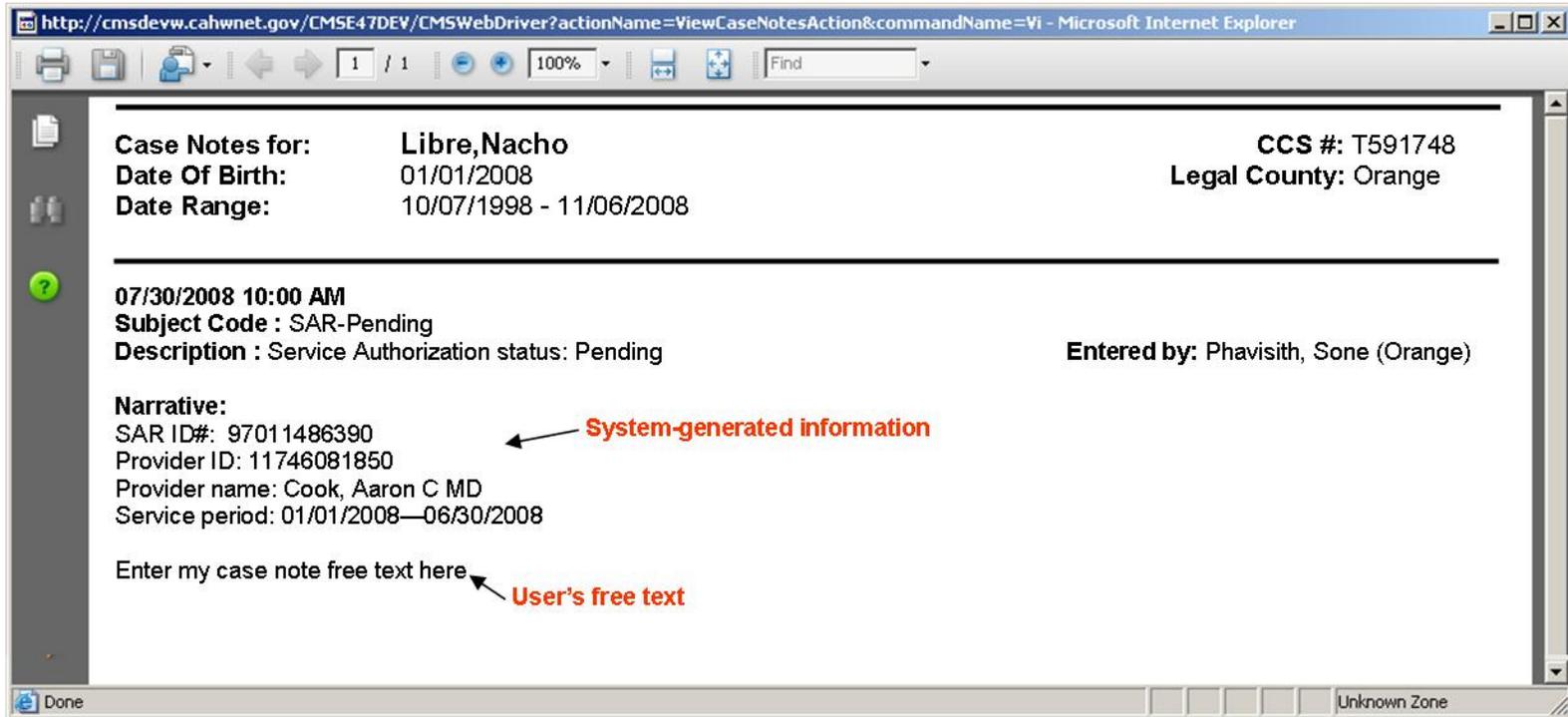


Figure 8-28, Print display of automatic case note

8.1.1 SAR Hyperlinks

- Step 1.** Click the SAR hyperlink to view the pending SAR. In order to view the pending SAR, the system will have to navigate to the SAR module. A confirmation dialog box will appear.
- Step 2.** Click 'OK' to navigate to the SAR module.

Case Notes

[Search Case Note](#)

Search Results - Case Notes

<input type="checkbox"/>	Date	Subject Code	Subject	CCS#	Client Name	County	Entered By	Status
<input type="checkbox"/>	11/05/2008	App-Letter1 Corres# 984852-2008	Application Status: 1st Letter: Sent Status: Sent	T591748	Libre,Nacho	30	Phavisith,Sone	
<input type="checkbox"/>	11/06/2008	Misc				34	Phavisith,Sone	
<input type="checkbox"/>	11/06/2008	App-Letter2 Corres# 895575-2				33	Cardona Technician,Margarita	
<input type="checkbox"/>	10/06/2008	App-Letter2				33	Cardona Technician,Margarita	
<input type="checkbox"/>	07/31/2008	Misc	complete	T591748	Libre,Nacho			
<input type="checkbox"/>	07/30/2008	Rpt-ChartRouted	Chart Routed	T591749	Munky,Drunk			
<input type="checkbox"/>	07/30/2008	SAR-Pending SAR# 97011486390	Service Authorization status: Pending	T591748	Libre,Nacho	33	Paredes Ccs Supervisor,Caridad	

191 Records found, displaying 1 to 20.
[First/Prev](#) [1](#), [2](#), [3](#), [4](#), [5](#), [6](#), [7](#), [8](#) [Next/Last](#)

[Back](#)
[Print](#)
[Attach](#)
[Transfer case note](#)

Microsoft Internet Explorer

To view the SAR, the system will navigate to the SAR module. Do you want to continue?

STEP 2
Click 'OK' to continue to navigate to the SAR module to view the pending SAR.

STEP 1
Click SAR hyperlink to view the pending SAR. System will navigate to the SAR module.

Figure 8-29, Click SAR hyperlink to view pending SAR

California Home DHCS Home DHCS Organization Sunday, April 20, 2008

Children's Medical Services Contact Us | Help | Logout
Caring for Children with Special Medical Needs... Web Messages(0)

CCS Modules | **Provider** | Reports | Administration

View SAR

NACHO LIBRE, 3868101 **PENDING, SAR ID 97011486390**

[Authorize](#) | [Deny](#) | [Cancel](#) | [Modify](#) | [Delete](#) | [Print](#) | [History](#)

CLIENT INFORMATION

Client Name:	NACHO LIBRE	F/R Elig:	ELIGIBLE	Reg Status:	CLOSED
Alias:		Med Elig Status:	ELIGIBLE	Application Status:	2ND LETTER SENT
CCS Number:	3868101	Diagnostic Only:	NO	PSA Status:	SIGNATURE PENDING
DOB:	01/01/2007	CCS Elig Status:	9K CCS	Program Begin Date:	01/01/2008
CIH:	32481471A0	County:	SACRAMENTO	Program End Date:	07/01/2008
Gender:	FEMALE				

PROVIDER INFORMATION

Provider Name:	COOK, AARON C MD	Provider Number:	1174601850
Address:	2025 MORSE AVE,SACRAMENTO,CA,95825	County:	SACRAMENTO
Provider Type:	PHYSICIAN		

SAR INFORMATION

SAR Number:	97011486390	Request Date:	01/01/2008
Service Begin Date:	01/01/2008	Service End Date:	06/30/2008
No Of Days:	182	State Funded:	N
EPSDT-SS:	N	CCS-SS:	N
State Approved Category:			
Primary Diagnosis:	110.0 DERMATOPHYTOSIS OF SCALP AND BEARD		
Secondary Diagnosis:	003.8 OTHER SPECIFIED SALMONELLA INFECTIONS		

SERVICE REQUEST AUTHORIZATION

Service Code	Type	Modifier	Alternate Code	Service Description	Alternate Description	Units	Quantity	Amount
01				PHYSICIAN		1		

Figure 8-30, Navigate to SAR module to view pending SAR

Clicking on the hyperlink of a SAR with a status of authorized or cancelled, the system will display a pop-up screen of the .PDF format.

- Step 1.** Click the hyperlink of a SAR that has either an authorized or cancelled status. The system will bring up a print display of the selected SAR.

Case Notes

Search Case Note

Search Results - Case Notes

<input type="checkbox"/>	Date	Subject Code	Subject	CCS#	Client Name	County	Entered By	Status
<input type="checkbox"/>	11/05/2008	SAR-Authorzd SAR# 97016006630	Service Authorization status: Pending	T591748	Libre,Nacho	30	Phavisith,Sone	
<input type="checkbox"/>	11/06/2008	Misc	Test narrative entry date	T591749	Libre,Nacho	34	Phavisith,Sone	
<input type="checkbox"/>			in Status: 2nd ent ent	T591748	Libre,Nacho	33	Cardona Technician,Margarita	
<input type="checkbox"/>	10/06/2008	App-Letter2	Application Status: 2nd Letter sent	T591749	Munky,Drunkn Curious	33	Cardona Technician,Margarita	
<input type="checkbox"/>	07/31/2008	Misc	Renewal process complete	T591748	Libre,Nacho	33	Verzosa Oa,Karen	
<input type="checkbox"/>	07/30/2008	Rpt-ChartRouted	Chart Routed	T591749	Munky,Drunkn Curious	33	Paredes Ccs Supervisor,Caridad	
<input type="checkbox"/>	07/30/2008	SAR-Pending SAR# 97011486390	Service Authorization status: Pending	T591748	Libre,Nacho	33	Paredes Ccs Supervisor,Caridad	

191 Records found, displaying 1 to 20.
 [First/Prev] 1, 2, 3, 4, 5, 6, 7, 8 [Next/Last]

Back
Print
Attach
Transfer case note

Figure 8-31, Click SAR hyperlink to view PDF display

Figure 8-32 displays the authorized SAR.

SAR #: 97016006630

CONFIDENTIAL
CALIFORNIA CHILDREN'S SERVICES (CCS)
SRO-SACRAMENTO REGIONAL OFFICE
 MS 8100
 PO Box 997413
 Sacramento, CA 95899-7413
 TELEPHONE: (916) 327-3100

Authorized Provider: NGUYEN, CHAU TUAN MD
 3291 LOMA VISTA RD
 VENTURA CA 93003

Provider Number: 1720160832
Telephone:

Provider Type: PHYSICIAN

AUTHORIZATION FOR SERVICES

Authorization is for services and effective dates indicated below, in accordance with CCS program policies and fee schedule. Authorization for additional services not listed below must be requested in advance. By providing these authorized services, you agree to accept payment from the CCS program as payment in full. If you have a Service Code Grouping (SCG) authorization, please check your Medi-Cal manual for services included in the SCG.

CCS CLIENT INFORMATION

Client Name: NACHO LIBRE
Alias:
Address: 8008 JALAPENO AVE
 APT 8
 ORANGE, CA 92866

Client Index Number: 30961381A2
CCS Case Number: 4059173
Date Of Birth: 01/01/2008

Parent/Guardian: MOM LIBRE
Address: 1515 K ST
 SUITE 510
 ORANGE, CA 92866

Gender: MALE
Client Telephone: (213) 898-4521
Parent/Guardian Tel: (213) 458-9874

Medical Home: SURABIAN, S R INC
Address: 1221 W Tenaya
 Fresno, CA 93711

County: ORANGE
Primary Diagnosis: 987.0 TOXIC EFFECT OF LIQUEFIED PETROLEUM GASES
Secondary Diagnosis:

AUTHORIZATION INFORMATION

Effective Dates: 01/01/2008 through 01/01/2008

CCS AUTHORIZED SERVICES

Service Code	Modifier	Service Description	Units	Amount
01		PHYSICIAN	1	

SPECIAL INSTRUCTIONS

Please refer to the Medi-cal website: www.medi-cal.ca.gov regarding billing instructions utilizing your National Provider Identifier (NPI). Thank you for your continued participation in the California Children's Services Program.

Issued By: PHAVISITH.SONE (SRO) **Date Authorized:** 11/19/2008

Page 1 of 1 Printed On: Wed Nov 19 13:03:40 PST 2008 SAR #: 97016006630

Figure 8-32, Print display of cancelled SAR

9 System Administration Functionalities

9.1 TRANSFER CASE NOTE

If users have entered a case note in the incorrect patient record, they can request to have a State system administrator transfer the case note to the correct patient.

- Step 1.** Select the case notes to transfer.
- Step 2.** Click on the 'Transfer case note' button.

Case Notes

Search Case Note

Search Results - Case Notes

<input type="checkbox"/>	Date	Subject Code	Subject	CCS#	Client Name	County	Entered By	Status
<input type="checkbox"/>	11/05/2008	SAR-Authrzd SAR# 97016006630	Service Authorization status: Pending	T591748	Libre,Nacho	30	Phavisith,Sone	
<input type="checkbox"/>	11/06/2008	Misc	Test narrative entry date	T591749	Libre,Nacho	34	Phavisith,Sone	
<input type="checkbox"/>	11/06/2008	App-Letter2 Corres# 895575-2008	Application Status: 2nd Letter: Sent Status: Sent	T591748	Libre,Nacho	33	Cardona Technician,Margarita	
<input type="checkbox"/>	07/31/2008	Misc	Renewal process complete	T591748	Libre,Nacho	33	Verzosa Oa,Karen	
<input checked="" type="checkbox"/>	07/30/2008	Rpt-ChartRouted	Chart Routed	T591749	Libre,Nacho	33	Paredes Ccs Supervisor,Caridad	
<input checked="" type="checkbox"/>	07/30/2008	SAR-Pending SAR# 97011486390	Service Authorization status: Pending	T591748	Libre,Nacho	33	Paredes Ccs Supervisor,Caridad	

191 Records found, display [First/Prev] 1, 2, 3, 4, 5, 6, 7

Back Print Attach Transfer case note

STEP 1
Select the case notes to transfer.

STEP 2
Click the 'Transfer case note' button.

Figure 9-33, State system administrators functionalities

- Step 3.** Search and select the destination patient record.
- Step 4.** Enter the name of the user requesting to transfer the case note.
- Step 5.** Click the 'Transfer case note' button.

Case Notes

Search Case Note

Transfer Case Notes screen

<input type="checkbox"/>	Date	Subject Code	Subject	CCS#	Client Name	County	Entered By	Status
<input checked="" type="checkbox"/>	07/31/2008	Misc	Renewal process complete	T591748	Libre,Nacho	33	Verzosa Oa,Karen	
<input checked="" type="checkbox"/>	07/30/2008	Rpt-ChartRouted	Chart Routed	T591749	Libre,Nacho	33	Paredes Ccs Supervisor,Caridad	
<input checked="" type="checkbox"/>	07/30/2008	SAR-Pending SAR# 97011486390	Service Authorization status: Pending	T591748	Libre,Nacho	33	Paredes Ccs Supervisor,Caridad	

TRANSFER CASE NOTE TO:

Search Client

Patient Name	SSN	DOB	Gender	County	
<input type="text"/>	<input type="button" value="find"/>				
UZUMAKI,NARUTO	T591750	35541781.A0	01/01/2008	MALE	34 <input type="button" value="X"/>

Comments: *Comments are required when transferring

Per user from a Legal CCS county

Figure 9-34, Transfer case note to correction patient record

After the case transfer is complete, the system returns to the case note search screen.

- Step 6.** Search for the transferred case notes of the destination patient record. Select the transferred case note to view as indicated by the status 'Transferred'.
- Step 7.** Click the 'Print' button.

Case Notes

Search Case Note

Destination patient record

STEP 6
Select the transferred case notes

	Date	Subject	CCS#	Client Name	County	Entered By	Status
<input checked="" type="checkbox"/>	07/31/2008	Misc Renewal process complete	T591750	Uzumaki, Naruto	33	Verzosa Oa, Karen	Transferred
<input checked="" type="checkbox"/>	07/30/2008	Rpt-ChartRouted Chart Routed	T591750	Uzumaki, Naruto	33	Paredes Ccs Supervisor, Caridad	Transferred
<input checked="" type="checkbox"/>	07/30/2008	SAR-Pending SAR# 97011486390 Service Authorization status: Pending	T591750	Uzumaki, Naruto	33	Paredes Ccs Supervisor, Caridad	Transferred

3 Records

STEP 7
Click the 'Print' button to view the transferred case notes

Figure 9-35, Select transferred case note to view

Figure 9-36 displays the format of the transferred case note. The transfer entry displays above the original case note with the date of when it was transferred. The original entry date is still used in searches.

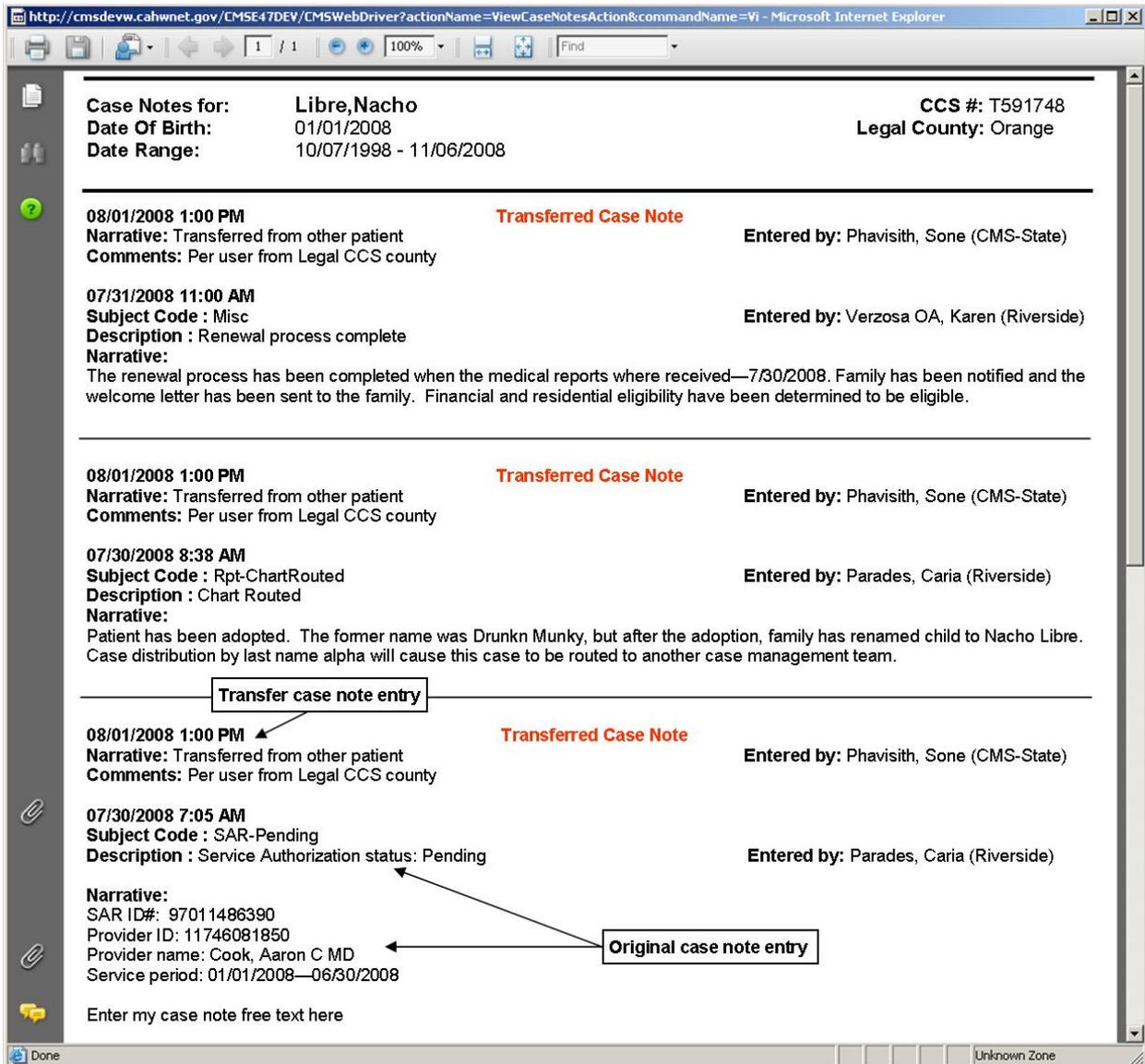


Figure 9-36, View transferred case note

9.2 FLAG AS ERROR

Users need to request from the State system administrators to flag the case note as an error.

Step 1. Select the case note to flag as an error by clicking on the subject description hyperlink.

Case Notes

Search Case Note

Search Results - Case Notes

<input type="checkbox"/>	Date	Subject Code	Subject	CCS#	Client Name	County	Entered By	Status
<input type="checkbox"/>	11/05/2008		Authorization pending	T591748	Libre,Nacho	30	Phavisith,Sone	
<input type="checkbox"/>	11/06/2008	Misc	Test narrative entry date	T591749	Libre,Nacho	34	Phavisith,Sone	
<input type="checkbox"/>	11/06/2008	App-Letter2 Corres# 895575-2008	Application Status: 2nd Letter: Sent Status: Sent	T591748	Libre,Nacho	33	Cardona Technician,Margarita	
<input type="checkbox"/>	10/06/2008	App-Letter2	Application Status: 2nd Letter sent	T591749	Munky,Drunkn Curious	33	Cardona Technician,Margarita	
<input type="checkbox"/>	07/31/2008	Misc	Renewal process complete	T591748	Libre,Nacho	33	Verzosa Oa,Karen	
<input type="checkbox"/>	07/30/2008	Rpt-ChartRouted	Chart Routed	T591749	Libre,Nacho	33	Paredes Ccs Supervisor,Caridad	
<input type="checkbox"/>	07/30/2008	SAR-Pending SAR# 97011486390	Service Authorization status: Pending	T591748	Libre,Nacho	33	Paredes Ccs Supervisor,Caridad	

7 Records found

Back
Print
Attach
Transfer case note

Figure 9-37, Select case note to flag as error

- Step 2.** Enter comments or reasons for flagging the case note as an error.
- Step 3.** Click the 'Flag as error' button

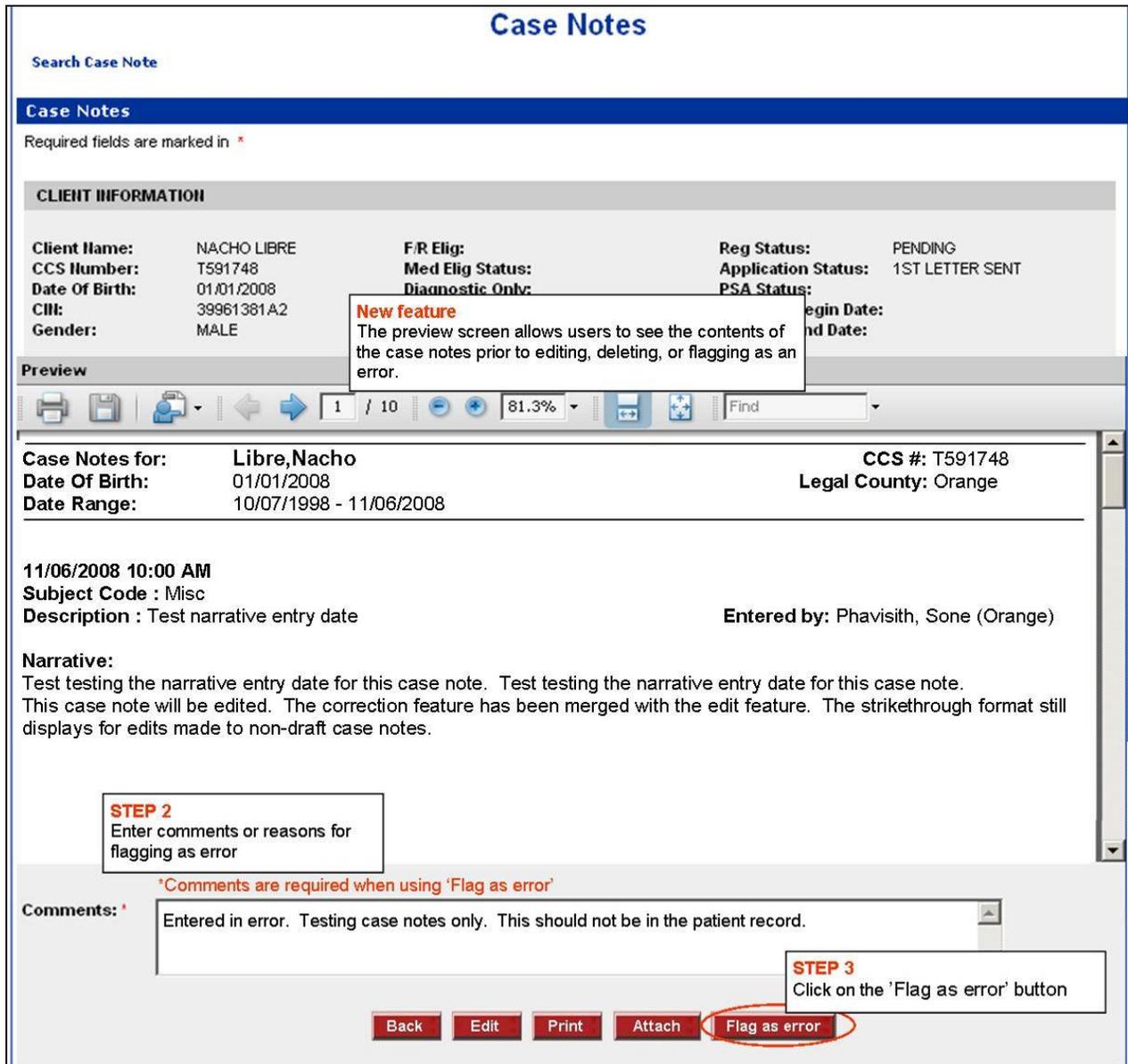


Figure 9-38, Enter comments prior to flagging the case note as error

After the case note is flagged as an error, the system returns to the case notes search screen.

Case notes flagged as an error will be excluded from the search results. To include case notes flagged as an error, place check mark in the 'Display error notes' check box under the Advanced Search options.

Advanced Search Options

(Combination of fields may be used, although not required)

Search User

<input type="checkbox"/>	User Name	County	Regional Office	User Status	
	<input type="text"/>	Select <input type="button" value="v"/>	Select <input type="button" value="v"/>	Select <input type="button" value="v"/>	<input type="button" value="find >"/>

Select Subject

<input type="checkbox"/>	Group Description	Subject Code	Subject Line	
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="find >"/>

Display error and deleted case notes:

Figure 9-39, Include error case notes in search results

9.3 PRINT ALL CASE NOTES IN A PATIENT RECORD

There is a known limitation where the system cannot return more than 200 records when searching for case notes. As a temporary solution, the system displays the 'Print all case notes' button to allow the system to display the PDF file of all the case notes for the selected patient.

Rules:

- 1. Used by County or State administrators; therefore, the button appears for only those users.
- 2. One patient record must be selected, only.
- 3. The PDF file lists the case notes in chronological order – oldest to newest.

Step 1. Select one patient record, only.

Step 2. Click the 'Print all case notes' button. The system displays a PDF file of all the case notes for the selected patient. The case notes are sorted in chronological order.

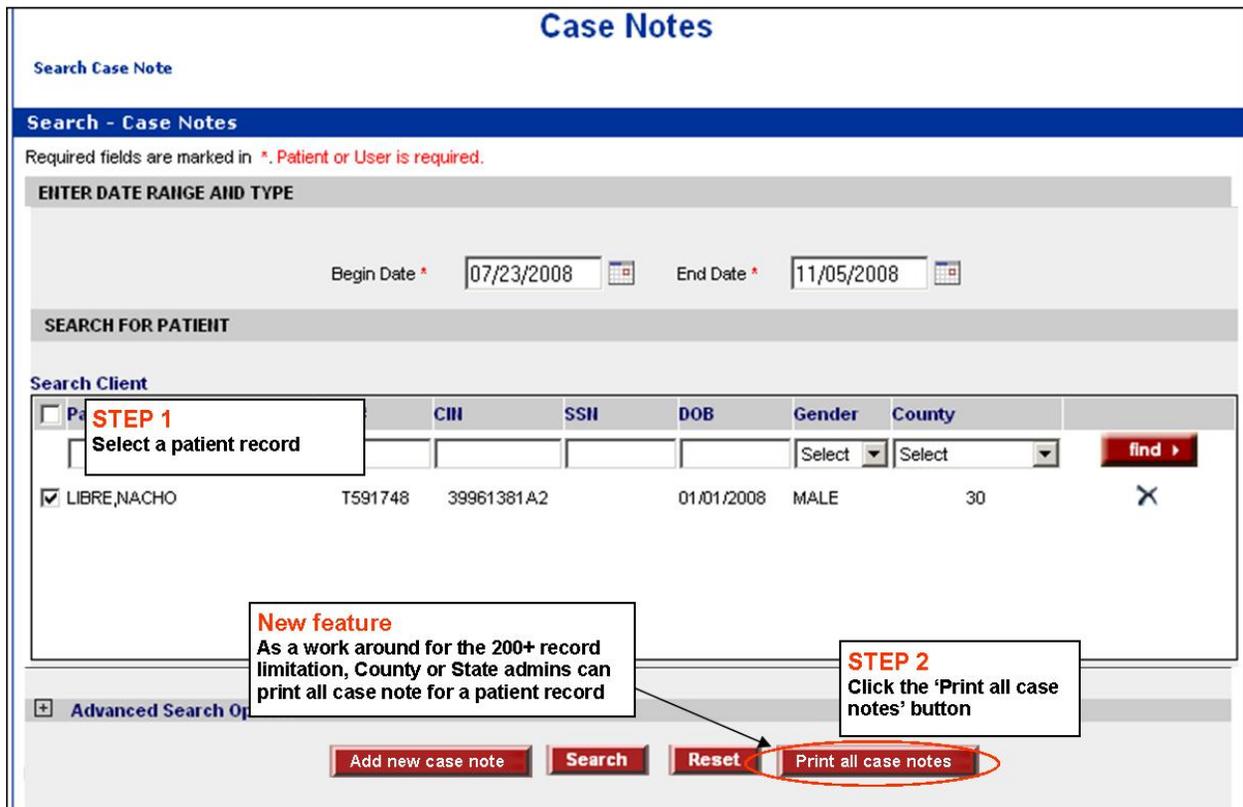


Figure 40, Use 'Print all case notes' button

10 Appendix A

Table 10-3, Proper Case Notes Subject Code usage

	Subject Code	Subject Description	Purpose of Use
1.	Elig-AnnualMedReview	Annual Medical Review	Documentation of Annual Review
2.	App-Misc	Application – other information or issues	Documentation regarding CCS application
3.	Misc-AppealIssue	Appeal Issues	Documentation of appeal actions - letter received and sent
4.	Elig-Apppt	Appointment – FEI/FS Appointment	Documentation of financial/face sheet appt scheduled at the CCS Office
5.	SAR-BillClaim	Bill / Claim Communication	When CSC or PR speaks to provider or client about a bill or claim
6.	Misc-CaseNarr	Case Narrative	Used for general narrative entry
7.	Misc-CenterClinicVst	Center / Clinic Visit	Documentation of visit to center or clinic appointments
8.	Rpt-ChartRouted	Chart Routed	Used when hard copy chart routed to CCS staff
9.	Corresp-misc	Correspondence – other information of issues	Documentation of generated correspondence or received correspondence.
10.	SAR-CostEstRequest	Cost Estimate Request	Documentation of CER sent to vendor by CSC & MTU
11.	DME	Durable Medical Equipment (non-MTP)	Documentation of DME supplies
12.	DME-Rehabilitative	Durable Medical Equipment – Rehabilitative (non-MTP)	Documentation of DME-Rehab supplies (RX, estimates, appts, delivery)
13.	Elig-misc	Eligibility – other information or issues	Documentation of program or client eligibility
14.	Misc-EPSDTSS	EPSDT SS Issues	Entry of EPSDT requests sent
15.	RefReg-FaceSheetInterview	Face Sheet Interview	Documentation of face sheet interview by RN & CSC
16.	Elig-FinElig	Financial Eligibility	Documentation of all financial & residential eligibility - initial and annual
17.	Insur-misc	Insurance – other information or issues	Documentation of insurance findings, questions or issues
18.	Misc-InterofficeXfer	Interoffice Transfer	Used when case transferred to another county
19.	SAR-InpatientReview	Inpatient Review	Documentation of Inpatient Authorization set up by RN & MD
20.	Misc-Intrepreter	Language Interpreter	Documentation of Interpreters for face sheet and MTU appts by everyone
21.	Misc-MaintTransportation	Maintenance and Transportation	Documentation of approval of maintenance & transportation to MTC appts or MD appts
22.	Rpt-MedRptInfo	Medical Report Information	Used by medical staff to document/summarize info in medical report
23.	Elig-MedEligAction	Medical Eligibility Action	Documentation of medical eligibility determination
24.	Misc	Other information or issues	Documentation of e-mails, letters, faxes sent or received and

CMS Case Notes

			other miscellaneous info
25.	Misc-PhoneCall	Phone Call	Documentation of a telephone call
26.	SAR-PerscriptionPharm	Prescription / Pharmacy	Document information related to prescription request
27.	SAR-ProviderInfo	Provider – information or issues	Documentation of a provider information or contact
28.	PSA-misc	PSA – other information or issues	Documentation of PSA tracking
29.	RefReg-ReferralInfo	Referral Information	Documentation of initial referral received
30.	LegacyAuth-Request	Request for Services	Documentation of authorization set up
31.	SAR-misc	Service Authorization (SAR) – other information or issues	Documentation specific to a client’s SAR
32.	Xfer-misc	Transfer Information	Documentation of a client’s transfer or any associated activities.
33.	Misc-TransitionPlan	Transition Planning	Used to indicated transition activities
34.	MTP-MedInfoComment	MTP Medical Information Comment	Comments related to diagnosis or treatment services
35.	MTP-ClientInfoComment	MTP Client Info Comment	Client registration comments
36.	MTP-SchoolInfoComment	MTP School Info Comment	Documentation of client’s school for MTP services
37.	MTP-TherapyServComment	MTP Therapy Services Comment	Documentation for administration activities – therapy services (Not used for running notes)
38.	MTP-VendorTherapyComment	MTP Vendor Therapy Comment	Documentation for administration activities –vendor therapy services (Not used for running notes)
39.	MTP-DMEComment	MTP Durable Medical Equipment Comment	Documentation of MTP DME supplies
40.	MTP-ReferralInfoComment	MTP Referral Information Comment	Documentation of initial MTP referral received
41.	MTP-CaseStatusComment	MTP Case Status Comment	Documentation of case status updates
42.	MTP-ConsentTrackingComment	MTP Consent Tracking Comment	Used to track MTP consents
43.	MTP-MTUAssignComment	MTU Assignment Comment	Document when a new MTU is assigned
44.	MTP-ConferenceSchedComment	MTP Conference Scheduling	Conference scheduling updates or additions comments
45.	MTP-MTUClinic	MTU Clinic	Documentation of MTU clinic appts outcomes (orders, referrals, RX, etc)
46.	MTP-MTUTherapyRpt	MTU Therapy Reports	Documentation of annual or 6 month eval reports
47.	MTP-MTUIssues	MTU Issues	Documentation of MTU issues
48.	MTP-MTPElig	MTU Eligibility	Comments related to Client’s MTP eligibility
49.	MTP-LocalEduAgency	Local Education Agency	Documentation of LEA activity by MTU
50.	MTP-MTPElig	MTP Eligibility	Documentation of MTU eligibility determination
51.	MTP-misc	MTP - other information or issues	Documentation of MTP e-mails, letters, faxes sent or received and other miscellaneous info
52.	MTP-miscMTU	MTU - other information or issues	Documentation of MTU e-mails, letters, faxes sent or received and other miscellaneous info
53.	MTP-MTUClinic	MTU Clinic	Conference scheduling within a MTU updates or additions

CMS Case Notes

			comments.
54.	MTP-MTUIssues	MTU Issues	Documentation of general narrative entries related to MTU
55.	MTP-MTUTherapyRpt	MTU Therapy Reports	Documentation based on the MTU therapy report.