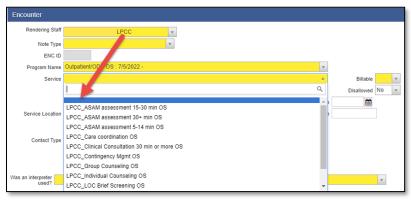Changes identified for the following: Encounter, Group Session Notes, Claim Item List, Batch List, and Encounter List.

Section 1 – Encounter Screen

- The Rendering Staff field – moved to the top of the screen
  - Rendering staff must have taxonomy code as part of user account set up
  - Create encounter by first selecting the rendering staff, then enter the start date of the encounter – Entering these values first, will update the encounter screen (Pre and post 07/01/23)

- Service field – will be filtered based on the allowed services for the rendering staff discipline and the client LOC/PE.
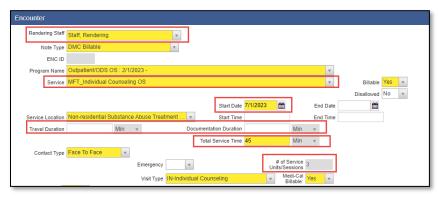

- Documentation Duration and Travel Duration fields – are optional
- Session Duration and Total Duration fields – no longer displayed
- New Total Service Time field – enter **direct** service time with client (do not round up or down)
- # of Service Units/Sessions field – duration-based services calculated based on the Total Service Time field (ex. 1 Unit = 15-minute increment) and is auto-populated
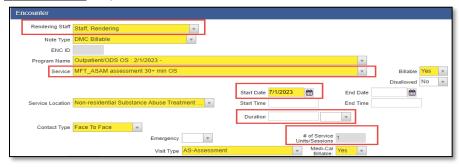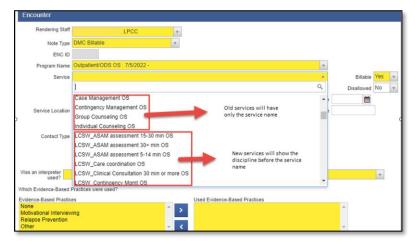
- <u># of Service Units/Sessions</u> field – unit-based services defaults to "1" and is read only
  - o <u>Duration field</u> is optional

- <u>Service Location</u> field – dropdown updated (select based on client's location at time of service)
- <u>Contact Type</u> field – service provided by Telehealth or Phone, contact type must be "Telehealth" or "Phone" whichever is applicable, as well as the <u>Service Location</u> should be
  - o "Telehealth provided in patient's home"
  - o "Telehealth provided other than in patients' home"

Note: Encounters with a <u>Start Date</u> pre-7/1/2023 will show both old and new services listed on the <u>Service</u> dropdown. Only select the services with service name (will not contain discipline). The old services will remain on the service dropdown for a period of time to allow for pre- 7/1/23 backdated entries.
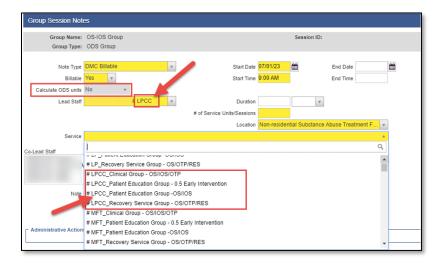
Section 2 – Group Session Notes Screen

- Calculate ODS Units field –
  - Defaults to NO and is read only for groups with Start Date of 7/1/23 forward
  - Defaults to YES and is editable for groups with Start Date of pre-7/1/23
    - **Select NO for OTP group counseling on groups with Start Date pre-7/1/23**
- Service field – dropdown will populate **all** group types pre and post 7/1/23
  - User must select groups starting with the "#" sign followed by discipline for groups with start date of 7/1/23 forward
  - User should select groups starting with "**" for groups with start date pre-7/1/23

Note: All the new group types preceded by "#" will show on the top of the service list followed by the pre-7/1/23 groups preceded with "**"

IMPORTANT NOTE: 7/1/23 forward – Issues identified with Group Sessions Note screen

- Groups with Start Date of 7/1/23 forward – Travel Time field is still being required and must have a zero (0) added in order to save it. DO NOT put any time other than a zero (0) as this would be added to the Total Service Time on the individual encounter. **NO travel or documentation duration** should be entered for Group encounters until system is fixed. Providers will be notified by MIS SUDEHRSupport.HHSA@sdcounty.ca.gov when the system has been fixed.

- When creating a "No Show" encounter through the group session notes screen, select "No Show" under the Contact Type on the individual encounter so appropriate fields are greyed out, then finalize encounter

Section 3 – Rolled up Claims, Claim Item List, Claim Batch List & Encounter List (For Billing Staff)

- Rolled-up claims – Claims can be rolled up if the service is provided by the same rendering staff, same day, same client, and same service.
    - o Includes both duration-based and unit-based services exception: service code S5000, S5001, H0020, H0019, H0012
    - o Totals units will be included to Primary Claim Item
    - o Status of Claim will be "Pending Roll-up" OR "Rolled Up"
- Claim Item List – Charge field and Charge column will no longer be visible
    - o Including exported list
- Claim Profile - Rate/Unit fields will no longer be visible
- Claim Batch List – Charge column will no longer be visible
    - o Including exported list
- Encounter List screen – Balance field and Balance column will no longer visible
    - o Including exported list
- Navigation Pane – the following 12 items below will no longer be visible to users; exception county staff
    - o EOB Transaction List Report is being developed in SSRS