QuickStart User Guide

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CONTACTING ICANOTES SUPPORT

Our Support team is available to assist you via phone Monday through Thursday 8:30am to 7:30pm Eastern (5:30am to 4:30pm Pacific) and Fridays 9:00am to 6:30pm Eastern (6:00am to 3:30pm Pacific). Support chat is available Monday through Thursday 9:00am to 7:00pm Eastern (6:00am to 4:00pm Pacific) and Fridays 9:30am to 6:00pm Eastern (6:30am to 3:00pm Pacific). Whether you need assistance with troubleshooting or training, our friendly support experts are waiting to answer your call and respond quickly to address you request. We also have someone on-call after hours to assist customers who are unable to access the program.

By Phone: 443-569-8778

By E-Mail: ticket@icanotes.com

By Live Chat: Visit our website for live chat assistance with a member of our Support Team.

Submit a Support Ticket: Click here to submit a ticket to our Support Portal, no login required!

Access our Support Portal: Click here to log in to the ICANotes Support Portal, where you can create new tickets, view ticket status, and peruse the knowledge base for quick answers to your questions.

In addition to this user guide, we have a library of on-demand video tutorials available on our website:

Video Tutorials

REFERRALS

We offer our customers a referral rewards program. If you refer a colleague from another practice, you are eligible to receive a $100 account credit as a reward if that colleague becomes a customer of ours for at least 90 days. To qualify for a referral reward, submit your colleague's information to sales@icanotes.com.

CHANGES TO YOUR ACCOUNT

If you want to:	Go to or Contact:
Add more users to your Group	Knowledge Base Article
Remove users from your Group	Knowledge Base Article
Add electronic signature to your account	Knowledge Base Article
Add e-prescribing to your account	ICANotes Website (at the bottom)
Set up electronic billing via a clearinghouse	ICANotes Website Partners

| Inquire about your ICANotes bill | Billing – 866-847-3590 or billing@icanotes.com |
| Set up credit card processing | [ICANotes Website](https://www.icanotes.com) |

- Type www.icanotes.com in your browser's address bar.
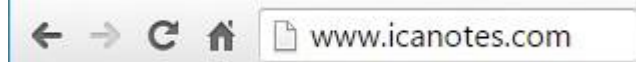
- Click the **Support** tab on the navigation bar.
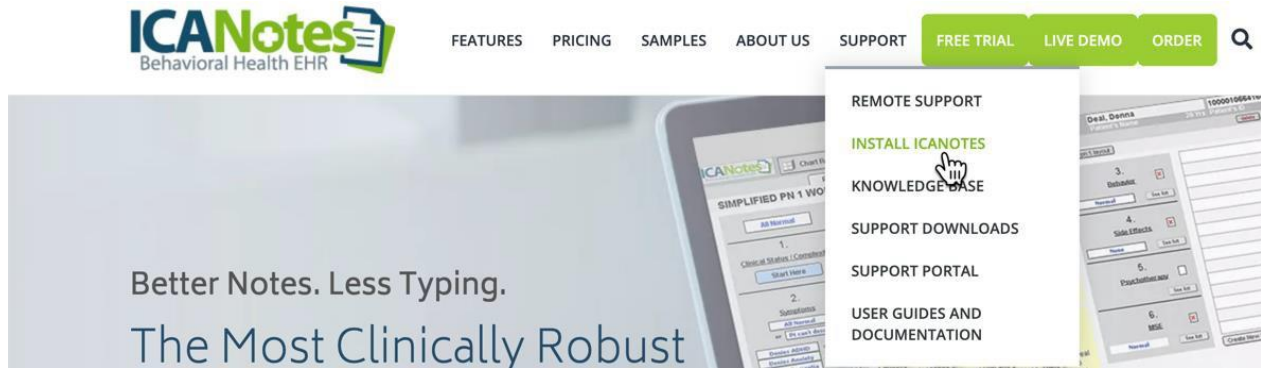
- Follow the instructions under **Install on Windows**. Follow step one to download a shortcut icon, as illustrated below.

- The option to Save As pops up. Make sure that it is set to save on your Desktop and click **Save**.
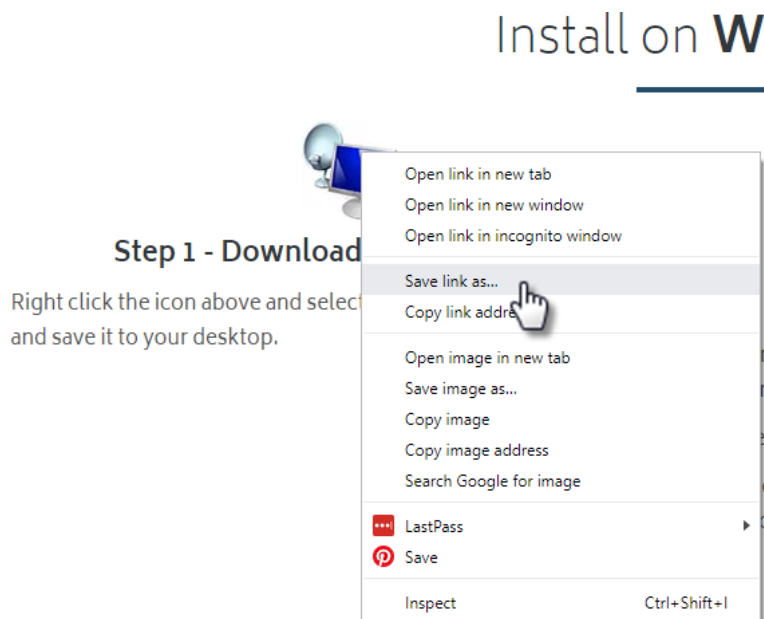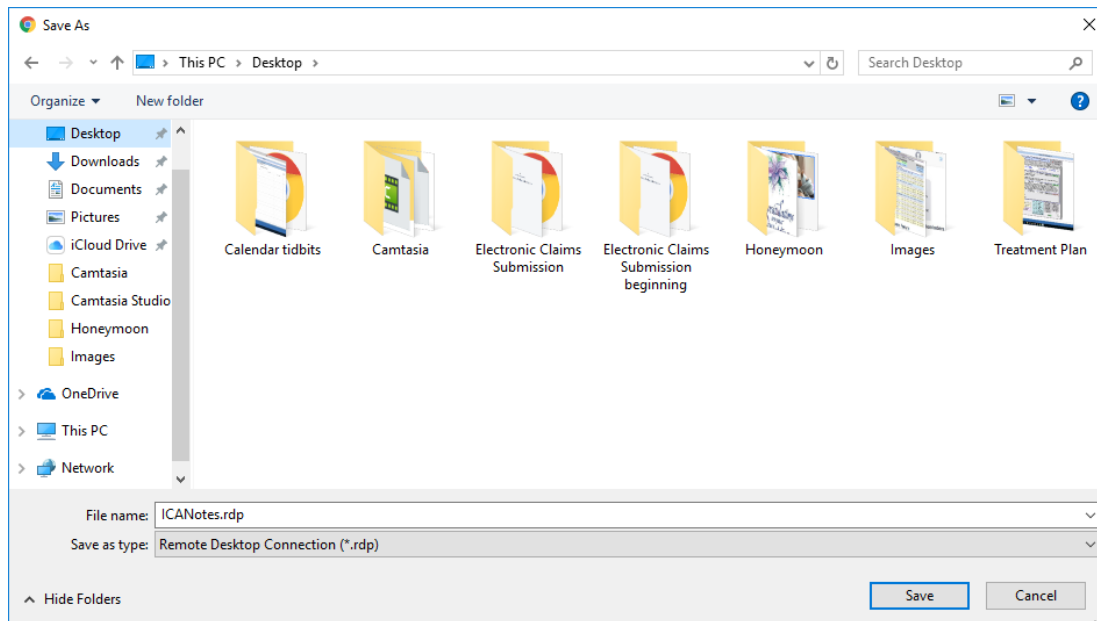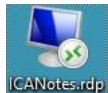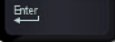
- After saving, the icon will be available on your desktop. Click on the icon.

- You will be prompted to enter your credentials to login.
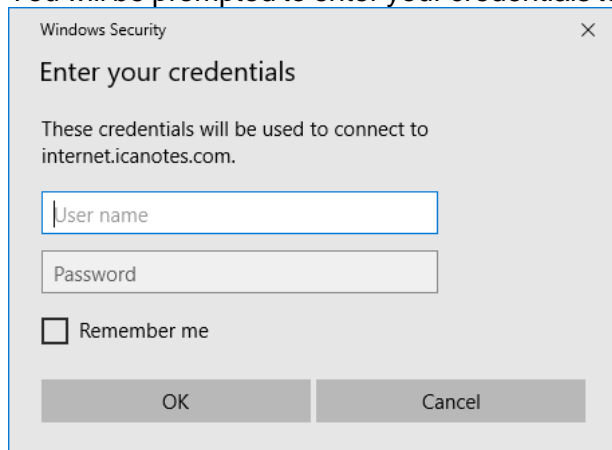
- In the **User name** field, enter your username in the following format: INTERNET\username (for example "INTERNET\janedoe", no quotations). Be sure to use a true backslash ⬚ as failing to do so will prevent login. The appropriate key for this character is typically found above the ⬚ key on the keyboard.

- Enter your password in the next field and click the ⬚OK⬚ button.

> **Forgot your password? Locked out?** If the wrong username/password combination is entered three times in a row, ICANotes will prevent further login attempts for 20 minutes. If this happens, or if you cannot remember your password, contact your group's security administrator or call ICANotes Support at 443-569-8778 to have your password reset or your account unlocked. **Please note: Due to security protocols, all password resets issued by ICANotes Support must be done over the phone.**

- After you log in, give the system 60 seconds to fully log in. You will be brought to the Clinician Reminder Sheet.

WINDOWS CONNECTION TROUBLESHOOTING
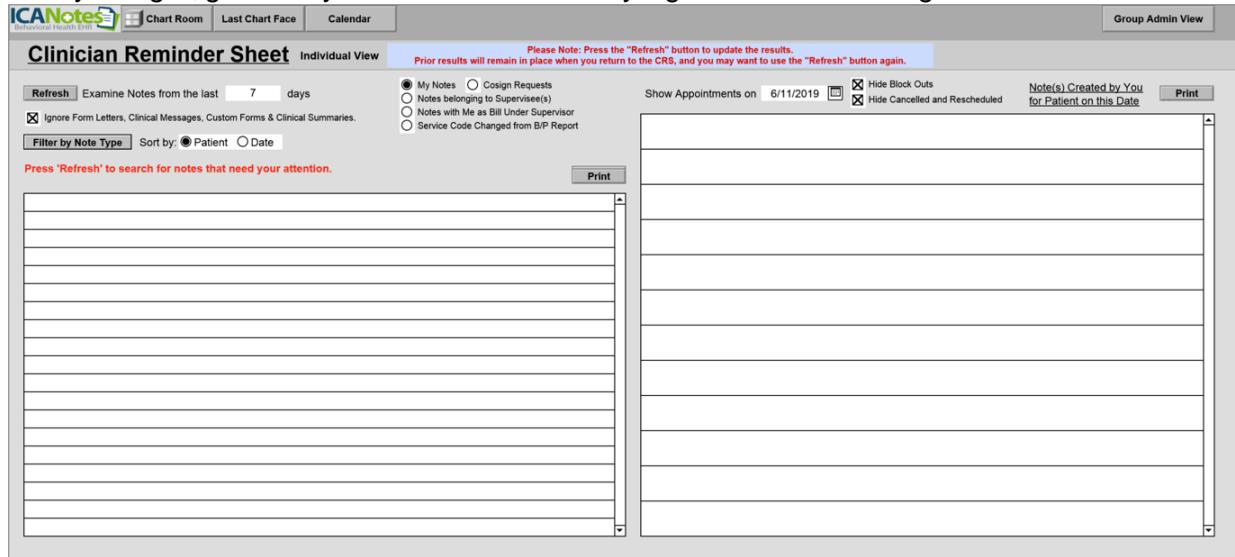
If you receive a certificate error stating that "Your remote desktop connection failed because the remote computer cannot be authenticated", please follow these steps:

 or
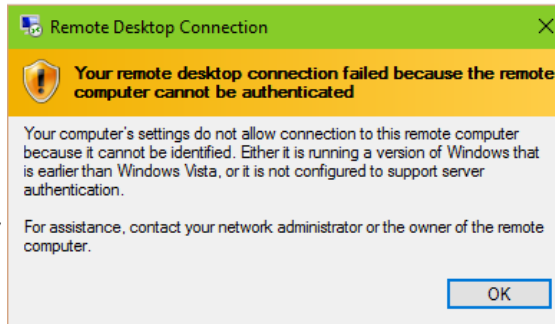
- Delete icon if one is on your desktop and unpin from the taskbar (as applicable).

o   Deleting icon

```
Open
Add to Start menu
Shred
Open file location
Run as administrator
Pin to Start
Scan
Unpin from taskbar
Restore previous versions
Send to                          >
Cut
Copy
Create shortcut
Delete
Rename
Properties
```
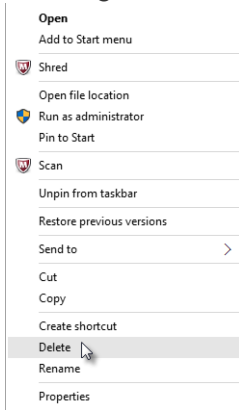
o   Unpinning from the taskbar.

```
Recent
Remote Desktop Connection
Unpin this program from taskbar
```

- Click Search.

```
Task Manager
Control Panel
File Explorer
Search
Run
Shut down or sign out           >
Desktop
```
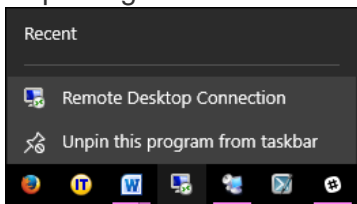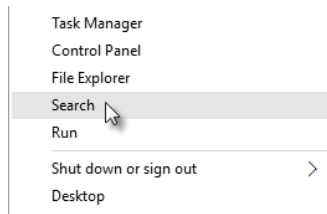
- Search for remote desktop connection.

```
Best match
Remote Desktop Connection
Desktop app
Remote Desktop Connection Manager
Desktop app
Settings
RemoteApp and Desktop Connections
remote desktop connection
```
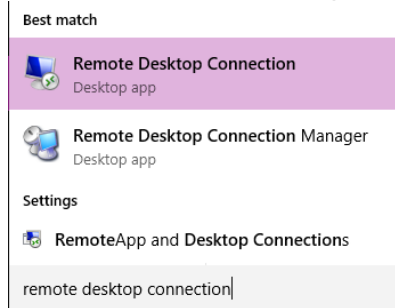
- Right click and select Send to Desktop.
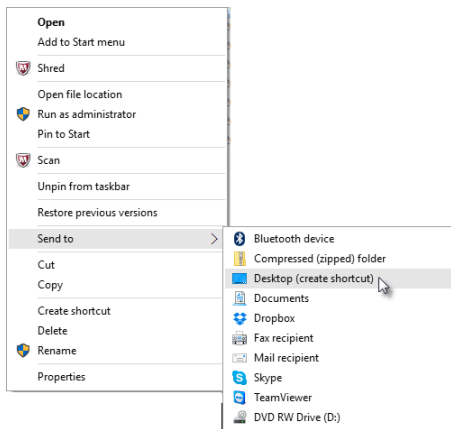
- If you use Windows 10 Cortana, right click the Remote Desktop Connection Desktop app and click 'Open file location'.
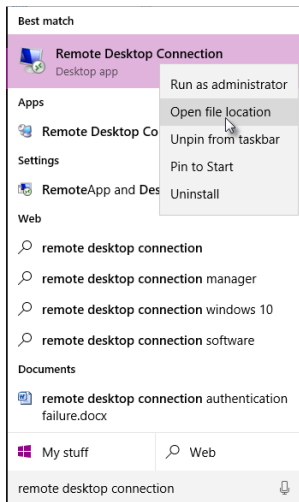
- On the popup window, select 'Send to' and then 'Desktop (create shortcut)'.
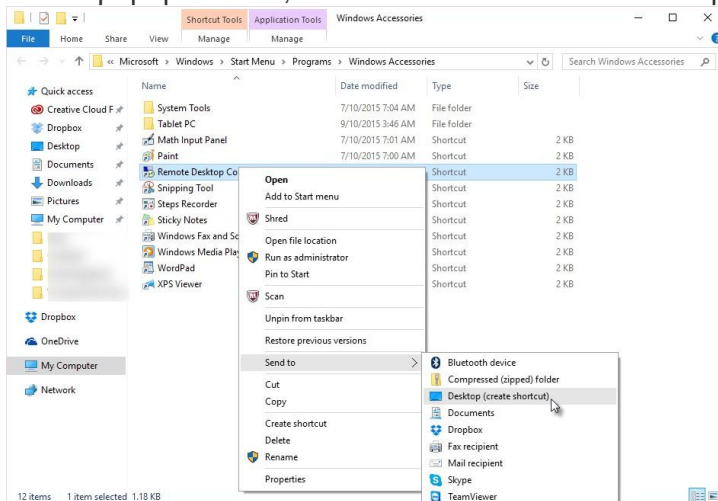
- The Remote Desktop Connection Icon will be on the desktop.

- Rename icon to ICANotes by right clicking on the icon and selecting 'Rename'.
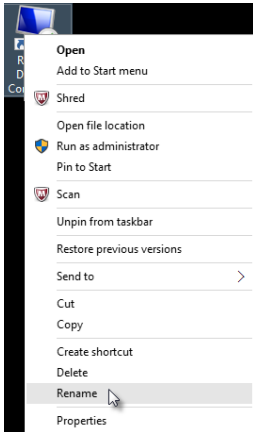
- Type ICANotes and click outside the field to save the change.

- Right click the icon and select Open (or Edit).
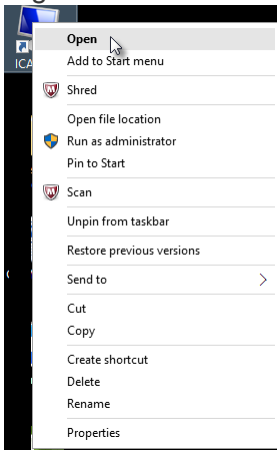
- Click Show Options.
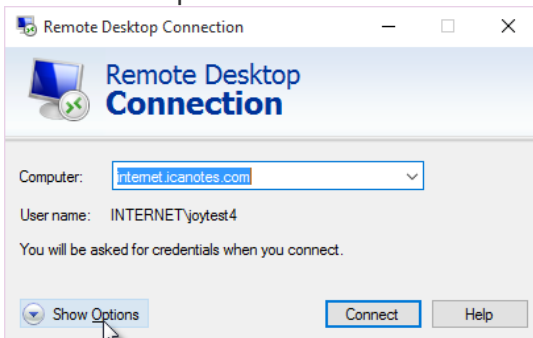
- Go to the Advanced tab and click the down arrow under Server authentication. Select 'Connect and don't warn me'.
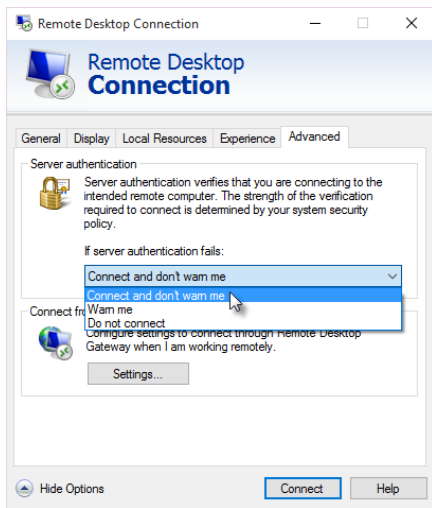
- Click the [Connect] button to start ICANotes.

INSTALLING ICANOTES (MAC)

To install ICANotes on your Mac:

Microsoft RDP 10.0 is downloaded from the App Store.

- Go to the top right corner of your screen and click the Apple icon. Then choose App Store... from the dropdown menu.

- Once the App store launches, search for Microsoft RDP.
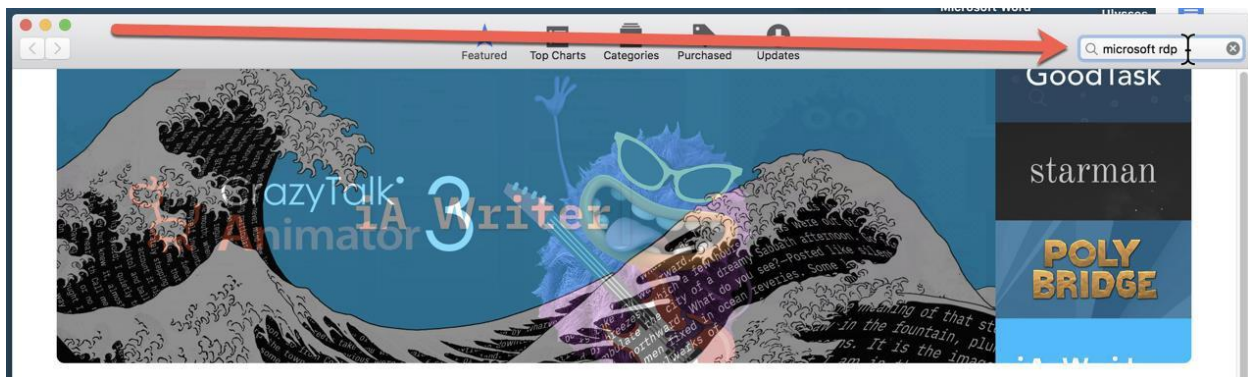
- Your search results may look like below. Choose the Microsoft RDP option with the circle orange icon [icon]. Click the GET button by the [icon] icon.
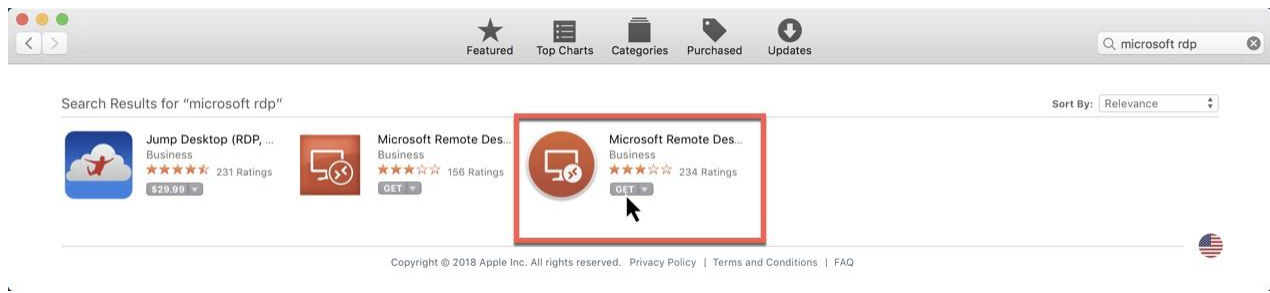
- Next, click INSTALL APP button to install Microsoft RDP.

- You may be prompted to enter in your Apple ID. In some cases, the App Store may prompt you to confirm your billing information. This is a standard process in the App Store, especially if it has been a while since you last downloaded any apps. The Microsoft RDP app is free and your credit card should not be charged for it.

- Once downloaded, click OPEN.
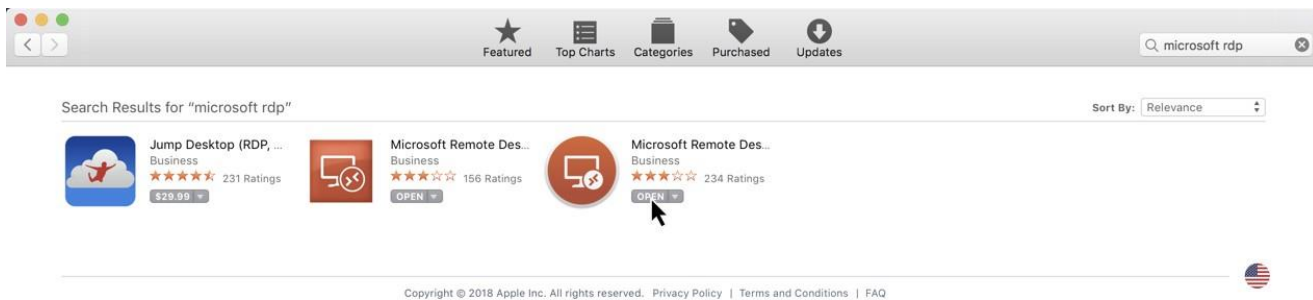
- When you start Microsoft RDP for the first time you'll need to add the connection for ICANotes. Start by clicking Add desktop button in the Microsoft Remote Desktop window.

- When the Add Desktop window populates, you will enter the following:
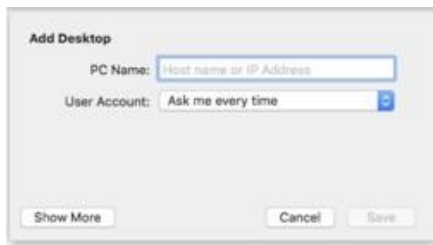
    PC Name: internet.icanotes.com

    User Account: Leave as Ask me every time

- Click [Show More] in the bottom left of the window.

- This will open the Edit Desktop window.
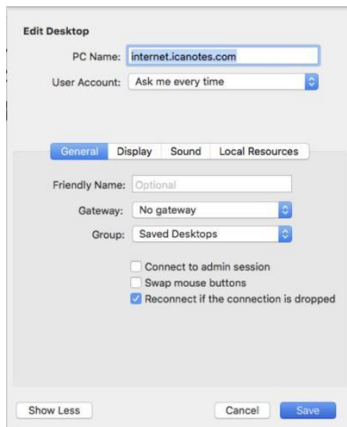
- Under Friendly Name, type ICANotes for easy identification.
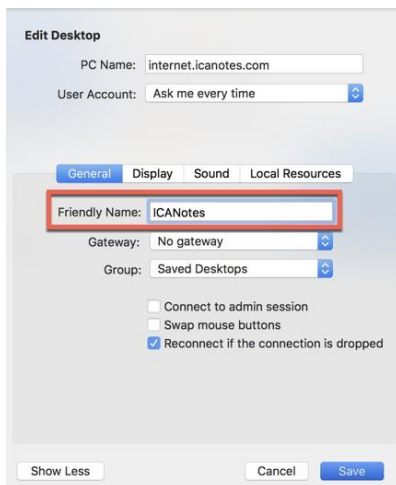
- The 'Swap mouse buttons' option may be useful if you are a left-handed mouse user. If you are using the trackpad (such as on a Macbook Air or Macbook Pro) the left side of the trackpad will be your right-click, and the right-side of the trackpad will be your left click.

- If you are not left-handed, you do not need to check this option.

- Click the **Display** tab to move to the next area.
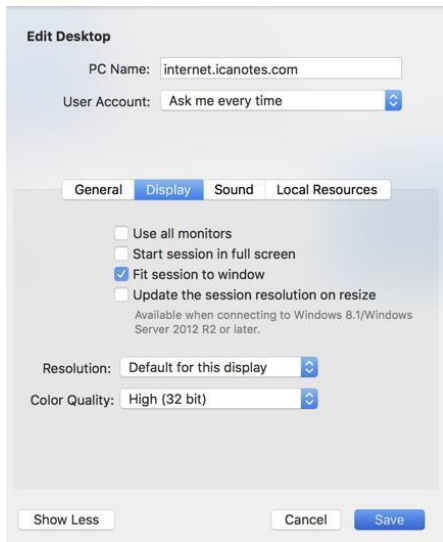
The option to **Start session in full screen** will start ICANotes up using the entire display area of your screen. In full screen mode you are NOT given the option to minimize the program to your dock.

If you prefer to use ICANotes in full screen, a handy keyboard shortcut you can use to navigate between open programs is *Command + Tab*. When you hold down the Command and then hit Tab key, you will see icons for the programs currently open. You can use the Tab key to cycle between each icon, and then release both keys to switch to that program.

For this and other keyboard shortcuts for your Mac, please refer to the Apple website
https://support.apple.com/en-us/ht201236

If you prefer launching ICANotes in windowed mode, make sure **Start session in full screen** is not selected. You can check the **Fit session to window** option to fit everything onto the window without horizontal scrolling. Users on high resolution monitors (27" and higher) may prefer to use full screen mode so that menus are not too small to see.

- Go to the **Local Resources** tab. Be sure that Printers and Clipboard are selected.
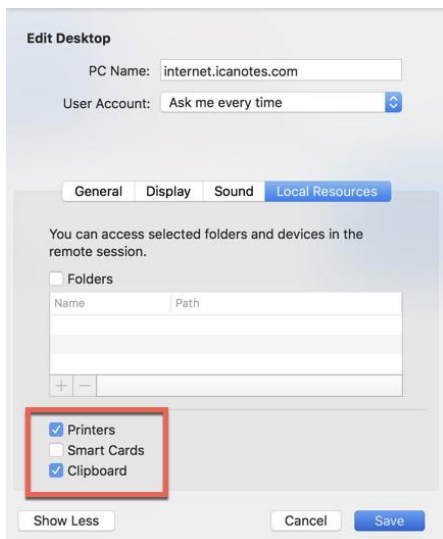
- Once all settings have been set, click the [Save] button. Your new icon will show on the Microsoft Remote Desktop.

- To login, double-click on the icon [ICANotes] you setup.

- Type in internet\username (example: internet\joytest4) and your password in this window. Then click the [Done] button.

User Account

internet.icanotes.com

User Name: internet\joytest4

Password: •••••••••

☐ Store user name and password   Cancel   Done

- ICANotes will open in either full-screen or windowed mode. If you prefer windowed mode you can minimize ICANotes by clicking on the **YELLOW icon** at the top left of the window.

- Once you are logged into ICANotes you can close out the connection screen (optional). Otherwise, when you click on the orange RDP icon in your dock (when minimized) it will bring up the connection screen instead of ICANotes.

- To close out of the connection screen, click the red X.

Microsoft Remote Desktop

⚏ ≡ ✽ ˅ + ˅   Desktops   Apps   Q Search
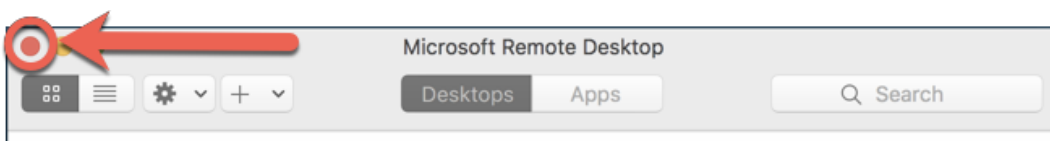
PLEASE NOTE: When logged into ICANotes you will need to use the pink Log Off button in the Chart Room to properly exit the program. Please DO NOT X out of the active ICANotes window to logout.

- You can also look at the orange RDP icon in your dock to see if the ICANotes window is currently open (the black dot underneath the icon indicates the program is open).

- If it is, right-click on the icon you will see **ICANotes** (the name we gave the connection). Click on ICANotes to bring up the ICANotes window.

- To keep ICANotes in your dock for easy access, right-click and from Options choose **Keep in Dock.**
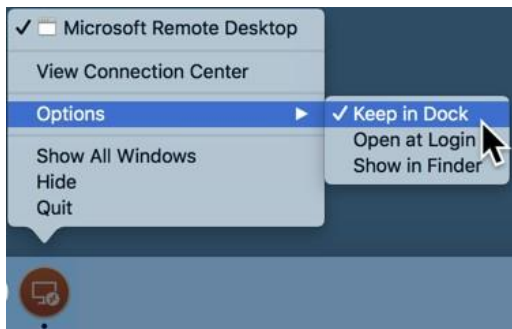
- You can move the icon to another spot on your dock by clicking and dragging the App icon to another spot on the dock.

Forgot your password? Locked out? If the wrong username/password combination is entered three times in a row, ICANotes will prevent further login attempts for 20 minutes. If this happens, or if you cannot remember your password, contact your group's security administrator or call ICANotes Support at 443-569-8778 to have your password reset or your account unlocked. **Please note: Due to security protocols, all password resets issued by ICANotes Support must be done over the phone.**

MAC CONNECTION TROUBLESHOOTING

If you receive a message that the file cannot be opened because it is from "an unidentified developer", please follow these steps:

- ○ Click the icon in the upper left corner of the screen.

- ○ Select System Preferences.

- • Click Security & Privacy.

- • On the Security & Privacy window General tab, click the in the bottom left to unlock the settings.
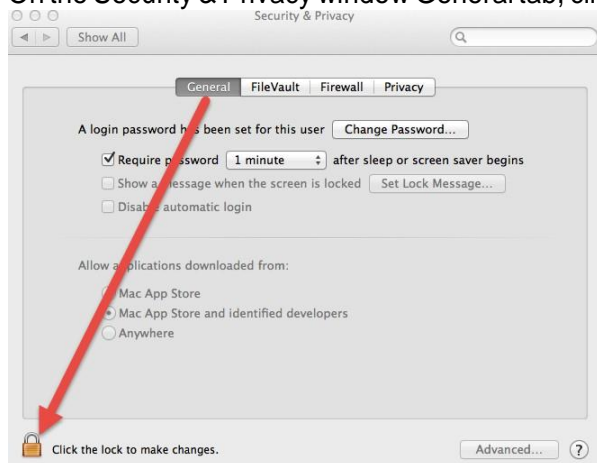
- • You will need to enter your master password to unlock.
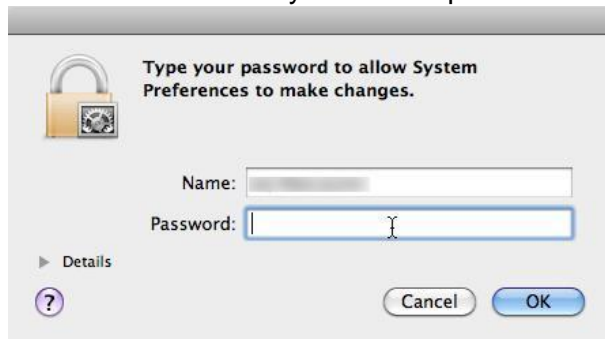
- • Under Allow applications downloaded from, click the radio button for Anywhere.

- Close the window and reattempt to install.

LOGGING IN ON A TABLET OR MOBILE DEVICE

ICANotes is compatible with almost every Android and Apple mobile device, including iPads, iPhones, and Kindles. Please follow these instructions to connect to ICANotes through your mobile device. The screenshots you see below were taken on an Apple device; however, the instructions are identical for Android devices unless otherwise noted.

- Go to your device's app store, search for "Microsoft Remote Desktop." The app should look like this:
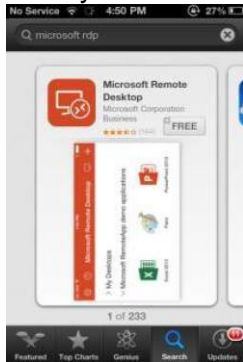
- Install the application.

- Once downloaded, open the app and tap the plus sign in the upper right-hand corner to add a new remote desktop connection (ICANotes).

- Your screen will display like this:

- Choose "Add PC or Server" to proceed.

- You will see the screen below.

- Tap "PC Name" to proceed to the next screen.

- You will be prompted to enter a "host name or IP address" – enter "internet.icanotes.com" into this field, without quotations.

- Click the "Done" button in the upper right-hand corner. This will bring you back to the screen below where you should now see "internet.icanotes.com" in the "PC Name" field.

- Tap the "User Name" field. Specify whether or not you want to be prompted to enter your username and password each time you connect. You may choose to add a user account or save your username and password – please be advised that this is not recommended due to HIPAA requirements.

- To save your username and password, choose the "Add User Account" option. You will be prompted to enter your username and password. Please note that your username must be entered in the same format as the example below, preceded by "internet\". Make note of the appropriate slash used as it must be precise in order to connect. For Apple device users, type "internet" (no quotations), then hit your "123" button in the lower left-hand corner, and then your special characters button (#+=), also in the lower left, to access the appropriate backslash. Then, return to the alphabetical keyboard and proceed to enter your username.

- Once you have entered your username in the format specified, enter your password. Please note that if you choose to save your username, your password is required.

- Once all required fields have been addressed, hit "Save" and return to the previous screen, which should look similar to this example:

- Tap the "Save" button in the upper right-hand corner to save your settings. This will take you back to the 'Home' screen of the app, which will look like this now that you have set up your ICANotes connection.

- To log into ICANotes, simply tap the connection listed under "My Desktops" as 'internet.icanotes.com'. A screen will display, indicating that you are being connected to ICANotes.
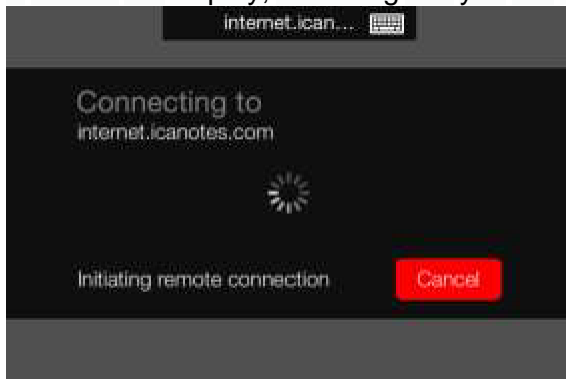
- Once connected, your screen should look like this:

Note: Upon initial login, your mouse settings may default to 'drag'. To change this, simply tap the darker-colored bar at the top of the screen. You will see the screen below appear – clicking the "Touch" option in the lower right-hand corner will change the settings to 'touch screen'.

- You should now be able to click the OK button on the login screen.

CHANGING YOUR PASSWORD

From within ICANotes:

- In the main ICANotes Chart Room, click on the [Settings + Directories] drawer in the lower right-hand corner of the screen.

- Click on the [Change My Password] button in the bottom middle of this screen.

- Enter your current password in the first field. In the second field, enter your desired new password and then enter it again in the "Confirm Password field"

Note: Passwords must be a minimum of eight characters, including at least one uppercase letter, at least one lowercase letter, and at least one number.

- Click the [OK] button to proceed. You will receive a confirmation message if successful.

From the Upload Site:

- You can access the upload site by going to https://upload.icanotes.com.

  ICANotes Documents Login

  This is a private computer system and is the property of ICANotes LLC. It is for authorized use only. Unauthorized or improper use of this system may result in administrative disciplinary action and civil and criminal penalties. By continuing to use this system you indicate your awareness of and consent to these terms and conditions of use. LOG OFF IMMEDIATELY if you do not agree to the conditions stated in this warning.

  Login

  User name

  Password

  Forgot Password?

  ☐ Remember me?

  Sign In

- The first time you log into the ICANotes Upload Site, you will be prompted to fill out the email used with your ICANotes account and three security questions.

  Answers

  Username

  1. What was your childhood nickname?

  answer

  2. In what city did you meet your spouse/significant

  answer

  3. What is the name of your favorite childhood frienc

  answer

  Submit

- There are a wide variety of questions that you can choose for your security questions. Hit the down arrow to the right of the field to get the full list of security questions.

- Once you have filled out your email address, selected three security questions and answers, click Submit.

  Answers

  Username

  1. What was your childhood nickname?

  2. In what city did you meet your spouse/significant

  3. What is the name of your favorite childhood frienc

  Submit

- Next time that you have forgotten your password to ICANotes, go to the upload site and select the Forgot Password? link.

- You will be prompted to input your username or email. Click the blue arrow.

- After clicking the blue arrow, you will be brought to the verification page. Please note that you can use the dropdown arrow in the Security Question field to answer any of the three security questions. Click the submit button.

- If successful, you will receive this message:

- Check your email and you will find your temporary password.
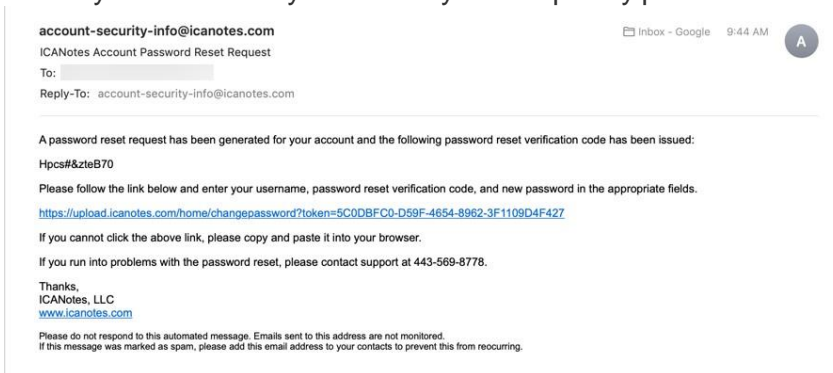
- Follow the Reset Password link to reset your password. If you used the Reset Password link (instead of typing the address into the browser), your username and the temporary password will populate in the fields. Type in your new password and confirm. Click the reset button.

Username

Password reset verification code

```
............
```

Passwords must be between 8 and
16 characters and cannot be the
same as the password reset
verification code

New password

```
..........
```

Confirm new password

```
..........
```

Reset

- You will know you were successful when you receive this message.

Your password has been reset.
Please wait a couple minutes for this
process to complete and enter your
ICANotes username and password again.
Click here to return to the login page.

Forgot your password? Locked out? If the wrong username/password combination is entered three times in a row, ICANotes will prevent further login attempts for 20 minutes. If this happens, or if you cannot remember your password, contact your group's security administrator or call ICANotes Support at 443-569-8778 to have your password reset or your account unlocked. **Please note: Due to security protocols, all password resets issued by ICANotes Support must be done over the phone.**

IMPORTING PATIENT DEMOGRAPHICS

If you currently have your patient demographics in electronic form, we can import the data into ICANotes for you at no extra charge. Please make every effort to ensure that your import file follows these instructions exactly as this will enable us to perform your data import more quickly. Files which do not follow these instructions will require more time to import.

First, follow this link to save the demographic import template to your computer:

https://upload.icanotes.com/files/Patient%20Demographics_GroupName.xls

> **Important Note:** ICANotes cannot be held responsible for the accuracy of the data you provide. Please ensure that all records are 100% accurate before submitting the file to ICANotes or be prepared to have your staff adjust the information record by record within the ICANotes system. Do not include any field you do not see listed below – doing so will dramatically increase the time required to import your data.

Once you have the template installed on your computer, open it and resave it with the following convention, where "username" is your ICANotes username: "PatientDemographics_username.xls".

After your Excel file has been saved according to the following instructions, either fill out the spreadsheet template appropriately or copy and paste the information from another spreadsheet. Many times, your previous software will provide a demographics export for this purpose. Please note that the ICANotes template formatting is required per our import process. Please see the list of required fields below.

Once your file has been populated with accurate patient information, save your file (being sure to follow the instructions mentioned above regarding the file name), and submit your file by uploading it to https://upload.icanotes.com/filedrop/. After you have uploaded your file via the secure Dropbox link, please send an email to ticket@icanotes.com to notify us of your file upload.

The following fields are **REQUIRED** in your spreadsheet. Please ensure the column names match **EXACTLY** as you see them below:

FirstName	should not contain salutation or initials
LastName	should not contain title or initials
PatientID	can be any format as long as it is unique
Gender	M, F, O or Male, Female, Other or Man, Woman or Boy, Girl, Person
DOB	1/31/2001 or 1/31/01 or 1/31/2001 or 01/31/01 (if this isn't provided, we'll fill in an arbitrary value)

The following fields are optional and may also be imported. There are no restrictions unless otherwise noted. Once again, make sure to title your columns exactly as you see them listed:

MiddleName
SocialSecurityNumber
DateEntered   1/31/2001 or 1/31/01 or 01/31/2001 or 01/31/01
Address
City
State
Zip
HomePhone
WorkPhone
CellPhone
Pager
EmailAddress
SchoolOrEmployer
SchoolGrade

MaritalStatus
Ethnicity
Religion
AdditionalNotes
PrimaryCarePhysicianName
ReferredByName
EmergencyContact
EmergencyContactNotes
InsuranceCompany1
PolicyNumber1
GroupNumber1
InsuranceCompanyTelephoneNumber1
InsuredFirstName1
InsuredLastName1
InsuredMiddleName1
InsuredDOB1
InsuranceCompany2
PolicyNumber2
GroupNumber2
InsuranceCompanyTelephoneNumber2
InsuredFirstName2
InsuredLastName2
InsuredMiddleName2
InsuredDOB2
PharmacyName
PharmacyPhone
PharmacyFax
GuarantorName
GuarantorPhone
GuarantorAddress
GuarantorCity
GuarantorState
GuarantorZip

Note: Any field not listed above may be included in the "AdditionalNotes" field by naming your desired data to be imported as "AdditionalNotes_YourFieldName", e.g., AdditionalNotes_BalanceDue. When imported, all the fields you name in that fashion will be merged and will be available in the Miscellaneous Notes section of the Demographics page on the patient chart.

**Please note that <u>all imports are final</u>.**

In this section, we will review each of the tabs which appear under 'Group Level Settings & Directories' in Settings + Directories. You must be a Group Administrator in order to make changes on these tabs. These tabs allow you to configure your group's ICANotes settings.

- To get started, click on the Settings + Directories drawer in the Chart Room, as shown below:
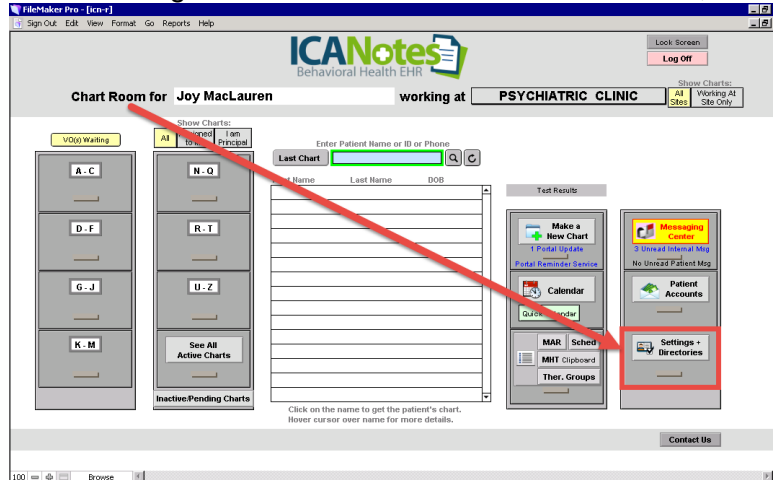
- Click on the 'Group Level Settings & Directories' tab.

- Clicking the [Show] button at the bottom of the screen will highlight in yellow those fields that are required for electronic billing. Fields highlighted in pink are optional.
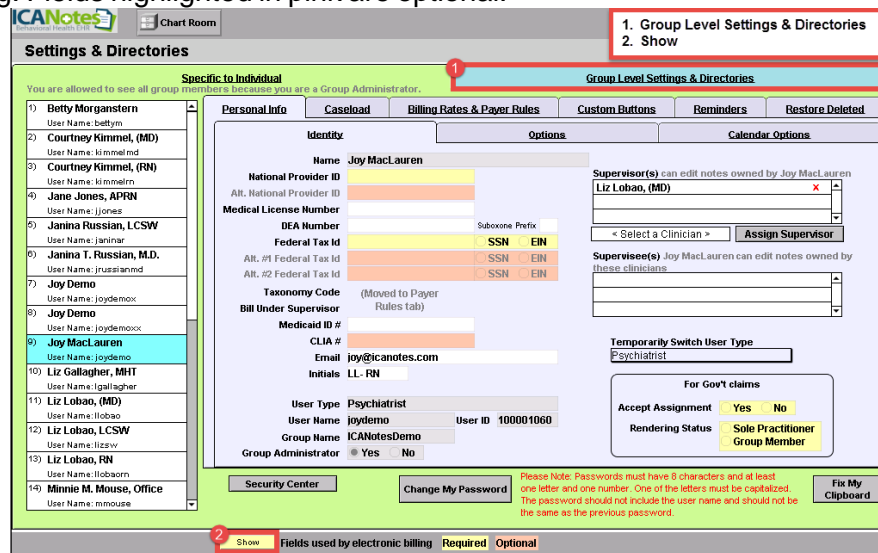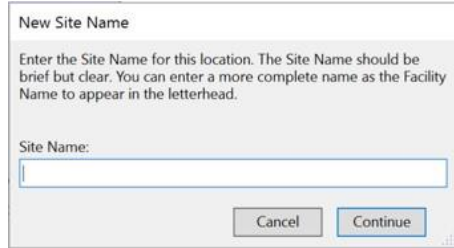
SITES/LETTERHEADS TAB

This first area stores some basic information about your organization which will be used in your notes and by the billing portion of ICANotes. Your office sites and letterheads will be listed on the left as you create them. For each site/letterhead, there are three tabs in the center of the screen pertinent information:

- Under the **Facility Info** tab, you create a new site by clicking on the [+ New] button.

- A box will appear prompting you to specify a name for the site. Click the [Continue] button. The site name is automatically entered into the record on the **Facility Info** tab.
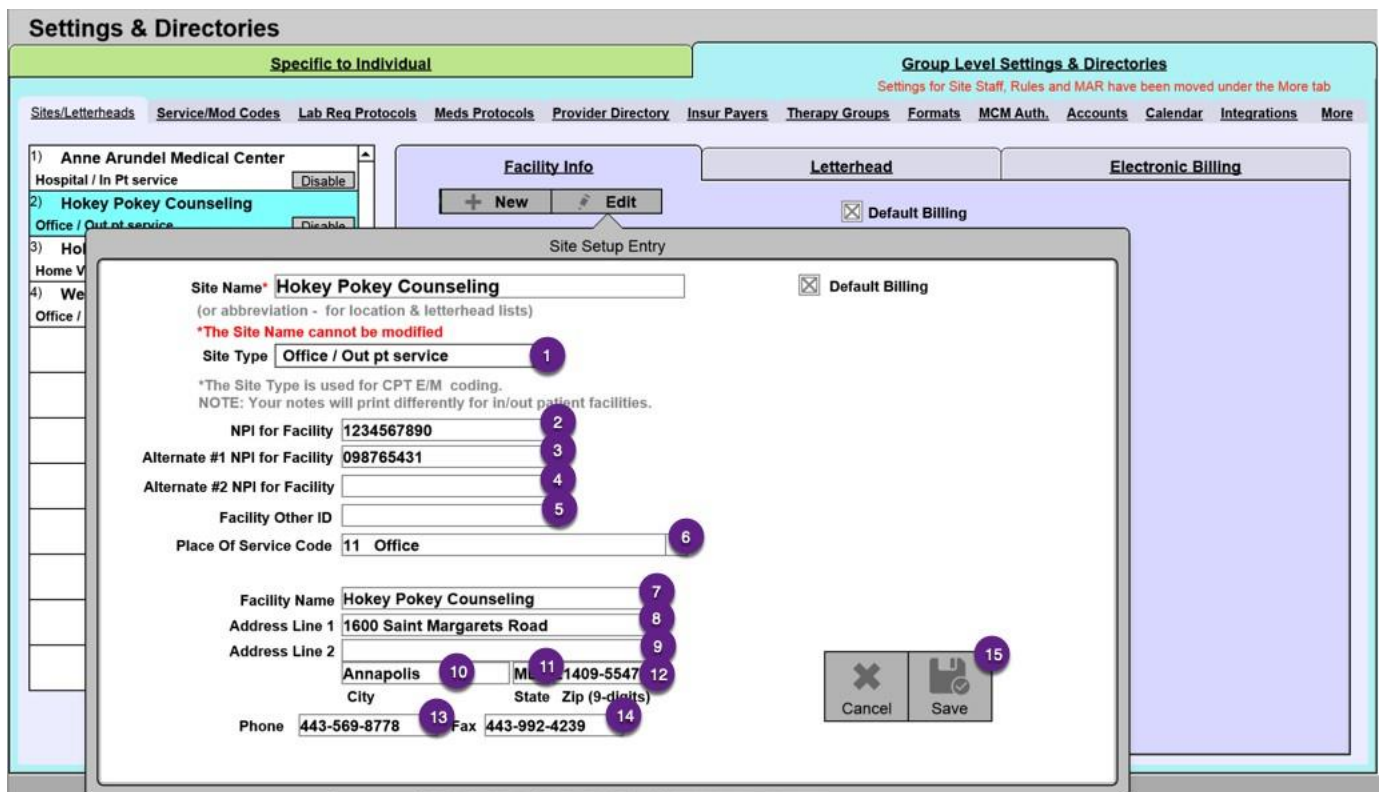
> **New Site Name**
>
> Enter the Site Name for this location. The Site Name should be brief but clear. You can enter a more complete name as the Facility Name to appear in the letterhead.
>
> Site Name:
> [   ]
>
> [Cancel] [Continue]

Note that after create a site name, it **should not** be changed for any reason.

1. Click on the field next to **Site Type** and select the type of location from the drop-down list.
2. Enter the **NPI** for this facility.
3. (Optional) enter the **Alternate NPI for Facility**.
4. (Optional) enter the **Alternate #2 NPI for Facility**.
5. (Optional) **Facility Other ID** you would like to record.
6. Choose your **Place of Service Code** by clicking on the field and selecting from the drop-down list.
7. Enter your full **Facility Name** as you want it to appear on your letterhead.
8. Street address of facility.
9. (Optional) address line two.
10. City of facility.
11. State of facility.
12. Zip code of facility. (For electronic billing purposes, a 9-digit zip code is required.)
13. Phone number of the facility.
14. Fax number of the facility.
15. Save button.

You may add other locations under the **Facility Info** tab as needed if your group operates multiple locations. You may also need to set up facilities specifically for billing purposes.

LETTERHEAD TAB

- Click on the **Letterhead** tab to the right of Facility Info.

- Click the [**Use Facility Address**] button and the [**Use Facility Phone / Fax**] button to automatically populate the data entered in Facility Info. A preview of the letterhead will appear below these fields – you may edit inside these boxes as desired.
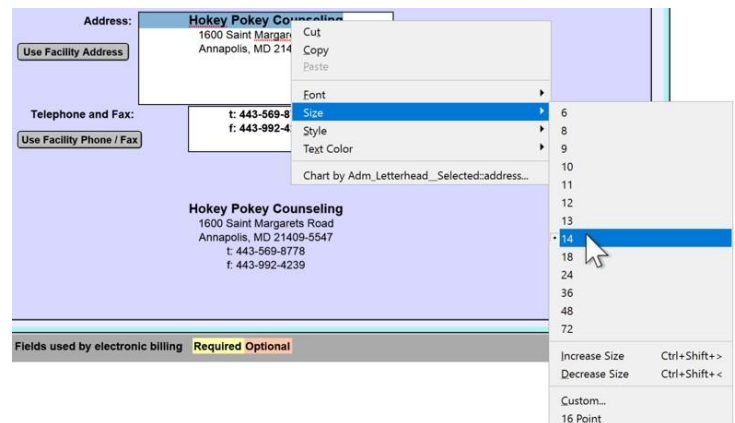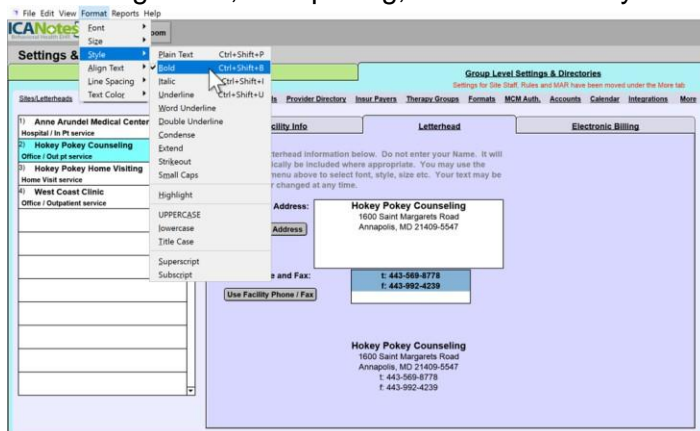

- You may format the letterhead font in a variety of ways by highlighting the information in either box and selecting "**Format**" from the toolbar above or right-clicking to get a dropdown menu. You can change the font, size, style, alignment, line spacing, and text color of your site's letterhead.

ELECTRONIC BILLING TAB

The **Electronic Billing** tab may be found to the right of the Letterhead tab. You need to enter information on this tab for each site listed on the left that will be used to submit claims (either electronically or by printing CMS1500 forms).
- Click on the first **Site Name** in the left column that you want to configure.

- Press the `Use Facility Address` button and the address you entered from Facility Info for that site will appear in the address field.

- Click in the box below the field labeled: **Billing Address for this Service Facility**. Select the site from which you send your electronic claims if the billing address is different than the facility address where services were rendered. This site needs to be setup in the list (on the left side) before they can be selected.

- Click in the box below the field labeled: Pay to Address for this Service Facility. Select the site from which you want the payment sent. This site needs to be setup in the list (on the left side) before they can be selected from the dropdown menu. The Facility Address, Billing Address, and Pay to Address can be three different addresses if needed.

- The **Billing NPI #** and the billing address will populate based on the service facility you choose for your billing address.

- You may choose to highlight fields that are required in Settings & Directories for electronic billing using the `Show` button.

Click the button below to watch a brief video demonstration of how to configure all settings under **Sites/Letterheads** tab.

Video Tutorial Sites/Letterheads

Click on the **Service/Modifier Codes** tab to the right of the Sites/Letterheads tab. You will be able to create your group's service, revenue, and modifier code lists here.

The **Service Code Short List** will be required when you create your individual billing rates under Specific to Individual tab. Setting up a short list will save you time as you will have the option to choose from your short list of billing codes (set up here) rather than a longer full list of all available billing codes.

- In the left column, click on the down arrow ▼ next to the field to open the full list of available service codes.

- If you do not find a code that you need, you can simply click within the field and begin typing – a box will open asking for the information for your custom service code. Enter the 5-digit code and the descriptive text, and then click the OK button.

Revenue Codes can be created for inpatient settings. If you are strictly an outpatient setting you can disregard this area. Click the next blank row (in the example below, the row right under 0024) and add the code, rate, and description.

If you would like to use modifier codes, you may click on a blank field in the right column and type in your own codes to create a **Modifier Code Short List**.

Click the button below to watch a quick video tutorial about the **Service/Modifier Codes** tab.

Video Tutorial
Service/Modifier Codes

LAB REQUISITION PROTOCOLS TAB

The Lab Req Protocols tab can be used to configure a group of lab tests for easier ordering on the Clinical Order Sheet.

- Click on the [+ New] button to create a new order protocol.

  1. Name the protocol.
  2. Pick a test from the drop-down menu or type in the name of test.
  3. Indicate the frequency from the drop-down menu or type in the frequency.
  4. Indicate the number of times the test should be performed.
  5. Type in the diagnosis.
  6. Click inside this box if the test should be performed while fasting.
  7. Indicate what type of request.
  8. Choose a reason/indication from the drop-down menu or type in the reason/indication.
  9. Save the test newly created.
  10. The newly created test will show in this area.
  11. Save the protocol.

Click on the button below to watch a brief video tutorial on how to set up a **Lab Req Protocols** tab.

Video Tutorial
Lab Req Protocols

MEDICATION PROTOCOLS TAB

The **Meds Protocols** tab can be used to configure a list of medication protocols that will automatically populate a group of medications into the medication list in a nurse or prescriber progress note. This is not relevant to DrFirst ePrescribe.

- Click on the [+ New] button to create a new medication protocol.

    1. Name the medication protocol.
    2. Pick the verb from the drop-down menu.
    3. Select the medicine from the drop-down menu or type in the medication.
    4. Select the dosage.
    5. Insert the Route/Qty.
    6. Indicate the timing.
    7. Insert the number to dispense.
    8. Indicate refills.
    9. Select the amount of days.
    10. Input the dose.
    11. Pick a comment/reason from the drop-down menu or type in the reason.
    12. Click the 'Save' button to save the newly created medication.
    13. The newly created medication will show in this area.
    14. Click 'Save Protocol' to save the protocol.

Settings & Directories

Specific to Individual	Group Level Settings & Directories
	Settings for Site Staff, Rules and MAR have been moved under the More tab

Sites/Letterheads Service/Mod Codes Lab Req Protocols Meds Protocols Provider Directory Insur Payers Therapy Groups Formats MCM Auth. Accounts Patient Portal Calendar Integrations More

Medication Protocol List + New

1)	**Admission Orders**
2)	**Admission PRNs**
3)	**Ativan PRN (CIWA)**
4)	**Ativan Taper**
5)	**Celexa Taper**
6)	**Common Cold (OP)**
7)	**Medrol Dose Pack**
8)	**Multiple Meds (OP)**
9)	**Remeron Protocol**
10)	**SSI: Regular Insulin**
11)	**Standing Orders: (w / instructions)**
12)	**STAT Ativan**
13)	**TB: Aplisol**

Protocol Name [1] Admission Orders   [ ] Delete [14] [ ] Save Protocol

Medications [Edit Drug List]

Direction	Medicine	Dose	Route Qty	Timing
[2]	[3]	[4]	[5]	[6]

# to Dispense	Refills	x Days	x Doses	Comment/Reason	
[7]	[8]	[9]	[10]	[11]	[12] [ ] Save

	Direction	Medicine	Dose	Route Qty	Timing	Delete
[13]	Start	Prozac	20 mg	PO	QAM	
	#	Refills	x Days	x Doses	Comm/Reason **Depression**	✗
2)	Start	Ambien	5 mg	PO	QHS PRN	
	#	Refills	x Days	x Doses	Comm/Reason	✗
3)	Start	Ativan	0.25 mg	PO	q 4 hr PRN	
	#	Refills	x Days	x Doses	Comm/Reason **Agitation**	✗
4)	Start	Antabuse	250 mg.	PO	QAM	
	#	Refills	x Days	x Doses	Comm/Reason **ETOH Deterrent**	✗
5)	Start	Zyprexa	2.5 mg	PO	QAM	
	#	Refills	x Days	x Doses	Comm/Reason **Psychotic Features**	✗

Please click the button below to view a quick tutorial on setting up a **Meds Protocols** tab.

**Video Tutorial
Meds Protocols**

PROVIDER DIRECTORY TAB

Use the Provider Directory tab to create a list of providers that you communicate with outside of your practice's ICANotes group. These providers may be Primary Care Physicians, referring providers, or any other providers you may want to have in a central directory. This list is especially useful for making referrals as you can store contact data as well as directions for the patient.

- Click on the [+ New] button to create a new external provider.
- The cursor will move to the name field. Enter the provider's information and then press the [Save] button.
- By clicking the [Export] button, you may export this directory if you ever need to print it or send it electronically.

Settings & Directories

Specific to Individual	Group Level Settings & Directories
	Settings for Site Staff, Rules and MAR have been moved under the More tab

Sites/Letterheads   Service/Mod Codes   Lab Req Protocols   Meds Protocols   Provider Directory   Insur Payers   Therapy Groups   Formats   MCM Auth.   Accounts   Calendar   Integrations   More

External Provider List

View by Specialty: _____ ✕
View by Site Name: _____ ✕
Search by other _____ ✕

➕ New

1)	Dennis Doom	Case Mgr/Team Leader
2)	Dr. Alice Strings	Psychiatric/Prescriber
3)	Dr. Faris P. Atchoo	Family Practitioner
4)	Dr. Frank N. Stein	Surgery
5)	Dr. Sharon Fillerup	Pediatrician
6)	Dr. Will Tickel	OT/PT/Recreation

Name Dr. Alice Strings
Address 54 Happy Lane
City Annapolis
State MD
Zip 21401
Telephone 443-512-1616
Fax
Email astrings@provider.net
Specialty Psychiatric/Prescriber
Site Name
Directions

NPI # 1284501253
Other # astring@provider.net

Export

🟩 Save
🟨 Cancel
🟥 Delete

☐ Automatically filter by working at location when adding PCP in demographics.

Please click the button below to view a quick tutorial on setting up a **Provider Directory** tab.

**Video Tutorial
Provider Directory**

INSURANCE PAYERS TAB

The Insur Payers tab can be used to enter the insurance companies your patients use most frequently and save them to a short list (which will appear when you enter a patient's demographics). Before you start creating, it is highly suggested that you click the ⌈Show⌋ button to highlight the required and optional fields for electronic billing.

- Click on the ⌈➕ New⌋ button to enter an insurance company name.

  1. Enter the insurance company's name.
  2. Enter the street address.
  3. Enter the city, state, and zip code to complete the mailing address.
  4. Enter the telephone and fax numbers.
  5. Designate the insurance type by clicking on the field and selecting from the drop-down menu.
  6. If you do not see the option you need for step 6, click in the insurance type (other) option and choose one of the options on the drop-down list.
  7. If you intend to send claims electronically, you will have to enter a payer ID – this will be supplied by the clearinghouse you choose to work with.

  8. If you would like to use the alternate NPI# entered under **Specific to Individual** tab (located on the Personal Info/Identity tabs) when you send claims to this insurance company, check this box.
  9. Click on this box if you would like to use either the Alt #1 or Alt #2 tax ID entered under the **Specific to Individual** tab.
  10. Click the 'Save' button to store this insurance company entry.

Settings & Directories

Specific to Individual | Group Level Settings & Directories
Settings for Site Staff, Rules and MAR have been moved under the More tab

Sites/Letterheads Service/Mod Codes Lab Req Protocols Meds Protocols Provider Directory *Insur Payers* Therapy Groups Formats MCM Auth. Accounts Patient Portal Calendar Integrations More

- If you later want to delete this or another insurance company from your short list, return to this screen, click on the appropriate insurance payer from the column on the left, and click the [Delete] button to remove it.
- You may export this short list for printing or electronic transmission by clicking on the [Export] button.
- Note: The Payer ANSI/NUCC Options shown on the right should not be edited in any way unless you are instructed to do so by the ICANotes Support or Training Teams.

Please click the button below to view a quick tutorial on how to use the **Insur Payers** tab.

**Video Tutorial
Insur Payers**

THERAPY GROUPS TAB

Use the **Therapy Group** tab to create patient therapy groups and to create group therapy note remarks which will be inserted in each participating patient's chart.
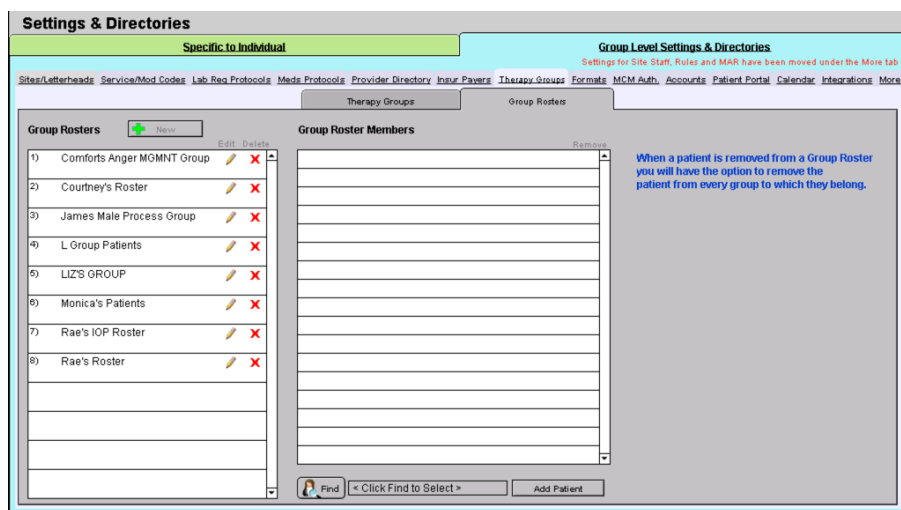

- Click on the [+ New] button in the upper left of the window (next to **Therapy Groups**) to start a new therapy group.
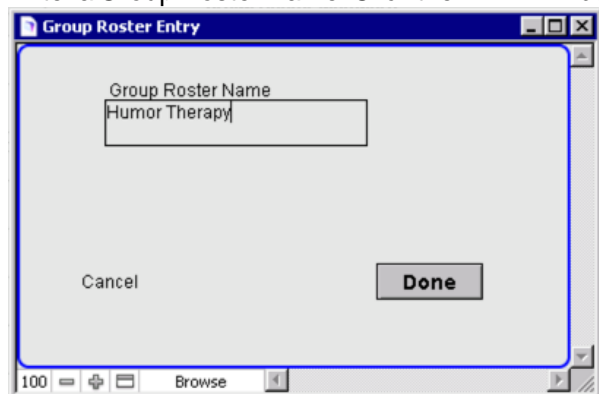
- The Therapy Group Entry window will open. Enter a Therapy Group Name and the site/location, and service codes. Click the **Done** button to create the group.
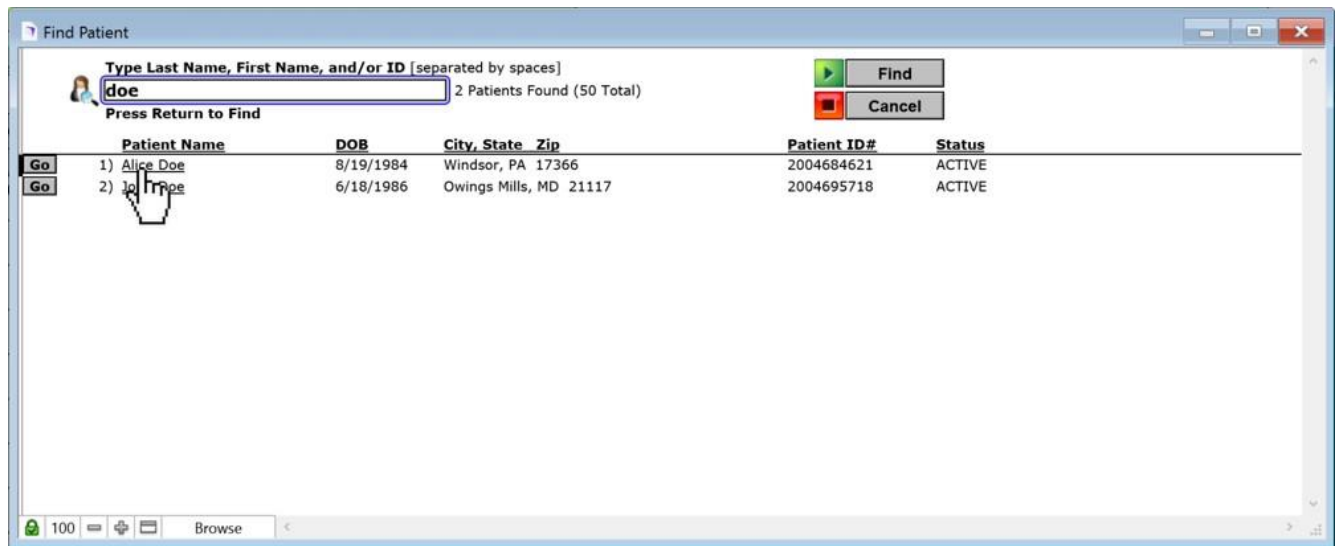

- To create a Group Roster, click the **New** button in the upper left of the window.

- Enter a Group Roster Name. Click the **Done** button to create the group roster.

- Find your patient by clicking the **Find** button. With the **Find Patient** window, locate the patient and click the patient's name.

- With the patient's name in the field, click the **Add Patient** button.

- The patient will be added to the roster. Continue the process until all patients are added.

Please click the button below to view a quick tutorial on how to use the **Therapy Groups** tab.

Video Tutorial
Therapy Groups

FONTS & STYLES TAB

Use the Fonts & Styles tab to change the look of finished notes for all users in your practice.
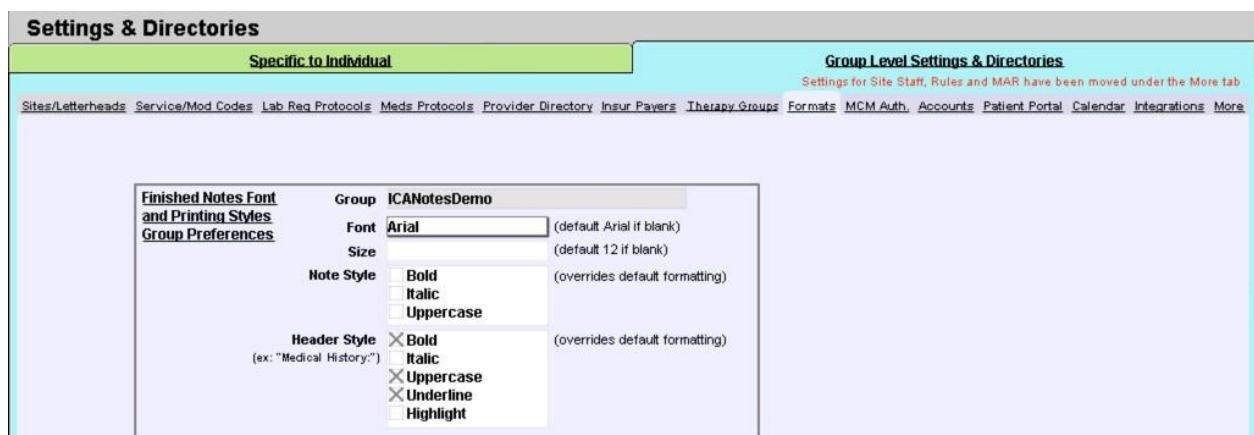
- Click on the **Font** field to open the dropdown list of available fonts (default is Arial).
- Click on the **Size** field to enter a new size (default/blank is 12 pt).
- Click on the appropriate checkbox(es) under **Note Style** to change the style of the body text in your notes.
- Click on the checkbox(es) under **Header Style** to change the style of headers in your notes.

Note: Any changes made here will only affect notes created after the change is made. No previously compiled notes will be altered.

Please click the button below to view a quick tutorial on how to use the **Fonts & Styles** tab.

> Video Tutorial
> Fonts & Styles

MCM AUTHORIZATION TAB

The **MCM Auth.** tab offers a quick look at all the managed care authorizations that your group has entered into the program.

- The Show Only checkboxes ☐ At Threshold and ☐ Non-Expired allow you to show only those patients that are at or past the threshold or those that are non-expired and active respectively. Alternatively, any listing in red needs attention because one of the two alert thresholds set on the patient's chart for managed care authorizations has been reached, either for number of sessions/units or expiration date.

Settings & Directories

Specific to Individual						Group Level Settings & Directories

Settings for Site Staff, Rules and MAR have been moved under the More tab

Sites/Letterheads   Service/Mod Codes   Lab Req Protocols   Meds Protocols   Provider Directory   Insur Payers   Therapy Groups   Formats   **MCM Auth.**   Accounts   Calendar   Integrations   More

Default Alert Recipient: [＿＿＿＿] X   Default Alert Sender: [＿＿＿＿] X   [Sort by Exp. Date] [Print] [Export]

Show Only: ☐ At Threshold ☐ Non-Expired

	Issued	Authorization #	Expires	Active	Send Alert Msg	Sessions Authorized	Used	Remaining	Units Authorized	Used	Remaining	
Banner, Bruce	5/14/2019	6546322	12/31/2019	☒	☒	20	1	19				edit
Hudson,	5/1/2019	78457845	12/31/2019	☒	☒	28	0	28				edit
Markle, Meghan	6/1/2019	848168418145	12/31/2019	☒	☒	7	0	7				edit

- The [edit] button will allow you to edit the MCM authorization for the patient specified.

- The [Sort by Exp. Date] button will list the patients by expiration date.

- The [Print] button will print the list.

- You may export this list for printing or electronic transmission by clicking on the [Export] button.

If you need to update the thresholds for a patient, you may do so in that patient's Chart Face. Just look for the [Add or Update Managed Care Authorizations] button in the lower left-hand corner.

Please click the button below to view a quick tutorial on how to use the **MCM Auth.** tab.
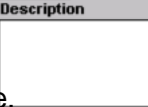
> Video Tutorial
> MCM Auth.

ACCOUNTS TAB

If you are using Patient Accounts to keep track of charges and payments, you can set up codes under the **Accounts** tab to link to a patient or a charge in order to report on any of the codes that you create.
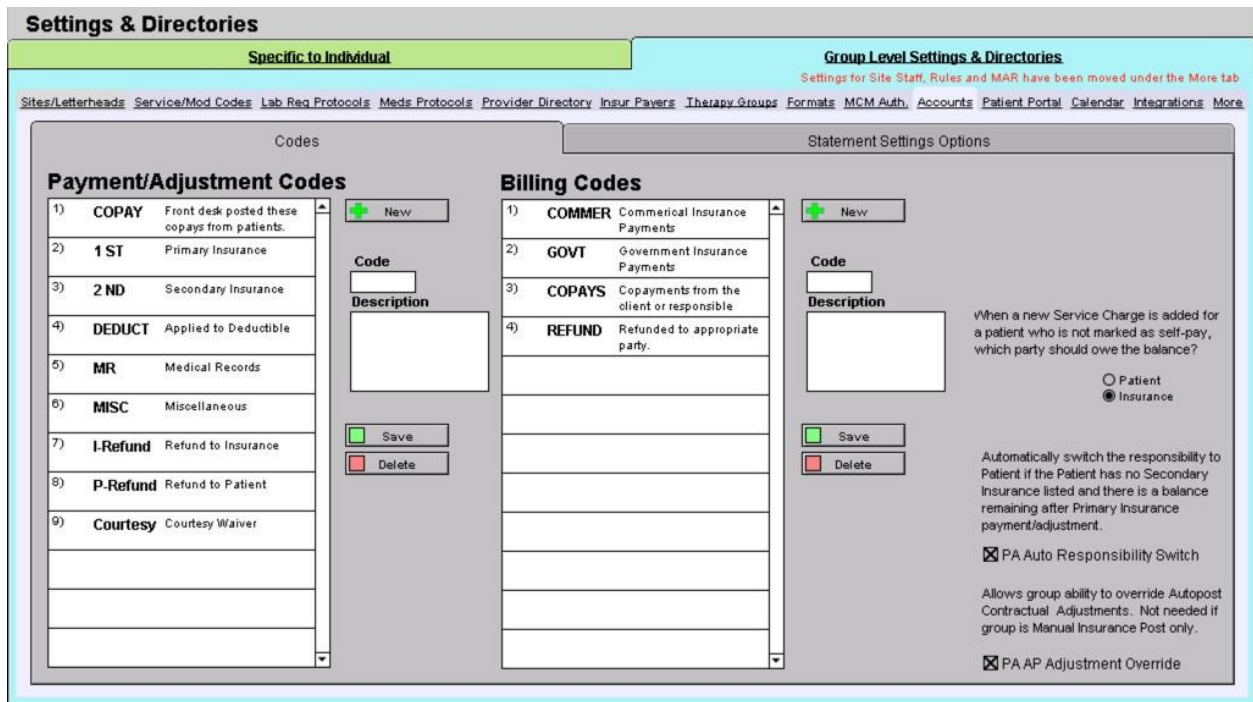
- On the left of the Codes tab, the **Payment/Adjustment Codes** section can be used to set up a payment code. When you go to post a payment in Patient Accounts, you can link these codes to a payment in order to report on them at a later time. The codes must be linked to a payment in order to report on them.

    1. Click the [+ New] button to create a new code.
    2. Enter the Code you would like to use.
    3. Enter the Description for the code.
    4. Select the [Save] button to save the code or [Delete] to delete the entry highlighted.
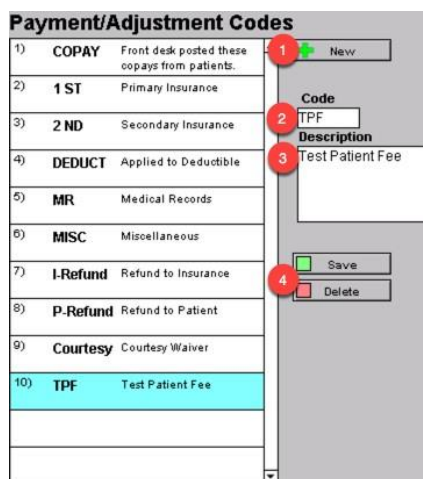
- **Billings Codes** list can be set up in a similar fashion. You can report on these codes as well. They are linked to charges recorded in ICANotes so that you can run reports on these codes.

    1. Click the [+ New] button to create a new code.
    2. Enter the Code you would like to use.
    3. Enter the Description for the code.
    4. Select the [Save] button to save the code or [Delete] to delete the entry highlighted.

Billing Codes

1)	COMMER	Commerical Insurance Payments
2)	GOVT	Government Insurance Payments
3)	COPAYS	Copayments from the client or responsible
4)	REFUND	Refunded to appropriate party.
5)	TPF	Test Patient Fee

- The toggle switch for Patient/Insurance is on the far right along with two checkboxes which are used in the patient account. PA Auto Responsibility Switch is to enable the system to automatically switch the balance responsibility from insurance to patient. An AP Adjustment Override allows you to modify auto posted contractual adjustments.

- On the Statement Settings Options tab, you are able to set up account default statement settings options which are applied to all patients (unless unique statement settings are set for a patient).

Please click the button below to view a quick tutorial on how to use the **Accounts** tab.

Video Tutorial Accounts

- In Settings & Directories > Group Level Settings & Directories tab > Calendar tab, there are two sets of settings that can be set by Group Administrators.
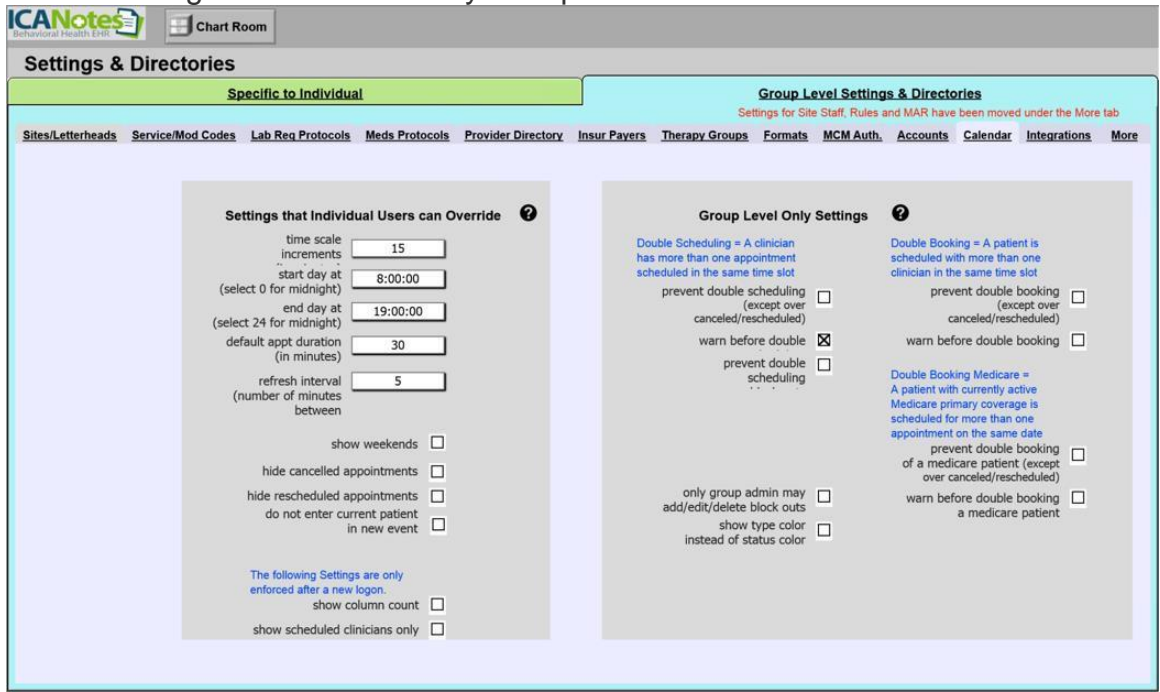
- This area allows group administrators to set default settings for individual users.
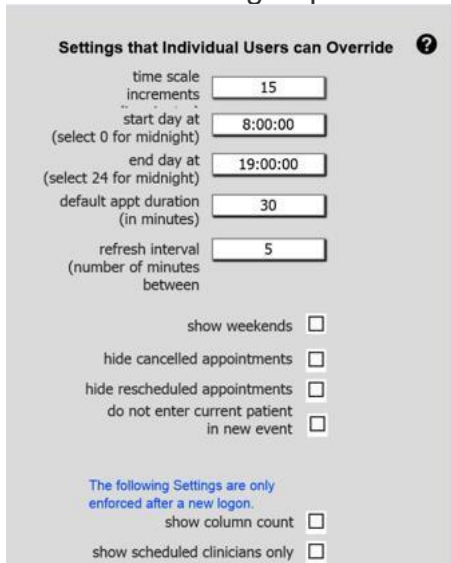
- This area allows group administrators to toggle on/off group level only settings.

Please click the button below to view a quick tutorial on how to use the **Calendar** tab.

Video Tutorial
Calendar Tab

MORE TAB

On the **More** tab, you can make further changes to your group level settings and directories.

SITE STAFF TAB

The **Site Staff** tab is useful for organizations with multiple locations. Use this tab to assign clinicians to a site. When assigned to a site, clinicians will only be able to retrieve charts for patients being seen at that site when they search for patients in the Chart Room.

Note: This feature must be enabled by the ICANotes Support Team. A Security Administrator or Group Owner should call 443-569-8778 or submit a ticket via ticket@icanotes.com to request that this feature be enabled for your group.

1. Filter by Site checkbox organizes the list by site.
2. Filter by Clinician checkbox organizes the list by clinician.
3. Site selection dropdown list will narrow down the list per site.
4. Clinician selection dropdown list will narrow down the list per clinician.
5. Click on the **Pick a Site** menu and choose the site you want to assign to a clinician.
6. Click on the Pick a Clinician field and select the clinician you are assigning from the dropdown list.
7. Click the [Assign Staff] button to save the assignment.
8. List of sites and clinician's assignment.

Please click the button below to view a quick tutorial on how to use the **Site Staff** tab.

MAR TAB

The Medication Administration Record (MAR) is frequently used by inpatient facilities. If your facility intends to use the electronic MAR in ICANotes, you can configure specific times of day to be associated with the medication timing options used for dispensing of medication. Once configured, the administration times will be automatically pushed onto the MAR.

Please click the button below to view a quick tutorial on how to use the **MAR** tab.

MISCELLANEOUS RULES TAB

The **Rules** tab has several features that you may want to enable for your group. Before you start creating, it is highly suggested that you click the [Show] button to highlight the required and optional fields for electronic billing.

- On the left, you will see **Check if Note is Claim-Ready** checkbox option. If you check the box, each time a note is compiled ICANotes will automatically check to ensure that all fields required to submit an electronic claim have been populated.

- The **Fasting Labs by Default** can be checked to include fasting labs by default.

- **Forward Patient's Telephone Intake Notes to** is where you can decide if you want the intake notes from the telephone intake to go into various areas in ICANotes.

- **Duration Values for Billing Service Combos** field is a type in field where values can be input for billing.

- On the right, there are a number of rules that can be configured to control the timing of due dates for various patient documents from the time of admission. Once these time intervals have been established, overdue documents will appear on each clinician's Clinician Reminder Sheet for easy visibility into items which need their attention.

  Note: This feature must be enabled ty the ICANotes Support Team. Please call 443-569-8778 or submit a ticket via ticket@icanotes.com to request that this feature be enabled for your group.

| Clinical Reminder Rules	Latency	Units	Role	Delete
Initial TP	24	Hours	Principal	✕
Initial Psychiatric Exam	24	Hours	Ther	✕
Initial Psychiatric Exam	1	Days	PsyMD	✕
Followup TP	1	Days	Principal	✕
Initial Psychiatric Exam				✕
				✕

CONFIGURING INDIVIDUAL SETTINGS

In this section, we will review each of the tabs which appear under **Specific to Individual** in **Settings + Directories**.

- Click on the 'Settings + Directories' drawer in the Chart Room, as shown below:
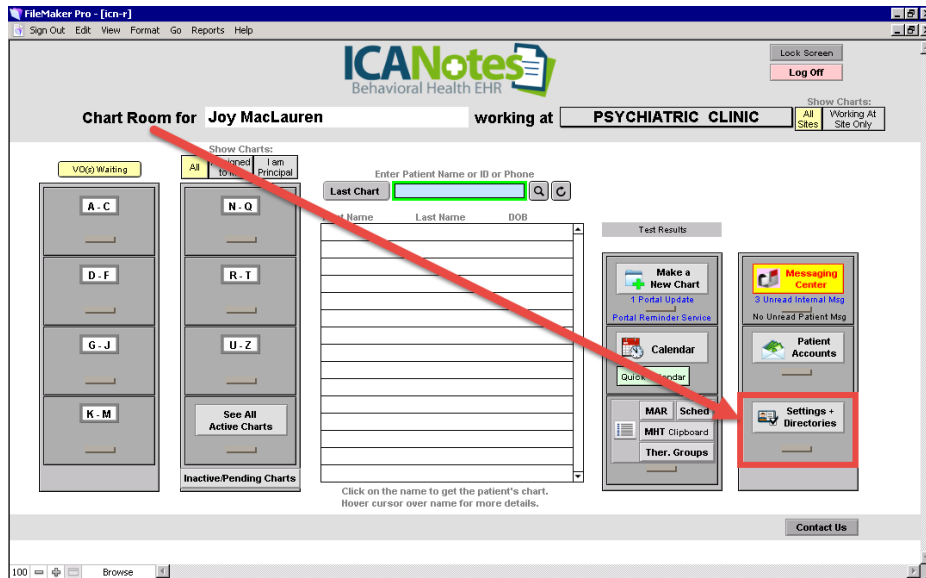
- The Specific to Individual tab will be the default window displayed. If you are a group administrator, you have the ability to configure settings for all users in your group and the left side of the window will show all users. Non-administrators will only be able to view and modify their own account settings.
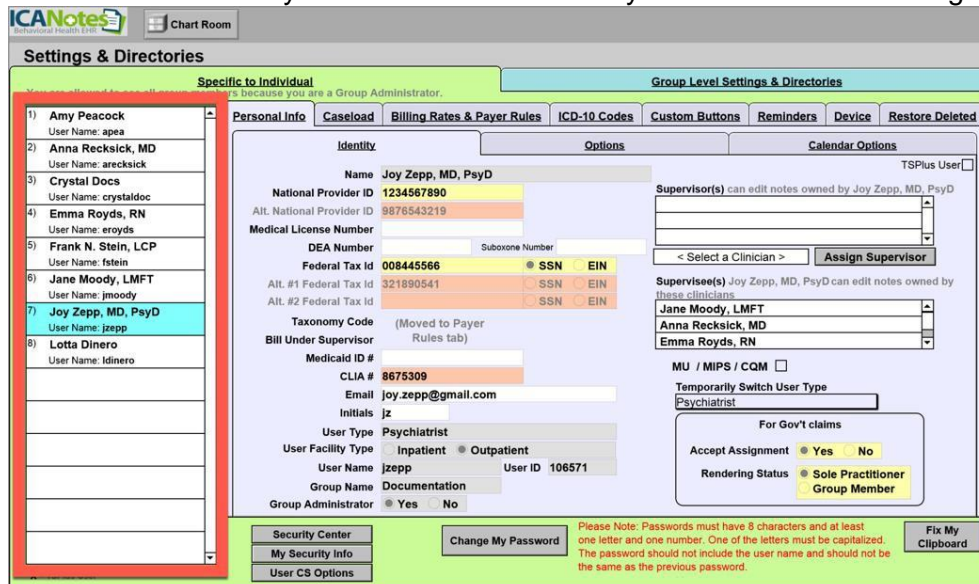
group administrator view

non-administrator view

PERSONAL INFO TAB

The settings in this portion of the program pertain to your identity and personal preferences. When you first enter Settings + Directories, you will be looking at the **Identity** area under the **Personal Info** tab.

The **Identity** and **Options** tabs are where the user's identification information can be added/edited.

IDENTITY TAB

On the **Identity** tab you can enter:
- National Provider ID/Alternate National Provider ID
- Medical License Number
- DEA Number
- Federal Tax ID/Alternate Federal Tax ID
- Medicaid ID
- CLIA#
- Email Address
- Provider Initials (initials will display next to provider-created documents on each Chart Face to provide a quick visual cue if the patient is seen by multiple clinicians)

On the **Identity** tab, you can also do the following: (Before you start creating, it is highly suggested that you click the [Show] button to highlight the required and optional fields for electronic billing.)

1. **Assign Supervisors** – Specify a supervisor for each provider. This feature will allow the supervising clinician to have edit access to the work areas of the supervisee's notes. The supervisor setting may also be used to grant access to billers for claim preparation purposes.
2. **Temporarily Switch User Type** – The enables a user to temporarily switch disciplines in order to access fields populated by other disciplines, such as when a nurse fills in for an intake coordinator.
3. **For Gov't claims** – If you accept government assignment for Medicare payments, indicate so here. Also indicate your rendering status.
4. **Security Center** – Users set up as Security Administrators for a group can enter this password-protected area (using the same ICANotes password) to update user accounts. They can add/disable users, reset passwords, and change permissions.

5. **Fix My Clipboard** – Pushing this button will correct a problem that sometimes occurs when attempting to copy and paste to and from the ICANotes program.
6. **Show Fields Used by Electronic Billing** – When this button is pushed, all fields required for electronic billing will display in yellow and optional fields will display in pink.

The following fields are populated by ICANotes and cannot be changed by the user:

- Name
- User Type
- User Name
- User ID
- Group Name
- Group Administrator

Please click the button below to view a quick tutorial on how to use the **Identity** tab.

Video Tutorial
Identity Tab

Under **Options**, you can enter the following information: Before you start creating, it is highly suggested that you click the `Show` button to highlight the required and optional fields for electronic billing.

1. **Signature at End of Note** – Enter your signature information as you would like it to appear at the bottom of your notes.
2. **Electronic Signature Name** – Enter your signature name if it differs from your display name (viewed in the **Identity** tab).
3. **Finished Note Header Name** – Enter your name or practice name here as you would like it to display at the top of each note, above the letterhead.
4. **Default Site/Letterhead Name** – If you have multiple sites, you can use the dropdown menu to select the site you are working at.
5. **Use Custom Rx Letterhead** – By clicking the Yes field, you can insert the custom letterhead you would like to use.
6. **Timezone (Relative to GMT)** – Please enter the number which corresponds to your local time zone in this field. Changing this number will only change the time on notes and other timestamps going forward.
7. **Show Clock at Startup** – Some clinicians may have ICANotes maximized which blocks the view of the clock on your local desktop. We offer a small clock that will display on the lower right of your screen when you are using ICANotes. You can check the checkbox to have the clock start automatically when you log in or you can come to this screen and press the `Show Clock Now` button to display the clock.
8. **Options at Logon** – Click the Show box to display the Clinician Reminder Sheet at logon (instead of the Chart Room).
9. **Clinical Decision Support Rules** - Check the Show box if you want the option to view clinical decision support rules when you compile a note. ***This box must be checked if you intend to attest for Meaningful Use incentives.***
10. **Patient Education Material** – Check the Show box if you want ICANotes to prompt you to offer patient education materials. ***This box must be checked if you intend to attest for Meaningful Use incentives.***
11. **Diagnostic Algorithm** – Check this box if, as a prescriber, you would like to review diagnostic algorithms for justifying psychotropic medications and treatment modalities for your patients.
12. **Use Military Time** – Check this box if you would prefer a 24-hour clock instead of a 12-hour clock.

13. **Rx Discount Card Enabled** – Choose this checkbox if you would like to enable the Rx discount card. Contact ICANotes Support to have this enabled for your group.

14. **Default Title for Notes** – If you prefer another title, click in the field and enter the title you want to appear on your notes. The Progress Note, non-Rx does have a drop-down menu option – you can double click inside the field to free text another title.

Default Note Titles	
Progress Note Prescriber	Progress Note Prescriber
Progress Note, non-Rx	Progress Note
Case Mgmt/SW Rx	Case Mgmt/SW Note
Group Therapy	Group Therapy Note
Nursing	Nursing Note
Play Therapy	Activity Therapy Note
Treatment Plan	Treatment Plan

☐ Yes   Default Note Titles

15. **Default Note Type & Discipline Button** – If you want to use a different letterhead for your scripts, enter the custom letterhead information in the field and check the box.

Default Note Type & Discipline

Default for Complete Assessment or when Changing Note Title:

Type (CE Only)   Complete Evaluation

Discipline   Psychiatrist

Default Note Type & Discipline

16. **Default Note Headers** – If you prefer another header for your Progress Note Initial Header, click in the field and enter the header you want to appear on your notes.

Default Note Headers

Progress Note Initial Header   Interval History
☐ No Initial Header

Default Note Headers

Please click the button below to view a quick tutorial on how to use the **Options** tab.

Video Tutorial
Options Tab

CALENDAR OPTIONS

In Calendar Options tab, there are settings that can be set per user.

You can choose which version of the calendar you want to use for your entire session.

Here you can decide what to show on your calendar. The default group option will show, but individuals can override. The 'start on view' field is the type of calendar view you want to see when you go to the calendar.

Please click the button below to view a quick tutorial on how to use the **Calendar Options** tab.

Video Tutorial
Calendar Options

CASELOAD TAB

The Caseload area shows the caseload of the clinician selected on the list in the left column. If you are a Group Administrator, you will see all clinicians in your group listed. If you are not a Group Administrator, you will see only your account listed.
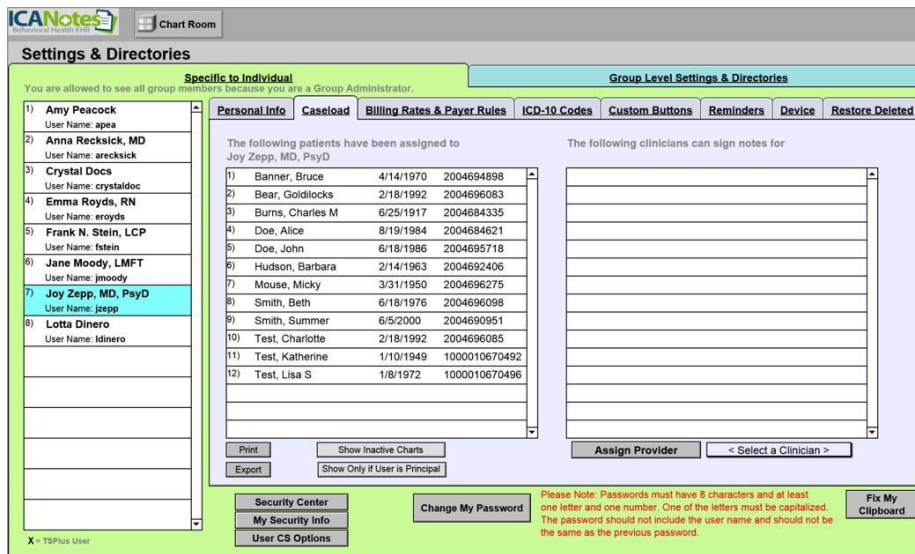
- The middle column displays patients assigned to the clinician selected on the left. If the total number of patients is needed, scrolling to the end of the list will provide the total as the list of patients is numbered.

- The right column lists any additional clinicians that are assigned to the patient selected in the middle column. This includes clinicians that were assigned to a patient in the demographics tab of the patient's chart; however, if any clinicians are assigned to a patient chart via this screen, that designation will not appear on the demographics tab of the patient's chart. Further, this will not reflect any supervisors that have been set up under the **Personal Info** tab.

Please click the button below to view a quick tutorial on how to use the **Caseload** tab.

BILLING RATES AND PAYER RULES TAB

The **Billing Rates** and **Provider Payer Rales** tabs are set up specific to the individual. If you are a Group Administrator, you will see all clinicians in your group listed. If you are not a Group Administrator, you will see only your account listed. Before you start creating, it is highly suggested that you click the Show button to highlight the required and optional fields for electronic billing.

51
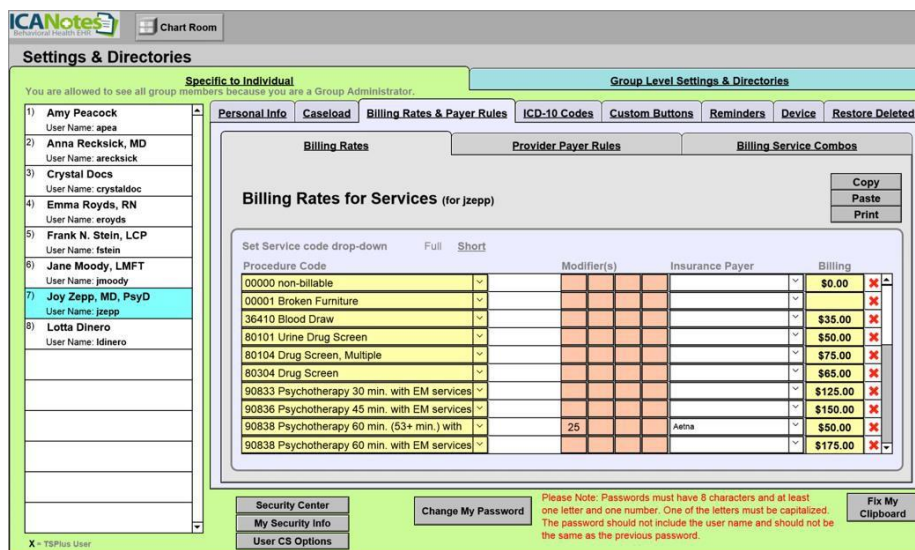
Please click the button below to view a quick tutorial on how to use the **Billing Rates & Payer Rules** tab.

<div align="center">

**Video Tutorial
Billing Rates & Payer
Rules**

</div>

BILLING RATES

The Billing Rates tab is where the amount charged by the provider for each type of service is entered. A different amount can be charged per service code when a modifier is used. Some insurance payers require these two-digit codes.

Different rates can also be set per payer; however, this is usually not necessary as payers generally have a predetermined amount that they will pay per service, regardless of what amount is billed. **Tip for Group Administrators:** When setting up the rates for a new group, it is helpful to copy and paste the rates from one provider to the others, then just modify the amounts accordingly.

The short list is a list of CPT codes used most often. A group administrator can create a group's short list by going to the **Group Level Settings & Directories** tab at the top of the screen and then selecting the **Service/Modifier Codes** tab.

- To enter billing rates, select a code using the dropdown arrow in the left column titled Procedure Code.
- Enter a Modifier (as needed).
- Enter an Insurance Payer if you want to assign a specific billing rate to a specific insurance carrier.
- Enter the billing rate for that service in the last column on the right.
- To delete a CPT code/billing rate, just press the red **X** to the right of the code.
- Select `Copy` to copy the entire list of CPT codes and billing rates.
- Select `Paste` to paste the previously copied list of CPT codes and billing rates onto this user.
- Select `Print` to print the entire list of CPT codes and billing rates.

Personal Info	Caseload	Billing Rates & Payer Rules	ICD-10 Codes	Custom Buttons	Reminders	Device	Restore Deleted

Billing Rates	Provider Payer Rules	Billing Service Combos

Copy
Paste
Print

Billing Rates for Services (for joydemo)

Full List   Short List
Select services provided

Procedure Code		+/- Modifier				+/- Insurance Payer		Enter billing rate	
00000 Medical Records Request	˅						˅	$25.00	X
00000 No Show Fee	˅					AMERIGROUP	˅	$50.00	X
00000 No Show/Cancellation Fee	˅					BCBS of ICANotes	˅	$50.00	X
90785 Interactive Complexity	˅						˅	$10.00	X
90792 Psychiatric Diagnostic Interview	˅						˅	$175.00	X
90832 Psychotherapy 30 min.	˅						˅	$150.00	X
90833 Psychotherapy 30 min. with EM services	˅						˅	$75.00	X
90834 Psychotherapy 45 min.	˅						˅	$125.00	X
94404 EAP	˅						˅	$75.00	X
99214 (Office Pt, Established)	˅						˅	$150.00	X

PROVIDER PAYER RULES

The Provider Payer Rules tab defines what information will be added to an insurance claim, per insurance payer.

1. Since all fields except for the Bill Under Supervisor are blank in the example below, Don Test 4 is the default supervisor for this user, meaning that Don Test 4's billing information will be present on all claims if no other supervisors are defined.

2. Janina T. Russian, M.D.'s information will be present on claims when Liberty Union is the payer, and the Billing Taxonomy and Modifier specified in that row will also be on the claim.

ICD-10 CODES

The **ICD-10 Codes** tab allows you to create a short list of ICD-10 Codes for the user. This list is used in the diagnosis fields of notes for a shorter list to choose from.

- To delete an ICD-10 code, just press the red **X** to the right of the code.
- Select **Copy** to copy the entire list.
- Select **Paste** to paste the previously onto this user.
- Select **Print** to print the entire list.
- Select the **edit** button to change the description.
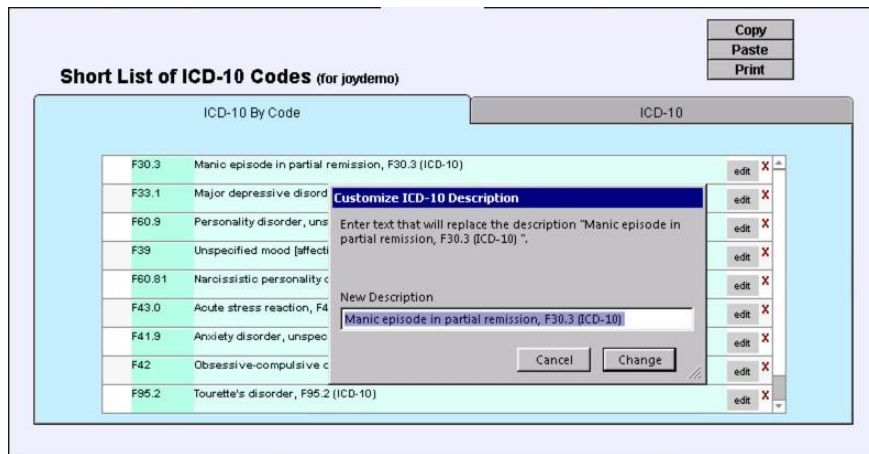
Please click the button below to view a quick tutorial on how to use the **ICD-10 Codes** tab.

Video Tutorial
ICD-10 Codes

CUSTOM BUTTONS TAB

The **Custom Buttons** tab allows you to view and manage the custom buttons you have created in ICANotes. When you first click on this tab, the system will automatically display custom buttons from all over the system.
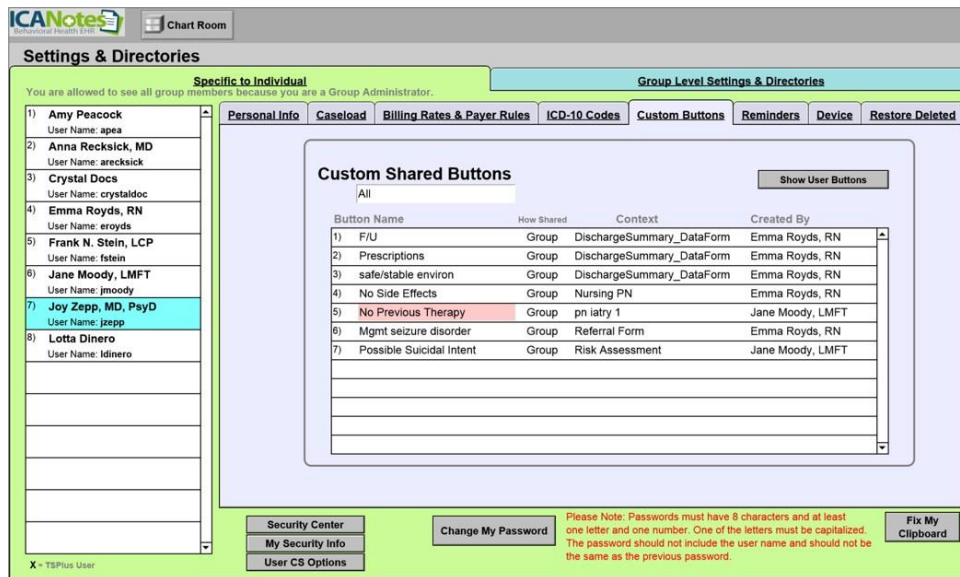
- You can display a subset of your custom buttons by selecting a particular area of the program from the dropdown menu on the left:
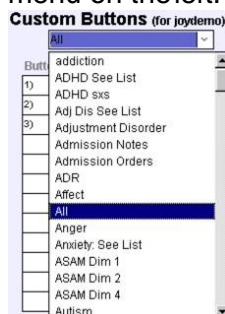
- You may choose to highlight a button on the list with a color or share it with your entire group by checking the boxes next to a custom button on the list:

Button Name	Shared w/Group	Highlight	Context	
1) Motherly	☒	☒	Play Therapy	edit
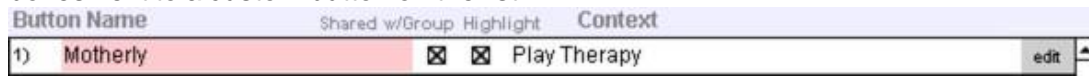
- By clicking the button next to a custom button, you can edit the name and content of a `edit` button, share it with specific users (or all users) in your group, or delete the button.

- If you want to review the list of all shared buttons in your group, click the `Show All Shared Buttons` in the upper right-hand corner.

- Please note that if you are a Security Administrator, you can review custom buttons created by other users which have not been shared with the group.

Please click the button below to view a quick tutorial on how to use the **Custom Buttons** tab.

**Video Tutorial
Custom Buttons**

REMINDERS TAB

The **Reminders** tab allows you to configure alerts that will be sent to you or to your colleagues via the **Messaging Center**.

- You may start a new reminder by clicking the `New` button.
- This brings up a new window that allows you to select from four preset reminder types: Patient, Clinician, Staff, or Perform AIMS Exam.

For a Clinician Reminder:
- Select the clinician you want the reminder sent to (**Recipient**).
- Select the **Date** it should be sent, and whether the reminder should be repeated and at what interval.
- Enter a **Subject** for the reminder.

- Type your **Message**.
- **Link to this Patient?** Check yes or no.
  - If yes, click on the <Type Last Name to Select> field to select the patient you want linked to the reminder. After you select a patient, their ID# and DOB will appear. You will then have the option of clicking on the field labeled Contact via to select how the patient wants to be contacted.
  - When you link to a patient, an icon will appear in the reminder message. If you click on the icon, you will be able to open the patient's chart.

For a Staff Reminder:
- Follow the same steps listed above for a Clinician Reminder but select a staff member rather than a clinician as the recipient.

For a Patient Reminder:
- Select the clinician or staff person who will receive the reminder to contact the patient (**Recipient**).
- Select the **Date** the reminder should be sent and whether it should be repeated and at what interval.
- Enter a **Subject** for the reminder and type your reminder Message.
- **Link to this Patient?** Select yes or no.
  - If yes, click on the <Type Last Name to Select> field to select the patient you want linked to the reminder. After you select a patient, their ID# and DOB will appear. You will then have the option of clicking on the field labeled **Contact via** to select how the patient wants to be contacted.
  - When you link to a patient, an icon will appear in the reminder message. If you click on the icon, you will be able to open the patient's chart.

For AIMS Exam:
- To set up a reminder to perform an AIMS Exam, follow the steps used to create a Clinician Reminder.

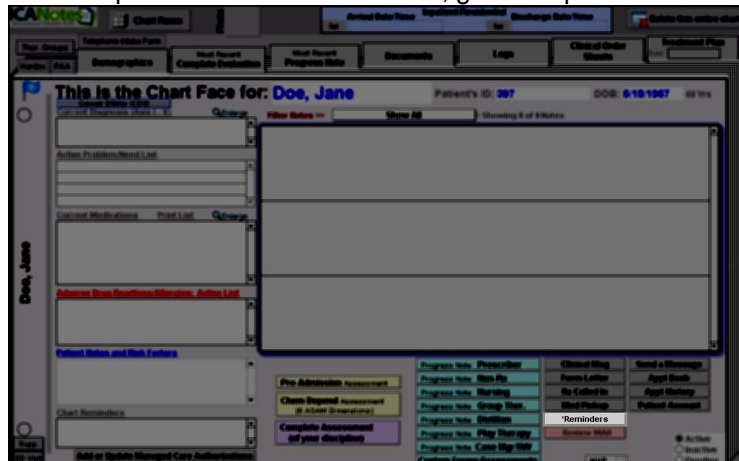### *Once the reminder has been created:*
- You will notice that the Patient Reminder box is now checked at the bottom of the Reminder dialog box.
  ☒ **Patient Reminder**

- The newly created reminder will show on the tab.

- After the patient has been contacted, go to the patient's Chart Face and click the [*Reminders] button.

- Select the reminder you wish to view and the reminder dialog box will open.

Reminders

	Status	From	To	Date	Subject	Patient	Repeat	Patient Reminder	Delivered
1)	Pending	Joy Test2	Joy Test4	3/16/16	Reminder: Copy Insurance Card	Doe, Jane	☐	☒	☐
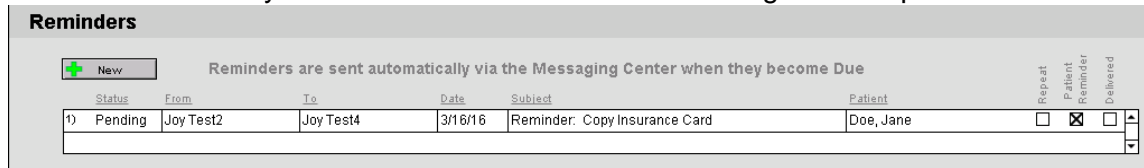
- Check the contacted box – today's date will populate. You can click the calendar ▦ icon to change the date if necessary. This checkbox is also available when accessing the reminder from the **Reminders** tab.

☒ Patient Reminder   ☒ Contacted   Date 3/10/2016 ▦

Please click the button below to view a quick tutorial on how to use the **Reminders** tab.

Video Tutorial Reminders

RESTORE DELETED TAB

The Restore Deleted tab feature is used to restore any notes or charts you may have deleted and now wish to have restored. All users have the ability to view those charts and notes that they have deleted personally; group administrators are able to review charts, notes, and treatment plans that other users may have deleted.
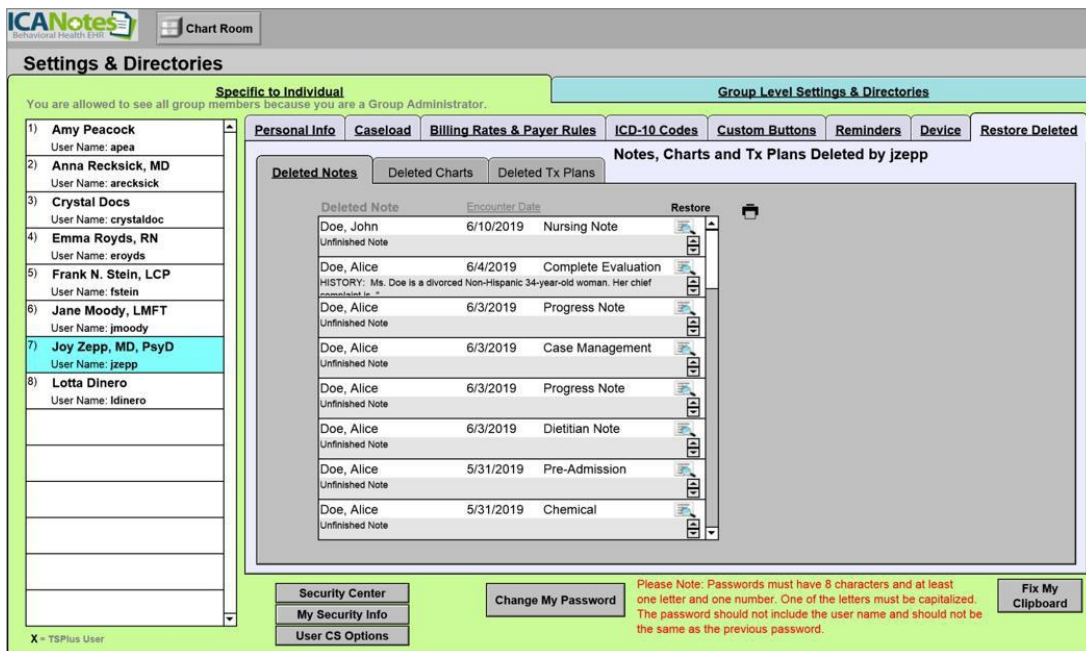
Note: Because deleted charts and notes are viewed by the user that took the delete action, it is necessary to know who deleted a chart or note in order to restore it. The permission to delete a chart or note may be granted or restricted within the **Security Center**.

- To restore a chart or note, simply click on the 🖥️ icon to the right of the note or chart.

| Deleted Note	Encounter Date		Restore
White, Snow Z	4/20/2017	Complete Evaluation	🖥️
UnFinished Note			

You can print a list of the Deleted Notes, Deleted Charts, or Deleted Tx Plans by clicking the 🖨️ icon.

Please click the button below to view a quick tutorial on how to use the **Restore Deleted** tab.

Video Tutorial
Restore Deleted

CREATING AND ACCESSING CHARTS

The opening screen in ICANotes is known as the Chart Room.
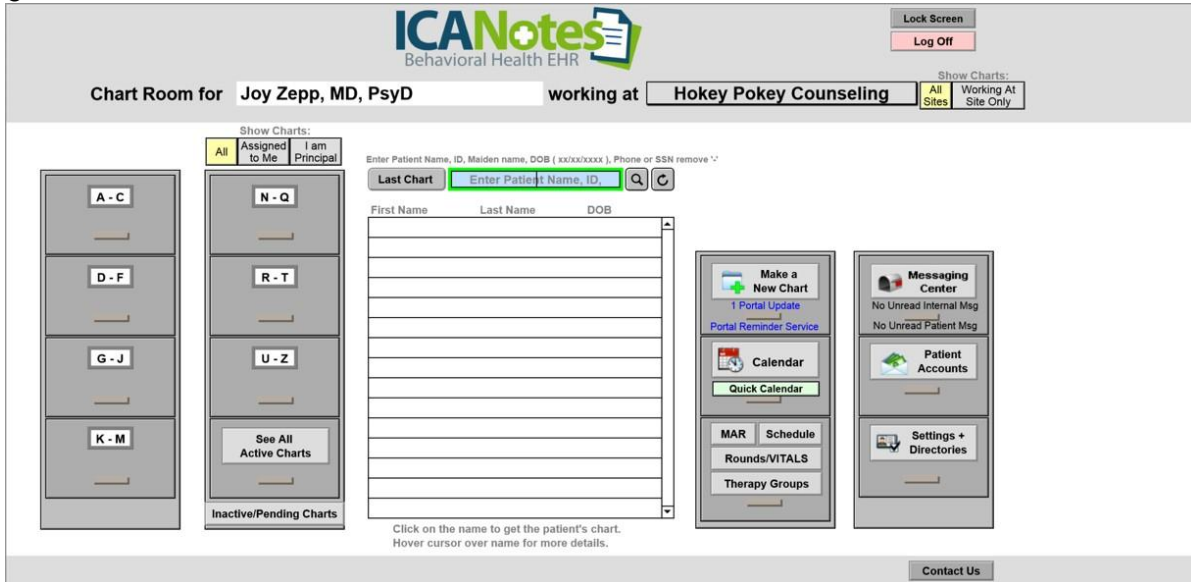
- Included in the Chart Room are two filing cabinets on the left where you will find patient charts organized alphabetically (A-C, D-F, etc.). After clicking in a particular drawer, the names of patient charts stored in that drawer will display in the middle of the screen in alphabetical order by last name. You can then scroll to the patient name whose chart you are looking for and click on the name to open the patient's chart.

- You may narrow the list to all charts, charts assigned to you, and charts that you are principal by clicking on the buttons shown below.
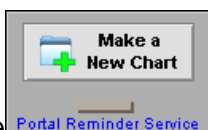

- You can search for a patient by name or ID by typing into the search field and hitting the [🔍] button.

Enter Patient Name or ID or Phone

[   ] [🔍]
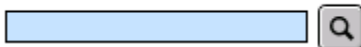
- Hitting the [Last Chart] button takes you right to the last patient you visited during your current login session.

CREATING A NEW CHART

- Click on the [Portal Reminder Service] drawer in the **Chart Room**.

- A popup will appear requiring the patient's first name, last name, and date of birth.

New Patient

Please enter the new patient's name and date of birth.

First Name
Alice

Last Name
Doe

Date of Birth
8/9/1984

Cancel   Continue

- After populating these fields, click the [Continue] button. The program will check to see if a chart already exists with that name and DOB or a similar name with the same DOB and alert you to help prevent duplicate charts.

New Patient Warning

There is already a patient with this name and DOB. Do you still want to add a new patient?

Click View to go to the existing patient chart.

View   Yes   No

- If no similar patients currently exist within your account, the system will then bring you to the demographics portion of the patient chart. The required fields will be highlighted in red; those fields that are helpful, but not required, are highlighted in blue.

- Again, if you intend to use ICANotes for electronic billing purposes, clicking the [Show] button in the bottom middle for 'Fields used by electronic billing' will highlight those fields required for billing purposes in yellow and those fields that are optional in pink.

- If you will be utilizing the e-prescription feature of ICANotes, you will also need to fill out the Zip Code and Home Phone Number fields for the patient.

- If you are using the Patient Portal, you will need to populate the patient's email address and check Portal (contact the ICANotes Support team to turn on the Patient Portal or the ICANotes Sales team to turn on the Premium Patient Portal).

- You will need to assign a provider in the lower left-hand corner. To do this, click on the field above the **Assign Provider** button and choose a provider from the list that appears. After selecting the appropriate provider, click the **Assign Provider** button and confirm that the provider name appears on the left.

- The first assigned provider will be considered the principal provider and will be highlighted in green. You may assign other providers as needed and change the principal provider designation as appropriate by clicking the **Principal** button on any provider names that are not highlighted in green.

- You can also assign roles to the assigned providers by clicking into the middle column and selecting from the menu.

- Once you have the appropriate providers assigned to the patient chart, you have several options:

    o The **Telephone Intake** tab will take you to Telephone Intake Form.

Telephone Intake Form

o The **Save and go back to Chart Room** button will save the patient information and return you to the Chart Room.

o The **Save and go to Chart Face** button will save the patient information and return you to the Chart Face.

o The **Cancel/Delete this Record and return to Chart Room** button will not save the patient information and return you to the Chart Room.

o The **Skip Initial; create a Group Therapy Note** button will save the patient information and open a Group Therapy Note.

o The **Skip Initial; create a Progress Note** button will save the patient information and open a Progress Note.

o The **CONTINUE to Initial or Complete Exam** button will save the patient information open a Complete Assessment.

- Continue filling out information in the demographics portion of the chart, including insurance information and other contacts. Episodes of Care tab is used primarily for inpatients.

- If you will be using the billing portion of ICANotes, it is recommended that you add insurance information to the patient's chart. To do so, click the **Insurance Information** tab.

- Click the ➕ New button and choose the appropriate insurance carrier from the insurance list that appears on the right.

- Proceed to fill out the remaining insurance information. You may prefer to use the "Show Fields used by electronic billing" button at the bottom to highlight required fields in yellow.

- After entering the patient's demographic information, you are ready to begin charting on your patient.

Please click the button below to view a quick tutorial on how to use the **Creating Charts** tab.

Video Tutorial
Creating Charts