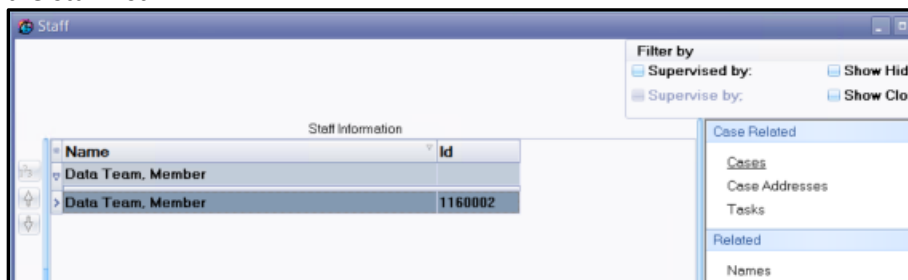


Quick Steps

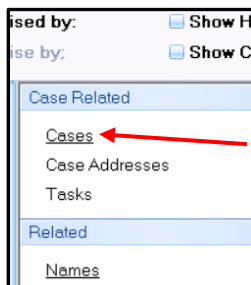
- Open the Case List Screen (if you are not already in it)
- Click the Case you are Working on
- From the Right Hand Menu Bar, Click on the Client Services Link
- Click the Add Button
- Fill out the Staff Services/Activities Form (all 3 sections) filling in the appropriate telehealth option (i.e. **Telehealth – Phone or Telehealth – Video**) in Place of Service.
- Click Save/Add More Service Button
- If Another Service Entry is Needed, Fill out the Staff Services/Activities Form (all 3 sections) and Click Save/ Add More Service Button
- If There is Not Another Service to Enter, Click the Close Button

Detailed Steps:

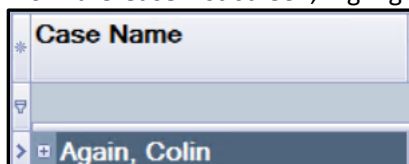
1. After logging into the database, the Staff window appears and the system identifies your name on the staff list.



2. Click on the **Cases** link (on the side menu bar) to get to your open case list.



3. From the **Case List** screen, highlight the case that you want to work on.



- 4.

Case Related

- County/Zip
- Assignments
- Program Status
- Clinical Instruments
- Services

Client Related

- Use the down arrow to select the **CPP Phase, Foster Parent Intervening or Medicaid** from the Add field, then click the green arrow.

Notes: CPP note

Add:

- CPP Foundational Phase
- CPP Feedback Phase
- 19 Ser
- CPP Core Intervention Phase
- CPP Discharge Phase
- Foster Parent Intervening
- Medicaid

- The **Staff Services/Activities** window will open.
Note, there is no auto-save function. Save your information by clicking **Save Your Progress** often in case of a power outage or disconnection.

The far left section is logistical information related to the service.

Service Dashboard

Service | Check-Lists | Summary (Check Lists)

Provider: [Field] [Search]

Staff: 1160002 [Search] Data Team, Member

Client Id: 1160004 [Search] Again, Colin

Service Date: [Field] Day Of Week

Start Time: [Field] End Time: [Field] Units: [Field]

Procedure: I04 [Search] Feedback Session

Appt. Status: 0 [Search] Held

Place of Svc.: P08 [Search] Office

Present at Session: [Field] [Search]

Focus of the Session: [Field] [Search]

Print Save Your Progress Save and Add New Service Close

Id	Label	Type Label
P08	Office	
P08B	Part C Agency Office	
P10	Court	
P11	Office of Attorney	
P12	Office at CYFD	
P13	Home- Foster Family	
P15	Child Care Center	
P30	Telehealth - Video	
P31	Telehealth - Phone	
P99	Other	

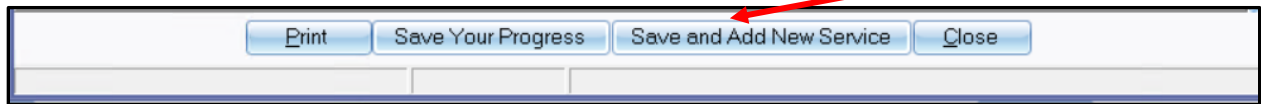
- Provider Staff** Use the magnifying glass look up tool to select the provider, select, and click **OK**. This field will automatically populate. Use the magnifying glass tool to select an option (if necessary), select, and click **OK**.
- Client ID** Will automatically fill in for the client you have selected
- Appointment Date/ Time** Type in the start and end times as well as the date of service (Service Date also has a dropdown tool to access a calendar).
- Procedure Appt. Status** Use the magnifying glass tool to select a billable procedure, select, and click **OK**. The database will default the status. Use the magnifying glass tool to select another option as necessary, select, and click **OK**.
- Place of Service** The database will default the place of service. Use the magnifying glass tool to select the appropriate Telehealth option (i.e. **Telehealth – Phone or Telehealth – Video**), select, and click **OK**.

The middle section will have dropdown choices concerning who was present at the visit and the focus of the session.

- Present At Session** Use the dropdown arrow tool to check an option or checkmark more than one option of who was present at the session.
- Focus of the Session** Use the dropdown arrow tool to check an option or checkmark more than one option related to the phase.

The right section will have a notes section that is optional.

- When the **Staff Services/Activities** window is complete, click on the **Save and Add New Service** button and the entry form will clear. If there are more services to enter, repeat step 7.



Print Save Your Progress Save and Add New Service Close

If there are no more services to enter for this client, click on the **Close** button to exit the form.



Print Save Your Progress Save and Add New Service Close

If you need further assistance please contact ECSC Data & Web Services:

ecscdata@unm.edu