



ClinicSource (CS) Training

November 2017

National Therapy Center
Speech Therapy • Occupational Therapy • ABA Therapy

Common Issues

- ▶ What's the website?
 - <https://secure2.clinicsource.com/ClinicPortal2/login.aspx>
- ▶ What's the Clinic Name?
 - NationalSpeech
- ▶ I'm having issues logging in, who do I contact?
 - Mel (mel@nationalspeech.com)
 - If unable to reach Mel contact support@clinicsource.com

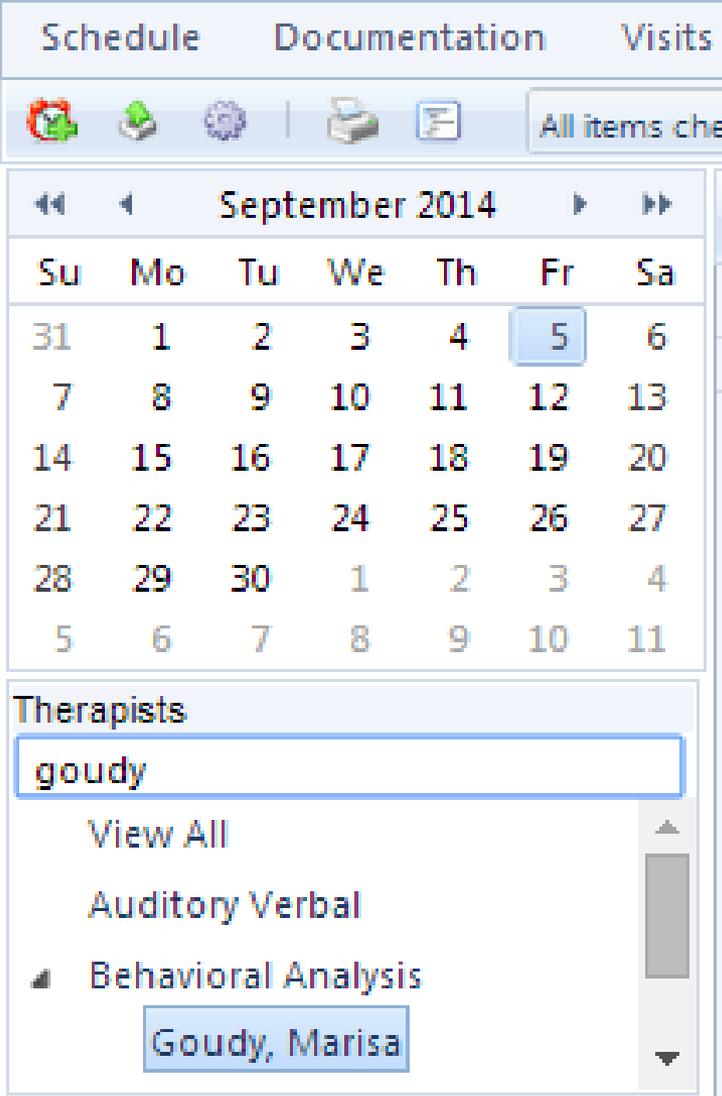
I can't find my schedule

- ▶ Change office in upper right hand corner
- ▶ Click arrow for office choices
- ▶ Capitol Hill: DC
- ▶ Bethesda/Germantown: MD
- ▶ NS In–Network: CareFirst (MD ONLY) & Aetna



I can't find my schedule (cont.)

- ▶ Click “Behavioral Analysis”
- ▶ In “Search Therapists...” bar, type in your last name
- ▶ Click “Behavioral Analysis” again



The screenshot displays a software interface with three tabs: "Schedule", "Documentation", and "Visits". Below the tabs is a navigation bar with icons for home, refresh, settings, print, and a document icon, along with a search bar containing "All items che". The main content area features a calendar for "September 2014" with the date "5" highlighted. Below the calendar is a "Therapists" search section with a search bar containing "goudy". The search results list includes "View All", "Auditory Verbal", "Behavioral Analysis" (with a dropdown arrow), and "Goudy, Marisa" (highlighted).

Su	Mo	Tu	We	Th	Fr	Sa
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	1	2	3	4
5	6	7	8	9	10	11

Therapists

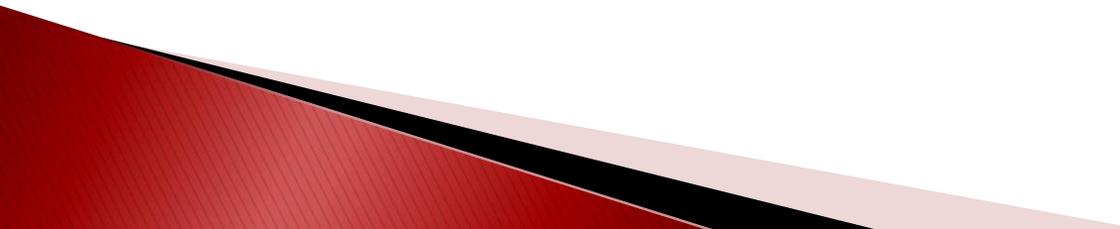
goudy

- View All
- Auditory Verbal
- Behavioral Analysis
 - Goudy, Marisa

When are session notes due?

- ▶ Notes are due in ClinicSource **24 HOURS** after the client's session start time
 - This includes: cancelled, no show & present sessions
 - Example: 9/4 session 6:00–8:00 pm, session note due 9/6 6:00 pm

How to create a note...



Appointments

Client's Name →

Start & End Time →

The screenshot shows a window titled "Edit Appointment - 461131". At the top right is a close button (X). Below the title bar is a toolbar with icons for save, delete, and other actions, and a checkbox labeled "Ignore Conflicts". The main form area contains the following fields:

- Appointment** (with an alarm clock icon)
- Type:** ABA Therapy (dropdown menu)
- Patient:** Client Name (dropdown menu)
- Therapist:** Goudy, Marisa (dropdown menu)
- Subject:** (empty text input field)
- Location:** Home (dropdown menu)
- Start Time:** 12/7/2015 8:30 AM (with calendar and clock icons)
- End Time:** 12/7/2015 9:30 AM (with calendar and clock icons)
- Recurring every:** (checkboxes for Mon, Tue, Wed, Thu, Fri, Sat, Sun)
- for the next:** (text input field) weeks.
- Biweekly:** (checkbox)

← ABA Therapy

← Your Name

← Place of service (e.g. Home, Daycare, School, Office)

Appointments: Attendance Status

The screenshot shows a form with the following elements:

- Recurring every:** A section with checkboxes for days of the week: Mon, Tue, Wed, Thu, Fri, Sat, Sun.
- Attendance Status:** A dropdown menu with the following options: -None-, Cancellation, Confirmed, No Show (highlighted), Other, Present.
- Text Box:** A box containing the text: "Client did not come to office, attempted to contact client's Mom".

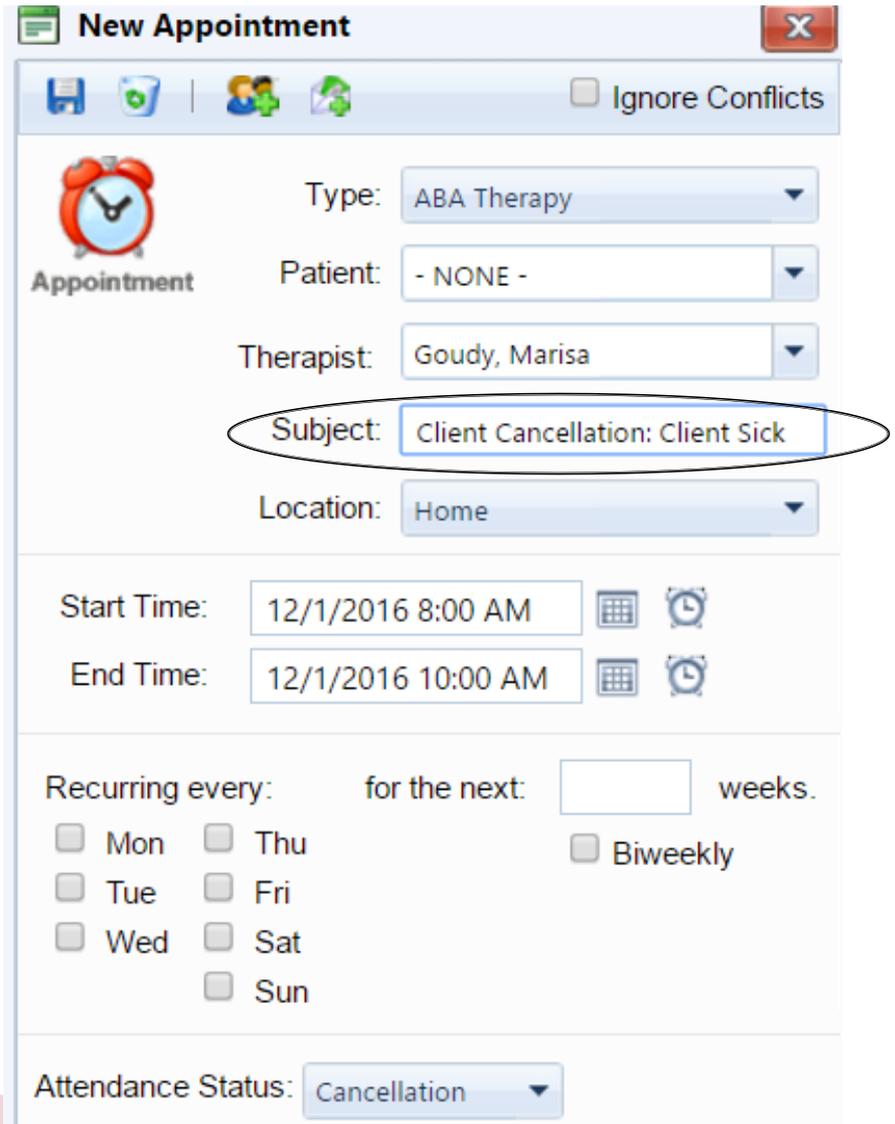
Arrows indicate that the "No Show" status is linked to the text box and that the text box is linked to the "Cancellation, No Show, Present, etc." label.

Cancellation, No Show, Present, etc.

Cancellation/No Show Explanation: who cancelled/no show (e.g. client/therapist cancelled), reason (e.g. client sick), notice duration (e.g. 2 hours prior to session)

Appointments: Cancelled Sessions

- ▶ Subject: enter who cancelled (e.g. Family or Therapist) followed by reason



The screenshot shows a 'New Appointment' form with the following fields and values:

- Type: ABA Therapy
- Patient: - NONE -
- Therapist: Goudy, Marisa
- Subject: Client Cancellation: Client Sick (circled)
- Location: Home
- Start Time: 12/1/2016 8:00 AM
- End Time: 12/1/2016 10:00 AM
- Recurring every: [] weeks.
- Days: Mon, Tue, Wed, Thu, Fri, Sat, Sun (all unchecked)
- Biweekly: []
- Attendance Status: Cancellation

Visits

If session occurred, client cancelled w/less than 24 hrs. notice or no showed click on “New Visit From Appointment”

New Visit From Appointment button

New Appointment

Ignore Conflicts

Appointment

New Visit from Appointment

Patient: Patient, Test

Therapist: Goudy, Marisa

Subject:

Location: Home Capitol Hill

Start Time: 9/1/2014 1:30 PM

End Time: 9/1/2014 2:30 PM

Recurring every: for the next: weeks.

Mon Tue Wed Thu Fri Sat Sun Biweekly

Attendance Status: Cancellation

Client cancelled session w/1 hr. notice due to transportation issues|

Visits: Cancellations LESS Than (LT) 2 hours notice

4. SAVE!

Schedule Documentation Visits Patients Payments Setup Help Logout

Visit

Patient: Client Name
Therapist: Goudy, Marisa
Location: Daycare

Visit Id: 151963 Count: 8
Type: BA
Start: 8:00 AM 11/14/2017

Diagnosis
R46.89 | Other symptoms & signs involving appearance & behavior

Units: 1

Id	CPT Code	Units	Duration	Inv.#	Authorizations
	Cx LT 2Hrs Cancellation with less than 2	1	30 min.		
		0	0 min.		
		0	0 min.		
		0	0 min.		
		0	0 min.		
		0	0 min.		
		0	0 min.		
Totals:		1	30 min.		

Manually change to 30 minutes

Visits: Cancellations MORE Than (MT) 2 hours notice

Schedule Documentation Visits Patients Payments Setup Help Logout

4. SAVE! →

Visit

Patient: Client Name
Therapist: Goudy, Marisa
Location: Daycare Client Name

Visit Id: 151963 Count: 8
Type: BA
Start: 8:00 AM 11/14/2017

Diagnosis
R46.89 | Other symptoms & signs involving appearance & behavior

Units: 1

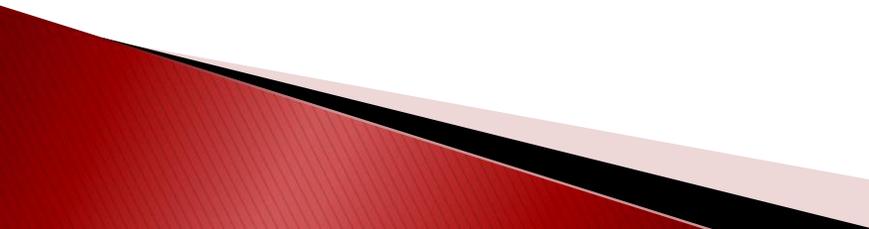
Id	CPT Code	Units	Duration	Inv.#	Authorizations
	Cx MT 2Hrs Cancellation with more than 2	1	0 min.		
		0	0 min.		
		0	0 min.		
		0	0 min.		
		0	0 min.		
		0	0 min.		
		0	0 min.		
Totals:		1	0 min.		

Leave at 0 minutes

Cancellations <24 hrs./No Shows: Progress Notes

- ▶ NOT NEEDED!
- ▶ After completing the visit for the cancellation, you are finished!

Visits: Cancellations 24+ hrs. notice

- ▶ NO VISIT NECESSARY!
 - ▶ Appointment Subject: Client Cancellation & reason
 - ▶ Appointment Attendance Status: cancellation
 - ▶ Attendance Status Explanation: e.g. client on vacation, provided with 72+ hrs. notice
 - ▶ Click SAVE on Appointment
- 

Visits: No Shows

Schedule Documentation Visits Patients Payments Setup Help Logout

4. SAVE!

Visit

Patient: Client Name
Therapist: Goudy, Marisa
Location: Daycare

Visit Id: 151963 Count: 8
Type: BA
Start: 8:00 AM 11/14/2017

Diagnosis
R46.89 | Other symptoms & signs involving appearance & behavior

Units: 1

Id	CPT Code	Units	Duration	Inv.#	Authorizations
	No Show Patient No Showed	1	30 min.		
		0	0 min.		
		0	0 min.		
		0	0 min.		
		0	0 min.		
		0	0 min.		
		0	0 min.		
		0	0 min.		
Totals:		1	0 min.		

Manually change to 30 minutes

Completed Sessions: Attendance Status

Recurring every:

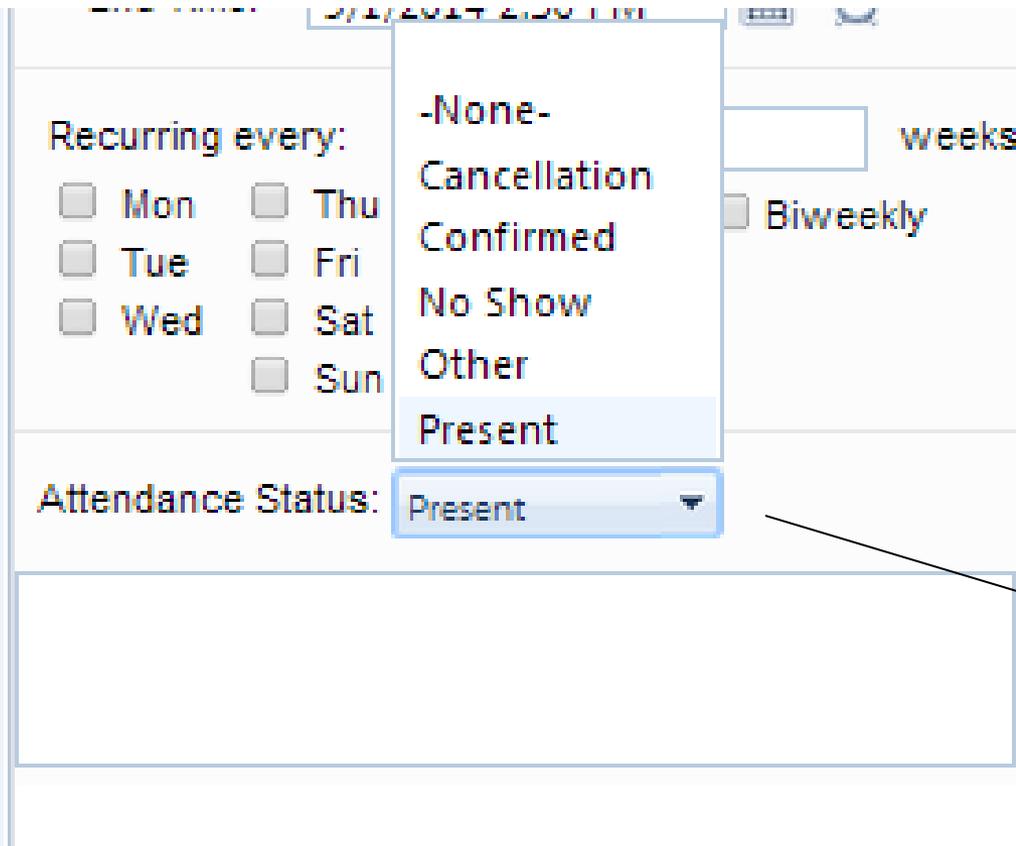
<input type="checkbox"/> Mon	<input type="checkbox"/> Thu
<input type="checkbox"/> Tue	<input type="checkbox"/> Fri
<input type="checkbox"/> Wed	<input type="checkbox"/> Sat
	<input type="checkbox"/> Sun

Attendance Status: Present

Biweekly

weeks

-None-
Cancellation
Confirmed
No Show
Other
Present



Present: i.e. do NOT
leave attendance status
blank!

Completed Sessions: Visit

4. New Progress Note

Visit

Patient: Client's Name

Therapist: Goudy, Marisa

Location: Home

Visit Id: 82415 Count: 102

Type: BA

Start: 5:00 PM 2/11/2016

Re-Eval Due: 6/4/2015

Diagnosis: F84.0 | Autistic disorder

Treatments				
Id	CPT Code	Units	Duration	Inv.#
79389	H2019 Direct ABA Services	4	60 min.	
		0	0 min.	
		0	0 min.	
		0	0 min.	
		0	0 min.	
		0	0 min.	
		0	0 min.	
		0	0 min.	
Totals:		4	60 min.	

1. CPT Code: specific to client (i.e. H2019 for most clients)

3. Most Units: 1 unit=15 mins. (e.g. 1 hr. session=4 units, 2 hr. session=8 units)

Completed Sessions: Progress Note

Click “New Progress Note” button (i.e. SOAP note)

Screenshot of a software interface showing a "New Progress Note" button circled in red. The interface includes a menu bar with "Schedule", "Documentation", "Visits", "Patients", "Payments", "Setup", and "He". Below the menu bar is a toolbar with icons for save, new, edit, back, trash, and print. The main area contains a "Visit" section with a "Patient" dropdown menu (Client Name), a "Therapist" dropdown menu (Goudy, Marisa), and a "Location" dropdown menu (Daycare). An arrow points from the text "New Progress Note button" to the circled icon.

“New
Progress
Note” button

Completed Sessions: Progress Note

Progress Note: Behavioral Analysis							National Speech-Capito	
S Patient:		Pat. Number:	1993	D.O.B.:	8/19/2009			
Visit Date:	9/4/2014	Duration:	60 min	Therapist:	Goudy, Marisa			
CPT	Units	Loc.	Start	End	Duration	Description	Diag.	
H2019-	4	12	8:00 AM	9:00 AM	60 min.	Therapeutic Behavioral Services, per 15 minutes provided by a Behavior Specialist	299.00	
The client was present prior to the session as well as for the duration of the session.								
O	#	Area of Concern	Goals				%Ach	
A	1	Compliance	c will comply with at least 90% of novel instructions the first time asked given appropriate wait time (typically 3-5 seconds), for three consecutive sessions and generalize compliance in all environments inside and outside of the home.				70%	
	2	Communication	c will use 4-5 word phrases to indicate his wants when presented with the verbal instruction, "What do you want?" given the appropriate wait time (typically 3-5 seconds) for three consecutive days with adults and peers.				80%	
	5	Self-Control	c will wait for preferred items for up to 3 minutes by staying seated and near an adult, with 90% accuracy, first time asked for three consecutive sessions with therapists and family.				100%	
	6	Self-Care	c will indicate that he needs to use the bathroom, remain dry, and complete his toileting routine independently for two consecutive weeks.				100%	
Self-Control: current target 60 seconds mastered								
P	The current plan of care should continue. Baseline new self-control target due to mastered target.							

S (Subjective): session location (e.g. home, office), who was present during session (e.g. Mom, brother) & subjective information (e.g. client appeared tired, client was upset when denied access to preferred item, etc.)

O/A (Objective/Assessment): each client will have goals that should automatically generate, you will need to put in the accuracy (i.e. %Ach) for each goal. In blank box underneath include specific targets, prompting method, common incorrect responses, strategies used, etc.

P (Plan of Action): ABA services should continue for XX hours/week (e.g. 6, 10, etc.) in specific location (e.g. natural environment, etc.) to work on XX goals (e.g. communication, social skills, etc.)

Progress Note: Signatures

2. SAVE!

1. Sign note! Your signature should appear on the bottom

Progress Note: Behavioral Analysis National Speech-Cap

S Patient:		Pat. Number:	1993	D.O.B.:	8/19/2009
Visit Date:	9/9/2014	Duration:	min	Therapist:	Goudy, Marisa

CPT	Units	Loc.	Start	End	Duration	Description	Diag
						Client was present prior to the session as well as throughout the duration of the session.	

O	#	Area of Concern	Goals	%Ach
<input checked="" type="checkbox"/>	1	Compliance	Client will comply with at least 90% of novel instructions the first time asked given appropriate wait time (typically 3-5 seconds), for three consecutive sessions and generalize compliance in all environments inside and outside of the home.	50 Last: 70
<input checked="" type="checkbox"/>	2	Communication	Client will use 4-5 word phrases to indicate his wants when presented with the verbal instruction, "What do you want?" given the appropriate wait time (typically 3-5 seconds) for three consecutive days with adults and peers.	10 Last: 80
<input checked="" type="checkbox"/>	3	Motor Imitation #1	Client will imitate the actions of familiar adults with 25 different functional play actions as a precursor skill for his play activities with 90% accuracy, first time asked, with appropriate wait time (typically 3-5 seconds) for three consecutive sessions.	80 Last: 0
<input checked="" type="checkbox"/>	4	Motor Imitation #2	Client will spontaneously imitate actions of peers for 7 different functional play actions over at least 2 separate observations.	75 Last: 0
<input checked="" type="checkbox"/>	5	Self-Control	Client will wait for preferred items for up to 3 minutes by staying seated and near an adult, with 90% accuracy, first time asked for three consecutive sessions with therapists and family.	10 Last: 100
<input checked="" type="checkbox"/>	6	Self-Care	Client will indicate that he needs to use the bathroom, remain dry, and complete his toileting routine independently for two consecutive weeks.	10 Last: 100

BCBA Supervision

- ▶ If you are supervised by a BCBA: you bill in CS using the regular code for time you see the client individually & the Nonbillable code for when the BCBA overlapped
- ▶ In your SOAP note, put when BCBA present in S portion of note (e.g. BCBA overlap 5:00–6:00 pm)
- ▶ On your timesheet, you will be paid for the duration of the session. In the Comments column put “BCBA Overlap 1 hr./etc.”

BCBA Overlap Visit Example

Visit

Patient: Client Name
Therapist: Your Name
Location: Daycare

Visit Id: 87784 Count: 32
Type: BA
Start: 11:00 AM 3/18/2016

Diagnosis
F89 | Unspecified disorder of psychological development

Treatments									
Id	CPT Code	Units	Mod1	Mod2	Mod3	Duration	Inv.#	Authorizations	
84683	NonBillabl Non-Billable Visit. Overlapped	2				30 min.			
84684	H2019 Direct ABA Services	2				30 min.			
		0				0 min.			
		0				0 min.			
		0				0 min.			

Non Billable: →
when BCBA overlapped
(e.g. 12:00-1:30 pm-6 units)

H2019: regular billing code,
client seen individually by
BT (e.g. 11:30 am-12:00 pm-
2 units)

Session Note Check List

APPOINTMENTS

- ❑ Type: ABA Therapy
- ❑ Start & End Time
- ❑ Location: Place of service (e.g. Home)
- ❑ Attendance Status: present, cancellation, no show, etc.
- ❑ Cancellation Subject: who, reason & notice of reason

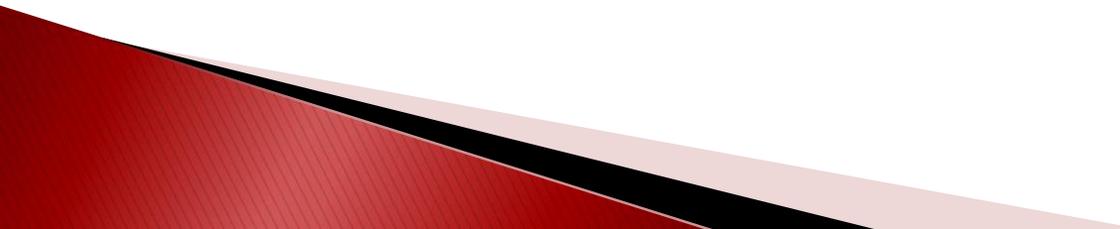
VISITS & SOAP NOTES (if necessary)

- ❑ CPT Code: H2019, CX LT/MT 2 hrs., etc.
- ❑ Pri. Diag. Code: F84.0, etc.
- ❑ Units: 1, 4, 8, etc.
- ❑ SOAP note for present sessions (all sections must contain information)
- ❑ Signature

****If any information above is missing for a note, your payment will be delayed if not immediately resolved****

Cancellations

What to do if your client cancels/no shows?

- ▶ Note cancellation in ClinicSource
 - ▶ Attempt to reschedule if your schedule & the client's schedule allows
 - ▶ Notify BCBA
- 

Cancellation Documentation

- ▶ Less than (LT) 2 hours
 - Appointment Status: Cancellation
 - Blank Area: cancellation w/less than 2 hr. notice by client, reason (e.g. transportation issues)
 - Create visit
 - CPT Code: CX LT 2Hrs
 - Diagnostic Code: specific client code (e.g. Autistic Disorder F84.0)
 - Units: 1 (should automatically generate)
 - Duration: manually change to 30
- ▶ More than (MT) 2 hours
 - Appointment Status: Cancellation
 - Blank Area: cancellation w/2+ hour notice by therapist/client, reason (e.g. vacation)
 - Create visit
 - CPT Code: CX MT 2Hrs
 - Diagnostic Code: specific client code (e.g. Autistic Disorder F84.0)
 - Units: 1 (should automatically generate)
 - Duration: leave at 0

Cancellation Pay

- ▶ If a client cancels a session w/2 hours or less notice, then therapists can bill for a cancellation stipend
- ▶ No Shows: if a client does not attend a session & no notice is provided, then therapists can bill for cancellation/no show stipend
- ▶ Cancellation/No Show Stipend Rate: 30 minutes
 - If a session is scheduled for 2 hours & the session gets cancelled you may only bill for 30 mins. (e.g. 4:30–6:30 pm session cancelled, hourly rate–\$17/hour, may bill \$8.50)

Admin Pay

What is considered “Admin”?

- ▶ Staff meetings
- ▶ Pre-approved time by BCBA for:
 - Assisting with programming
 - Helping with office events (e.g. Halloween party)
 - Any time working on task not working directly with a client
- ▶ Does NOT include: writing notes, completing timesheet, answering emails, etc.

How to document admin time

- ▶ Create appointment
- ▶ Create visit
- ▶ CPT Code: BT Admin 15/17
- ▶ Units: 1
- ▶ Duration: total time, manually change
- ▶ Save!
- ▶ No note needed

The screenshot shows a software interface for documenting a visit. The top navigation bar includes 'Schedule', 'Documentation', 'Visits', 'Patients', 'Payments', 'Setup', 'Help', and 'Logout'. The main form is titled 'Visit' and contains the following fields:

- Patient: Client Name
- Therapist: Goudy, Marisa
- Location: Daycare
- Visit Id: 151963, Count: 8
- Type: BA
- Start: 8:00 AM, 11/14/2017
- Diagnosis: R46.89 | Other symptoms & signs involving appearance & behavior

Below the form is a table for 'Treatments' with the following columns: Id, CPT Code, Units, Duration, Inv.#, and Authorizations.

Id	CPT Code	Units	Duration	Inv.#	Authorizations
	BTAdmin 17 Behavior Therapy Admin	1	60 min.		
		0	0 min.		
		0	0 min.		
		0	0 min.		
		0	0 min.		
		0	0 min.		
		0	0 min.		
		0	0 min.		
Totals:		1	60 min.		

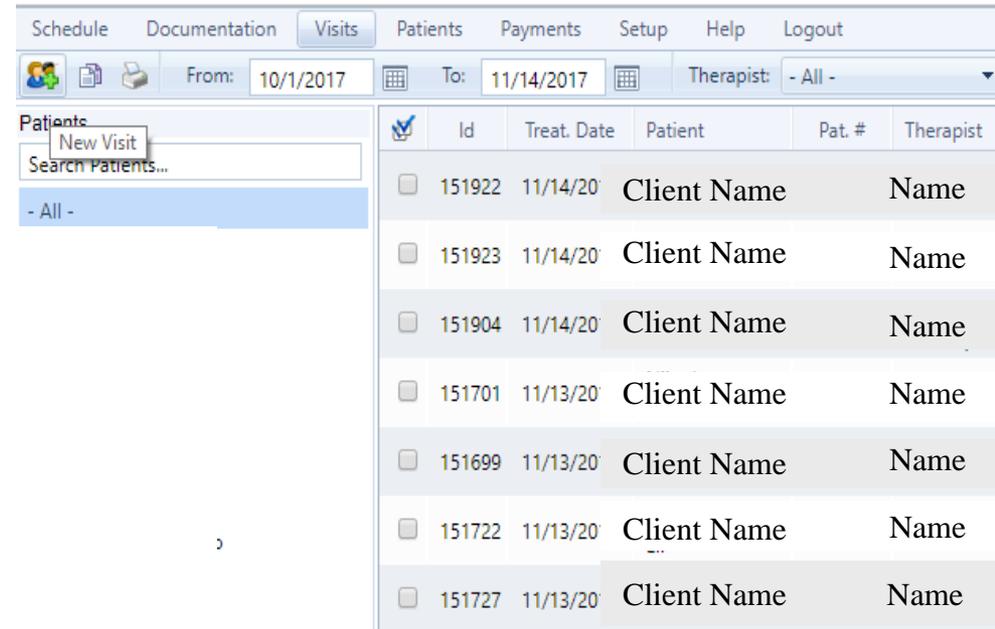
NS In-Network

What is this for?

- ▶ To be used for clients with CareFirst (MD ONLY) or Aetna as the primary payer
- ▶ If the client also has a secondary payer who will be the ultimate payer of services (e.g. HSCSN), the visit will need to be duplicated in the corresponding office location (e.g. Capitol Hill)

How do I duplicate a visit?

- ▶ Change schedule location
- ▶ Click “Visits” on header
- ▶ Click “New Visit” (2 people with + sign)
- ▶ In visit enter CPT codes & duration per funding source



The screenshot shows a software interface with a 'Visits' tab selected. The interface includes a header with navigation options: Schedule, Documentation, Visits, Patients, Payments, Setup, Help, and Logout. Below the header, there are filters for 'From: 10/1/2017', 'To: 11/14/2017', and 'Therapist: - All -'. A 'Patients' dropdown menu is open on the left, showing 'New Visit' and 'Search Patients...' options. The main area displays a table of visit records.

Id	Treat. Date	Patient	Pat. #	Therapist
151922	11/14/20	Client Name		Name
151923	11/14/20	Client Name		Name
151904	11/14/20	Client Name		Name
151701	11/13/20	Client Name		Name
151699	11/13/20	Client Name		Name
151722	11/13/20	Client Name		Name
151727	11/13/20	Client Name		Name

Enter “Appointment” Info

- ▶ Change following info using drop down arrow:
Patient, Therapist, Location
- ▶ Change Date (click Calendar, select date, OK)
- ▶ Change time

The screenshot shows a software interface with a menu bar at the top containing 'Schedule', 'Documentation', 'Visits' (highlighted), 'Patients', 'Payments', 'Setup', 'Help', and 'Logout'. Below the menu bar is a toolbar with icons for save, print, back, and other functions. The main area is divided into several sections:

- Visit Information:** Includes a 'Visit' icon, 'Patient: Client Name', 'Therapist: Jackson, Chavon', and 'Location: Daycare'.
- Visit Details:** 'Visit Id: 152025', 'Count: 5', 'Type: BA', and 'Start: 9:00 AM' on '11/14/2017' with a calendar icon.
- Diagnosis:** 'R46.89 | Other symptoms & signs involving appearance & behavior'.
- Treatments Table:** A table with columns for Id, CPT Code, Units, Duration, Inv.#, and Authorizations.

Id	CPT Code	Units	Duration	Inv.#	Authorizations
148621	0364T Adaptive Behavior Treatment by	1	30 min.		
148622	0365T Adaptive Behavior Treatment by	7	210 min.		
		0	0 min.		
		0	0 min.		
		0	0 min.		
		0	0 min.		
		0	0 min.		
Totals:		8	240 min.		

Duplicating Visit ONLY

- ▶ No note needed!

What codes do I use?

NS In-Network

- ▶ 0364T: 1 unit (30 minutes)
- ▶ 0365T: remaining units (30 minutes/unit)

Capitol Hill/Bethesda

- ▶ HSCSN
 - H2019: all units (15 minutes/unit)

Billing Codes

What codes to use

Funding Source	Codes	Units–Time
HSCSN, DCEI, MoCo I & T, Trusted	H2019	1–15 mins.
AmeriHealth	98960	1–15 mins.
CareFirst BCBS, Tricare, Kaiser & Aetna	0364T	1–30 mins. (1x/day)
	0365T	1–30 mins., use for remaining duration
All Sources (for BCBA overlap during session)	Nonbillable BCBA Overlap	Same as funding source client overlap occurred
Admin	CX LT 2 hours	1–30 mins. (total)
	CX MT 2 hours	0–Not billed
	No Show	1–30 mins. (total)
	BT Admin 15/17	1–15 mins.