

# Storyboard Private Provider Monthly Summary entries and ICD-10 Codes

This storyboard demonstrates how to enter a Monthly Summary and document ICD-10 codes. Monthly Summaries show up in Case Recordings only when marked 'Completed'.

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# Private Provider Monthly Summary Entries

## Viewing Workload Screen

- **Home** Screen
- **Workload** tab
- **Viewing Worker** box: System defaults to the name of the person logged into the system
- **Viewing for:** Lists the workload currently being viewed
- **Supervises section:** Will see list of all personnel being supervised
- **Field Grid:** Current log in viewing of Private Provider's Work Item assignments



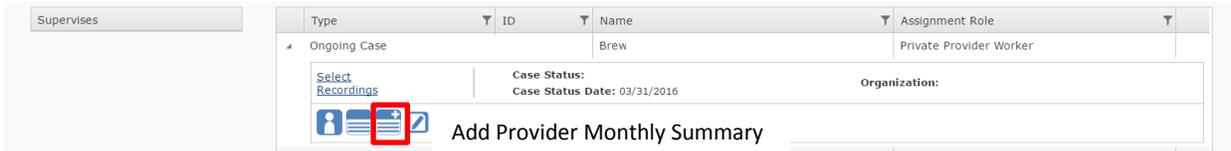
## Viewing the Provider Monthly Summary Icon

- From **Ongoing** Case
- Click the **Monthly Summary** icon to navigate directly to the Monthly Summary page

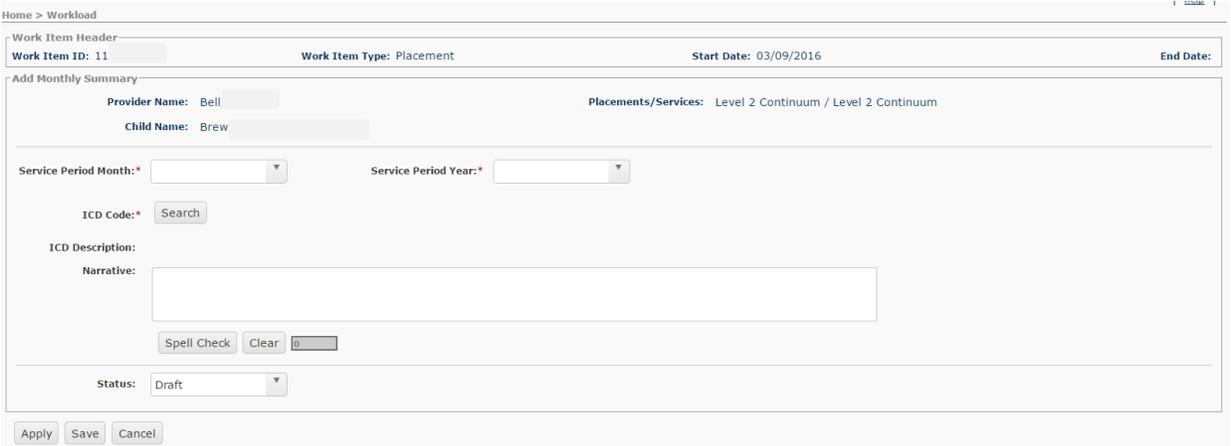


- The paper icon is associated with the “Provider Monthly Summary”. If you hover over the icon, a “Provider Monthly Summary” pop up label is visible. If previous Summaries have been entered, you can access and read them via this icon.

- The paper icon with the + is associated with Adding Provider Monthly Summary. If you hover over the icon, the “Add Provider Monthly Summary” pop up label is visible. Click on the icon.



- You are automatically directed to the Add Monthly Summary page.



- **Service Period Month\*** - this is a required field. Choose the month from the dropdown.
- **Service Period Year\*** - this is a required field. Choose the Year from dropdown.
- **ICD Code:** Click search to identify the correct ICD code.

Below shows how the screen will look.



## Entering the ICD Code

The steps to entering an ICD code will be the same as previously outlined until you get to the ICD Code Search step.

- Enter ICD Code if known **OR**
- Enter ICD Description in box
- Click **Search**.

Home > Workload > Monthly Summary Detail | help |

ICD Search Criteria

ICD Code:

ICD Description:

ICD Search Results

ICD Code  ICD Description

10 items per page

No items to display

All ICD codes will display containing the ICD description entered.

- Determine which code is correct.
- Click on the code and make it orange.
- Click **Choose**.

ICD Search Criteria

ICD Code:

ICD Description:

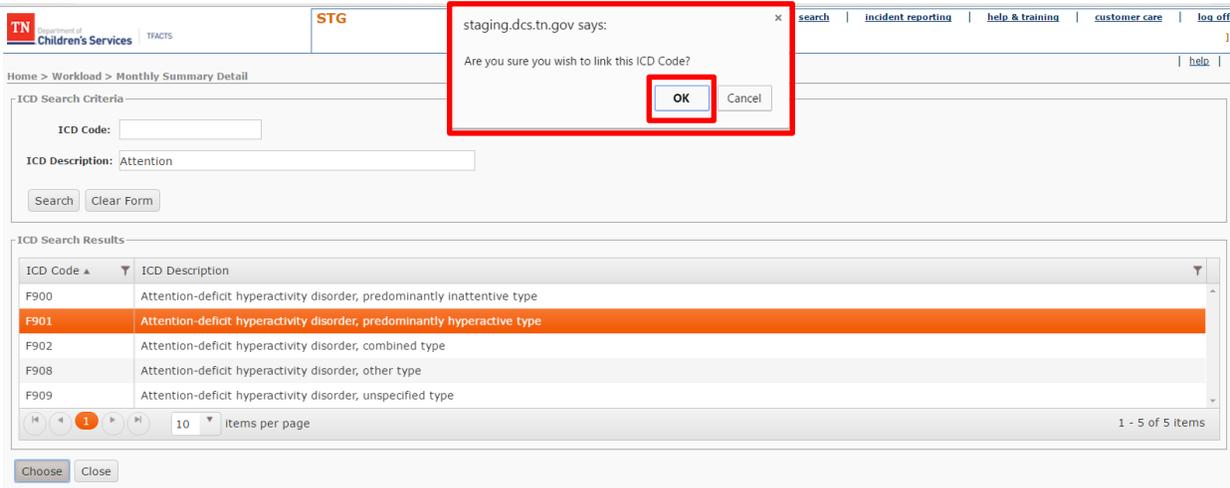
ICD Search Results

ICD Code	ICD Description
F900	Attention-deficit hyperactivity disorder, predominantly inattentive type
F901	Attention-deficit hyperactivity disorder, predominantly hyperactive type
F902	Attention-deficit hyperactivity disorder, combined type
F908	Attention-deficit hyperactivity disorder, other type
F909	Attention-deficit hyperactivity disorder, unspecified type

10 items per page

1 - 5 of 5 items

- A pop up message “Are you sure you wish to link this ICD code?” will display.
- Click **OK**.

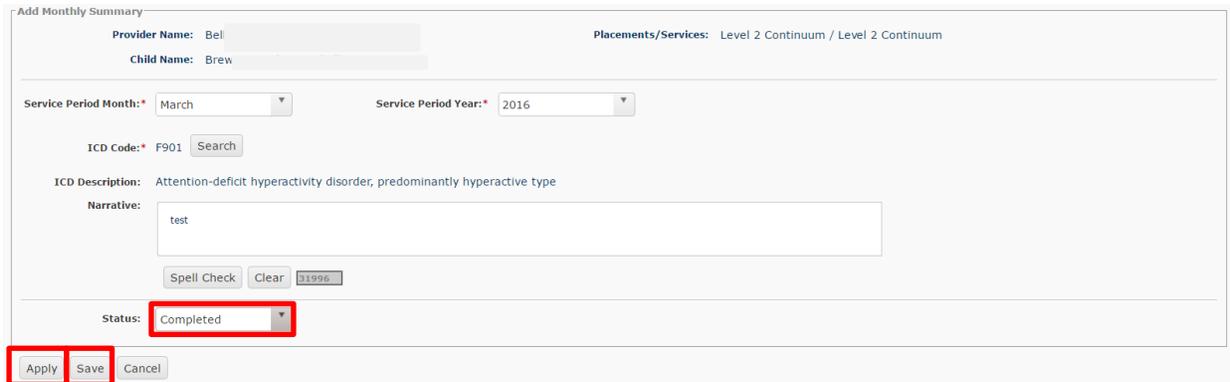


The screen below displays a ‘Completed’ Monthly Summary entry after the ICD-10 codes go into effect.

**Note:** \*The Status cannot be ‘Completed’ unless the Narrative field is populated.

**Note:** \*You cannot print Monthly Summaries unless they are in the ‘Completed’ status.

- **Status:** Choose ‘Completed’ if the Monthly Summary entry is completed.
- Click **Apply** to remain on the Add Monthly Summary page to review your entry, OR
- Click **Save**, which will navigate you back to your Workload page.



## Four Statuses' of Monthly Summaries

There are 4 statuses for a Monthly Summary.

- **'Draft'**
- **'Completed'**
- **'Created in Error'**
- **'Narrative Needed'** (occurs when either a monthly summary was in draft status or no monthly summary was present, but a payment request record was approved by DCS Central Office.)

### 'Draft' Status

The screen shot below displays a Monthly Summary entry that is in 'Draft'

The fields listed below are required fields and must be entered to save a Monthly Summary.

- **Service Period Month\***
- **Service Period Year\***
- **ICD Code:\***

The screenshot shows the 'Monthly Summary Detail' form. At the top, it displays 'Work Item ID: 112', 'Work Item Type: Placement', 'Start Date: 03/09/2016', and 'End Date:'. Below this, the 'Monthly Summary Detail' section includes 'Provider Name: Bell, [redacted]', 'Child Name: Brew', and 'Placements/Services: Level 2 Continuum / Level 2 Continuum'. The 'Service Period Month' is set to 'April' and 'Service Period Year' is set to '2016'. The 'ICD Code' field has a search button. The 'ICD Description' is 'Attention-deficit hyperactivity disorder, predominantly hyperactive type'. The 'Narrative' field contains the text 'test'. The 'Status' dropdown is set to 'Draft'. At the bottom, there are 'Apply', 'Save', and 'Cancel' buttons. Red boxes highlight the 'Service Period Month', 'Service Period Year', 'Status', and 'Apply' buttons.

**Note:** When a Monthly Summary is in a 'Draft' status, click **Apply** then **Save**.

## How to Retrieve Monthly Summaries

### How to Retrieve a Monthly Summary via the Workload Page.

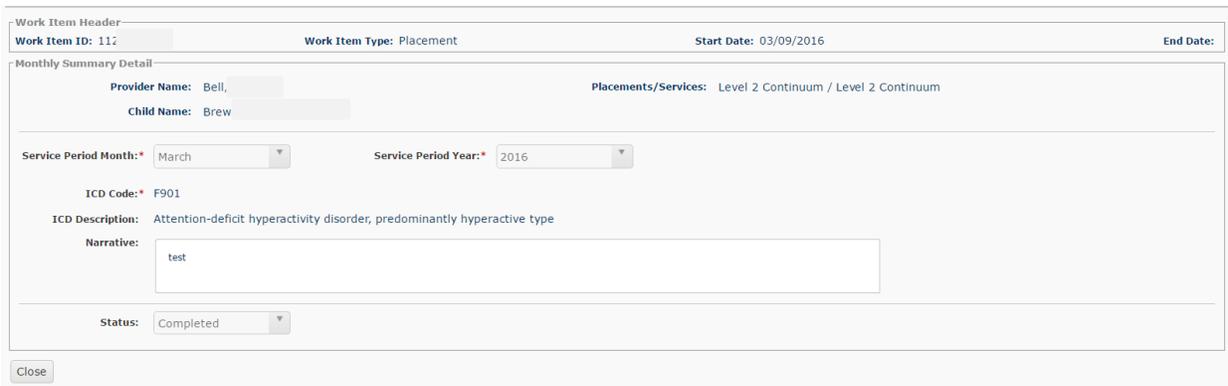
- Click paper icon to access previously existing Monthly Summary.



- Select which Monthly Summary from the Monthly Summary List by making it orange
- Click Select



- The monthly summary that is selected will populate.



## How to Retrieve a Monthly Summary via a Person Search

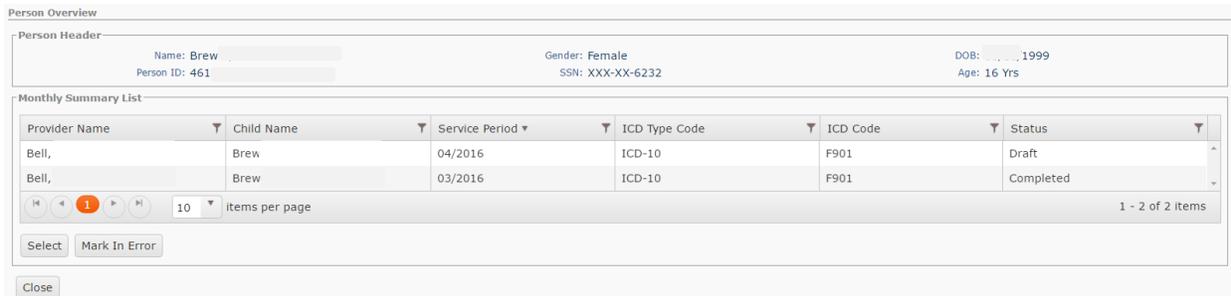
- Click on Person icon to access person profile.



- Click **Monthly Summary** link.



- The Monthly summary list will display.



## Monthly Summary Status List

- Monthly Summaries that have been previously started –‘Draft’ or any that are marked ‘Completed’ will display, as well as ‘Created in Error’ will display.
- Monthly Summary’s will only be saved as a Case Recording when they’ve been marked as ‘Completed’

### ‘Draft’ Status

The screen shot below displays a Monthly Summary record in ‘Draft’ status.

Person Header

Name: Brew  
Person ID: 461

Gender: Female  
SSN: XXX-XX-6232

DOB: '1999  
Age: 16 Yrs

Monthly Summary List

Provider Name	Child Name	Service Period	ICD Type Code	ICD Code	Status
Bell,	Brew	04/2016	ICD-10	F901	Draft
Bell,	Brew	03/2016	ICD-10	F901	Completed

10 Items per page 1 - 2 of 2 Items

Select Mark In Error

Close

### Making updates to a Monthly Summary in ‘Draft’ status

- On the Monthly Summary List page, click on the Monthly Summary you wish to review or update, it will be highlighted orange.
- Click **Select**.

Monthly Summary List

Provider Name	Child Name	Service Period	ICD Type Code	ICD Code	Status
Bell,	Brew	04/2016	ICD-10	F901	Draft
Bell,	Brew	03/2016	ICD-10	F901	Completed

10 Items per page 1 - 2 of 2 Items

Select Mark In Error

Close

**Note:** The screen shot below displays the updated Monthly Summary record again saved in 'Draft' status.

**Person Header**

Name: Brew Person ID: 461	Gender: Female SSN: XXX-XX-6232	DOB: 1999 Age: 16 Yrs
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**Monthly Summary Detail**

**Provider Name:** Bell, [redacted]      **Placements/Services:** Level 2 Continuum / Level 2 Continuum

**Child Name:** Brew [redacted]

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**Service Period Month:** April      **Service Period Year:** 2016

**ICD Code:** F901     

**ICD Description:** Attention-deficit hyperactivity disorder, predominantly hyperactive type

**Narrative:**

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**Status:** Draft

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### 'Completed' Status

- Below is a screen shot of a Monthly Summary record that is in 'Completed' status.
- **Note:** It is no longer editable.
- **Note:** This will now show up in Case Recordings because it is marked 'Completed'.
- **Note:** To print- the entry will now show up in Case Recordings to be printed.

Person Overview > Monthly Summary List

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**Person Header**

Name: Brew Person ID: 461	Gender: Female SSN: XXX-XX-6232	DOB: 1999 Age: 16 Yrs
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**Monthly Summary Detail**

**Provider Name:** Bell, [redacted]      **Placements/Services:** Level 2 Continuum / Level 2 Continuum

**Child Name:** Brew [redacted]

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**Service Period Month:** March      **Service Period Year:** 2016

**ICD Code:** F901

**ICD Description:** Attention-deficit hyperactivity disorder, predominantly hyperactive type

**Narrative:**

---

**Status:** Completed

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### ‘Created in Error’ Status

- If a Monthly Summary needs to be ‘Marked in Error’, click the ‘**Mark in Error**’ button.
- Only Monthly Summaries in a ‘**Completed**’ status can be marked in error.

The screenshot shows the 'Person Header' for a patient named Brew (Person ID: 461, Gender: Female, DOB: 1999, Age: 16 Yrs). Below this is a 'Monthly Summary List' table with columns for Provider Name, Child Name, Service Period, ICD Type Code, ICD Code, and Status. Two entries are shown: one in 'Draft' status (04/2016) and one in 'Completed' status (03/2016). Below the table, a 'Mark In Error' button is highlighted with a red box.

- When marking a Monthly Summary record in error, TFACTS will display a warning message stating, ‘Are you sure you want to Mark this Monthly Summary in Error?’
- Click **OK** if you are sure you want to mark the Monthly Summary record in error. If not, click Cancel.

This screenshot shows the same interface as above, but with a confirmation dialog box overlaid. The dialog box title is 'staging.dcs.tn.gov says:' and the message reads 'Are you sure you want to Mark this Monthly Summary In Error?'. The 'OK' button is highlighted with a red box. In the background, the 'Mark In Error' button in the table is also highlighted in blue, and the second row of the table (the 'Completed' entry) is highlighted in orange.

- Immediately upon clicking OK, TFACTS changes the status of the Monthly Summary record to **'Created in Error'** and subsequently marks the Case Recording **'Created in Error'** as well.

Your data has been saved. close confirmation

Person Overview

Person Header

Name: Brew	Gender: Female	DOB: /1999
Person ID: 46;	SSN: XXX-XX-6232	Age: 16 Yrs

Monthly Summary List

Provider Name	Child Name	Service Period	ICD Type Code	ICD Code	Status
Bell,	Brew	04/2016	ICD-10	F901	Draft
Bell,	Brew	03/2016	ICD-10	F901	Created In Error

10 items per page 1 - 2 of 2 Items

Select Mark In Error

Close

## Printing Monthly Summaries

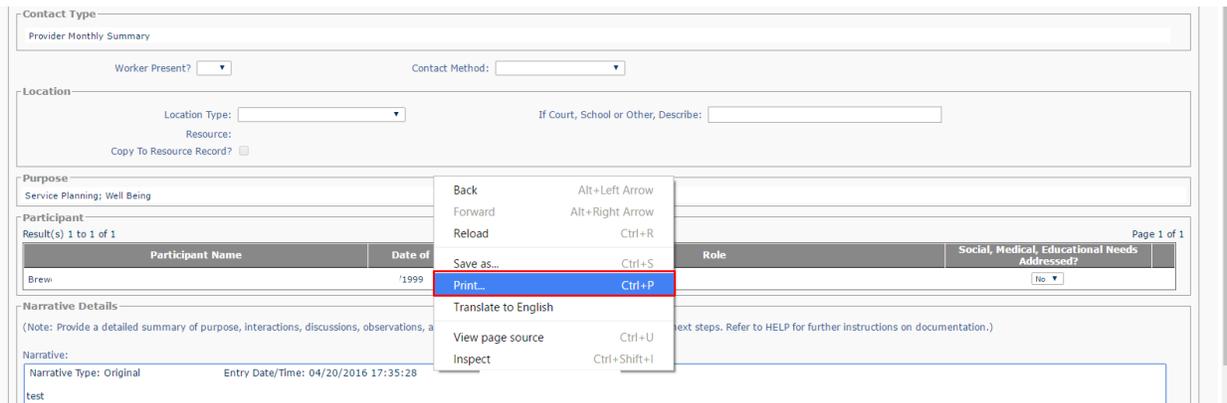
- Monthly Summaries in 'Completed' Status are available to print as a Case Recording.
- Click **Recordings** from within the case you wish to print.



- Click select by the Provider Monthly Summary you wish to print (must be in 'Completed' status).



- Right click on your mouse.
- Select **Print** from drop down box.



OR

- While in the Family Case, click on **Print** button



- Mark each box you wish to Print

Print Recording List  
Result(s) 1 to 200 of 200 Page 1 of 1

Recording ID	Contact Date	Contact Type	Participant	Entered By
Status	Contact Method			Location
270	04/12/2016	Private Provider/Child Contact	Brew	For: Resource Home
Completed	Face To Face			
<input checked="" type="checkbox"/>	04/01/2016	Provider Monthly Summary	Brew	For: Resource Home
Completed				

- Scroll to bottom of page and click **Generate** button.



- Click **Generate Report** button.

Reports

Document Category: CASE      Document Title: Case Recording Summary - #NA  
Work-Item ID: 29      Work-Item Reference:  
Task ID: 50      Task Reference:

Document History

Document ID	Date	Document Name
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- Click **Save Form**.



**You have completed this storyboard.**