



Medical Appointment & Services – Provider Job Aid

The Medical Appointments & Services screen is used by Caseworkers and Providers to document medical appointments and services for a client. Medications prescribed and diagnoses made during these appointments can also be documented here.

Medical Appointments & Services screen

Medical Appointments & Services

*Denotes Required Fields **Denotes Half-Mandatory Fields #Denotes AFCARS Fields

Allergies

Appointments Medication Diagnosis

Medical Category* Date* Medical SubCategory*

Summary

Recommendations

Behavioral/Physical Health Professional Other Specify

Save Cancel

Audit
Last Updated Date
Updated By

Navigation

1. Navigate to the *My Services* Screen and bring the Referral/Service Episode into focus.
2. Navigate to the *Client List* screen.
 - a. **Case > Client > Client List**
3. Select the desired client and click **Show**.
4. Navigate to the *Medical Appointments & Services* screen.
 - a. **Case > Clients > Health > Medical Appointments & Services**



Medical Appointments & Services List screen

Medical Appointments & Services List

* Denotes Required Fields

** Denotes Half-Mandatory Fields

#Denotes AFCARS Fields

Appointments		
Medical Category	Medical Subcategory	Date ▼
Dental	Check-up/ Cleaning	01/04/2016

1. The *Medical Appointments & Services List* screen contains a list of all of the medical appointments and services documented for this client.
 - a. The *Medical Appointments & Services List* grid displays the *Medical Category*, *Medical Subcategory* and *Date* of the appointment.
 - b. The **Show** button become active after at least one appointment/service has been entered.
 - allows the user to enter new appointments.
 - navigates the user back to the **Client > Health** splash screen.
2. Click to begin documenting a new appointment.



Medical Appointments & Services – Appointments tab

Medical Appointments & Services

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Allergies

Appointments Medication Diagnosis

A Medical Category* Date* **F** **Audit**
Last Updated Date

Medical SubCategory* Updated By

B Summary

C Recommendations

D Behavioral/Physical Health Professional Other Specify

E Save Cancel

Tip: The Allergies section will appear above all of the tabs and will display all active Allergies listed for the client on the **Health > Allergies/Dietary Needs** screen.

1. Entering a new Appointment:

- a. Select the *Medical Category*. The screen will refresh to update the *Medical SubCategory* list.
 - i. Select the *Medical SubCategory*.
 - ii. Enter the *Date* of the appointment.
- b. Enter a *Summary* of the appointment.
- c. Enter any *Recommendations* from the appointment.
- d. Select the *Behavioral/Physical Health Professional* for the appointment. This drop-down contains a list of all of the active Collaterals associated who are identified as some type of Behavioral or Physical Health professional on the *Collateral* screen.
 - i. If the Behavioral/Physical Health professional is not a collateral "other" can be selected.
 - ii. When "other" is selected the *Other* text box becomes mandatory. Type in the name of the Behavioral/Physical health professional here.
- e. Click **Save** at the bottom of the **Appointments** tab to save the information entered and unlock the **Medication** and **Diagnosis** tabs.
 - i. Click **Cancel** to return to the *Medical Appointments & Services List* screen without saving the information entered.
- f. When **Save** is clicked the *Audit* section will display the date and time of the last update to this screen as well as the name of the KIDS user who completed the update.



Medical Appointments & Services – Medications tab

Medical Appointments & Services

*Denotes Required Fields

**Denotes Half-Mandatory Fields

#Denotes AFCARS Fields

The screenshot shows the 'Medication' tab selected. The 'Medication' grid is empty, with 'New' and 'Save' buttons to its right. Below the grid is the 'Medication Details' form. The 'Medication*' field has a 'Find...' button. The 'Start Date', 'End Date', and 'Type*' fields are highlighted with a red box (D). The 'Strength/Unit' and 'Other Specify' fields are highlighted with a red box (E). The 'Prescribed By', 'Phone', and 'Purpose' fields are highlighted with a red box (F). The 'Dosage', 'Frequency', and 'Special Instructions' fields are highlighted with a red box (G). A 'Cancel' button is at the bottom left.

1. The **Medication** tab allows users to document any medications associated with this appointment.
 - a. The *Medication* grid displays all of the *Medication(s)* entered for this appointment and the medication's *Start Date* and *End Date*.
 - b. The **New** button to the right of the grid will become active once the first medication is saved. Click the **Save** button to the right of the grid once the Medication Details have been completed.

- c. Click the **Find...** button below the *Medication* field to locate the medication.



Medication*

Find...

Other Specify

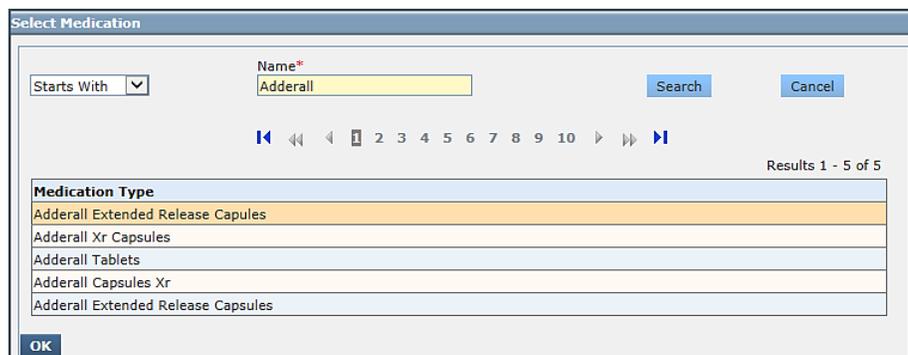
The *Select Medication* pop-up will appear:



Select Medication

Starts With Name* Search Cancel

- i. Medications can be searched in several ways. The search drop-down defaults to *Starts With*. Other options include: *Sounds Like*, *Is*, and *Contains*. *Starts With* is recommended.
- ii. Type in the *Name* of the medication and click **Search**.
- iii. A list of possible medications will appear.



Select Medication

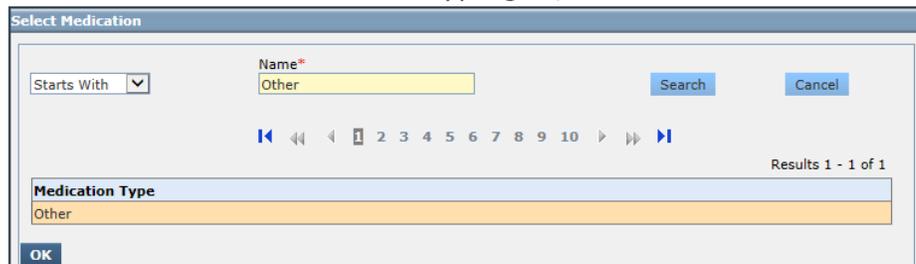
Starts With Name* Search Cancel

Results 1 - 5 of 5

Medication Type
Adderall Extended Release Capules
Adderall Xr Capsules
Adderall Tablets
Adderall Capsules Xr
Adderall Extended Release Capsules

OK

- iv. Review the list to locate the correct medication. Once the correct medication is located, click on the medication in the *Medication Type* grid and click **OK** to select that medication.
- v. If the medication cannot be located Type "Other" in the Name field, click on *Other* from the *Medication Type* grid, and click **OK**.



Select Medication

Starts With Name* Search Cancel

Results 1 - 1 of 1

Medication Type
Other

OK

- vi. To close the *Select Medication* pop-up without choosing a medication click **Cancel**.



Tip: If "Other" is chosen the **Other Specify** field below **Medication** will become mandatory. This is where the medication's name should be entered.

- d. Enter the *Start Date* and *End Date* (if applicable) for the medication. Select the medication *Type* (*Prescription* or *Over-the-Counter*).

Start Date	End Date	Type *
<input type="text"/>	<input type="text"/>	<input type="text"/>

- e. Select the *Strength/Unit*. The options available in this drop-down are determined by the medication entered and the FDA recommended strengths/units for that medication.

Strength/Unit	Other Specify
<input type="text"/>	<input type="text"/>

If the medication entered is "Other" then the *Strength/Unit* will default to *Other* and *Other Specify* will become mandatory. Enter the strength and unit in *Other Specify*.

Strength/Unit	Other Specify *
Other	<input type="text"/>

- f. Enter the name of the medical professional who prescribed the medication and their phone number in *Prescribed By* and *Phone*. Detail the reason for the medication in *Purpose*.

Prescribed By
<input type="text"/>
Phone
<input type="text"/>
Purpose
<input type="text"/>

- g. Enter the Dosage, Frequency and Special Instructions (if applicable).

Dosage
<input type="text"/>
Frequency
<input type="text"/>
Special Instructions
<input type="text"/>

2. Once the *Medication Details* have been completed click **Save** to the right of the *Medication* grid.
3. To enter more medications click **New** to the right of the *Medication* grid. Remember to save all entries before moving on to the **Diagnosis** tab.

Medical Appointments & Services – Diagnosis tab

1. Entering a new Diagnosis:

- a. Select the *Diagnosis System Used*. The *Appointment/Assessment Date* will automatically populate with the date entered for the appointment on the **Appointments** tab.
- b. Select the *Axis/Category*.
- c. Select the *Subcategory*.
- d. Select the *Type* (Primary or Secondary).
- e. Select either the *Diagnosis Code* or the *Diagnosis*. When one is selected the other will automatically update.

For example:

Choosing Mild persistent asthma in the *Diagnosis* drop-down will cause the associated diagnosis code (J45.3) to be selected in the *Diagnosis Code* drop-down.

Selecting J45.3 from the *Diagnosis Code* drop-down will cause the diagnosis of Mild persistent asthma to be selected in the *Diagnosis* drop-down.

- f. If there are more diagnoses associated with the *Appointment/Assessment Date* they can be entered by clicking the **Add Diagnosis** button. A new blank diagnosis line will appear for entry.
- g. When all of the diagnoses for the *Appointment/Assessment Date* have been entered click **Complete**.

If the **Cancel** button is clicked before the **Complete** button none of the information entered in the **Diagnosis** tab will be saved.

- i. Upon clicking **Complete** a confirmation pop-up will appear: *Have you completed all the Diagnoses associated with this Appointment/Assessment Date?*

- ii. Click **Yes** to complete the entry, click **No** to continue documenting more diagnoses for the Appointment/Assessment date.



- If DSM-IV is selected for the *Diagnosis System Used* only the *Type*, *Diagnosis Code*, and *Diagnosis* drop-downs will be editable.

Diagnosis System Used*		Appointment/Assessment Date		
DSM-IV		01/06/2016		
Axis/Category*	Subcategory*	Type*	Diagnosis Code*	Diagnosis*
		Primary		

For more information...

For assistance, please contact the Allegheny County Service Desk at ServiceDesk@AlleghenyCounty.US or call 412-350-HELP (4357). Select Option 2 for the DHS Service Desk.

To access the Self Service Tool go to <http://servicedesk.alleghenycounty.us>