

Bar Code Scanning

Overview

Option **A-12** provides the agency with the ability to create identification cards for clients to check-in, and for providing hard copy verification of attendance in single sessions and/or groups. Off of this scanning database, activity and billing records can be created and posted.

There are three versions of the **A-12** program available to the agency. The designation of the program version is determined at the time of installation and is based upon the level of automation that the agency wishes to implement with this sub-system. The following pages will describe each barcode sub-system version with all of the available options. Some options are common to each version, sometimes with different results, and other options are unique to each.

It will be helpful to first understand the rationale behind each barcode sub-system.

- ◆ **Version 1:** The first version is a detailed tracking of groups, utilizing the scanner to track attendance for scheduled groups and record the full data into the activity and billing databases.
- ◆ **Version 2:** The second version utilizes the scanner to track only the total elapsed time from check in to check out and assign an activity code for the service based on this duration. No scheduling of services is involved.
- ◆ **Version 3:** The third version is an on-line comparison and confirmation of the printed rosters and schedule postings. The scanner generates time records, as in Version 2, with which to compare each client's schedule.

The Barcode Scan Record Menu is divided into three subsections, which describe the primary functions of the options that are assigned. The actual options within each sub-section vary with the version selected and installed per agency. However, there are also common functions across each version.

- Scanned database.
- Utilities.
- Posting to the billing database.

This chapter will examine the common features across each version of the barcode sub-system with specific application comments for each option, as well as the unique features of each version.

Common Features: All Versions

Utilities

This subsection of the Barcode Scan Record Menu includes all of the options directly related to the utilities involved in the scanned record database. Option **PI** provides the mechanism for storing and printing both client and staff identification cards.

Print ID Cards

Option **A-12 PI** offers a menu for options on printing client and/or staff identification cards. These options are as follows:

- **AD - add to the list:** Adds the client number and/or operator code to the list (**SH**) of those waiting to have an identification card printed (**PR**).
- **SH - show list of waiting cards:** Displays a list of individuals that have been queued for printing. This list identifies the client by number and name and the operator by code and name that have been designated for an identification card through an **AD** entry.
- **PR - print the cards:** Prints the identification cards that have been added (**AD**) and are waiting (**SH**) to be printed.

```
IMA Mental Health - Development Area  Option:A12-SH
Barcode scan record

Cards waiting to be printed: 38 (max 10 per page)

SH - show list of waiting cards
AD - add to the list
PR - print the cards

Option:
                2 men ext
```

The options for making staff and client identification cards at A-12 PI.

Note: This option is set-up to print on standard 2 x 3 ½" laser cards and/or labels with 10 cards per page. The **AD** and **SH** options allow the user to determine when there are 10 cards to print in order to conserve agency resources.

- ◆ This option is the same across **Versions 1, 2 and 3.**

Scanned database

This subsection of the Barcode Scan Record Menu includes all of the options directly related to scanning clients as checked into and out of the agency on any date of service. Clients scan in and out of the agency through **SI**. This scan record can be

viewed in **SH** or edited in **ME** for lost identification cards, forgetting to check out, or other agency defined reason. Reports can also be generated on this data in **DR**, **LR** and **LG**.

Scanner Input

Option **A-12 SI** is the receiving desk for the scanner, similar to that of the **A-7** Front Desk Manager, described in a previous chapter. The initial screen serves as a prompt for clients entering the agency to scan their identification cards upon arrival.

Staff can also utilize this screen by scanning their identification card and clocking in.



The initial prompt screen at A-12 SI.

When the client arrives at the agency, the client scans in, creating a record in the scanned database with the time checked in. Similarly, the client scans out at the end of the day and/or at the conclusion of services for that day, completing the time record in the scanned database with the check out time. Each client can have up to one record for a single day. This record can contain up to 10 pairs of check in/check out times.

Client Scan In

Once the client scans into the agency, the screen displays a greeting message welcoming the client by name. Other greeting features vary across versions.

- ◆ **Version 1:** In addition to the greeting, the screen displays the client appointment information/schedule and instructs the client to take the printout generated for him/her. This printout includes the client's schedule for the day, coupons to be remitted at each activity and a token coupon if the client is eligible for tokens.

Note: Token eligibility is determined in the client Billing Header at the **'Token:'** field with a **Yes** designation.

- ◆ **Version 3:** In addition to the greeting, the client's schedule for the day appears on the screen.
- ◆ **Version 2 exception:** If the client has an appointment scheduled on the on-line schedule, the appointment information will be displayed as above.

```

IMA Mental Health - Development Area
Client Check-In

Good afternoon

TEST CLIENT

The time now is 1:38 PM
Your sessions today are scheduled for:

11:30 AM 3-day Intensive

2:00 PM Adult Chem Abuse Prg
The ACAP Memo

4:00 PM Special Intensive Gr
Data:

Please take your printout
Press <Enter>

1

```

The A-12 SI greeting screen for Versions 1 and 3.

- ◆ **Version 2:** When the client scans in, a greeting is displayed on the screen with program enrollment information and lists any assigned counselors and/or staff.
- ◆ **Versions 1 and 3 exception:** If the client does not have an appointment scheduled in the on-line schedule, the program enrollment information is displayed.

```

IMA Mental Health - Development Area
Client Check-In

Good afternoon

TEST CLIENT

The time now is 1:41 PM
No appointments or groups have been scheduled for you today.

Your Counselor is: Michael Samel
Dafna Sarah Frydman, C.S.W
You are enrolled in: AA - Atlantic Avenue
AT - ACMHC Adult Treatment Program

Press <Enter>

1

```

The A-12 SI greeting screen for Version 2.

When a client scans his/her card more than once in a short time period, one of the scans can be cancelled or the scan can be accepted to log the client out. The options are as follows:

- **Accept this scan:** Accepts this scan as a record of the client checking out shortly after checking in.
- **Cancel this scan:** Cancels this scan, keeping client logged in at previously scanned time.
- **Undo previous scan in:** Cancels both the previous scan and the current scan, without creating any scan record.

```

IMA Mental Health - Development Area
Client Check-In

You are scanning out
      0 minutes
from when you scanned in!

Would you like to:
1. Accept this scan
2. Cancel this scan
3. Undo previous scan in

Selection:1

1 bck fwd def num

```

The scanned record verification screen for repeated scans within a short time frame.

- ◆ This option is the same across **Versions 1, 2 and 3.**

Client Scan Out

Clients scan out of the agency in the same fashion that they scan in, completing the scan record in the database. The screen displays a salutation and the time that the client is leaving. If a client forgets to scan out, an operator will need to do a manual edit of the record as described in the next section. These instances will show up on the reports of this database so that corrections can be made prior to any posting of activities.

```

IMA Mental Health - Development Area
Client Check-In

Good Bye
TEST CLIENT

The time now is 3:23 PM

Press <Enter>

1

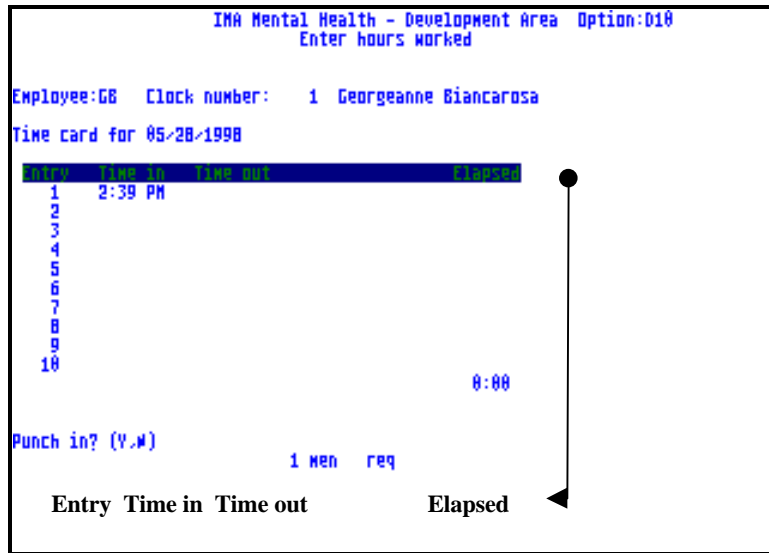
```

The A-12 SI screen at client scan/check out.

- ◆ This option is the same across **Versions 1, 2 and 3.**

Staff Scan In

Additionally, staff can clock in and out at **SI** by scanning their own individual identification cards. At the '**Card number:**' prompt, the staff identification card can be scanned or the operator code can be typed and entered. The **D-10** screen for entering hours worked will be presented. As a result, staff can utilize the **SI** option to create their individual time card records.

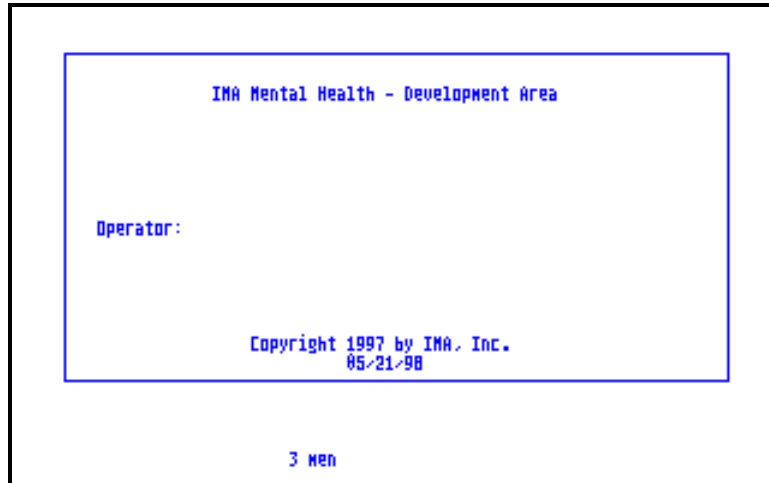


The D-10 screen accessed from A-12 SI for staff time records.

- ◆ This option is the same across **Versions 1, 2 and 3.**

Security Feature

There is an additional security feature built into this option. Once the SI option is selected, the full IMA menu will not be accessible again without first verifying the operator identification. This prevents unauthorized users and/or clients from being able to access confidential client and/or agency information.



The security screen for user verification before returning to the Main Menu.

- ◆ This option is the same across **Versions 1, 2 and 3.**

Manual Edit of Records

Option **A-12 ME** allows the user to manually enter or change a client scan record by client and date for a defined set of reasons. These reasons are listed in the agency-defined table **SWPRES**, which might include lost or forgotten card, neglecting to scan out, etc.

IMA Mental Health - Development Area Option: A12-ME
Barcode scan record

Client: 2651 Client Test

Swipe record for 05/21/1998

Billed: W → Billing indicator.

Entry	Time in	Time out	Reason	Elapsed
1	8:55 AM	11:18 AM	02	2:23
2	11:18 AM	11:19 AM	04	0:01
3	12:55 PM		01	
4				
5				
6				
7				
8				
9				
10				

Total elapsed time: 2:24

Entry Time in Time out Reason Elapsed
B men ext scn fpg fwd del

The ME screen at A-12 for manually entering and changing client scan records.

Once the swipe entry is edited, press the <scn> key to return to the 'Client:' prompt. Another client record can be selected to edit or the user can return to the menu.

Note: Pressing <ext> or <men> prior to returning the 'Client:' prompt will cause the record to be maintained in its original form and changes will not be retained.

Additionally, there is a 'Billing:' field in each swipe record, which is filled by the system and cannot be edited by the user. Yes indicates that this item has been billed, while No indicates that this service has not been billed.

- ◆ This option is the same across **Versions 1, 2 and 3.**

Show a Scanned Record

Option **A-12 SH** will display a designated scanned record on the screen for a selected client and day as shown above. This is the same record as edited in **ME** or as scanned in and out through option **SI**, but is for look-up only.

- ◆ This option is the same across **Versions 1, 2 and 3.**

Display Selected Records

Option **A-12 DR** provides a record list display of a designated range of scanned records. The options are as follows:

- **Client:** A specific client or all clients.
- **Staff:** A specific staff member or all staff.
- **Starting date:** A specific date and/or the first date in the designated record(s).
- **End date:** A specific date or the last date in the designated record(s).

IMA Mental Health - Development Area Option: A12-DR
Barcode scan record

Client	Date	Stf	In	Out	Res	In	Out	Res	Billed
2651	05-16-98		10:00 AM	4:00 PM	01				M
2651	05-18-98		8:56 AM	3:06 PM	01				M
2651	05-19-98		9:01 AM	2:56 PM	01				M
2651	05-20-98		8:54 AM	3:30 PM	01				M
2651	05-21-98		8:55 AM	11:18 AM	02	11:18 AM	11:19 AM	04	M
			12:55 PM	3:36 PM	01				

Client Date Staff In Out Res In Out Res Billed
(reason) (reason)

Use <def> for all clients
Client: 2651 Staff: all Starting date: 05151998 End date: 05211998
6 MEN EXT SCH HLP FWD DEF

Display selection criteria.

The display and selection options for A-12 DR.

- ◆ This option is the same across **Versions 1, 2 and 3.**

Print Selected List of Records

Option **A-12 LR** provides a hard copy record of the display from DS. The selection criteria screen is the same. A report is printed with the following columns:

- **Client:** Client number as specifically designated in the selection criteria or listed by number for all.
- **Date:** Listed from start to end based on the selection criteria defined.
- **Stf (Staff):** The staff assigned for the designated scanned activities within the schedule.
- **In:** Time scanned in.
- **Out:** Time scanned out.
- **Res (from SWPRES):** Reason for manually edited and/or entered swipe records.
- **In:** Time scanned in.
- **Out:** Time scanned out.
- **Res (from SWPRES):** Reason for manually edited and/or entered swipe records.
- **Billed:** Indicates whether the service day/activity is billed yet or not: **Yes** or **No**.

Note: If a client scans/swipes in and out several times during the day, only the first two recorded time periods are printed on this report.

- ◆ This option is the same across **Versions 1, 2 and 3.**

Daily Log

Option **A-12 LG** prints out a log of the scanned clients by day, sorted by name or time. This report has the following columns:

- **Sign in:** Time scanned in.
- **Client:** Client number and name.
- **Sign out:** Time scanned out.
- **Duration:** Time spent in agency/services.

```
IMA Mental Health - Development Area Option:A12-LG
Barcode scan record

Date:05211998 Sort by (T)ime or client (N)ame?T
1 men ext bck fwd def req
```

The selection screen for A-12 LG.

```
FACILITY LOG FOR 05-21-98
IMA MENTAL HEALTH - DEVELOPMENT AREA 05-21-98 1:54 PM GG PAGE NO. 1
Selection criteria:
Sorted by check-in time

SIGM IN CLIENT SIGM OUT DURATION
8:55 AM 2651 Client, Test 3:36 PM 5:05
8:58 AM 2429 TEST, CLIENT 2:55 PM 5:57
10:00 AM 2342 CLIENT, TEST 2:34 PM 4:34
10:00 AM 2660 Test, billing 2:10 PM 4:10
2:00 PM 2389 test, test 4:30 PM 2:30

Type <return> to continue (E to end, S to start over or P to print)
1 men ext
```

A display of the report generated on paper for A-12 LG.

- ◆ This option is the same across **Versions 1, 2 and 3.**

Posting to the Billing Database

This subsection of the Barcode Scan Record Menu includes all of the options directly related to interfacing the scanned client records with the staff activity and billing databases. Each option has its specific mechanism for posting these activities as

completed services and thereby creating both activity and billing records. These options will be discussed later in this chapter with the version specific features.

Many reports can be run to determine the effects of this scanned database on billing activities. **DS**, **LS**, **WA** and **WB** are all reports available from the **A-12** Posting Sub-menu that are also available as **A-2** options. These reports are typically run following the option-specific posting functions for the recorded services.

Display List of Activities on Screen

Option **A-12 DS** is a display of selected service and/or activity records. This **A-12** option is a direct link to the **A-2 DS** option as shown below. Selections can be made for the following:

- **Program:** A specific program or all programs.
- **Staff:** A specific staff member or all staff.
- **Client:** A specific client or all clients.
- **Starting date:** A specific date or the first date in the designated record(s).
- **Ending:** A specific date or the last date in the designated record(s).

Pgm	Staff	Seq	Client	Date	Activity	Time	Appt. Time
AT	DSF	173	2651	05-21-98	010	0.40	9:00 AM
AT	GB	48	2651	05-21-98	03	1.00	1:00 PM
AT	GB	49	2651	05-21-98	ASA	1.00	2:30 PM
AT	MS	413	2651	05-21-98	S	1.00	3:30 PM

Use <def> for all programs
 Program:AT Staff:all Client: 2651 Starting date:05211998 Ending:05211998
 2 men ext scn hlp fwd def

Selection criteria.

The display of selected activity records and the selection criteria in A-12 DS.

- ◆ This option is the same across **Versions 1, 2 and 3.**

Selected List of Records

Option **A-12 LS** is a report of selected service and/or activity records. This **A-12** option is a direct link to the **A-2 LS** option as shown below. Selections can be made for the following:

- **Program:** A specific program or all programs.
- **Staff:** A specific staff member or all staff.
- **Client:** A specific client or all clients.
- **Activity code:** A specific activity code or all.

- **Starting date:** A specific date or the first date in the designated record(s).
- **Ending:** A specific date or the last date in the designated record(s).
- **Sort by:** Program, Staff or Client.
- **Include non-client related records?:** Yes, No or Only.

```

IMA Mental Health - Development Area  Option:A2 -LS
Services-visits

Program:AT
Staff:all
Client: 2651
Activity code:all
Starting date:05101998
Ending:05211998
Sort by:S

Include non-client related records?(Y,N,O)M

Y(es), N(o) or O(nly)

1 Men ext scn hlp bck fwd def

```

The selection screen for A-12 LS/A-2 LS.

This report gives an accounting of staff activity for the defined selection criteria. The **A-2 LS/A-12 LS** report is explained in detail in the Reports Chapter of this guide.

- ◆ This option is the same across **Versions 1, 2 and 3.**

Weekly Activity Report

Option **A-12 WA** is a report of selected service and/or activity records specifically for detail on weekly group activities in CDT programs as reflected from weekly batch entries in **A-2 WR** and/or the weekly swipe record from **A-12 SI**. This **A-12** option is a direct link to the **A-2 WA** option as shown below. This report is explained in the Reports Chapter of this guide.

Selections can be made for the following:

- **Program:** A specific program or all.
- **Starting Monday:** Since this is a weekly report, the starting date must be a Monday.
- **Sort by?:** Program or Staff.

```

                IMA Mental Health - Development Area  Option:A2 -WA
                Services/visits

Program:AT  ACMHC Adult Treatment Program
Starting Monday:05181998
Sort by program or staff? (P,S)S
Sort by client code or name? (C,W)C■

                1 men ext bck req

```

The selection screen for A-12 WA/A-2 WA.

- ◆ This option is the same across **Versions 1, 2 and 3.**

Weekly Billing Summary Report

Option **A-12 WB** is a report of selected service and/or activity records specifically for detail on weekly group activities in CDT programs as reflected from weekly batch entries in **A-2 WR** and/or the weekly swipe record in **A-12 SI**. This **A-12** option is a direct link to the **A-2 WB** option as shown below.

- **Attendance is as of mm/dd/yy – check attendance?:** Yes or No.
- **Include detail?:** Yes or No.
- **Program:** A specific program or all.
- **Number of holidays:** Type and <enter> the number of holidays for the week of the report.
- **Starting Monday:** Type and <enter> the date for the week selected beginning on Monday.
- **Use quick index or slow index?:** This question related to the speed of the report job. Accept the default **Quick index** by pressing <enter>.

```

                IMA Mental Health - Development Area  Option:A2 -WB
                Services/visits

Attendance is as of 05/22/98 - check attendance? (Y,W)Y
Include detail? (Y,W)Y
Program:AT  ACMHC Adult Treatment Program
Number of holidays:8
Starting Monday:05181998

Use quick index or slow index? (Q,S):Q

                1 men ext bck req

```

The selection screen for the A-12 WB/A-2 WB.

The columns on this report are defined below for both the Billing Detail and Summary for the selection criteria.

Billing Detail Report:

- **Client:** Number and Name of each client for each activity record for the week.
- **Date:** Date of service/activity.
- **Transaction:** Transaction number for that activity by program and staff.
- **Staff:** Staff assigned to client in program record.
- **Status:** Status of the service/activity record in the billing cycle.
- **Activity:** The activity code billed for the combined CDT services.
- **Weight:** The weight assigned the activity for the staff per individual service.
- **On site:** Yes or No, indicating whether the service occurred on site (Y) or not (N).
- **CXBCG:** Designations from the activity code "Type of Activity" definition in **H-8**, with a Yes or No answer for each type: C(Regular), X(Crisis), Brief, Collateral, and Group.

```

BILLING DETAIL FOR PROGRAM ACMHC Adult Treatment Program
Week starting 05/18/1998
IMA MENTAL HEALTH - DEVELOPMENT AREA 05/23/98 10:00 AM GB PAGE NO. 1
110k2911e7C

```

CLIENT	DATE	TRAMS.	STAFF	STATUS	ACTIVITY	WEIGHT	ON SITE	CXBCG
1234 Levitt, Lance	05/19/98	1	DSF	B ✓	100	0.33	Y	YNNNY
2651 Client, Test	05/18/98	24	DSF	B ✓	500	0.35	Y	YNNNY
	05/19/98	25	DSF	B ✓	500	0.35	Y	YNNNY
	05/20/98	26	DSF	B ✓	500	0.35	Y	YNNNY
	05/21/98	27	DSF	B ✓	500	0.35	Y	YNNNY
	05/22/98	28	DSF	B ✓	500	0.35	Y	YNNNY
3000 Steinbrunner, Jeremia	05/19/98	150	GB	B ✓	001	0.35	Y	YNNNY

Type <return> to continue (E to end, S to start over or P to print) █
1 men ext

The A-12 WB/A-2 WB Billing Detail Report.

Billing Summary Report:

This report lists Monday through Sunday by date and day, including a weekly total with two columns underneath each day and the total heading. The first column reflects **Medicaid** and the other, **Other Sources**. The following are defined for each of those columns, which is a daily and then weekly total view.

Total served

- **Number of visits:** Total visits.
- **Equivalent units:** Weighted accounting of visits.
- **Dollars:** Billed amount.

- **Number absent:** Count of clients who are enrolled, but did not attend scheduled services.
- **Total enrolled:** Total number enrolled in program.

Activity: All applicable activities are listed by code and description.

- **Number of visits:** Total visits.
- **Equivalent units:** Weighted accounting of visits.
- **Dollars:** Billed amount.

Totals: per page, which combined should equal Total Served numbers from above.

- **Total visits:** Total visits for page.
- **Total units:** Total units for page.
- **Total dollars:** Total dollars for page.

- ◆ This option is the same across **Versions 1, 2 and 3.**

Version 1: Special Features

The first installation version is a full automation of scanning records and posting activities to the billing database. Additional Utilities and Posting functions create the necessary tools and linkages for a fully automated scanned database and billing interaction.

Clients scan into the agency for check-in with their individual identification cards. Sheets are printed for each client with activity coupons, their individual schedules and a token coupon, if appropriate. The clients remit their coupons at each point of service for admission to the service. The responsible staff secures these admission coupons in the envelope bar-coded with the specific date, staff code, group identification and appointment time. The client then scans out when he/she has concluded with services for the day.

A designated operator then scans these envelopes and coupons at the conclusion of each service day. This creates both an activity record and a billing record for the services provided, as defined within those activity codes.

```
IMA Mental Health - Development Area  Option:A12
Barcode scan record

Scanned database:                               Utilities:
SI - scanner input                               PI - print ID cards
ME - Manual edit of records                       PD - print client daily coupon sheet
SH - show a scanned record on screen             PE - print daily group envelopes
DR - display selected records
LR - print selected list of records
LG - daily log

Posting to the billing database:
SE - scan envelopes & coupons
PW - print daily worksheet
DS - display list of activities on screen
LS - selected list of records
WA - weekly activity report
WB - weekly billing summary report

Option:                                     2 men
```

The A-12 Barcode Scan Record Menu for Option 1.

Utilities

In addition to **A-12 PI**, as discussed in the previous section, the following options are available in Version 1.

Print Client Daily Coupon Sheet

A-12 PD prints out an additional copy of the daily coupon sheet that the client gets at check-in by the **SI** screen. This option can be utilized when a client loses or misplaces his/her sheet throughout the day, thereby eliminating the need to rescan that client in. This option does not create another scan record. Enter the client number at the '**Client:**' prompt and the sheet for that day will print. These coupons are collected at the point of service or assigned activity by the group counselor or designated staff.

Print Daily Group Envelopes

A-12 PE prints the bar-coded labels for group envelopes encoded for the designated date of service, staff, group and scheduled time from the on-line schedule. These

envelopes are used by the group counselor or designated staff to collect the above coupons.

Posting to the Billing Database

In addition to **A-12 DS, LS, WA** and **WB**, as discussed in the previous section, the following options are available in Version 1.

Print Daily Worksheet

A-12 PW prints a worksheet of the envelopes that should be received for the day. This report shows the following information for each date of service.

- **Group:** Group code and name.
- **Time:** Scheduled time.
- **Staff:** Staff responsible/provider.
- **# Clients:** Number of clients enrolled in the group/number of tickets expected in each envelope.

```
GROUP LISTING FOR 05/28/98
TMA MENTAL HEALTH - DEVELOPMENT AREA  06/02/98  10:55 AM  GB      PAGE NO.  1
GROUP          TIME          STAFF  # CLTS.
ACAP - Adult Chem Abuse Prg  2:00 PM  DSF    10
DDX1 - Dual Dx - Access     12:00 PM  GB     3
COMM - COMMUNITY meeting    9:30 AM  MS     5

Type <return> to continue (E to end, S to start over or P to print)
1 Men
```

A sample worksheet from A-12 PW.

This worksheet along with the **A-12 LG** serves as a cross-reference for scanning the envelopes to post the activities in **A-12 SE**. **PW** lists the groups that were scheduled for the day and **LG** is the log of clients that scanned in and out of the agency for the day. The envelopes received should match the worksheet and the coupons within the envelopes should match the log for the time(s) of the scheduled activities.

Scan Envelopes and Coupons

Bar-coded envelopes and coupons are scanned in option **A-12 SE**. The envelope represents the activity or service provided and the coupons indicate the participants in that group. First the envelope is scanned at the **'Scan envelope:'** prompt. Then, the client numbers on the coupons contained within the envelope are scanned into the box presented. This creates an activity record for these clients and services as would be created using **A-2 SC**. The rest of this process is the same as **A-2 SC** and is detailed in the Billing Chapter of this guide.

```

IMA Mental Health - Development Area Option:A12-SE
Barcode scan record

Adult Chem Abuse Prog
Client Client Client Client
2651 T Client
2430 c test
2291 C Test
2389 t test
2375 t test
■

Use the <del> key to delete a client entered in error
        G Men ext scn bpg fpg hlp bck fwd del

```

The A-12 SE screen for posting a group after scanning the corresponding envelope.

Version 1 Review

The process of creating the scanned database and posting the scanned activities/services within Version 1 is as follows.

Preparation

- Create client identification card(s) in **PI**.
- Create staff identification card(s) in **PI** if desired.
- Schedules of staff individual and group appointments are maintained on-line.

Daily Scan Procedures

- Clients scan in at **SI** and receive a coupon sheet with individual and group appointments, his daily schedule and a token coupon, if applicable.
- Staff scan in at **SI** if desired.
- Daily envelopes are printed out each morning for staff to collect client coupons through **PE**.
- Clients and staff scan out of the agency to check out.

Posting Activities

- A daily worksheet of groups scheduled for the day is printed through **PW** to check that all of the envelopes are turned in at the end of the day.
- The scan log can be printed out in **LG** to cross-check the clients that attended the scheduled activities by time.
- Envelopes are scanned in **SE** and the client coupons are entered to create both an activity and billing record.

Version 2: Special Features

The second installation version is an automation of scanning records and posting activities to the billing database based on time. Additional Posting functions create the necessary linkages for an automated scanned database and billing interaction for assigning activity codes based on the time a client spends in the agency.

Clients are checked in and out of the agency at the receiving desk through use of the scanner at **A-12 SI**. A posting file is created from this scanned database, where an activity code is assigned to the service based on the time spent and the corresponding time rules. These activities are then posted to the activity and billing databases once approved and accepted.

This version does not require that any coupons or envelopes are scanned, nor does it require that appointments be scheduled on staff calendars.

```
INA Mental Health - Development Area  Option:A12
Barcode scan record

Scanned database:          Utilities:
SI - scanner input        PI - print ID cards
ME - manual edit of records
SH - show a scanned record on screen
DR - display selected records
LR - print selected list of records
LG - daily log

Posting to the billing database:
PB - preliminary billing list
FB - final billing list
DS - display list of activities on screen
LS - selected list of records
WA - weekly activity report
WB - weekly billing summary report

Option: 2 men
```

The A-12 Barcode Scan Record Menu for Option 2.

Posting to the Billing Database

In addition to **A-12 DS, LS, WA** and **WB**, as discussed in the previous section, the following options are available in Version 2.

Preliminary and Final Billing Lists

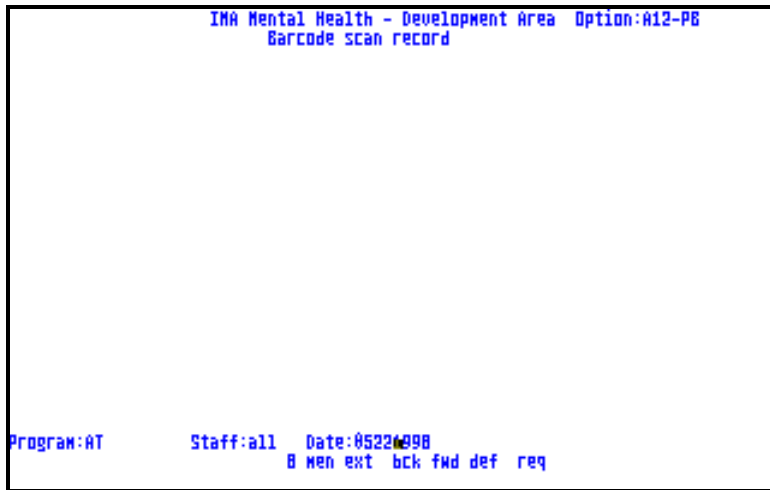
At the end of each service day, a Preliminary Billing Report is run in **A-12 PB**. This report lists each client for the service date with the proposed activity code based on the time duration spent in the agency. Any changes that need to be made with regard to time in and/or out can be made in **A-12 ME**.

Once the Preliminary Billing List is correct and approved, the Final Billing List Report can be run in **A-12 FB**. When the report is printed, the system will then prompt the user **'Ready to update items?'** Answering Yes will create the staff activity and corresponding billing records for the date of service.

The preliminary and final reports are the same and therefore share identical selection criteria and report layouts. The difference being that the Final Billing List Report creates the posting file to the activity and billing database.

The selection criteria for running the Preliminary (**PB**) and Final Billing (**FB**) List Reports are as follows:

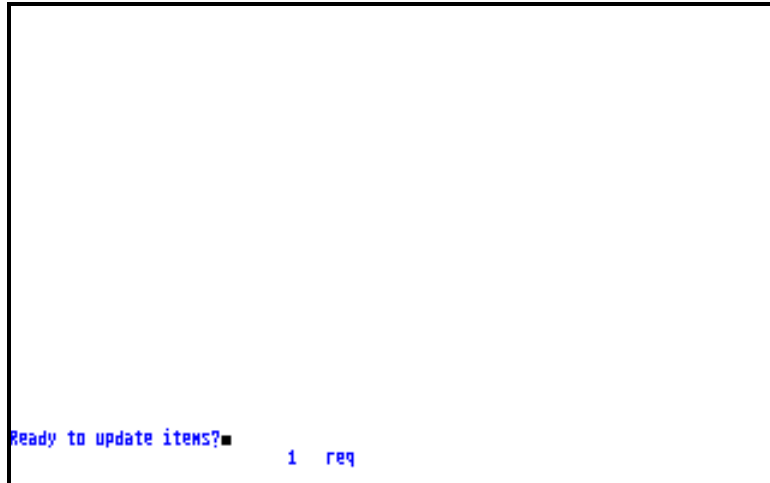
- **Program:** A specific program or all programs.
- **Staff:** A specific staff or all staff.
- **Date:** Date of service.



The A-12 PB/FB selection screen for the Preliminary and Final Billing Reports.

The columns on both the Preliminary and Final Billing List Reports are as follows:

- **Date:** Date of service.
- **Client:** Client number and name.
- **Program:** Program code for client's program enrollment.
- **Staff:** Staff from program record.
- **Billed?:** Yes or No, indicating whether the service has been billed yet.
- **First Check In:** Time of client's first check in for the date of service.
- **Total Duration:** Time spent in agency from first check in to check out.
- **Activity Code Duration:** Expected duration from 'Activity duration:' field in the **H-8** activity code definition.
- **Activity code:** Proposed activity code and description based on the built in time rules.



The A-12 FB prompt for posting the assigned activity and corresponding billing records.

Version 2 Review

The process of creating the scanned database and posting the scanned activities/services within Version 2 is as follows.

Preparation

- Create client identification card(s) in **PI**.
- Create staff identification card(s) in **PI** if staff are required to create on-line time record through scanning.

Daily Scan Procedures

- Clients scan into the agency at **SI**.
- Clients scan out of the agency at **SI**.
- Staff scan in and out of the agency at **SI** if they are required to maintain on-line time records.

Posting Activities

- A Preliminary Billing Report is run at **PB** to determine the clients in attendance and the activity codes assigned to their time duration of service(s) in the agency. This creates a posting file that can be edited and reviewed.
- This posting file is reviewed and edited as necessary in **ME**. Times in and out can be edited per client for agency defined reasons. Another Preliminary Report (**PB**) should be run to determine that the edits were made and are correct.
- Once the Preliminary Report is finalized, a Final Billing Report is run at **FB** to post the activities by the assigned codes. After the report is run, a prompt is given to make sure that the items are ready to be updated and posted.

Version 3: Special Features

The third installation version utilizes the scanned records as a reference sign-in log and cross-reference for each staff schedule to support traditional paper and on-line procedures. Additional Posting functions create the necessary linkages for the scanned database to support and reinforce the activity and billing records.

Additionally, this **A-12** option offers a direct link to **A-2 SC**, in which activity records are created and posted to the billing database as usual.

Again, this third option does not involve scanning coupons and/or envelopes. Clients are checked in and out of the agency at the receiving desk through use of the scanner in **A-12 SI**. At the end of the service day/week and after activities are posted, a cross-reference to staff activity records and group rosters can be run. This provides scanned database verification of the paper and on-line documentation resources.

```
IMA Mental Health - Development Area  Option:A12
Barcode scan record

Scanned database:          Utilities:
SI - scanner input        PI - print ID cards
ME - Manual edit of records
SH - show a scanned record on screen
DR - display selected records
LR - print selected list of records
LG - daily log

Posting to the billing database:
LA - x-ref to Staff activity records
GA - group roster x-ref list
DS - display list of activities on screen
LS - selected list of records
SC - schedule directed client posting
WA - weekly activity report
WB - weekly billing summary report

Option: 2 men
```

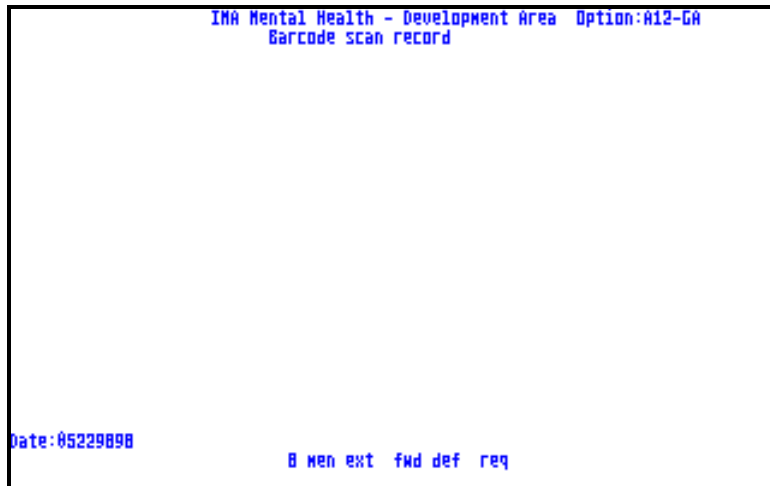
The A-12 Barcode Scan Record Menu for Option 3.

Posting to the Billing Database

In addition to **A-12 DS**, **LS**, **WA** and **WB**, as discussed in the previous section, the following options are available in Version 3.

Group Roster Cross-reference List

Group rosters can be cross-referenced in **A-12 GA** to support existing paper and on-line documentation of group participation and billing records. The date of service only is selected to run this report.

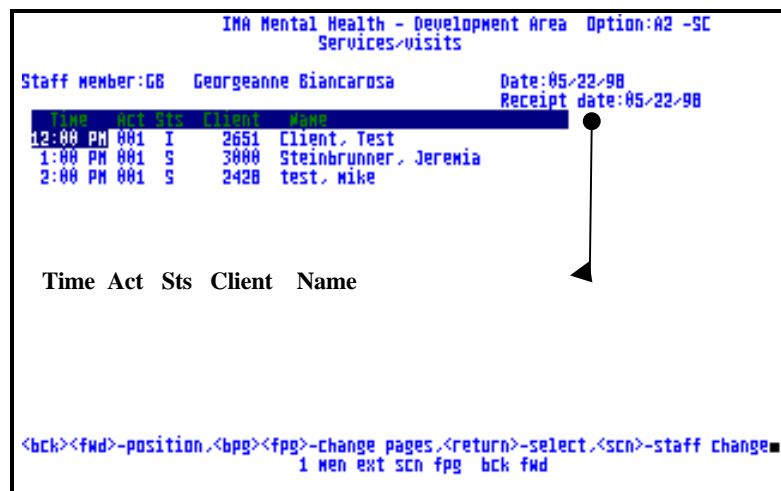


The A-12 GA selection screen for the Group Roster Cross-reference Report.

This report provides a list by group, specifying the group code and description, time scheduled and staff responsible for the specified date of service. This report also lists the clients who checked in through **A-12 SI** by number and name and those clients that did not check in by number and name.

Schedule Directed Client Posting

A-12 SC is a direct link to **A-2 SC**, in which individual staff schedules are presented by date of service. The activities on these staff schedules can then be closed and posted to the activity and billing databases. This process is detailed in the Billing Chapter of this guide.



A-12 SC/A-2 SC for schedule directed client posting of activity and billing records.

Cross-reference to Staff Activity Records

Staff activity records can be cross-referenced in **A-12 LA** to support existing paper and on-line documentation of activities and billing records. The selection criteria for this report are as follows:

- **Client:** A specific client or all clients.

- **Staff:** A specific staff or all staff.
- **Starting Date:** Specific date or first date in scanned database.
- **End date:** Specific date or the last date in the scanned database.

```

INA Mental Health - Development Area Option:A12-LA
Barcode scan record

Use <def> for last
Client: 2651 Staff:all Starting date:05181998 End date:22
      B men ext bck fwd def

```

The A-12 LA selection screen for cross-referencing the scanned database to the staff activity records.

This report lists the following in each column:

- **Date:** Date of service.
- **Client:** Client number and name.
 - Activity code and description for each scheduled service fall under the client's number and name.
- **Facility:** Actual time checked – Actual time checked out.
- **Total clocked in:** Actual time client spent in agency (duration).
 - **Total services:** Number of services client was scheduled for and received while in agency.

Version 3 Review

The process of creating the scanned database and posting the scanned activities/services within Version 3 is as follows.

Preparation

- Create client identification card(s) in **PI**.
- Create staff identification card(s) in **PI** if staff are required to create on-line time record through scanning.
- Staff schedules of individual and group appointments are maintained on-line.

Daily Scan Procedures

- Clients scan into the agency at **SI**.
- Clients scan out of the agency at **SI**.

- Staff scan in and out of the agency at **SI** if they are required to maintain on-line time records.

Posting Activities

- A Group Roster Cross-reference List Report is run in **GA** to determine the groups scheduled for the day by time and staff with the clients enrolled in each by checked in or not checked in for the day.
- Groups are posted and closed in **A-12/A-2 SC** in the traditional fashion.
- Additional cross-referencing can be obtained in **LA** for a comparison of the scanned database to the staff activity records for selected ranges of time.