

# Chart View –

View/read clinical documents (e.g. assessments, treatment plans, progress notes, etc.)

## Recommended Chart View List of Documents:

- Full Assessment (Adult, Child, Immediate/Same Day, ICARE 0-5)
- Assessment Addendum (Adult and Child)
- Mental Status Exam (Adult and Child)
- Community Functioning Evaluation
- DMH Client Treatment Plan
- Medication Consent/MSS Treatment Plan
- Diagnosis
- Individual Service Progress Note
- Scheduled Group Service Progress Note
- Crisis Evaluation Progress Note
- Special Use Progress Note
- Medication Service Progress Note
- Patient Health Questionnaire – 9 (PHQ-9)
- Generalized Anxiety Disorder 7 (GAD 7)
- PTSD Checklist (PCL 5)
- Mental Health Triage

The screenshot shows a clinical chart view for a patient named TEST,PLAN (003139103). The interface includes a Banner Bar at the top with patient information, a Search Forms section with widget controls, and several data widgets such as Client Demographics, IBHIS Services Summary, Progress Notes, and Legacy (IS) Episode History. A Document Management section is visible on the left, with a 'Launch POS Scan' option highlighted by a red box and an arrow pointing to a separate instruction box.

**Banner Bar** (highlighted in green): Information seen in the Banner Bar is populated from Update Client Data (age, DOB, address, phone number), Vitals Entry (height, weight, BMI), and Order Connect (allergies).

**Search Forms** (highlighted in green): Refresh widget information, Close out of chart, Add/Remove forms from Chart View List.

**Add/Remove Widgets** (highlighted in green): Add/Remove Widgets.

**Document Management** (highlighted in red): Launch POS Scan.

**Client Demographics** (TEST,PLAN (3139103)):

- DOB/Age: 1975-01-01 / 44
- SSN: 000-00-0000
- Race: White
- Smoking Status: Former Smoker
- Gender: Female
- Primary Language: English
- Ethnicity: Not Hispanic or Latino
- Smoking Assessment Date: 2017-09-27

**CONTACT INFO:**

- Cell Phone: 213-555-5555
- Home Phone: 213-333-3333
- ADDRESS: 695 S. Vermont Drive

**IBHIS Services Summary**

Program of Service	FirstSvc	LastSvc	SvcCount
1904A ANTELOPE VALLEY MHC	2018-08-08	2018-08-08	1
6840F SAN FERNANDO MENTAL HEALTH CENTER	2017-07-11	2017-07-11	1

**Progress Notes** (Previous 3000 days):

- Selection: All Notes
- Progress Note - 08/08/2018 by Susan Cozolino
- Individual Service Progress Note (Unscheduled)
- Note Type: Progress Note
- Draft/Final: Final
- Progress Note Text: test note

**Legacy (IS) Episode History**

**COS/MAA Client Specific Notes**

Type	Program of Service	Date	Practitioner	Note	Pla Recomi

Scan any paper documents via **Launch POS Scan**

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**Overview** – takes you back to the Chart View Widgets

This screenshot shows the 'DMH Treatment Plan' document. The 'Overview' button is highlighted with a red box. The document title is 'DMH Treatment Plan' with a subtitle 'Submitted 01/14/2019 at 03:02 PM by GUADALUPE MALDONADO MD'. Below the title, it shows 'Plan Date: 01/14/2019' and 'Plan Name (Provider ###, [staff]First Initial.Last Name): TEST Doc Routing'. The 'Current' and 'History' tabs are visible at the top of the document content area. On the right side, there are buttons for 'Add', 'Print All', 'Edit', 'Print', and 'Report', with the 'Edit', 'Print', and 'Report' buttons highlighted by a red box.

- **Current** shows you the most recent document
- **History** shows you all past documents

- **Edit** – allows you to edit the form if it is in draft
- **Print** – allows you to print the Chart View version of the document
- **Report** – allows you to print the Report version of the document (*recommended when providing documents to clients or for audits*)

**Practitioner** who submitted/electronically signed the document, and **date** the document was submitted/electronically signed

This screenshot shows the 'Diagnosis' section. It displays three diagnosis entries: '3: LE01156 TARZANA TREATMENT CENTERS, INC 02/05/2018 - Active', '2: LE00019 LA County DMH 05/28/2014 - Active', and '1: LA County DMH PreAdmit (0) 05/28/2014 - 05/28/2014'. The '2: LE00019 LA County DMH' entry is highlighted with a red box. Below the entries are filters for 'Type Of Diagnosis' and 'Primary Diagnosis', along with a 'Clear Sort/Filter' button.

Certain forms (e.g. diagnosis, progress notes, etc.) may be **episodic**. Make sure to select the **LE00019 Episode** to view documents submitted and completed by DMH

This screenshot shows the 'Individual Service Progress Note' view. It features a list of filters for sorting and filtering notes: 'Note Type', 'Data Entry Date', 'Entry Person', 'Data Entry Time', 'Draft/Final', 'Progress Note For', 'Service Charge Code', 'Service Program', and 'Date Of Service'. Each filter is represented by a dropdown menu.

When viewing **progress notes**, filters can be used to find specific notes (e.g. notes written by a specific program, from a specific practitioner, within a date range, etc.)

This screenshot shows a table of 'DMH Clinical' documents. The table has columns for 'View', 'Print', 'Client ID', 'Client Name', 'Status', and 'Form Name'. A red box highlights the 'Documents' list on the left, which includes 'DMH Clinical', 'Financial', 'HIPAA Forms/Consents/Acknowledge', and 'Progress Notes'. A green box highlights a text block explaining that scanned paper documents are available here.

View	Print	Client ID	Client Name	Status	Form Name
<input type="checkbox"/>	<input type="checkbox"/>	2175161		Final	DMH Clinical
<input type="checkbox"/>	<input type="checkbox"/>	2175161		Final	DMH Clinical
<input type="checkbox"/>	<input type="checkbox"/>	2175161		Final	DMH Clinical
<input type="checkbox"/>	<input type="checkbox"/>	2175161		Final	DMH Clinical

Any paper documents scanned into IBHIS can be viewed. Clinical paper documents such as any assessments or other clinical tools should be available under **DMH Clinical**. Signed paper consents and acknowledgement should be available under **HIPAA Forms/Consents/Acknowledgments**.