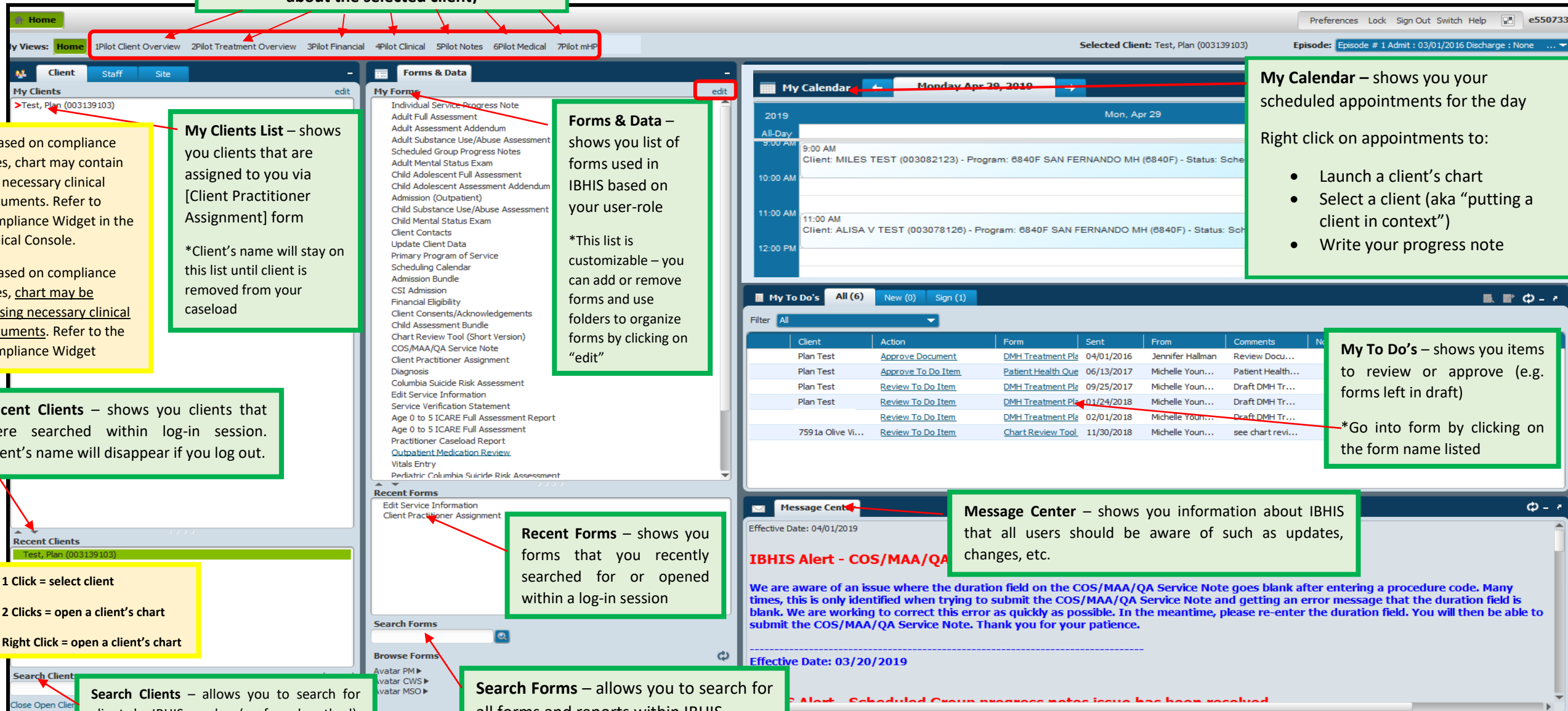


# Home View:

Provides information about your day

Consoles/Tab (provides client-specific info about the selected client)



> Based on compliance rules, chart may contain the necessary clinical documents. Refer to Compliance Widget in the Clinical Console.

> Based on compliance rules, chart may be missing necessary clinical documents. Refer to the Compliance Widget

**My Clients List** – shows you clients that are assigned to you via [Client Practitioner Assignment] form

\*Client's name will stay on this list until client is removed from your caseload

**Recent Clients** – shows you clients that were searched within log-in session. Client's name will disappear if you log out.

1 Click = select client  
2 Clicks = open a client's chart  
Right Click = open a client's chart

**Search Clients** – allows you to search for clients by IBHIS number (preferred method), name (last name, first name), DOB, & social

**Advanced Search** – allows you do a more thorough search using multiple criteria

**Forms & Data** – shows you list of forms used in IBHIS based on your user-role

\*This list is customizable – you can add or remove forms and use folders to organize forms by clicking on "edit"

**Recent Forms** – shows you forms that you recently searched for or opened within a log-in session

**Search Forms** – allows you to search for all forms and reports within IBHIS

\*If client is highlighted, allows you to complete the form for that client

**My Calendar** – shows you your scheduled appointments for the day

Right click on appointments to:

- Launch a client's chart
- Select a client (aka "putting a client in context")
- Write your progress note

**My To Do's** – shows you items to review or approve (e.g. forms left in draft)

\*Go into form by clicking on the form name listed

**Message Center** – shows you information about IBHIS that all users should be aware of such as updates, changes, etc.

**IBHIS Alert - COS/MAA/QA**

We are aware of an issue where the duration field on the COS/MAA/QA Service Note goes blank after entering a procedure code. Many times, this is only identified when trying to submit the COS/MAA/QA Service Note and getting an error message that the duration field is blank. We are working to correct this error as quickly as possible. In the meantime, please re-enter the duration field. You will then be able to submit the COS/MAA/QA Service Note. Thank you for your patience.

Effective Date: 03/20/2019


Alert: Scheduled Group progress notes issue has been resolved

## Home View:

Provides information about your day



### Menu Bar:

- Preferences – change color scheme
- Lock – locks your view to prevent another user’s access (need to re-enter user name and password)
- Sign Out – logs you off IBHIS (need to re-enter user name and password)
- Switch – allows you to switch from one user’s log-in to another user’s
- Help – allows you to create/manage User Defined Templates (see How to Create User Defined Templates in IBHIS)
-  - allows you to customize your Home View by adding/removing widgets