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Configuring Internet Explorer

- MyEvolv requires a specific browser setting configuration to ensure optimal performance. Incorrect browser settings will result in page loading issues and scripting errors.

- Evolv will not work in other web browsers such as Google Chrome and Safari.

- Updated browser settings documentation is provided as new releases and updates dictate. Refer to the latest version of Evolv_IEsettings to configure Internet Explorer.
Computer Settings: Time Zones

- ALL COMPUTERS should be checked to insure the correct time zone is selected.
  - This will cause billing/pay issues if time zones are not correct.

Right click on the date and time in the lower, right corner of the screen or access the settings through the Startup menu and Control Panel.
System Login: Active Directory

Users (YAP email users)

- Login Name and Password: this is the same username and password used to log into YAP email.
- Domain: yapinc.org
- Active Directory: this box must be checked

https://webapps.yapinc.org/evolv_cs/login.aspx
System Login: Non-active Directory Users (users **DO NOT** have YAP email accounts)

- Login Name and Password: provided upon setup and users will be prompted to change passwords at first login and every 90 days after.
- Active Directory: this box should **NOT** be checked

[https://webapps.yapinc.org/evolv_cs/login.aspx](https://webapps.yapinc.org/evolv_cs/login.aspx)
System Logout

The Logout Button is the recommended way for users to properly exit the system.
System Timeout

The timeout is reset every time the user takes any action requiring access to the database, like displaying a pop-up, opening or saving a Form, or navigating in the system. The timeout is NOT reset while typing in an open form since it doesn’t require access to a database.

Evolv-CS permits users to resume work after timing out, so, for example, you will not lose 2 hours worth of typing.

If a user times out, a modal window (the below login screen is the modal window) covers up the screen, and another modal window provides the option to log back in and resume work.
System Timeout: T.O. warning

The user will see a warning in the upper right corner of the Evolv screen when the session is about to expire. Click directly on the warning to reset the timeout and prevent the system timeout.
Staff Lookup Their Own Information

- Users can access account settings by clicking their username next to the Logout button.
Personalized Navigation Settings

- Users can change their navigation preferences and non-active directory users can update usernames and passwords.
Assigned Case Loads, Staff and Workgroups

- Users can also view case load assignments, Workgroup Enrollments and staff they are assigned to supervise. (select the tabs to view)
System Maintenance Functions

- **Current Users**: View users currently logged in the system
- **Failed Logins**: View user failed login attempts
- **User Lockout**: View/unlock user accounts
  - non-active directory only. YAP email account holders will have to be unlocked by IT
Unlocking User Accounts (Non-active directory only)

- Users will be locked out after 3 failed attempts.
  - Select the “Application Maintenance” icon
  - Select the “User Lockout” tab
  - Select the delete icon
  - Select “Yes” to confirm the delete
Pro Tips

- Use the F11 key to increase the size of your workspace (The use of on/off keys such as F11 is called Toggling)
  - This will turn Evolv-CS into a full-screen application so you can have a larger workspace by hiding the Windows Task Bar and other open programs.
  - Hit the F11 key again to undo

- Use Ctrl C to copy and Ctrl V to paste: this shortcut can be used as a time saver throughout Evolv.
  - Copy the facility from the Facility Providing Service field and paste into the following entries instead of searching and selecting each time
  - Copy the main contact number from the Demographics section and paste into the Collateral contact when updating or loading clients

- Dates can be selected by clicking on the Calendar icons.

- Screen Shots: Hold down the Alt key and hit the PrtScn key – use Ctrl V to paste in the body of an email or a Word doc

- The Navigation menu can be docked and un-docked by clicking on the Pushpin icon
System Overview

Evolv is an **Electronic Health Record (EHR) Management System**

- The Evolv-CS System works like a set of filing cabinets:

  - **Evolv-CS System** = Wall of Filing Cabinets
  - **Module** = Column of Drawers
  - **Sub-Module** = Drawer in the cabinet
  - **Form Set** = File Folder of related information in the drawer
  - **Form Set Member** = Document in the folder
System Navigation

- **Evolv button**: activates the dropdown menu of modules, sub-modules, form sets and form set members used for navigation.

- **MyEvolv Launcher**: launches the MyEvolv page.

- **Breadcrumb Bar**: displays the current location in the system.

- **Task Bar**: quick access to modules.

- **Personalized Navigation Buttons**
Navigating To/Viewing Data

- Modules are points of entry into the system
- Sub-Modules are folders within Modules
- Form Sets within Sub-Modules contain groups of Form Set Members
MyEvolv Module

MyEvolv is set as the default screen when you log into the system

- The MyEvolv icon is on the Task Bar
MyEvolv Functions

- Each section in MyEvolv is called a widget. Each widget has four icons.

  ![My Clients](image)

  - ![ ] Click to refresh the items in the widget
  - ![ ] Click to launch the corresponding module
  - ![ ] Click to collapse or expand the widget
  - ![ ] Click to remove the widget

- To Show and hide widgets:

  - Click ![ ] at the left of the screen.
  - Click the checkbox for any widgets you would like to view or uncheck any you would no longer like to view.
  - Click the X to close the pane
  - Click ![ ] to save the settings.
The Supervisor module can be accessed via the Task Bar icon or the Navigation menu.

- Review and approve services, plans and incidents
- Access and send Alerts
- Manage subordinates’ calendars
- Manage scheduled tasks/events
- Transfer supervisor assignments from one supervisor to another as a batch
- Transfer client worker assignments from one worker to another as a batch
Reviewing and Approving Services, Notes, and Plans

- Staff with pending approvals will be expanded when first entering this area.

<table>
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**Worker: Flintsone, Pebbles**

**Worker: Jetson, Judy**

<table>
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<tr>
<th>Client: Huxtable, Theo</th>
<th>Program</th>
<th>Actual Date</th>
<th>Entry Information</th>
<th>Submission Date</th>
<th>Approved Date</th>
<th>$</th>
<th>Action</th>
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<tr>
<td>Counseling Service</td>
<td>Residential Services</td>
<td>01/15/2011</td>
<td>07/20/2011 11:53am-Jetson, Judy</td>
<td>07/20/2011</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>General Client Assessment</td>
<td>Residential Services</td>
<td>01/15/2011</td>
<td>07/21/2011 12:29am-Jetson, Judy</td>
<td>07/21/2011</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Counseling Service</td>
<td>Residential Services</td>
<td>01/13/2011</td>
<td>07/20/2011 11:52am-Jetson, Judy</td>
<td>07/20/2011</td>
<td></td>
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</tr>
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Staff Information

- Viewing information about the Staff Member: click on the staff’s name to show either staff information or messages sent to staff.
Supervisor Actions

- The **Action** dropdown allows the supervisor to select an action to perform on ALL services/plans in the list. (use this option with caution)
- **Save** must be selected to confirm actions. (No changes will be made if **Save** is not selected)

- Review Progress Note
- Approve
- Un-Submit
- Create message for staff
- Un-Approve

Select the service to open the service entry for review
Search Filter

- **Include Approved Services within (days):** this is used to access services that have been approved
- **All Staff:** this is used to access services/plans for a specific staff (you will only be able to select staff assigned to you as the supervisor - not nested supervisors)
- **All Clients:** this is used to access services/plans for a specific client
- **All Services:** this is used to access specific services
- **From/Thru:** access specific dates of service

Enter # of days here to view approved services
Incidents Review

- The supervisor can review Incident reports that were submitted for review
  - Click on the incident to open for review
Alerts

- The supervisor can review his or her alerts without leaving the Supervisor area.
Sending Alerts

- **Select New**
  - **Create Alert**: send a message to specified staff
  - **Create Alert For Logged In Staff**: send a message to staff currently logged in
  - **Create Alert For All Staff**: send a message to All Staff
Managing Alerts

- **New**: create a new message
- **Select All**: apply an action to all messages
- **Delete**: delete selected messages
- **Mailbox**: view messages in your Inbox, Sent, or Archive folders
Viewing Alerts

- Click on an Alert to open the message.
  - Users can **Print**, **Respond** and **Delete** from here.
- Select **View Message** to open the message in another window that can be minimized.
  - Allows for navigation to another area of Evolv while keeping the minimized message open and accessible.
Timesheet Module

- The Timesheet module can be accessed via the Task Bar icon or the Navigation menu.
  - **Pick Staff**: search and select staff to access their timesheet
  - **Previous** and **Next**: navigate between weekly timesheet views
  - **Week of**: timesheet week start date
  - **Submit**: submits the entire week’s timesheet. **DO NOT USE AT THIS TIME**
    - If this is used in our current version of Evolv, all previously submitted and approved services will revert back to submitted/unapproved status.
Entering Services through the Staff Timesheet

- Select <Add New>
  - Select service entry from the drop down menu
- Select **Client Services** to enter Billable Client Services
- Select **Staff/Non-Client Services** to enter Non-billable Services
Non-billable Service Entry Form

- Sections in **bold** are required fields
  - The screen shot below shows the form with all the required fields completed
- **Remarks** is NOT required at this time
- Select **Save** once entry is complete

Click on the buttons to open the selection menu window for Program/Service and Site Providing Service

Select the non-billable service from the menu options

Search and select your facility
Billable Client Service Entry

- Search and select the Client and corresponding Service
  - Multiple services will be displayed for clients including services that may not apply to your facility. To narrow the search results, use the **Service Name** field to specify the service being entered.

![Search and select the Client and corresponding Service](image)

- Use partial entry of names when searching as spelling may differ between ESLs and Intakes.
- Enter service to narrow search results (It’s not necessary to enter the complete service name, the first few letters of the service can be used.)
Billable Service Entry Form

- Complete all required fields
  - Always double check that AM and PM were entered correctly before saving
- Select Save
The system will identify the service entries that are set up to pay contact fees in order to calculate the contact fee. Services and mileage need to be paid in the same week for the system to be able to make this calculation.

- Enter the total mileage for the week as 1 entry.
- Remarks: use to detail the individual days and miles for each client.
Mileage-Direct Service Staff (CONTF) Service Entry Form

- **Site Providing Service**: search and select your facility
- **Actual Date**: use any date within the packet week
- **Time**: use any time
- **Mileage**: enter the total mileage for the week
- **Remarks**: detail the clients, dates and mileage
- **Save**
YAP Mileage Reimbursement: Mileage-Direct Support Staff

- **Non-client mileage** – paid at $.345/mile
- Enter the total mileage for the week as 1 entry.
- Remarks: use to detail the dates, locations and mileage
Mileage-Direct Support Staff Service Entry Form

- **Site Providing Service**: search and select your facility
- **Actual Date**: use any date within the packet week
- **Time**: use any time
- **Mileage**: enter the total mileage for the week
- **Remarks**: detail the dates, locations and mileage
- **Save**
Client Reimbursements

- **Direct Deposit staff will not enter client reimbursements into Evolv**
- Reimbursements are entered under **Client Services**
- Select the service named **YAP Reimbursement**
Client Reimbursements continued...

- **Actual Date**: use the week ending date
  - If a reimbursement is for a previous pay period, use that pay period’s week ending date and enter separately from any reimbursements in the current pay period.
- **YAP Reimbursement Amount**: enter the total authorized $ amount to be reimbursed for the client in that week
- **YAP Reimbursement Description**: restaurant/store, receipt amount and description
- **Facility Providing Service**: search and select your facility
- **Save**
Staff Timesheet: View/Edit Services

- Select the **Edit icon** to open the service entry. Make necessary edits, save and close the window.

- Select the **Delete icon** to delete an entry from the system:
  - A service that has been paid/billed through Evolv cannot be fully deleted from the system. Selecting Delete will prompt you to “Mark As Delete” rendering it inactive but still accessible for records maintenance and auditing.
  - **NEVER** make changes to services that have been paid/billed.
Late Work

- Late work is defined as billable/non-billable paperwork that is turned in after payroll has been processed for that week or the packet has already been sent to your Program Manager.

- If paperwork is turned in by staff after your packet has been submitted to Program Services, you must wait until the following week to enter the service(s) into Evolv.
  - Always contact your Program Manager before entering or changing services in Evolv once your packet has been sent.
Service Entry Validation Reports

- Reports should be run in the following order:
  - **Staff Services Overlap Report**
    - If any overlaps in service are still being addressed after your packet has been submitted, please notify your Program Manager
  - **Employee Hours Details Report**
    - This report is used to validate services entered into Evolv against the paperwork to ensure that everything has been entered correctly
  - **Reimbursements Report** (if applicable)
Staff Services Overlap Report

Evolv > Reports > Clients > Services & Treatment > Staff Service Overlap
Staff Services Overlap Report

**Parameters**

- **From Date/Through Date**: based on the current packet week
  - Adjust the **From Date** as needed to include any late work

- **Report Selection**: Order by: **Supervisor/Worker**

- **PA Facilities Only**: Exclude No Show

- **Parameter**: Facility Providing Service
  - **Value**: search and select your facility

- **Preview**: to run the report

---

Click on each ellipsis to open Parameters and Values selection windows.

**PA Facilities Only**
Employee Hours Details

Report Parameters

- **From Date:** 1/1/1901
  - This date is used to capture any service dates entered in error
- **Through Date:** use the current packet week ending date
- **Report Selection:** Employee Hours Details Report
- **Parameters:**
  - **Not Paid**
  - Services not indicated as ‘do not pay’
- **Parameter:** Facility Providing Service
  - **Value:** search and select your facility
- **PA Facilities Only:**
  - **Parameter:** No Show
    - **Value:** No
- **Preview:** to run the report
Reimbursement Report

Evolv > Reports > Data Insight Report Writer > Custom Reporting > Custom Reporting
- Select Shared Reports
- Select YAP Reimbursement Extract

And Unit number: enter your unit number
And Week Ending Date: enter the packet week ending date
Select Run
Packets

- Packets are now scanned and emailed to your Program Manager and the distribution email called packetdist
  - This distribution email includes Program Services management as well as Monitoring staff

**Packet Scanning Procedure:**

1. The unit must arrange the work alphabetically by employee as outlined on the scan checklist.
2. The scan will not be processed by the program manager without a scan checklist completed for comparison. The “Scan Checklist Completed By” field must be filled in by the unit. The scan should be completed as soon as the unit is confident that all payable work has been received and processed.
3. At the completion of all scanned material, the scanning party (AM, etc.) must contact their program manger on the phone and notify them that the scanning is complete. If the program manager can not be reached, the unit will need to call to notify one of the following supervising staff: Ann Shepos (ext 1141), Tisen Thomas (ext 1148), Keith Koenig (ext 1157), or Donna Strawbridge (ext 1156).
4. At receipt of all scanned documents, the PM will then print the scan checklist and review that all materials are there as listed and will contact the unit if there are any discrepancies in the material counts, etc.
5. If a new document (not originally on the scan checklist) must be scanned after the scanned checklist has been sent and verified, the unit must call the program manager to arrange the submission of that new scanned material.

Because your program manager has several verifications to make prior to approving your entries for submission to payroll, it is important that you adhere to the set pack entry deadlines.

***Nothing should be entered/edited and approved in Evolv after the packet has been submitted without instruction from your program manager or speaking to your program manager first***
Procedures

- **New Hires/PAFs**
  - Scan and email to OnboardingPAF, PM and Evolv_PAf. New hires cannot be loaded into Evolv until they have been issued an employee ID number. (must be loaded into UltiPro first)

- **Intakes**
  - After loading the client into Evolv, scan and email the intake to your PM and Wauntia West (EVS) for review and entry of the benefits assignments needed for payroll and billing. PMs must get intakes in a timely manner in order to update clients prior to payroll.

- **Client Benefit Changes**
  - Email changes to Nicole McKee and your PM

- **Service Entry Corrections**
  - The only time you will ever edit a service entry is during the current week’s packet review process. **DO NOT EDIT SERVICES THAT HAVE BEEN PAID/BILLED**

- **Billing Corrections** **CONTACT YOUR PROGRAM MANAGER BEFORE ENTERING/APPROVING ANY BILLING CORRECTIONS**
  - Corrections to services needed for billing are addressed as follows:
    1. It is very important that you coordinate with your PM _before_ entering and approving any corrections.
    2. Mark the incorrect service entry as delete. (they will need to be unapproved and un-submitted first)
    3. Enter the correct service information (new, separate entry) They will need to be approved to pick up in billing.
    4. Notify your PM when complete so they can have the correction(s) excluded from the next payroll extract.

**Failure to follow steps 1 and 4 will result in duplicate pay for hourly paid staff**

- **Evolv Account Requests:** support@yapinc.zendesk.com
- **Evolv Password Resets:** support@yapinc.zendesk.com
- **Evolv Technical Support:** support@yapinc.zendesk.com

7/23/2015
Amending Progress Notes

- The amend feature should only be used when a note has been paid or billed and there is no change in the date/time. *This is very important.* If the note has not been paid or billed you should use the current process of un-approve and un-submit and re-submit the note correctly. If a notes date/time needs to be changed the note will have to be deleted and re-written and the program manager notified as to the change so the appropriate billing can be completed.
Amend feature

The amend feature works by creating a copy of the existing note that can then be edited. The original note is displayed in the system with a line through it and can still be opened as view only. The pay/billing history carries over to the amended note to prevent it from paying/billing again.

- Select the Amend icon
Amend Reason Code

- Select **Reason Code** to open the Event Amend Reason selection window and select the appropriate code.
- Select **Update**.
Edit Form

- The progress note is opened for editing
- Make necessary edits and select **Save**
Amended Progress Note

- The original note now has a line through it and the edited note is shown below it.
Billing Reports

Evolv > Finance > Reports > Secure Clients > Claim Details
Holds Report

- **From Date/Through Date:** use a specified date range or use 1/1/1901 through the current date to capture all
- **Report Selection: All Claims**
- Check the **Held Claims** box
- Select **Preview** to run the report
Write Offs Report

- **From Date/Through Date:** use a specified date range or use 1/1/1901 through the current date to capture all
- **Report Selection:** All Claims
- **Parameter:** Claim Action
  - Value: Write Off to Bad Debt (Claim Status: Denied; Claim Type: Original)
- Select **Preview** to run the report
Holds/Billing Corrections

Common holds reasons and how to address each:

• **No Authorization** – All authorizations must be scanned to Wauntia West. Please allow 1 -2 weeks for new auths to be entered into Evolv.
  • If you believe an authorization is entered into Evolv that is not correct (EX: a BMT auth was entered into Evolv, when you think it should be an MT auth) please contact Wauntia directly.
• **Over-utilization** – Review all of the units authorized against all of the ESL’s that were submitted. If this claim was an over-utilization, the billing department will write off what cannot be billed for the claim, and bill the rest to use up all of the units authorized. PLEASE NOTE: a claim for 16 units WILL HOLD if the auth only has 15 more units left. This is where the BH billing department will bill the 15 units and write off the other 1, if no retro-auth is issued.
• **No Diagnosis** – Enter the client’s primary diagnosis code into Evolv or set the primary diagnosis to Priority 1. (If the diagnosis code is not set to 1 Primary, it will hold the billing claim. ALSO, if there is more than one diagnosis, only ONE should be set to primary.)
• **The wrong type of service was entered into Evolv and does not match the authorization.**
  • Services are *never* edited after they have been processed in payroll/billing. You will always mark them as delete and re-enter the corrected service. Contact your PM before making any changes in Evolv to prevent payroll issues. Please email your PM after corrections have been completed to have them excluded from payroll.
  • PLEASE NOTE: the incorrect service will still show up on the Holds Report for a minimal amount of time, until the billing department can release that claim.
Client Reports

Evolv > Reports > Clients > General

Each report will be accessible via tabs
Client Roster

• **As Of Date**: select the current date
• **Report Selection: Order by**: Client Name
• **Parameter: Managing Office**
  ◦ **Value**: search and select your facility
• **Parameter: Client Statuses**
  ◦ **Value**: Active
• Select **Preview** to run the report
Client Roster: Benefits Not Assigned

- **As Of Date**: select the current date
- **Report Selection**: Order by: Client Name
- **Check Client**: No Benefits Assigned box
- **Parameter**: Managing Office
  - **Value**: search and select your facility
- **Parameter**: Client Statuses
  - **Value**: Active
- **Select Preview** to run the report
Benefits Assignments

• **From Date/Through Date:** use the current date for both to capture only current information
• **Report Selection: Order by:** Client Name (choose other sorting options as needed)
• **Parameter: Managing Office**
  ◦ Value: search and select your facility
• **Parameter: Client Statuses**
  ◦ Value: Active
• Select **Preview** to run the report
Benefits Assignments: No Primary Diagnosis

- **From Date/Through Date:** use the current date for both to capture only current information
- **Report Selection: Order by:** **Client Name** (choose other sorting options as needed)
- Check the **Does not have Primary Diagnosis** box
- **Parameter: Managing Office**
  - **Value:** search and select your facility
- **Parameter: Client Statuses**
  - **Value:** Active
- **Parameter: Program** (Select the program enrollment that requires a diagnosis for billing. Enter additional program parameters if needed)
  - **Value:** select the program enrollment
- Select **Preview** to run the report
Benefits Assignments: Missing ASD/Non-ASD Modifiers

- **From Date/Through Date**: use the current date for both to capture only current information
- **Report Selection**: Order by: Client Name
- **Parameter**: Managing Office **Value**: search and select your facility
- **Parameter**: Client Statuses **Value**: Active
- **Parameter**: Program **Value**: Behavioral Health Community
- **Parameter**: Program Modifier **check the Not Equal box**
  - **Value**: ASD
- **Parameter**: Program Modifier **check the Not Equal box**
  - **Value**: Non-ASD
- **Parameter**: Plan
  - **Value**: select CCBH, CBHNP, VBH or MA
- **Select Preview** to run the report
Diagnosis Information: Active ASD Clients

- **As Of Date**: use the current date
- **Parameter: Managing Office**
  - **Value**: search and select your facility
- **Parameter: Client Statuses**
  - **Value**: Active
- **Parameter: Diagnosis**
  - Value: 299.00
  - Value: 299.01
  - Value: 299.80
  - Value: 299.81
- Select **Preview** to run the report

→ Reports → Clients → General → Diagnosis Information