# Steps for Supervisor review of Client Session bills and Progress Notes

# How to receive notice to review a session

Your supervisee should send you a Task on your To-Do List.

To open the To-Do List click on the color bar menu at the bottom of the page. This list is highlighted in yellow.

Notice any memos you have received.

Switch Accounts to your supervisee’s account. You will need to do this in order to work on the task assignment or respond to the supervisee with another task assignment.

Again, open the To-Do List in the color bar at the bottom of the page.

Review the provider’s request for the chart review. The provider has been instructed to write his or her name, the client’s name, and the date of service in the subject line or Task Description line. This information is essential to track the request.

# How to review the Client Session bill

Go to the provider’s menu and click on Client Sessions

Click on the date the provider has asked you to review

If the provider has entered a Client Session bill on the selected date, a magenta bar should appear with the client name and service listed.

Click on the manila folder icon to see the client session bill. Check the following items for accuracy: date, client name, billing code, location type, session length, charges, modifier, units and authorization. You will need to know your supervisee’s modifier type. Please be careful to pay attention to these details as they are essential for billing and audits. No one else will be checking after you as you are the final reviewer.

When you are done click back on the web browser tool bar.

If you see a lock and pencil icon click on it and you will see the note the provider wrote and attached to this client session bill.

If you don’t see the lock but instead see a clipboard icon with a white paper note on it, this means the provider attached a note but did not sign and lock it. Click on the icon, review the note but prepare to send a notice to the provider that the note must be signed and locked. This must be done within 48 hours of the session.

If you see a brown clipboard icon with no note on it, this means the provider did not write and attach a note to this client session bill. Notify the provider immediately.

# How to review the note

Do the minutes indicated on the note correspond to the minutes on the Client Session bill?

Do the services checked on the note correspond to the CPT codes that were listed on the Client Session bill? Providers should not select a family session and a psychotherapy service at the same time. Interactive Complexity can be used at the same time with psychotherapy and group therapy only. No other session types maybe billed the same day the provider bills for a family therapy session.

Did the provider use Measurable Outcomes to report on the client’s current behavior and progress toward measurable goals

Did the provider include a description of a clinical intervention? Techniques? Theory?

Did the provider answer the check boxes appropriately? Use N/A appropriately?

Did the provider use interactive complexity appropriately?

Did the provider write a description of the client’s response to the intervention? Was the written description consistent with the information identified in the check boxes?

Did the provider include a plan? Next appointment date?

Does the note show the therapist’s clinical plan or cognitive processes regarding the treatment process?

You can add information or comments to the note. These comments will become part of the client’s permanent record. Go to the bottom left hand corner for the note and click on “Add Note Addendum”.

Electronically sign the note by clicking on “Add Note Addendum” and select “Supervisor Approval” in the drop down box.

When you are finished reviewing the client’s notes, open up one of the notes and click on Print. This is written in red at the top of the note. Make sure you have pop-ups enabled in your web browser. Enter the date range in the calendar and click “print” on the calendar screen. You should be able to scroll through the notes. Watch for errors due to duplicated notes, wrong client chart, drops in service etc. Instruct the provider to make any needed corrections.

# Send the office notice of the approved billing

Open up the To-Do List again.

Open up the provider’s task requesting the note review. Make sure the subject line contains the provider’s name, the date of service and the client’s name

In the body of the task note, write a note telling Renee that the service is approved for billing. Please remember that she will not be double checking your work.

On the side of the task note open up the drop down box labeled as “Assign Task To:” Select R Klein.

At the bottom, the drop down box labeled as “Associated with Client” should have the client’s name selected.

Click on “Update this task”. You have just sent this to the office for billing.

# Reviewing CAFAS Assessments and Treatment Plans

Procedures to be developed