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

# How to receive notice to review a session

1. Your supervisee should send you a Task on your To-Do List.
2. To open the To-Do List, click on the color bar menu at the bottom of the page. This list is highlighted in yellow.
3. Notice any memos you have received.
4. 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.
5. Again, open the To-Do List in the color bar at the bottom of the page.
6. 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

1. Go to the provider’s menu and click on **Client Sessions**
2. Click on the date the provider has asked you to review
3. 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.
4. 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.
5. When you are done click back on the web browser tool bar.
6. This should return you to the screen with the magenta bar and the session bill. On the right you will see one of three different icons: a lock and pencil, a brown clipboard with a note on it, or a brown clipboard without a note on it.

* If you have a lock and pencil icon, click on it and you may view a note that was written the same day as this session bill. You will need to click “print” to view all of the notes for this billable session. TCMs are now being asked to enter an SED Determination form with the Client Session bill.
* If you see a brown clipboard icon with a white paper note on it, this means the provider attached a note but did not sign and lock it. Notify the provider immediately. And again to view all the notes associated with this session bill, click on “print” and scroll through your notes.
* If you see a brown clipboard icon with no note on it, this means the provider did not write a note on the same day he or she created the bill. (TCM are asked to complete an SED Determination form on the date of the Client Session bill.) Click on the brown clipboard icon; Click “print” to review the notes or you may select the top right drop down box that says “create new note”. This drop down box lists all of the notes entered for this client.

# How to review a note submitted prior to the Client Session bill

1. Go to the menu and click on **Progress and Session Notes**
2. Select the name of the client from the drop down box on the left.
3. In the far right drop down box you will find every note entered for this client. Select the note the provider has requested that you review.
4. The selected note will open up for your review.

# Be sure to review each note in the month being billed for services.

1. Does the month/date indicated on the note correspond to the month/date on the Client Session bill?
2. Check the time the note was electronically signed against the time on the note. The note must be signed within 48 hours of the service time. Failure to do so could render the entire month of services unbillable. Please be aware that the electronic signature is time stamped to Pacific Time zone and in Military time. [Click here for a chart to help you convert.](https://www.transformationsllc.net/library/electronic-medical-records-system/military-time-and-time-zones/)
3. Review the note for quality and completion.
4. As the supervisor 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 of the note and click on “**Add Note Addendum”.**
5. If the note is incomplete or inaccurate, you may instruct the provider to add an addendum or note correction. Notification is done through the To-Do List system.
6. Once the note passes approval, you must electronically sign the note by clicking on “**Add Note Addendum**” and select “**Supervisor Approval**” in the drop down box.
7. 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.

# Reviewing CAFAS Assessments and Treatment Plans

1. Check the CAFAS system for the Assessment and treatment plan.
2. I recommend you add your supervisee’s clients to you client dashboard for easy review.
3. Verify the date of the plan.
4. Verify the TCM provider’s interventions are entered into the plan.
5. Verify that a Crisis plan is included for high risk problems.
6. The assessment and plan must be complete before billing is submitted to the office.

# Send the office notice of the approved billing

1. Open up the To-Do List again.
2. 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**
3. 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.
4. On the side of the task note open up the drop down box labeled as “**Assign Task To**:” Select R Klein.
5. At the bottom, the drop down box labeled as “**Associated with Client**” should have the client’s name selected.
6. Click on “**Update this task**”. You have just sent this to the office for billing.