

**To:** BHS Providers

**Date:** 12/1/16

**From:** AnnLouise Conlow, BHS Senior MIS Manager

**Re:** Cerner Community Behavioral Health (CCBH) Client Attachments

MIS has established the following process for attaching specified documents to the client record within CCBH.

**Note:** County of San Diego Behavioral Health Services Quality Management has approved only the following client document types to be attached to client records in CCBH:

- Consent for Treatment
- Medications Consent
- Coordination of Care
- Release of Information
- Client Plan Signature Pages

Programs are strongly encouraged by San Diego Behavioral Health Services Quality Management to begin using this functionality. At some time in the future, client attachments may be required.

Administrative (Admin) staff will obtain a client's document as listed above. Clinicians will print the client signature page to provide to the admin staff. These documents must be converted to PDF format. Admin staff then attaches the PDF to the client's record in the CCBH Clinician's Home Page utilizing the Client Attachments functionality. Please note the following preconditions:

1. Admin staff must have access to the Client Attachments tab in the CCBH Clinician's Home Page via the Access Request Form (ARF).
2. Admin staff must know how to scan documents using a network printer and save this scanned document into a shared drive.
3. Admin staff must create a folder under the shared drive and name this folder CD. Use this folder to save the scanned client documents.

**Note:** CD stands for Client Documents. This folder name abbreviation simplifies one of the steps under these instructions that requires typing the name of this folder.

Admin staff will follow the instructions and tips as indicated below:

1. Scan the client document using a network printer, and save it on the shared drive under the folder named CD.
  - a. Follow County policy for retention and destruction of files on hard drives to ensure the security of client files.

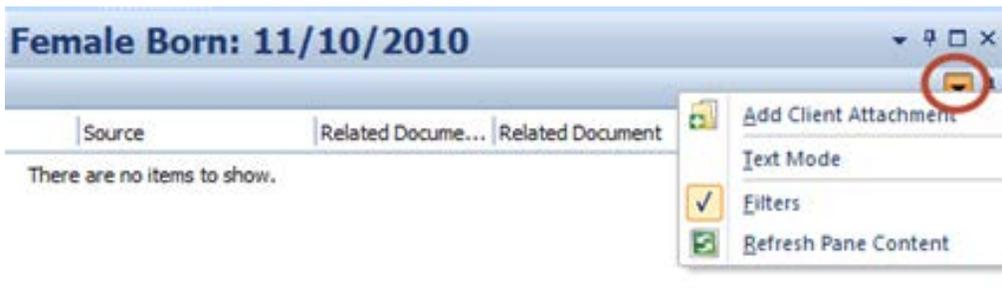
**Behavioral Health Services  
QUALITY IMPROVEMENT – MIS MEMO**

- b. Retain paper source documents in the hybrid chart until further notice from County of San Diego Behavioral Health Services Quality Management.
2. Name the client document using this naming convention format:  
***Document Type Abbreviation\_Last 4 Digits of Case#. pdf.***

**This table must be used as a reference for file naming convention rules.**

<b>Document Type</b>	<b>Format: Document Type Abbreviation + Last 4 Digits of Case#. Pdf</b>
Consent for Treatment	Consent Tx_1234.pdf
Medications Consent	Consent Meds_1234.pdf
Coordination of Care	Coord of Care_1234.pdf
Release of Information	ROI_1234.pdf
Client Plan Signature Pages	CP Sig Pg_1234.pdf

- 3. Log onto CCBH and open Clinician’s Home Page.
- 4. Open the client’s case number.
- 5. Select the ‘Client Attachment’ tab.
- 6. Click on the drop down arrow menu on the upper-right corner of the Client Attachments panel and select ‘Add Client Attachment.’



- 7. Under the ‘Attachment Detail’ window enter the following entries:

Document Date: Click on the blue **Document Date** label and enter the date.

Document Type: Click on the blue **Document Type** label to open the document types list. The following table shows the client documents that are allowed to be attached and their corresponding selection from the Document Type list.

**Behavioral Health Services  
QUALITY IMPROVEMENT – MIS MEMO**

Client Document Allowed to be Attached...	Select this from the Document Type list...
Consent for Treatment	Consent
Medications Consent	Consent
Coordination of Care	Medical
Release of Information	Legal
Client Plan Signature Pages	Client Plan

**Document Title:** Enter the file name designated on step 2 for the client document.

**Document Source:** Enter the document source. For instance, enter Client if the document was provided by the client.

**Clinical Document Type:** This is an optional field and can be used to link a client document to a clinical document. For instance, a Client Plan Signature Pages document received from the client can be linked to a Client Plan that was previously entered for this client. Click on the ‘Clinical Document Type’ dropdown and select Client Plan and select either Undefined or Client Plan.

**Related Client Document:** This field is only required if the previous field was completed. For instance, if Client Plan was selected on the previous field, then click on ‘Related Clinical Document’ and select the appropriated Client Plan that should be linked to the attached client document.

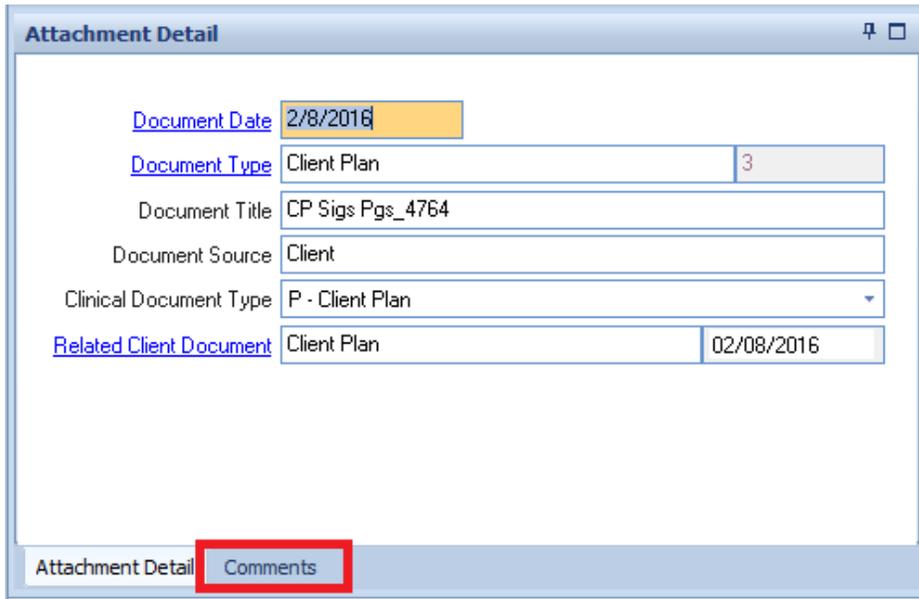
The screenshot shows a web form titled "Attachment Detail". The form contains the following fields:

- Document Date:** 2/8/2016
- Document Type:** Client Plan (with a count of 3)
- Document Title:** CP Sigs Pgs\_4764
- Document Source:** Client
- Clinical Document Type:** P - Client Plan (dropdown menu)
- Related Client Document:** Client Plan (with a date of 02/08/2016)

At the bottom of the form, there are two tabs: "Attachment Detail" (which is active) and "Comments".

## Behavioral Health Services QUALITY IMPROVEMENT – MIS MEMO

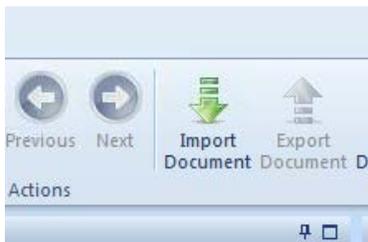
- Click on the 'Comments' tab on the bottom to enter comments to include the Staff ID responsible for attaching the document.



The screenshot shows a window titled "Attachment Detail" with a toolbar at the bottom. The toolbar contains two tabs: "Attachment Detail" and "Comments". The "Comments" tab is highlighted with a red rectangular box. The main area of the window displays the following information:

Document Date	2/8/2016
Document Type	Client Plan 3
Document Title	CP Sigs Pgs_4764
Document Source	Client
Clinical Document Type	P - Client Plan
Related Client Document	Client Plan 02/08/2016

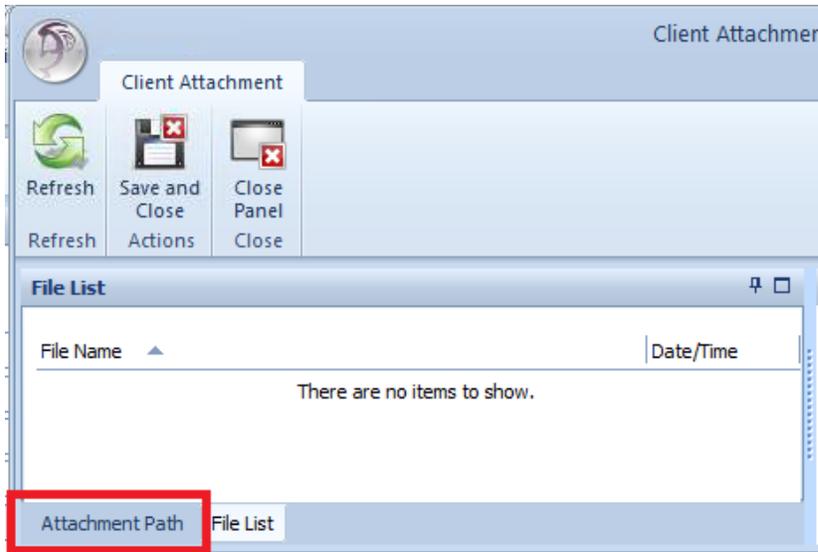
- Click on the 'Import Document' button.



Note: The Scan Document or Scanner Preferences features are not used by the County of San Diego.

## Behavioral Health Services QUALITY IMPROVEMENT – MIS MEMO

10. The 'Client Attachment Document Import' opens. Click on the 'Attachment Path' tab on the bottom.

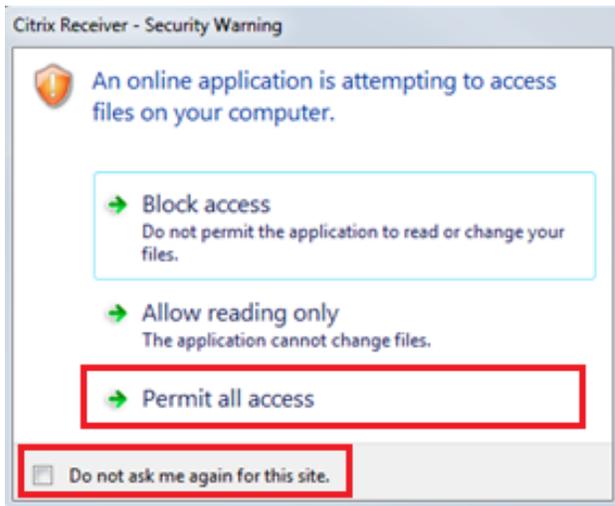


11. Type the path for the network folder under the shared drive named CD where the client document has been saved. Note: CD stands for Client Documents.

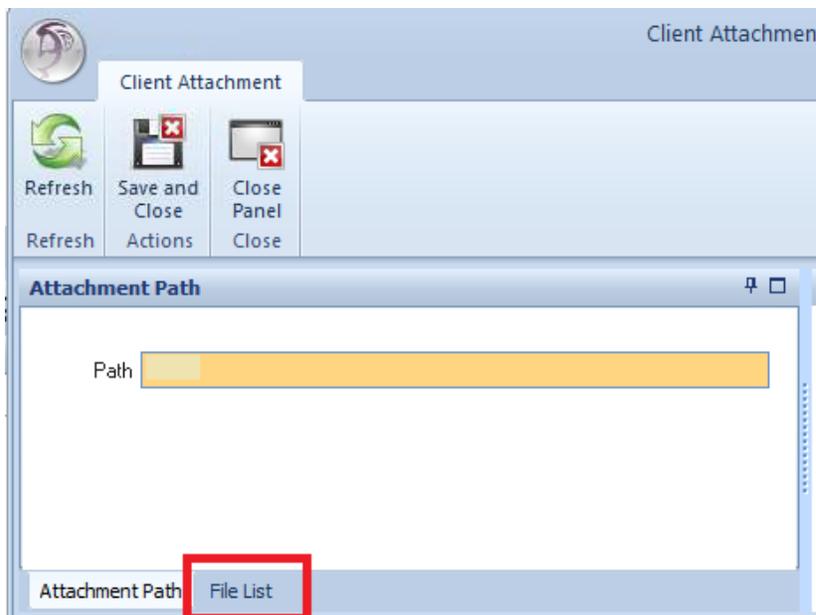


## Behavioral Health Services QUALITY IMPROVEMENT – MIS MEMO

12. TIP: If you receive the Citrix Security Warning below, select ‘Permit all accesses,’ and check the checkbox ‘Do not ask me again for this site.’

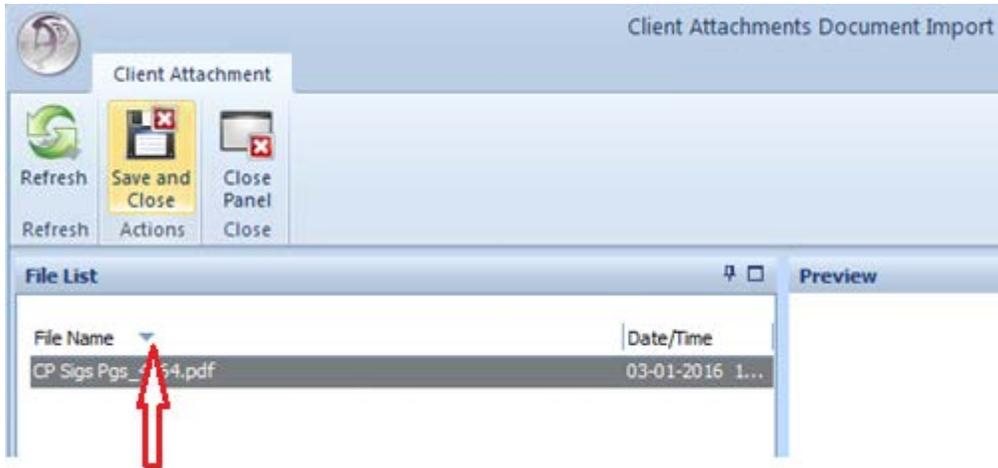


13. Click on the ‘File List’ tab on the bottom.

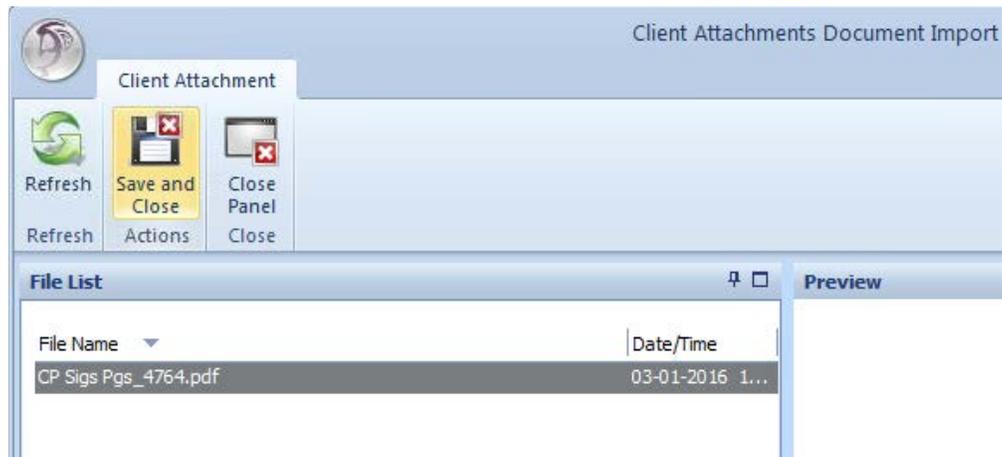


## Behavioral Health Services QUALITY IMPROVEMENT – MIS MEMO

14. Click on the arrow next to the 'File Name' header in order to refresh the file list.



15. Select the appropriate file for this specific client only. Click on the 'Save and Close' button.



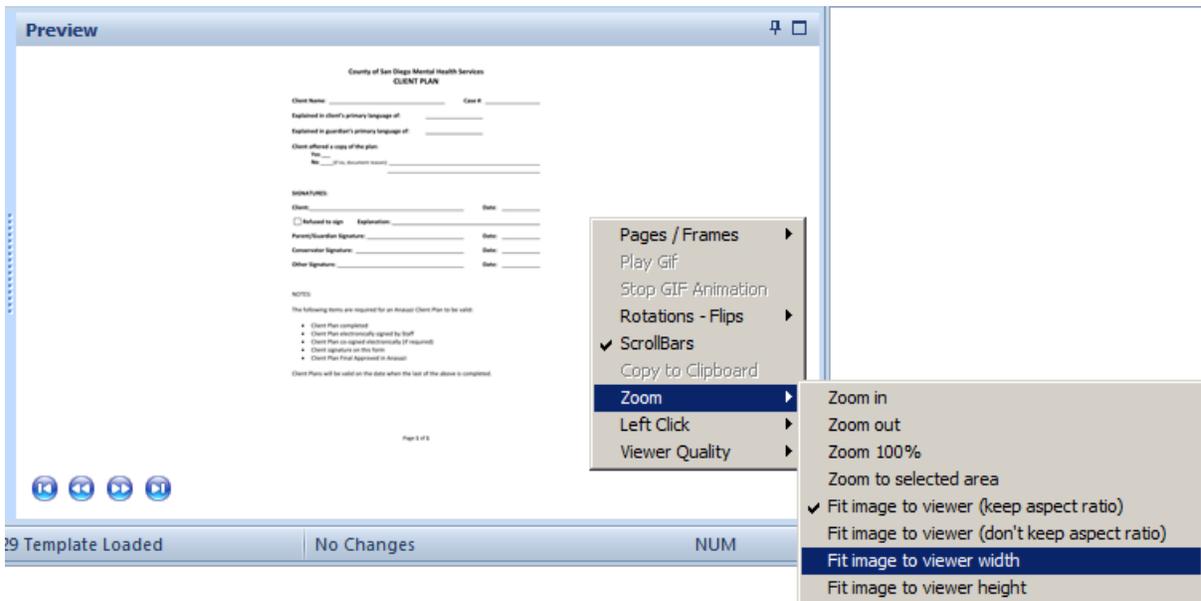
16. Enter your CCBH password and click Ok.



## Behavioral Health Services QUALITY IMPROVEMENT – MIS MEMO

17. The document now shows under the 'Preview' section of the 'Attachment Detail' window.

Tip: To zoom in the document showing on the 'Preview' area, right-click anywhere inside the preview area and select **Zoom>Fit image to viewer width**.



Tip: To expand the 'Client Attachment' window, place the cursor on the bottom right corner and drag the corner to the desired window size.



**Behavioral Health Services  
QUALITY IMPROVEMENT – MIS MEMO**

18. Click the 'Save and Close' button.

19. The attached document is now listed under the client's attachment tab.

Document Date	Type	Title	Source
02/08/2016	Client Plan	CP Sigs Pgs_4764	Client

Tip: In order to open the menu under the attached document, right-click the document listed; and this opens the menu available for the attachment. The options are Attachment Maintenance, Show, Display Narrative, Void, Export and Print. Note: The 'Export' option is currently not available.

Document Date	Type	Title	Source	Related Document Type
02/08/2016	Client Plan	CP Sigs Pgs_4764		

- Attachment Maintenance
- Show
- Display Narrative
- Void
- Export
- Print

## Behavioral Health Services QUALITY IMPROVEMENT – MIS MEMO

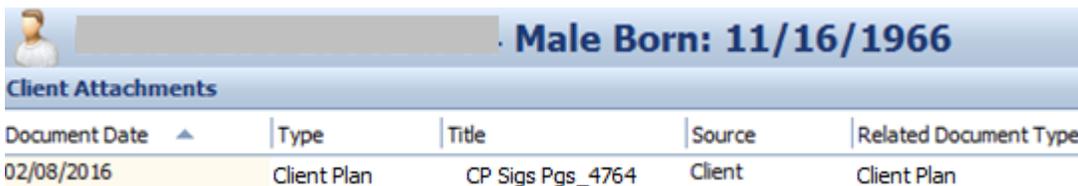
### Clinical View

CCBH Clinical staff will have access via the ARF to the attached documents uploaded by Admin staff. Clinical staff will follow the instructions and tips as indicated below:

1. Log onto CCBH and open Clinician's Home Page.
2. Open the case number that has the attached document.
3. Click on the 'Client Attachments' tab on the bottom.



4. The 'Client Attachments' tab shows the list of documents available.

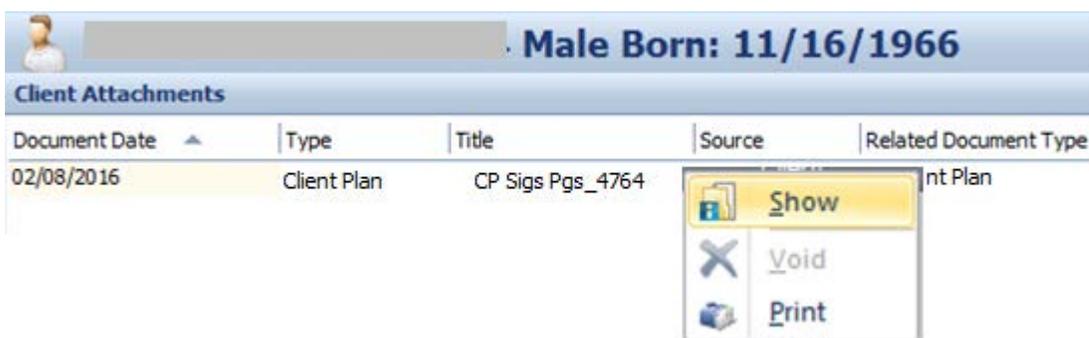


Male Born: 11/16/1966

Client Attachments

Document Date	Type	Title	Source	Related Document Type
02/08/2016	Client Plan	CP Sigs Pgs_4764	Client	Client Plan

5. Right-click the client document in order to launch the menu available for the attachment. The options are 'Show' and 'Print.' Click on 'Show.'



Male Born: 11/16/1966

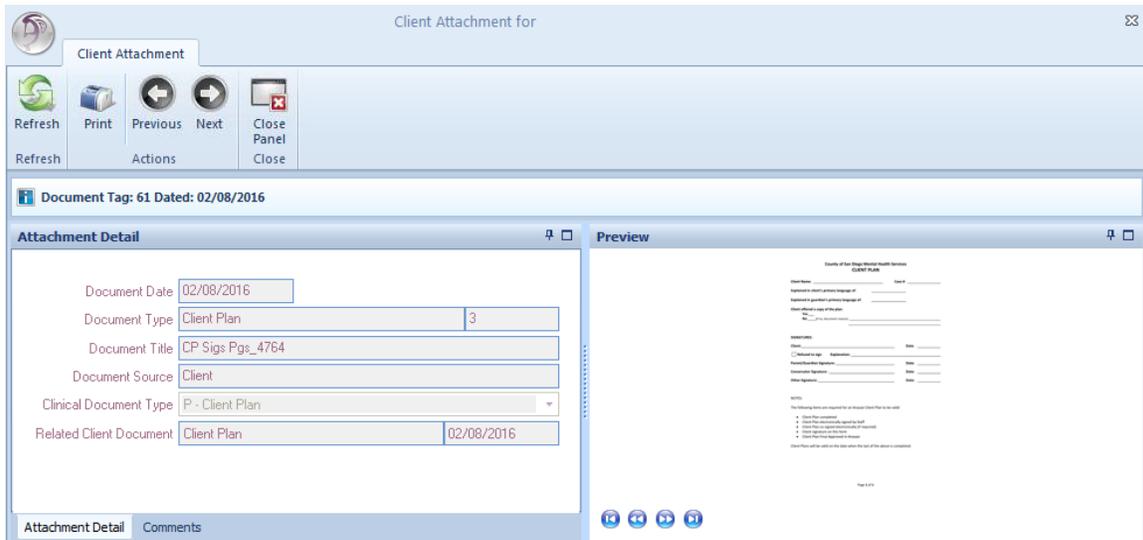
Client Attachments

Document Date	Type	Title	Source	Related Document Type
02/08/2016	Client Plan	CP Sigs Pgs_4764	Client	Client Plan

Context menu options: Show, Void, Print

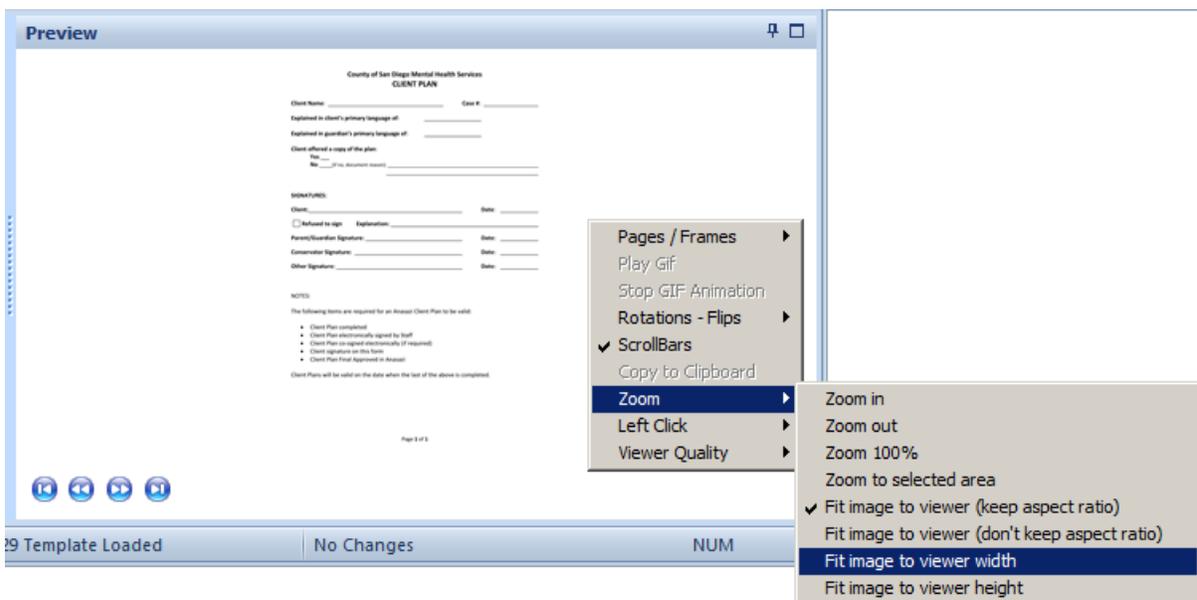
## Behavioral Health Services QUALITY IMPROVEMENT – MIS MEMO

6. The 'Client Attachment' window opens.



7. The document now shows under the 'Preview' section of the 'Attachment Detail' window.

**Tip:** To zoom in the document showing on the 'Preview' area, right-click anywhere inside the preview area and select *Zoom>Fit image to viewer width*.



## Behavioral Health Services QUALITY IMPROVEMENT – MIS MEMO

Tip: To expand the 'Client Attachment' window, place the cursor on the bottom right corner and drag the corner to the desired window size.

**County of San Diego Mental Health Services  
CLIENT PLAN**

Client Name: \_\_\_\_\_ Case #: \_\_\_\_\_

Explained in client's primary language of: \_\_\_\_\_

Explained in guardian's primary language of: \_\_\_\_\_

Client offered a copy of the plan:  
 Yes \_\_\_\_\_  
 No \_\_\_\_\_ (if no, document reason): \_\_\_\_\_

**SIGNATURES:**

Client: \_\_\_\_\_ Date: \_\_\_\_\_  
 Refused to sign Explanation: \_\_\_\_\_

Parent/Guardian Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Conservator Signature: \_\_\_\_\_ Date: \_\_\_\_\_

NUM

8. Client Plan Signature Page attachments that are linked to a Client Plan are available to view under the Client Plans tab.
9. Open the Client Plans tab in CHP.
10. Select the Client Plan. Right-click and select 'Client Attachments.' Select the appropriate Client Plan Signature Page attachment. Note A/D indicates Attached Document.

Client Plans						
Type	Description	Begin	End	F/A	V	A/D
Client Plan	Client Plan	11/02/2016	11/02/2017	✓		✓

- Client Plan Maintenance
- Display Narrative
- Display Audit Events
- Client Attachments