Organization Management

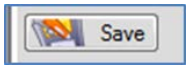
Summary:

The Organization Management section is for setting up your organization's information such as locations, Federal Tax ID, License, NPI numbers, maintain documents and more. The information here will be used for processes like billing, invoicing, etc.

Tabs:

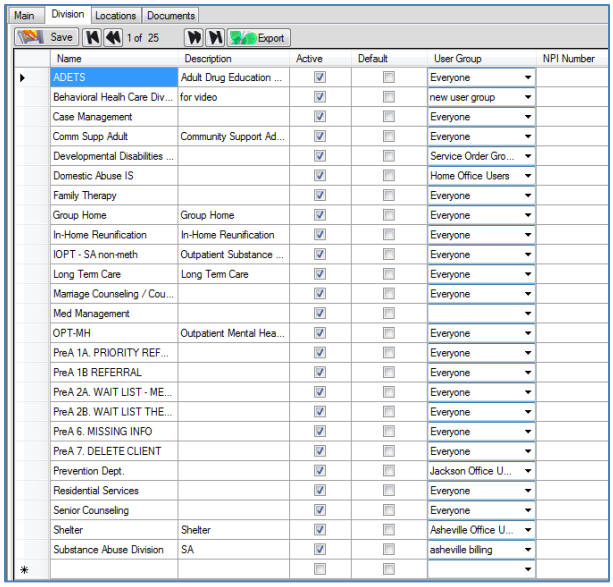
MAIN TAB

This is where your practice name, federal tax id number, NPI, taxonomy, etc., will need to be completed. Logo 1, which will appear on the upper left of your statements and other reports, can be your practice logo or any picture you wish to appear there. Logo 2 will appear on the upper right side of the statement or report. You can also select the logo that will appear on your **Portal** home page. Once this is all completed click the **Save** button.



*You will typically find **Save** on the upper left corner of the screen. It's very important to always click **Save** if you have made any changes before leaving a page.*

DIVISIONS TAB



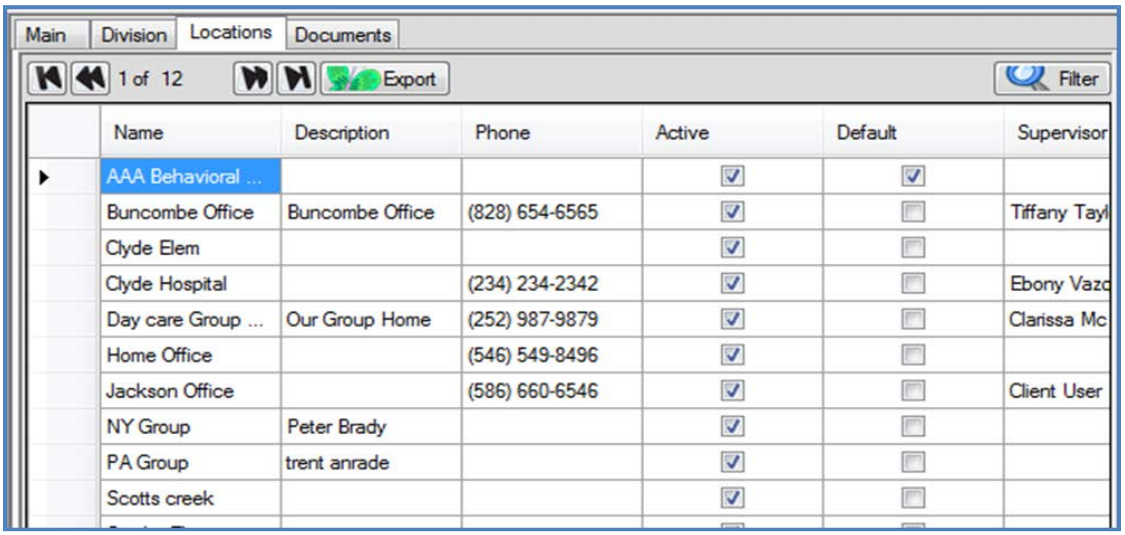
Name	Description	Active	Default	User Group	NPI Number
ADETS	Adult Drug Education ...	☑	☐	Everyone	
Behavioral Healh Care Div...	for video	☑	☐	new user group	
Case Management		☑	☐	Everyone	
Comm Supp Adult	Community Support Ad...	☑	☐	Everyone	
Developmental Disabilities ...		☑	☐	Service Order Gro...	
Domestic Abuse IS		☑	☐	Home Office Users	
Family Therapy		☑	☐	Everyone	
Group Home	Group Home	☑	☐	Everyone	
In-Home Reunification	In-Home Reunification	☑	☐	Everyone	
IOPT - SA non-meth	Outpatient Substance ...	☑	☐	Everyone	
Long Term Care	Long Term Care	☑	☐	Everyone	
Marriage Counseling / Cou...		☑	☐	Everyone	
Med Management		☑	☐		
OPT-MH	Outpatient Mental Hea...	☑	☐	Everyone	
PreA 1A. PRIORITY REF...		☑	☐	Everyone	
PreA 1B REFERRAL		☑	☐	Everyone	
PreA 2A. WAIT LIST - ME...		☑	☐	Everyone	
PreA 2B. WAIT LIST THE...		☑	☐	Everyone	
PreA 6. MISSING INFO		☑	☐	Everyone	
PreA 7. DELETE CLIENT		☑	☐	Everyone	
Prevention Dept.		☑	☐	Jackson Office U...	
Residential Services		☑	☐	Everyone	
Senior Counseling		☑	☐	Everyone	
Shelter	Shelter	☑	☐	Asheville Office U...	
Substance Abuse Division	SA	☑	☐	asheville billing	
✳		☐	☐		

Divisions are a method of breaking up service types in order to provide greater control in the system quickly and efficiently. List the different Divisions of your practice or different types of service. Divisions are used for reporting purposes as well as group assignments. If multiple programs are utilized, set them up as Divisions.

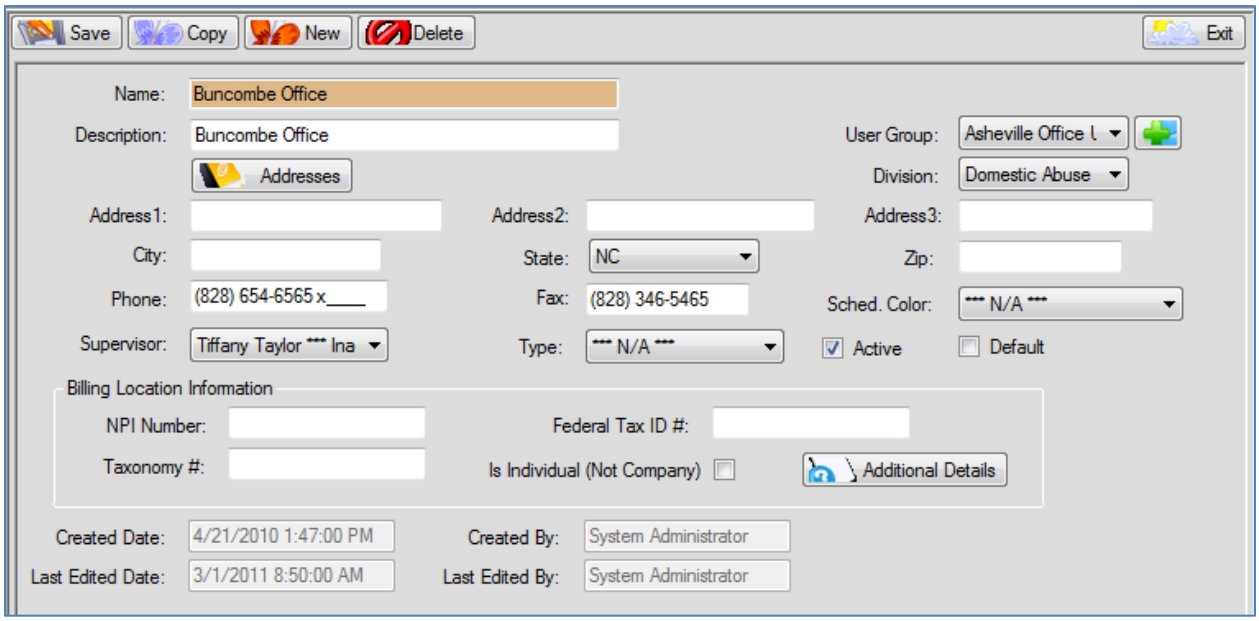
LOCATIONS TAB

Additional organization locations should be listed here:

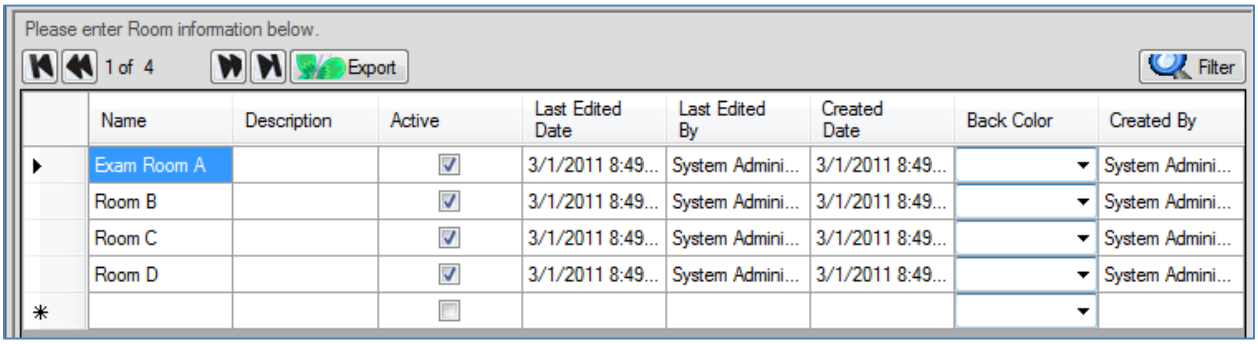
1. Notice the screen is *split in half*. On the left are any locations which have been created.



2. Below is an image of the top right side of the screen where all the information for each location is entered. It is *VERY IMPORTANT* to enter the 9 digit zip code for each location as this is required for electronic billing. To enter a new location, click the **New** button and start your other location. Repeat until done. Remember to click **Save** after each location is entered.



3. The bottom half of the right side of the screen, seen below, digs a little deeper into the location. You can have designated rooms within the location. This is mostly used with scheduling. It will show on your appointment and allow you to search for available rooms at different locations.



	Name	Description	Active	Last Edited Date	Last Edited By	Created Date	Back Color	Created By
▶	Exam Room A		☑	3/1/2011 8:49...	System Admini...	3/1/2011 8:49...		System Admini...
	Room B		☑	3/1/2011 8:49...	System Admini...	3/1/2011 8:49...		System Admini...
	Room C		☑	3/1/2011 8:49...	System Admini...	3/1/2011 8:49...		System Admini...
	Room D		☑	3/1/2011 8:49...	System Admini...	3/1/2011 8:49...		System Admini...
*			☐					

4. Once all information is entered, click **Save.**

DOCUMENTS TAB

Note: *many look at this as a file cabinet: think of the Document Type as the drawer you open and the thread name is the hanging folder. When you upload the document, it will be the paper in the folder.*

This is an area where you can upload company documents. To upload a new document, start on the last line, the one with the *****. Enter **Thread Name** and then select the D**ocument Type** from the drop-down menu.

1. Click on the line where it is highlighted in blue and click the **New Document** button *(highlighted)*. The box will open so that you can upload the document. Give the document a description and **Browse** for the file on your computer. The **Document Name** will fill in automatically with the file you attach. Click **Save** and **Exit.**

2. To *remove a document*, double-click the row in the bottom you want to remove and click **Delete** in the popup window. Click **Yes** and **Yes** to delete the file.

Document tabs are listed throughout PIMSY under the **Corporate** tab, **User Documents**, **Client Documents** and under the **Utilities** tab. There are **Public Documents**, & **Private Documents** also. We also have documents on both **Progress Notes** and **Assessment Notes**.

Use Case

Just after the ABC Company receives their PIMSY application, the Super User (administrator) must enter company information for their records. This information will be used for several things, including billing. Everything is included in all relevant tabs, including locations if there is more than one for their company.

Example: The therapists in the ABC Company go to local schools to conduct therapy with some of the students. Those trips must be scheduled and documented for company records, such as payroll and/or billing. In PIMSY, they enter all locations where their staff conducts therapy, including specific rooms if applicable.