

PIMSY Provider Portal

Summary:

PIMSY now offers access to a portal specifically developed for our PIMSY providers. From the portal, providers can fully utilize the PIMSY calendar and have access to Alerts, Requests and Payroll.

How to access the Provider Portal:

You can reach the Portal via a web browser, such as MS Internet Explorer (IE) or Chrome. The Support team will provide your web address and login information. **Your web address will be:** [https://\[company acronym\].pimsyportal.com](https://[company acronym].pimsyportal.com)

You can also go to the **Links** menu in your main PIMSY and click on **PIMSY Portal**



Calendar (Home)

When you first log into the Provider Portal, you will see your calendar for the current day.

Home / **Calendar**

Full Calendar

Events and Schedules Filter By User System Ad Show Weekends

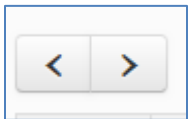
< > T today New Appointment Dashboard Refresh Jan 6 — 12, 2019 month week day

	Mon 1/7	Tue 1/8	Wed 1/9	Thu 1/10	Fri 1/11
all-day					
10am	10:00 - 10:30 Abbott, Nakia ZOD3, DOB: 12/13/1995, Co Pay: \$0.00, Phone: 270.1024218		10:00 - 10:30 10:00 - 10:15 abbott, sally Abbott, A-C-2041, DOB: 05/28/1985, Co Pay: \$15.00, Phone:	10:00 - 10:40 Huerta, Glenda XEP52386, DOB: 04/20/1980, Co Pay: \$0.00, Phone: 0339059672,	9:30 - 10:45 (Unavailable) Unavailable for work Busy, Scheduled, SAL #: 107506, At: 9:30AM
	10:30 - 11:00 Mc Daniel, Otis DID18351, DOB: 05/06/2000, Co Pay: \$0.00, Phone:	10:30 - 11:00 Abbott, Nakia ZOD3, DOB: 12/13/1995, Co Pay: \$0.00, Phone: 270.1024218 (00853)			
11am	11:00 - 12:00 (90853) Group Psychotherapy , Scheduled, SAL #: 107139, At: 11:00AM		11:00 - 11:30 Scheduled, Clyde Center, Room 2, SAL #: 107435, At: 11:00AM	11:00 - 11:15 (H2012) Day	

FIELDS & BUTTONS

< > T today New Appointment Dashboard Refresh Sep 23 — 29, 2018 month week day

The left/right **Arrows** will change the view forward or backward from day to day, week to week or month to month.



T today – changes the current view to the current day

New Appointment – opens a new appointment window; the fields in this window work the same way as a PIMSY My Sal Calendar appointment window in your main PIMSY. *See instructions below for Edit and New Appointment.*

Add SAL

Start Date* 01/07/2019 User Name System Administra

Start / End Time* 1:48 PM 2:18 PM User Group **N/A**

Duration 30 Status Scheduled

Client Name **N/A** Client Group **N/A**

Billing Code **N/A** SAL # N/A

Division **N/A** Note # N/A

Location **N/A** Client # N/A

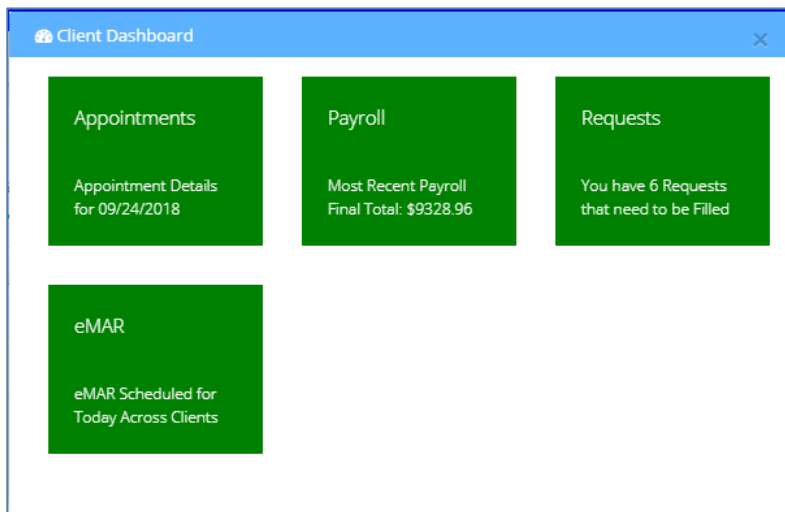
Room **N/A** Group Note # N/A

Note Recurrence Take Payments Client Dashboard

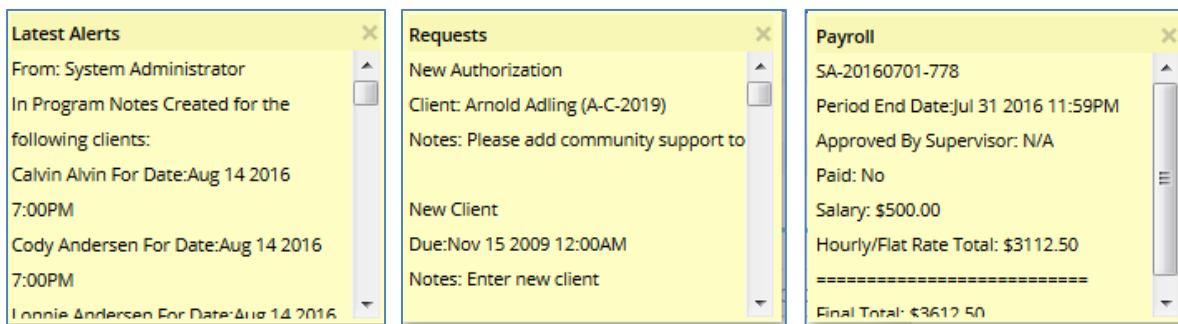
Remarks

Dashboard

The **Dashboard** contains important daily information just like the Dashboard in your main PIMSY. This window shows a synopses of Latest Alerts, Requests, Payroll and more, that are related to the user logged into the portal.

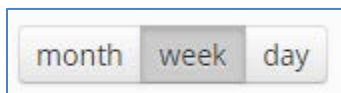


Samples:

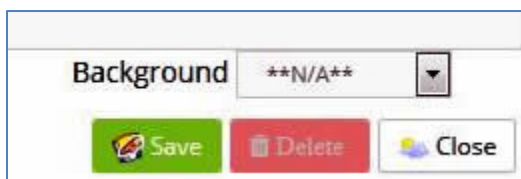


Refresh – reloads the current calendar window

month-week-day – changes the calendar view to a full month, a week or a day at a time.



The background color for an appointment can be customized from the edit window.



Clients

To access your client charts, click on **Clients** in the menu on the left. The client charts contain the same features found in your main PIMSY.

Client / Client List

Client Maintenance

Donna Koger

☒ All Clients

☐ Today's Clients

Client Report

Dashboard

Abby, Bobby

Client Details

Demo / QnA

Insurance

Administration

Medical

Diagnosis

Notes

Document

Audits

Surveys

Statement

New

Legal Guardian

Responsible Party

Emergency Contact

eRX Register

Save

Prefix

N/A

Client Number

J-C-2092

Alt Client Number

First Name*

Bobby

Middle Name

PQRS

Last Name*

Abby

Suffix

N/A

Alias

Maiden Name

Date of Birth*

06/02/1937

Age

81

Phone

(987) 898-7987

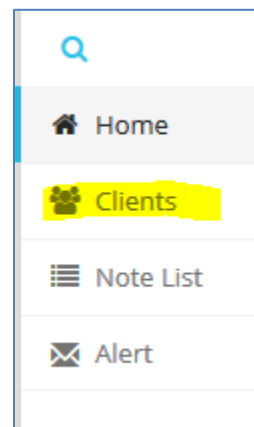
Email

bb@gmail.com

Cell

Address 1

111 Here Street



Note List

When you click on the **Note List** button on the menu, a new window appears where you can view all of your clients' progress or assessment notes. You can also View a Report. If you click on the Note number, you can edit the note unless it has been released.

Note List / Note List

Note List

Donna Koger

☒ All

☐ Progress Note

☐ Assessment Note

Search:

Note #	Last Name	First Name	Client #	Service Date	Performed By	Billing Code
A-C-1310-14739 View Report	Acosta	Sally	A-C-1310	01/08/2019 12:00 AM	System Administrator	(90839)Psychothera for Crisis First 60 m
A-C0810-001-14737 View Report	Abingdon	Arron	A-C0810-001	01/03/2019 1:30 PM	System Administrator	(H0036 HA)Individu Community Suppor
ZUM5094-14713 View Report	Hoffman	Leon	ZUM5094	12/16/2018:6:00 PM	Rick Briggs	(H0019)Rehab
ZUM5094-14709 View Report	Hoffman	Leon	ZUM5094	12/14/2018:6:00 PM	Rick Briggs	(H0019)Rehab
VUT122-14710 View Report	Clay	Ronnie	VUT122	12/14/2018:6:00 PM	Lorie Montgomery	(H0019)Rehab

Alert

In this section, you can *send Alerts* to other **Users**. Just as in your main PIMSY, enter your **Message** and select the recipients by double-clicking names on the left to add them to the list on the right.

Send Alert

Sent By:

Donna Koger

Message:

Unassigned Users

System Administrator
Georgia Alexander
Javier Anderson
Trent Andrade
missy applestein
new ARC admin
Annie ARC therapist
Daphne Arnold
Janet Ayala

Assigned Users

Send

Add all

Remove All

See your **Dashboard** to view **Alerts** you have received.

Appointments

Appointment
Details for
01/16/2019

Latest Alerts

Payroll

Most Recent
Payroll Final
Total: \$3612.50

Requests

You have 11
Requests that
need to be Filled

eMAR

eMAR Scheduled
for Today Across
Clients

Latest Alerts

From: System Administrator

In Program Notes Created for the
following clients:

Calvin Alvin For Date:Aug 14 2016
7:00PM

Cody Andersen For Date:Aug 14 2016
7:00PM


Lonnie Andersen For Date:Aug 14 2016








INSTRUCTIONS





New Appointment

Click on the **New Appointment** button on the calendar or double-click on a time slot. Complete all fields required and **Save**. The new appointment window works the same way as your main PIMSY.

Notice the **Note**, **Recurrence** and **Take Payments** buttons are grayed out. If you are creating a note from the Calendar **New Appointment** button, when you have completed at least the **Client Name** and **Billing Code**, **Save** the new appointment in order to access the **grayed out buttons**. The **Note** section works the same way as the **Notes** in your main PIMSY.

 Add SAL

Start Date*	<input type="text" value="01/07/2019"/>		User Name	<input type="text" value="System Administrator"/>			
Start / End Time*	<input type="text" value="2:27 PM"/>		<input type="text" value="2:57 PM"/>		User Group	<input type="text" value="**N/A**"/>	
Duration	<input type="text" value="30"/>		Status	<input type="text" value="Scheduled"/>			
Client Name	<input type="text" value="**N/A**"/>		Client Group	<input type="text" value="**N/A**"/>			
Billing Code	<input type="text" value="**N/A**"/>		SAL #	<input type="text" value="N/A"/>			
Division	<input type="text" value="**N/A**"/>		Note #	<input type="text" value="N/A"/>			
Location	<input type="text" value="**N/A**"/>		Client #	<input type="text" value="N/A"/>			
Room	<input type="text" value="**N/A**"/>		Group Note #	<input type="text" value="N/A"/>			

 Note  Recurrence  Take Payments  Client Dashboard

Remarks

Edit Appointment

Select an existing appointment and click **Edit** to make changes.

Your Appointment

8:00 - 8:30
Supervision (614),
Scheduled,
SAL #: 61956,
At: 8:00AM

Edit

When you click to edit an appointment, a window opens with options and details about that appointment. Make changes as needed and **Save**.

Progress Note

Save

Delete

Close

Phibbs, Newy

Service Date *

09/25/201

Start/End Time *

8:30 AM

9:00 AM

30

Location Code *

(11) Office

In Clinic

Face to face

Billing code *

(H2012)Day

Location Type

N/A

Division

N/A

Note Type *

N/A

Released for Review

Reviewed

Released

Note #

QP *

Greg Brady

Inpatient

Admitted

09/24/2018

Discharged

09/24/2018

Answers

Add template...

Disposition & Status

Goal

Add Services

Addendums

Misc. Q & A Tracking

Sorry no goal(s) found.

Assessment Note

[Print Report](#)

Service Date * 01/16/2019 ☐ Allow Release

Start/End Time * 12:00 AM 12:30 AM 30

Location Code * 11 Office ☐ In Clinic ☒ Face to face

Billing code * **N/A** Location Type **N/A**

Division **N/A** Note Type * **N/A**

☐ Released for Review ☐ Reviewed ☐ Released

Performed By **N/A**
Note #
QP * System Administrator
☐ Inpatient
Admitted
Discharged

Purpose of Contact History of Present Illness Intervention / Observation Effectiveness of Interventions [Add template...](#)

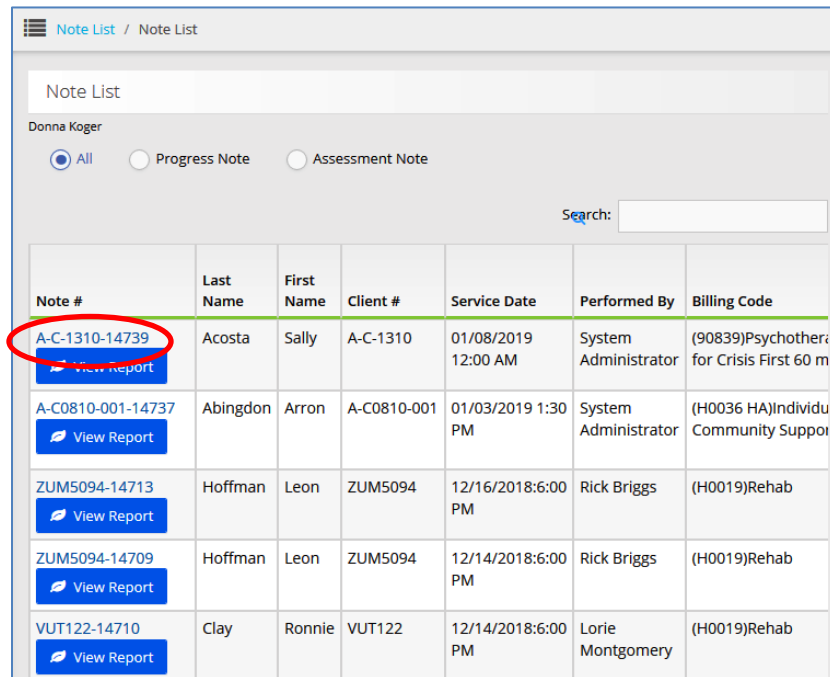
Forms Substance Usage Medications Diagnosis Goal Add Services Addendums Team Misc. Q & A Tracking

Goal #	Goal	Objective	Support/Intervention	Who Will Provide Support	Se
1	Gain a comprehensive understanding of ADHD and its Show More	Acquire current and credible information about ADHD Show More	Advise the parents to read current literature that.... Show More		

Edit Notes

You can edit **Notes** from the **Appointment Edit** window, the **Note List** or from the Client's Chart.

Open the **Note List** and click on a note number on the left.



Note List

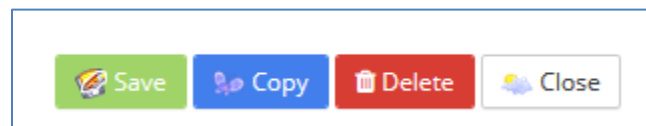
Donna Koger

☒ All ☐ Progress Note ☐ Assessment Note

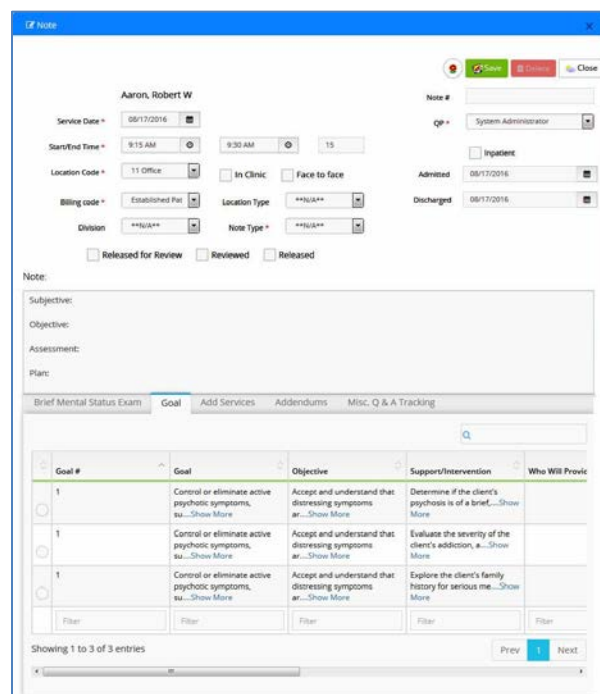
Search:

Note #	Last Name	First Name	Client #	Service Date	Performed By	Billing Code
A-C-1310-14739	Acosta	Sally	A-C-1310	01/08/2019 12:00 AM	System Administrator	(90839)Psychothera for Crisis First 60 m
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ZUM5094-14713	Hoffman	Leon	ZUM5094	12/16/2018:6:00 PM	Rick Briggs	(H0019)Rehab
ZUM5094-14709	Hoffman	Leon	ZUM5094	12/14/2018:6:00 PM	Rick Briggs	(H0019)Rehab
VUT122-14710	Clay	Ronnie	VUT122	12/14/2018:6:00 PM	Lorie Montgomery	(H0019)Rehab

When you have finished making changes to the note, **Save** at the top right. You can also **Delete** a note from this window.



Take/Make Payments



Note

Aaron, Robert W

Service Date: 05/17/2016

Start/End Time: 9:15 AM - 9:30 AM

Location Code: 11 Office

Billing code: Established Fee

Division: ***U/L**

Note Type: ***U/L**

Released for Review: ☐ Reviewed: ☐ Released: ☐

Note #

GP: System Administrator

Inpatient: ☐

Admitted: 05/17/2016

Discharged: 05/17/2016

Note:

Subjective:

Objective:

Assessment:

Plan:

Brief Mental Status Exam Goal Add Services Addendums Misc. Q & A Tracking

Goal #	Goal	Objective	Support/Intervention	Who Will Provide
1	Control or eliminate active psychotic symptoms, su...Show More	Accept and understand that distressing symptoms ar...Show More	Determine if the client's psychosis is of a brief...Show More	
1	Control or eliminate active psychotic symptoms, su...Show More	Accept and understand that distressing symptoms ar...Show More	Evaluate the severity of the client's addiction, a...Show More	
1	Control or eliminate active psychotic symptoms, su...Show More	Accept and understand that distressing symptoms ar...Show More	Explore the client's family history for serious me...Show More	


Showing 1 to 3 of 3 entries


Prev 1 Next

The PIMSY Provider Portal has a couple of areas where the User logged into the portal can **Take Payments or Make Payments** if that feature is permitted in their profile.

Edit SAL



When you open an appointment to edit, there is a **Take Payments** button which opens a window where you can receive the client's payment. This payment ***applies to the appointment selected***. This payment will be reflected in your main PIMSY.

 Note

 Take Payments

+ Client Payment Form

Payment Form



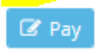
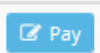
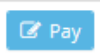
Service Date:	1/9/2019 10:00:00 AM	Performed By:	System Adminis
Service Desc:	**N/A**	Misc. Info.:	Co Pay: \$15.00 Deductible: \$0 Co Ins Amt: \$ Co Ins + Co Pa
Note #:	N/A	SAL #:	107433
Invoice #:			
Charge Type:	Please Select	Payment Method:	***N/A***
Payment Date:	1/9/2019	Invoice Date:	1/9/2019
Amount Invoiced:		Payment Amount:	
Payment Information			
Check / Ref. #:			
 Process Payment		 Cancel	

Complete the required fields for the form of payment to be processed and click **Process Payment**. Click on **Save this Card to your Profile** to safely save the credit card information to the PIMSY system for future reference.

Client Chart

Open the Clients area from the menu on the left. Select a client and go to their **Statement** tab.

- 1) You can take payments here in two ways. If you click on the **Make Payment** button to collect a payment for a client, it is a **general payment on the account**. This payment will also be reflected in your main PIMSY.
- 2) Click on the **PAY** button on the left to complete the transaction. This payment is **applied to a specific invoice**.

Statement Details				
				
	Balance	Service Date	Description	Performed By
	4.80	02/18/2009	H0036 HQ Group Community Support	N/A Leonard Chandler, P-LCSW
	2.44	04/15/2009	H0004 HQ DMH Outpatient Tx Group	Ebony Vazquez*, HR & Billing Assistant
	3.44	04/17/2009	H0004 HQ DMH Outpatient Tx Group	N/A Leonard Chandler, P-LCSW
	4.60	05/17/2009	H0036 HQ Group Community Support	N/A Leonard Chandler, P-LCSW

If you have questions or problems concerning the Provider Portal, contact our Support Team for assistance:
support@pimsyehr.com or 877.334.8512 ext 3