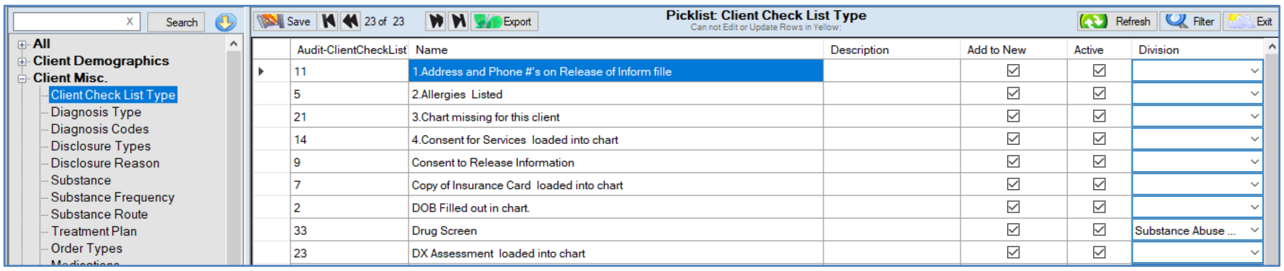
PickList Management

Summary:

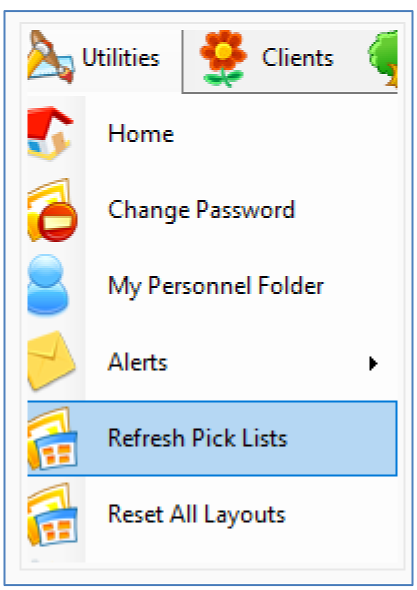
There are many items in the PickList area that make this section look overwhelming. Handle it one section at a time and you will have your system set up the way it needs to work for your practice. You won't likely edit every tab, but they are all available in case you need them for your company.

Here is a snapshot of what the screen looks like when you first open it. Each section has information that you will need to review or complete.



***VERY IMPORTANT**: You must click **Save** on each topic if there is a change made on that topic page. **Save** is typically on the upper left side of the open window.*

*When you make changes to the **PickList**, you also need to go to the **Utilities** menu and click **Refresh Pick Lists** to see your changes in the system.*



Topic List

The PickList main topics are described here:

All – opens a list of all PickList items

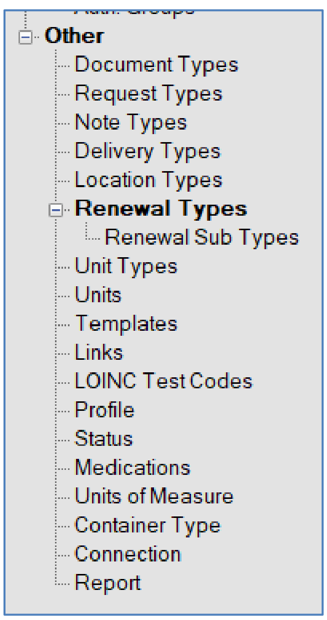
Client Demographics – contains information about each client, such as gender, age, ethnicity, etc.

Client Misc. – covers topics such as diagnosis, substances, treatment plans, etc.

People/Contact/Addresses – more information on your clients, such as country, states and address, contact types and more.

Billing – settings for codes, modifiers, payment methods, etc.

Other – several topics not covered in the above categories.



Instructions

Review every topic in **PickList Management**. Some topics will need additional input that is specific to your company. Other topics are pre-populated. It is good to go ahead and familiarize yourself with the format and available options.

Example:

Go to **Other** > **Document Types**.

- Other
  - Document Types
  - Request Types
  - Note Types
  - Delivery Types
  - Location Types
  - Renewal Types
    - Renewal Sub Types
  - Unit Types
  - Units
  - Templates
  - Links
  - LOINC Test Codes

-4	Documents Updated via Portal	Documents Uploaded vi
-3	Receipt Full Footer Image	Receipt Full Footer Imag
6	Receipt Full Footer Image	
-5	Service Plan Footer Image	Service Plan Footer Ima
-2	Statement Footer Image	Statement Footer Image
30	Board Meeting Minutes	
15	CSS Continued Stay Criteria	
14	CSS Entrance Criteria	
17	Day TX Continue Stay Criteria	
16	Day TX Entrance Criteria	
39	PCP	

The rows that are yellow **cannot be edited**.

To add a document type, go to the bottom blank line and fill in the **Name**, optional **Description** and check the box **Active** if you want this new type available in all new client charts.

7	Diagnostic Assessment	
38	Emergency Petition	
20	Incident Report	
54	Child Questionnaire	
55	Corner House DC Plan	
56	(BHTF) Verbal Permission	

The **DocumentTypeID** will be added automatically upon **SAVE**.

Audit-DocumentTypeID	Name	Description
42	Release of Info	
51	Remits	
29	Report Templates	
32	Resume	
3	Secondary Insurance Card	
4	Service Plan	
-5	Service Plan Footer Image	Service Plan Footer Image: Upload
53	Signed Privacy Docs	
41	Statement Footer Image	
-2	Statement Footer Image	Statement Footer Image: Upload jp
35	Test JPW	
46	Test JPW Doc Type	Test for JPW
37	test mt	
50	Ticket 7378	Testing this out
5	Treatment Plan	
27	User Annual Review	
28	User Confidentiality Form	

Scroll over to the right and complete applicable columns. Go to **Renewal Sub Type**, **Client Check List** and **Division** PickList topics to edit the dropdowns.

	Add to New Clients	Add to New Users	Is Fillable Word Template	Order	Renewal Sub Type
	☐	☐	☑	35	
	☐	☐	☑	36	
	☐	☐	☑	37	
	☐	☐	☑	38	
	☐	☐	☑	39	
	☐	☐	☑	40	

Client Check List	Division	Active	Show in Portal	If Word Doc Allow Editing
		☑	☐	☐
		☑	☐	☐
		☑	☐	☑
		☑	☐	☐
		☑	☑	☑

Show in Portal – check this if your company is using the feature.

If Word Doc Allow Editing – check this if the document is an editable MS WORD document.

Be sure to **SAVE** and **Refresh PickLists** after every change to a PickList item before you move to another topic.

Remember, if you need to further edit items in the PickList, your PIMSY Administrator can go back anytime to make changes in the system settings.