



Provider Portal - Tags

Quick Guide

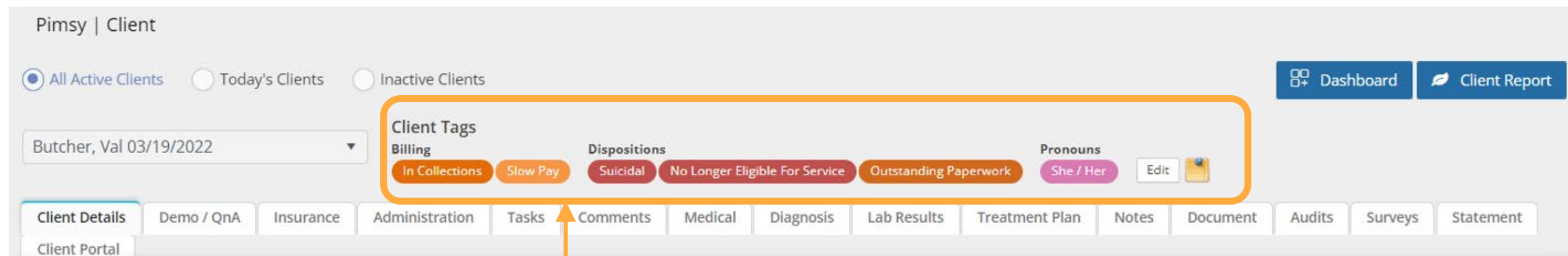
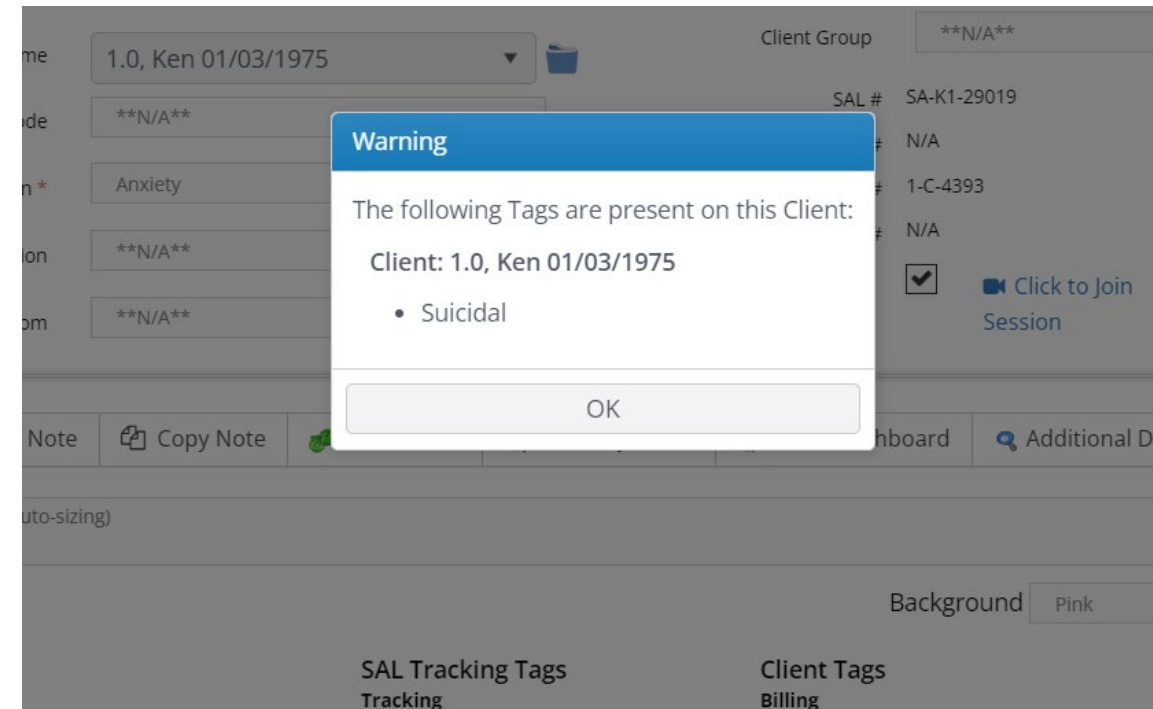
Tags

Tags offer an easy, quick, at a-glance snapshot of various client attributes and statuses.

Warning Pop-up

When selecting a client appointment, you may find a warning pop-up once the SAL appointment opens.

Certain tags will kick-off this warning to create awareness regarding specific clients.



Client Chart Tags

When entering a client chart, users will see any tags assigned to that specific client at the top of the chart. The tags are divided into sections for Billing, Dispositions, and Pronouns. Tags can be edited by clicking the **Edit** button to the right of the client tags.

Tags (cont'd)

Edit Sal Tags

Going into a client SAL appointment will also have tags displayed at the bottom of the appointment.

Users can add, edit, or remove tags here.

Like the client chart tags in the SAL appointment are divided into sections:
SAL Tags
SAL Tracking Tags
Client Tags

The screenshot shows the 'Edit SAL' window with the following details:

- Start Date***: 08/23/2022
- Start / End Time***: 9:48 AM to 10:18 AM
- Duration**: 30
- Client Name**: Abbott, Grace 12/01/1994
- Billing Code**: **N/A**
- Division ***: Cindy's Therapy
- Location**: **N/A**
- Room**: **N/A**
- User Name**: Mary Alex
- User Group**: **N/A**
- Status**: Scheduled
- Client Group**: **N/A**
- SAL #**: MA-GA-29052
- Note #**: N/A
- Client #**: A-C-4151
- Group Note #**: N/A
- TeleHealth Appointment**:

Buttons: Note, Copy Note, Recurrence, Take Payments, Client Dashboard, Additional Details

Remarks (auto-sizing)

Background: Pink

SAL Tags Info: Co Pay Collected, Edit

SAL Tracking Tags Tracking: In Waiting Room, Edit

Client Tags

- Billing**: In Collections
- Dispositions**: Violent, Outstanding Paperwork, reduced concentration lack of sleep
- Pronouns**: She / Her, Edit

Buttons: Save, Delete, Close

Tags (cont'd)

Tags – Progress / Assessment Note

Tags can be viewed in the Progress/Assessment Notes from within the SAL Appointment. Here, users can add, edit, or remove tags within the note.

The screenshot shows a 'Progress Note' form for Moby Gillis. The form includes fields for Service Date (06/29/2022), Start/End Time (10:45 AM to 11:00 AM), Location Code ((11) Office), Billing code ((90791)Assessment 100.00ur N/A-1), and Division (**N/A**). It also has checkboxes for 'In Clinic' (checked) and 'Face to face', and dropdowns for 'Location Type' (**N/A**) and 'Note Type' (BIRP). On the right, there are fields for 'Performed By' (Doc, Wats), 'Note #' (G-C-157-7946), 'QP' (**N/A**), 'Admitted' (12/31/1999), and 'Discharged' (12/31/1999). An orange box highlights the 'Note Tags' section, which includes 'Billing' (None), 'Client Tags' (In Collections, Slow Pay, Homicidal, Suicidal, No longer eligible for service, Pronouns: He/Him), and 'SAL Tags Info' (Confirmed Appt w/ Client, Co-Pay, Records Pulled, Tracking: In Waiting Room). Below the tags is a 'Note:' field with a 'Dictation' toggle (OFF) and buttons for 'Answers' and 'Add template...'. At the bottom, there are tabs for 'Disposition & Status', 'Goal', 'Add Services', 'Addendums', 'Reference', and 'Misc. Q & A Tracking'. The 'Goal' tab is active, showing the message 'Sorry no goal(s) found.'

Tags (cont'd)

+ Client Payment Form [Close]

Payment Form

| | | | |
|------------------|---------------------------------------|-----------------|---|
| Service Date: | 6/29/2022 10:45:00 AM | Performed By: | Doc, Wats |
| Service Desc: | (90791)Assessment 100.00ur N/A-106923 | Misc. Info.: | Client Paid: \$0.00 Appt. Balance: \$15.00 Appt. Charge: \$15.00 Co Pay: \$15.00 Co Ins Amt: \$ |
| Note #: | G-C-157-7946 | SAL #: | WD-MG-20528 |
| Invoice #: | INV-18921 | Payment Method: | ***N/A*** |
| Charge Type: | Co Pay | Invoice Date: | 7/1/2022 |
| Payment Date: | 12/31/1999 | Payment Amount: | |
| Amount Invoiced: | 15.00 | | |

Payment Information

Check / Ref. #:

An invoice has already been submitted. To submit another, click "New Invoice" below.

[New Invoice](#) [Close](#) [Receipt Full](#) [Receipt Lite](#) [View Report](#)

Client Tags

Billing

[In Collections](#) [Slow Pay](#) [Edit](#)

Note Tags

Billing

[None](#) [Edit](#)

Tags - Client Payment

Tags can also be accessed in the Client Payments screen via the SAL appointment.

Here, users can find billing related client tags at the bottom of the payment form window.