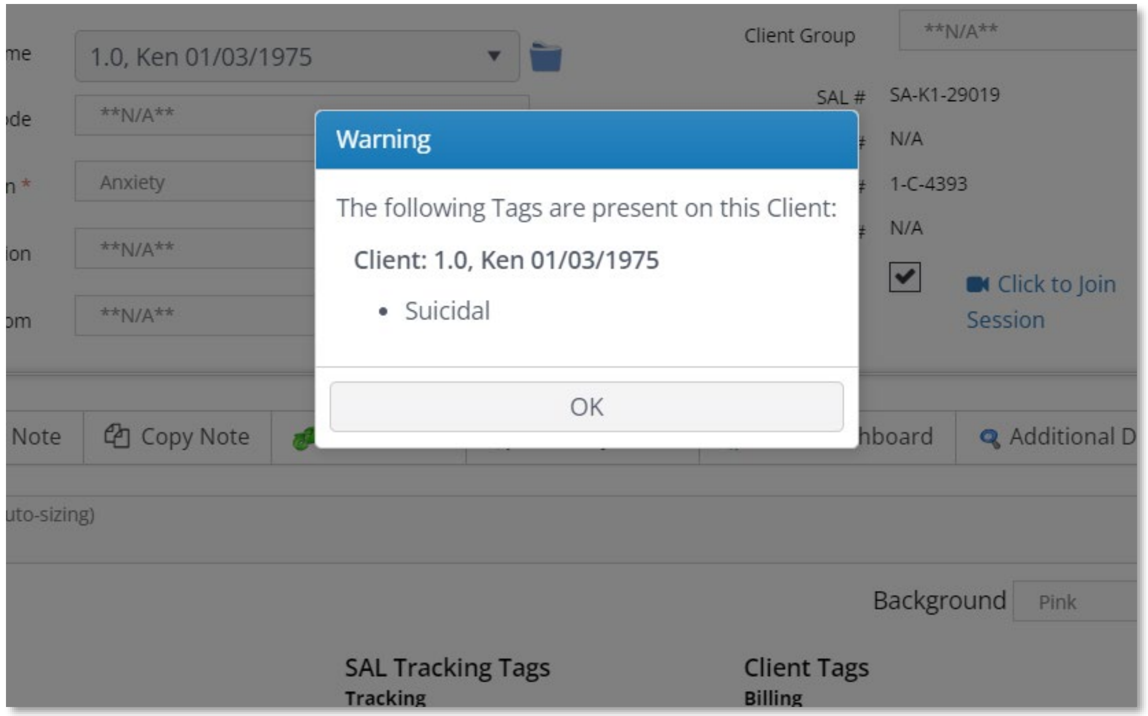
PIMSY

Provider Portal - Tags

Quick Guide

Tags

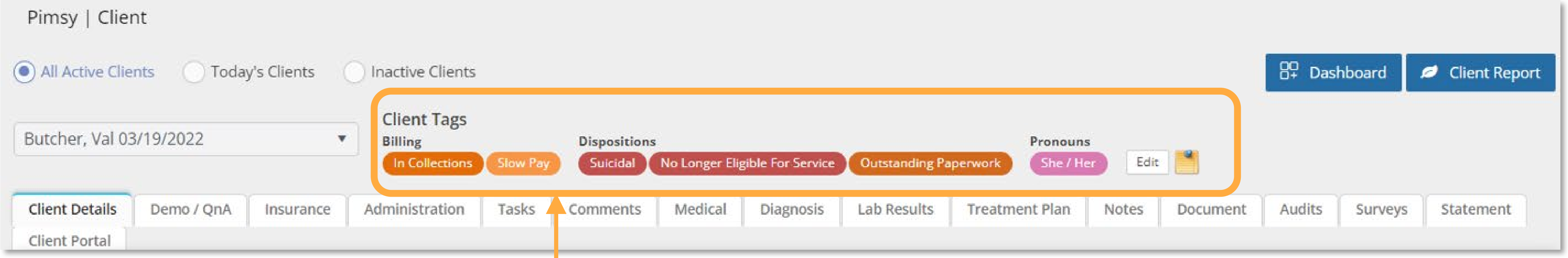
Tags offer an easy, quick, at a-glance snapshot of various client attributes and statuses.



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.

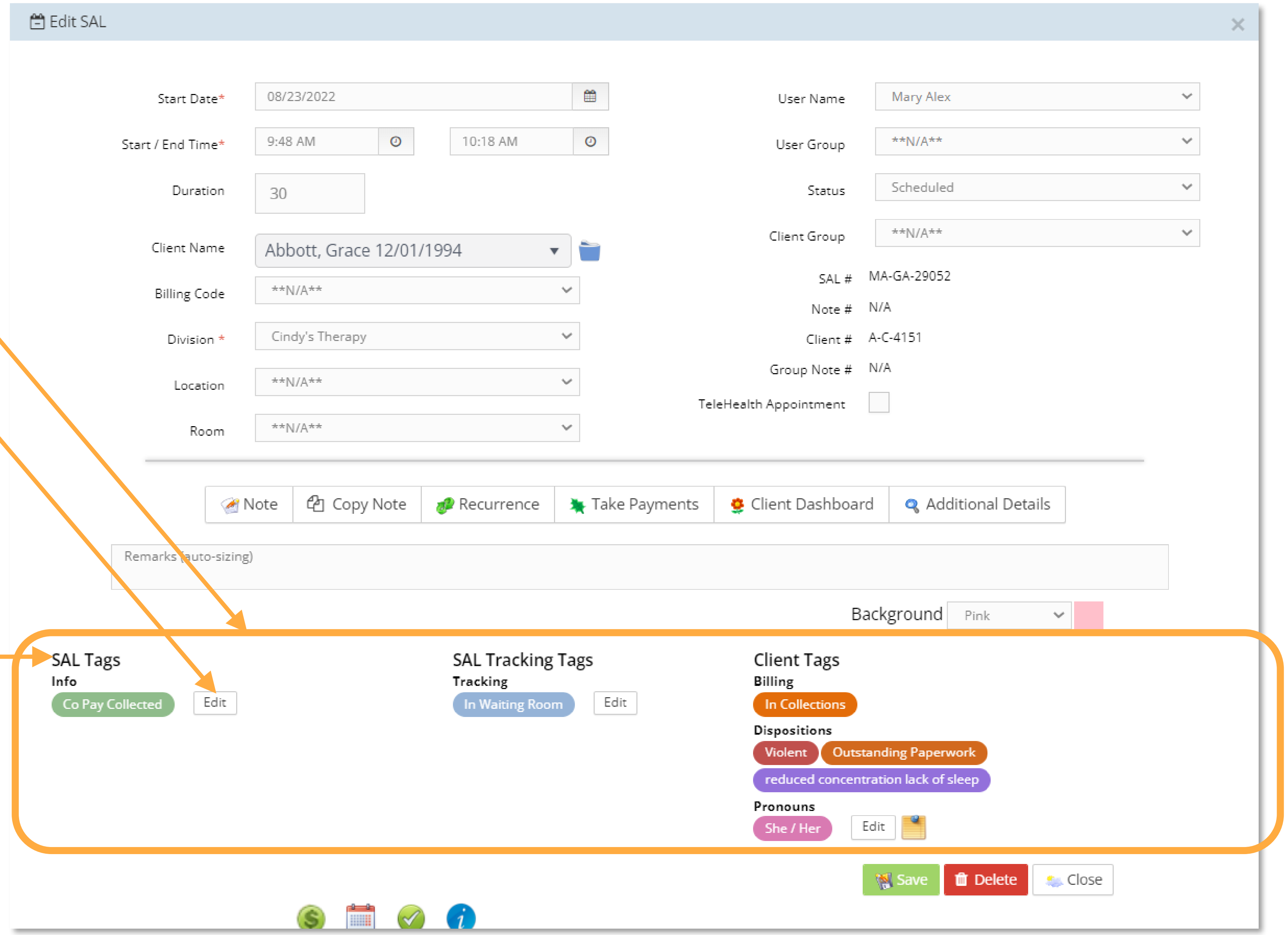
Tags (cont'd)

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.

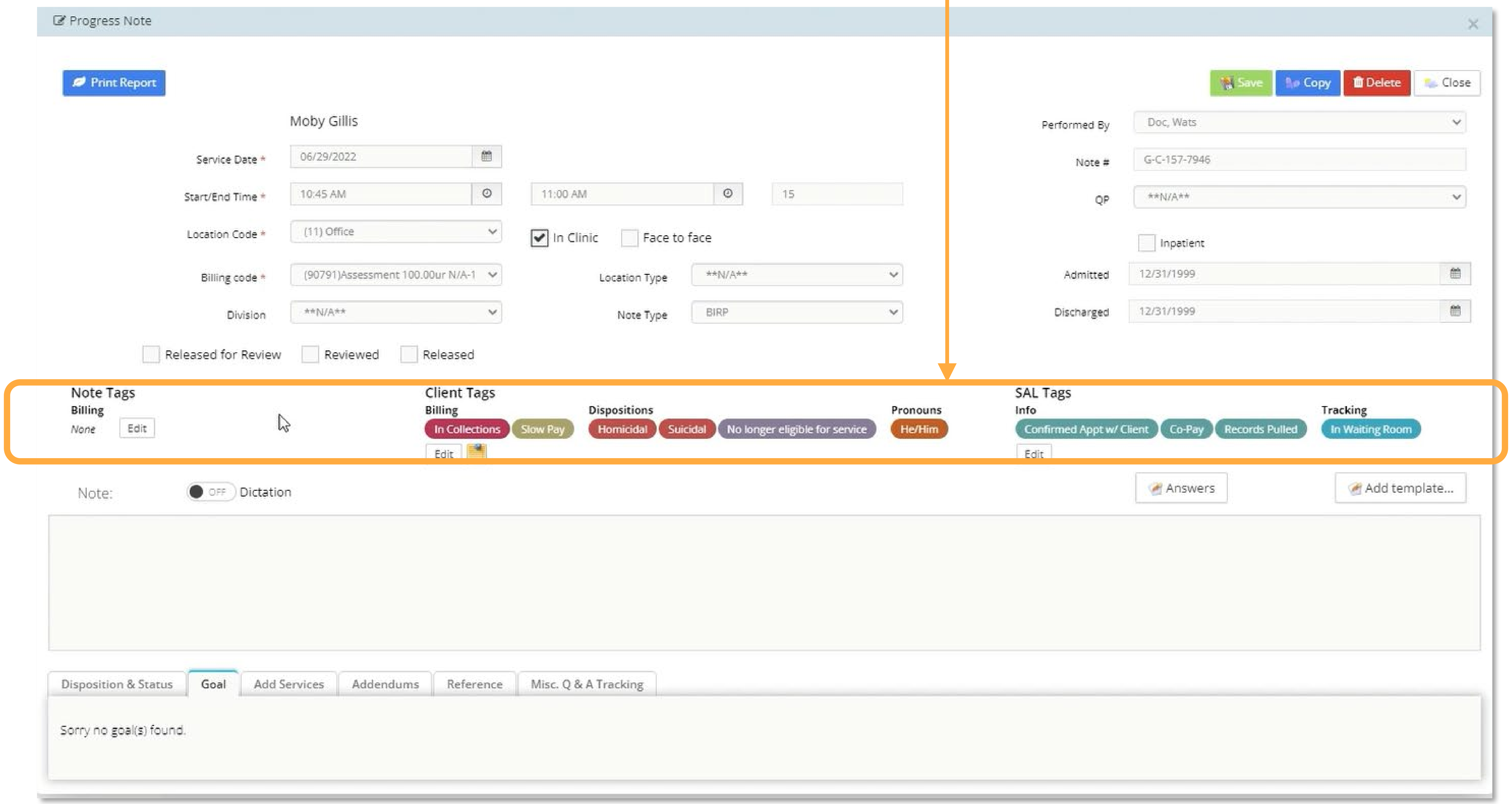
Like the client chart tags in the SAL appointment are divided into sections:
SAL Tags
SAL Tracking Tags
Client Tags



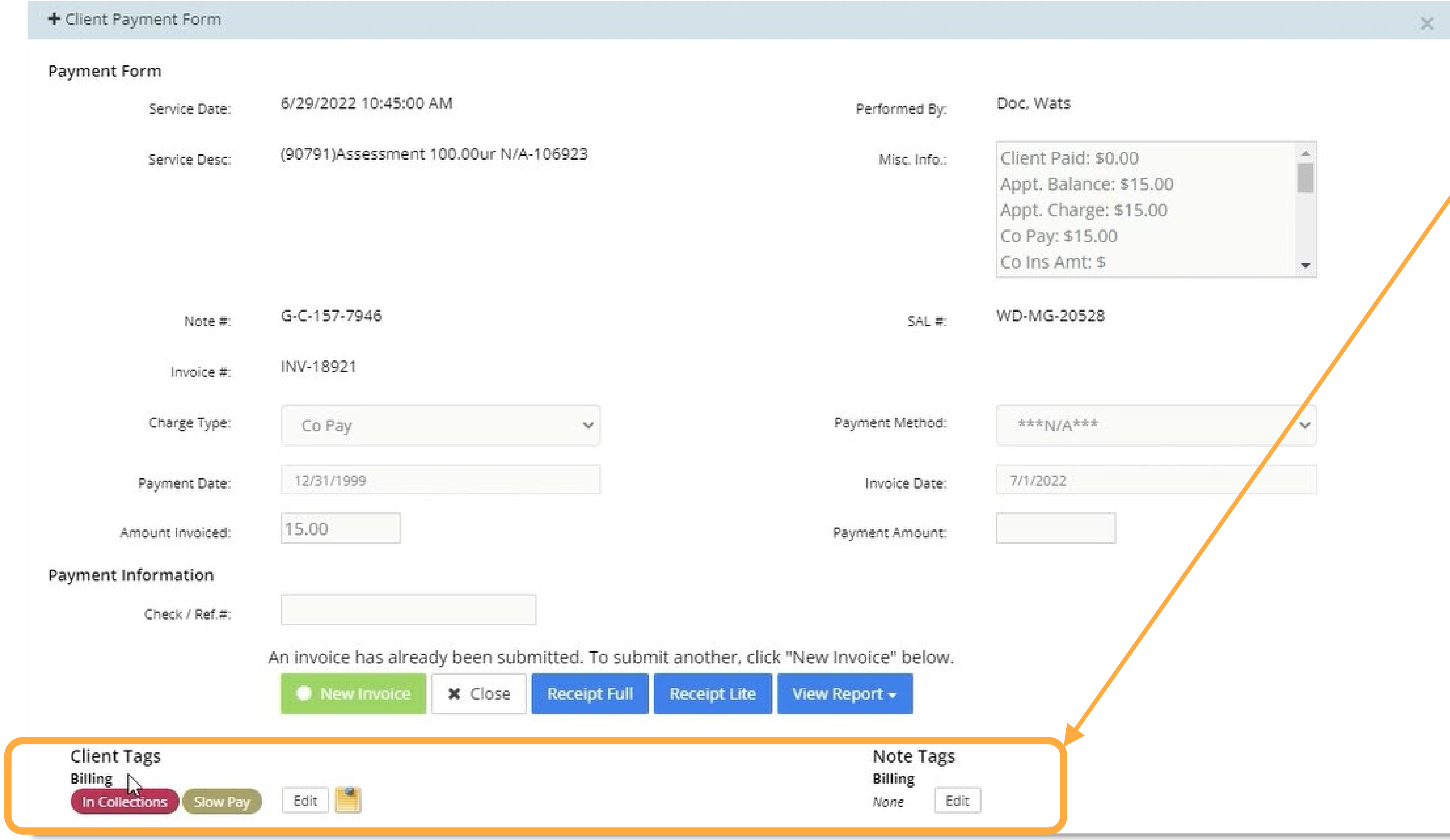
Tags (cont'd)

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.



Tags (cont'd)



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.