

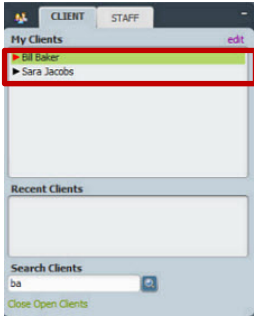
Practitioner Caseload

Maintain caseload so that client assignment is accurate, and to effectively use the My Clients list.

My Clients list

Display clients in your caseload:

- Select a client in order to open forms for that client (this works with most forms).
- Double-click on a client name in order to open the chart.



Pre-Admit form - Enter Admitting Practitioner field

1. In the Admitting Practitioner field, enter the practitioner name or ID, and select.
(Use the practitioner name "XXX, SEEFIL" if unknown.)
2. Once the form is filed, the client will appear in the chosen practitioner's My Clients view.

Admission form - Enter Attending Practitioner field

1. In the Attending Practitioner field, enter the practitioner name or ID, and select.
(Do not fill in the Admitting Practitioner field in the Admission form.)
2. Once the form is filed, the client will appear in the chosen practitioner's My Clients view.

Attending practitioners can be re-assigned to the client throughout the client episode, using the Attending Practitioner form.

Attending Practitioner form

Add or update the Attending Practitioner after Admission form is filed.

The attending practitioner information from the client's admission record populates this form and can be edited (*only one attending practitioner should be present for a client**).

1. Enter Date of Assignment.
2. In the Attending Practitioner field, enter the staff name or ID, and select.
**The attending practitioner is listed when running client self pay statements/bills.*

Other Practitioner Assignment form

Assign other practitioners to a client.

1. Select Client.
2. If the client has multiple episodes, the Episode Information pre-display shows. Select the episode and click OK.
3. If the client has previous other practitioner assignment records, select the record. Click Edit to change information, or click Add to create a new record.
4. For the Type Of Practitioner field, select the practitioner type.
5. In the Practitioner field, enter the staff member name or ID, and select.

6. In the Date Of Assignment field, enter the assignment start date.
7. In the Time Of Assignment field, enter the start time of the assignment.
8. Click Submit.

Transfer Practitioner Caseload form

Transfer one practitioner's caseload to another practitioner.

1. Select Admitting Practitioner Caseload to transfer the admitting practitioner, or Select Attending Practitioner Caseload* to transfer the attending practitioner caseload.
**This would be the more likely choice.*
2. In the Transfer Caseload From field, enter the practitioner name or ID, and select.
3. In the Individual Or All Clients field:
 - Select All to transfer all clients from one practitioner to another.
 - Select Individual to only transfer certain clients.
4. When transferring individual clients, click "Select Clients To Transfer" to display the Transfer Practitioner Caseload window. Select the clients to transfer and click Ok.
5. In the Transfer Caseload To field, enter the practitioner name or ID, and select.
6. In the Effective Date of Transfer field, enter the transfer caseload date.
7. In the Effective Time of Transfer field, enter the transfer caseload time.
8. Click Submit. Click Ok to confirm the transfer.

Refresh Caseloads form

Immediately refresh practitioner caseload information, so that the My Clients list is updated *(the list will automatically update the next time the practitioner logs in, even if Refresh Caseloads is not used).*

1. In the Individual or All Practitioners field:
 - Select All to refresh caseload information for all practitioners.
 - Select Individual to refresh caseload information for a single practitioner (Practitioner field).
2. For an individual practitioner report, enter the practitioner name in the Practitioner field.
3. Click Process.

Pre Admit Discharge / Discharge forms

Once a client is discharged from a program, the client is removed from the practitioner's caseload.

Practitioner Caseload Report

Run a report to view the current caseload for all practitioners in a program(s).

View assignments for an individual

Double-click on a client's chart and:

- a. Click on the Attending Practitioner link.
- b. Click on Other Practitioner Assignment link.