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## Workflow Terminology

<table>
<thead>
<tr>
<th>Workflow</th>
<th>Workflow is used in CWS, and generates a TO DO list for users. Some options have workflow and enable a user to send their work for review to another user.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Draft</td>
<td>In workflow, this allows for a user to save data to the database as a draft, to be completed at a later date.</td>
</tr>
<tr>
<td>Pending Approval</td>
<td>In workflow, this allows a user to complete the option and forward the information to another user’s ‘to do’ list for review. The reviewing user will have the ability to accept or reject the submission, noting the reason.</td>
</tr>
<tr>
<td>Final</td>
<td>In workflow, this allows for the user to complete the data and make it a permanent and unchangeable part of the database.</td>
</tr>
<tr>
<td>Pre-Display</td>
<td>Some options have pre-displays, which enable the user to pick previous instances of administrations of that option. Finalized instances of the option can be opened in edit mode, but changes will not be saved. To start a new instance, click ‘ADD’.</td>
</tr>
</tbody>
</table>
Types of Workflow

.gstatic.com/photos/433433434.png

(assert Draft / Pending Approval / Final

- Used for Assessments and Treatment Plans
- Has the functionality to ‘Approve or Not Approve’
- Can cycle thru Draft / Pending Approval status

(assert Draft / Final Co-Sign

- Used for Progress Notes
- Note is either in Draft or Final only. There is NO ‘Pending Approval’ status. Can only ‘Co-sign.’
- Can NOT cycle thru a Draft / Pending Approval status

Required Users

(assert MHAdClin1
(assert MHChClin1
(assert SAAdClin1
(assert SACHClin1
Progress Note Workflow (Draft/Final)
- User puts Progress Note in ‘Draft’ status and works on it until completed.
- To-Do will appear on Clinician To-Do List.
- When completed, clinician notifies ‘Supervising Clinician’ via SFDPH email/direct meetings that a Progress Note is completed and ready to be finalized.
- ‘Supervising Clinician’ communicates with note submitter via SFDPH email or direct contact/meetings with clinician as to whether note is acceptable or not acceptable.
- If unacceptable, clinician continues to edit ‘Draft’ note and communicate with ‘Supervising Clinician’ until acceptable repeating above as necessary.
- If acceptable, Clinician marks note as ‘Final’.
- Service Charge entered on Client Ledger.
- A Co-Sign To-Do flag is sent to ‘Supervising Clinician’.
- ‘Supervising Clinician’ co-signs notes.
- To-Do item removed from ‘Supervising Clinician’ list.

**Warning: Once note is finalized, the service charge is sent to the client ledger.**

Assessment Workflow (Draft/Pending Approval/Final)
- User put assessment in ‘Draft’ status and works on it until completed.
- A To-Do item will appear on Clinician To-Do List.
- When completed, clinician puts assessment in ‘Pending Approval’.
- To-Do item is removed from submitting user and put on ‘Supervising Clinician’ To-Do list.
- ‘Supervising Clinician’ Approves ‘Yes or No’.
- If ‘Yes’, assessment is made ‘Final’.
- If ‘No’, assessment is put back into ‘Draft’ status and sent back to submitting user To-Do list and removed from Supervising Clinician To-Do list.
- Submitting user makes necessary correction and puts assessment back in ‘Pending Approval’.
- Workflow cycles until Supervising Clinician ‘Approves’.

Treatment Plan Workflow
- Similar to Assessment workflow
To Do List

Purpose:

The To Do List is one of the Main Icon across the top of the Home Page. It is the central repository for To Do items created as part of the Workflow process.

The My To Do Task displays the current user’s To Do items in the Active Task Frame. The My To Do List Window displays the My To Do List Folder that contains sub-folders with the days and dates that the To Do Items were sent. Opening the sub-folder displays that day’s individual To Do items. Each item displays the time the To Do was sent, the associated Client, and a brief description of the task, and the Sender.

From the My To Do List Window the user can perform the following tasks:

- Open the option associated with the To Do Item- For those To Do items that use options that are not included in this functionality, the system directs the user to open the appropriate option.

- Refresh the To Do listings to include any To Do items sent and remove all To Do items completed during the user’s current session. This is performed using the right-click Navigation Menu or clicking the Refresh button.
Navigating the My To Do List Window

Home Page Access

You can access the My To Do List from the Home Page by clicking on the icon.

You can access the My To Do List from the Home Page by clicking on the menu item in the Task List section.
You can access the My To-Do List from the Home Page by selecting the Tasks menu item and then selecting the My To-Do List menu item.

Opening and closing the To-Do List Menu Tree

There are several ways to open and close the folders.
- Double-click the specific folder or sub-folder
- Right-click the specific folder or sub-folder to display the Navigation Menu and left-click the Open or Close command.
- Left-click the Toggle associated with the specific sub-folder.

To-Do List buttons:
- The Refresh button adds To-Do Items to the folders that were created during the user’s current session.
- The Dismiss button closes the To-Do List and returns you back to the Home Page.
Action Menus within the My To Do List Window

- The Action Menu is available by right-clicking the specific To Do Item (Figure2-27). The menu provides the user with the following command:

1. Open- Depending on the To Do type, clicking Open either enables the user to complete the To Do by navigating to the associated option or provides a message box to inform the user to open the associated option for the selected To Do item.
2. View Details- Clicking View Details generates a report that contains the details associated with the selected To Do item.
3. Enter Option – The user can open the actual form item for editing.
4. Enter Post-it Note – The user can put a note attached to the To-Do item.

Types of To-Do items

- **Group Note Completed and an Individual Note is required (User)**
  - Who will receive this:
    This would display on any User/Clinician that had written a Group Progress Note and now needed to write/customize the individual group members notes.
  - How is it displayed:
    It will have the keywords ‘Type: Group’ in the item

Note: You will not be able to open the item directly from the To-Do List item. Access the option directly thru ‘Progress Note (Group and Individual)’

- Access Options
  
  No right click or double-click options. You must access the form item directly from the menu or other methods.

- What it means:
  
  You have completed a group note where that particular client was in attendance and you need to write an individual note for that client’s attendance.

- What you need to do:
  
  Access ‘Progress Note (Group and Individual) and write an individual note for the group member
• **Individual Note is required (User)**
  - Who will receive this:
    This would display on any User/Clinician that had written an Individual Progress Note it is in ‘Draft’ status and needs to be edited/finalized.
  - How is it displayed:
    It will not have the keywords ‘Type: Group’ in the item

  Note: You will not be able to open the item directly from the To-Do List item. Access the option directly thru ‘Progress Note (Group and Individual)’

  - Access Options
    -- Double click opens the To-Do item only, not the form. Only allows you to manage the To-Do, not the form.
    -- Right click to access the Post-it choice
    -- You must enter the actual form via normal access methods to complete the Note

  - What it means:
    You have an Individual Progress note to complete.

  - What you need to do:
    Access ‘Progress Note (Group and Individual)’ and edit/complete the individual note.

• **Co-sign needed for To-Do item (Supervising Clinician)**
  - Who will receive this:
    This will be received by a Supervising Clinician and signifies that that a Co-signature is required for a Progress Note.
  - How is it displayed:
    It will have the keywords ‘Co-sign’ in the item description.

  - Access Options
    -- Double click opens the To-Do item only, not the form. Only allows you to manage the To-Do, not the form.
-- Right click to access the ‘Open’ choice to actually co-sign item.

-- Right click to access the ‘View Details’ choice

- What it means:
  You will need to review and co-sign the progress note.

- What you need to do:
  1. Run the ‘Progress Note Workflow Management Report’
  2. Determine which co-sign notes can be co-signed and which need to be further work
  3. Co-sign / or notify user of additional work

- Assessment in ‘Draft’ and needs additional work or to be Finalized
  - Who will receive this:
    The user who wrote the note will receive a To-Do item to remind them to complete/Finalize the assessment
  
  - How is it displayed:
    Will contain the words ‘assessment and ‘in Draft status’

  - What it means:
    An assessment is in ‘Draft’ status and needs further work/finalization

  - What you need to do:
    Enter the option and continue editing/completing form

  - Access Options
    -- Double click opens the To-Do item only, not the form. It only allows you to manage the To-Do list.
    -- Right click to access the ‘Enter Post-it Note’ choice
    -- Right click to access the ‘Enter Option’ choice. View actual form for editing.
    -- Right click to access ‘Open’ choice. Same as double clicking. Opens the To-Do item only, not the form. It only allows you to manage the To-Do list.
• **Assessment in ‘Pending Approval’ and needs to be approved/‘Finalized’**
  - Who will receive this:
    A supervising clinician that need to ‘Approve/Not Approve’ an assessment.
  - How is it displayed:
    ![Image showing an assessment in 'Pending Approval'](image)
  - What it means:
    A user has submitted an assessment for ‘Approval’
  - What you need to do:
    You will need to ‘Approve’ or ‘Not Approve’ item
  - Access Options
    -- Double click opens the To-Do item only, not the form. It allows you to ‘Approve / Not Approve’ with Comment the assessment.
    -- Right click to access the ‘Enter Post-it Note’ choice
    -- Right click to access the ‘Enter Option’ choice. View actual form in ‘Read Only’ status.

• **Treatment Plan in ‘Draft’**
  - Who will receive this:
    Any user who puts a Client Treatment Plan in ‘Draft’ status.
  - How is it displayed:
    Will contain keywords ‘Draft Client Treatment Plan’
  - Access Options
    -- Double click opens the To-Do item only, not the form. It only allows you to manage the To-Do list.
    -- Right click to access the ‘Enter Post-it Note’ choice
-- Right click to access the ‘Enter Option’ choice. View actual form for editing.

-- Right click to access ‘Open’ choice. Same as double clicking. Opens the To-Do item only, not the form. It only allows you to manage the To-Do list.

- What it means:
  There is a DRAFT Client Treatment Plan that needs addition work.

- What you need to do:
  Access the form and Complete the Client Treatment Plan

**Treatment Plan in ‘PENDING APPROVAL’**

- Who will receive this:
  Any user who puts a Client Treatment Plan in ‘Pending Approval’ status.

- How is it displayed:
  Will NOT contain keyword ‘Draft’
  Will contain keywords ‘for Reviewing’

- Access Options
  -- Double click opens the To-Do item only, not the form. Allows you to manage the ‘Approval’ ‘Not Approval’ process.
  -- Right click to access the ‘Enter Post-it Note’ choice
  -- Right click to access the ‘Enter Option’ choice. ‘Read Only’

- What it means:
  There is a Client Treatment Plan that has been placed in ‘Pending Approval’ status and requires ‘Approval’ for Finalization or ‘Not Approval’

- What you need to do:
  ‘Approve’ or ‘Not Approve’ the Client Treatment Plan
Running Progress Note Workflow Management Report

Access ‘Progress Note CoSign Workflow Mgmnt Rpt’ from the home screen in the normal way, either, menu, or search, or favorites.

From the report screen, select the program you wish to report on and then click the ‘Process’ icon located at the top of the screen.
# Sample Report Output

City and County of San Francisco

<table>
<thead>
<tr>
<th>H. L. Jamal</th>
</tr>
</thead>
<tbody>
<tr>
<td>MH Adult (Counsel)</td>
</tr>
<tr>
<td>Patient Name: HATFIELD, SAM (1612)</td>
</tr>
<tr>
<td>Admit Date: 6/27/2010</td>
</tr>
<tr>
<td>Written By: AVATAR12</td>
</tr>
<tr>
<td>Note Type: MH Adult (Counsel)</td>
</tr>
</tbody>
</table>

**Progress Note:**

CALLED FOR CABE MANAGEMENT, INFO

**Note Addresses Which Treatment Plan Problem:**

Problems: Behavioral Health Needs (Symptoms and Impairments) Goal:
Reduce the symptom/frequency/severity of anxiety. INFO Objectives:
The objective is to be good. Intervention: Individual info.

**Additional Note Written By:** On: As:
Review Co-sign Progress Note from To-Do list

✉ Access To-Do list

✉ Navigate to date in question and open To-Do tree by double-clicking on green arrow

My To Do List

- 09:44 AM CBS CPR Initial Assessment ISAAC CLARKE (000000000) THIS IS THE COMMENT FOR DRAFT Sent By: NETSMART GARY H EHLMAN in Draft status
- 10:25 AM Client Treatment Plan ISAAC CLARKE (000000000) Client Treatment Plan '1ST FOLLOW UP For Reviewing Sent By: NETSMART GARY H EHLMAN
- 11:05 AM Client Treatment Plan ISAAC CLARKE (000000000) Draft Client Treatment Plan 'NEW TEST FOR WORKFLOW' For Reviewing Sent By: NETSMART GARY H EHLMAN
- 11:24 AM Progress Notes (Group and Individual) ISAAC CLARKE (000000000) Co-Sign Adult Residential (SAR) Case For Episode 1 Sent By: NETSMART GARY H EHLMAN

✉ Right-click on To-Do item and select ‘Open’
At the Co-Sign screen, enter a comment, if applicable and submit the form to co-sign the Progress Note.

<table>
<thead>
<tr>
<th>Label</th>
<th>Field Type</th>
<th>Required</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Original and Appended Notes</td>
<td>Text Box</td>
<td>Display Only</td>
<td>This area represents the Progress Note and all Appended Progress Notes</td>
</tr>
<tr>
<td>Co-Signer’s Comments</td>
<td>Scrolling Text Box</td>
<td>N</td>
<td>Co-Signer enters comments here.</td>
</tr>
<tr>
<td>Submit Button</td>
<td>ICON</td>
<td>Y</td>
<td>Submit the form to co-sign the Progress Note.</td>
</tr>
</tbody>
</table>
Review / Co-sign Notes from Menu

Access ‘Review/Co-Sign Note (Workflow) the usual method, either, menu, search or favorites

Select your patient, if no patient already selected.
From the Note Review and Co-Sign main window, select the Note Type you wish to Co-sign. Then select from the filtered List of Notes, the note that you wish to Co-sign. That note will then populate the ‘Original and Appended Notes’ field.

Go to page 2. On page 2, write a comment, if applicable, and submit the form to co-sign the Progress Note.
You will receive the following pop-up dialog box.

![Pop-up dialog box]

You can go to the first page and co-sign more notes, or close the application by selecting the BIG X.

![Close button]
Approve/Reject Assessments from To-Do list

👩 Access To-Do list

👩 Navigate to date in question and open To-Do tree by double-clicking on green arrow

My To Do List

<table>
<thead>
<tr>
<th>My To Do List</th>
</tr>
</thead>
<tbody>
<tr>
<td>► Sent: Wednesday April 7, 2010</td>
</tr>
<tr>
<td>► Sent: Wednesday April 14, 2010</td>
</tr>
<tr>
<td>► Sent: Wednesday April 21, 2010</td>
</tr>
<tr>
<td>► Sent: Friday May 14, 2010</td>
</tr>
<tr>
<td>► Sent: Tuesday May 18, 2010</td>
</tr>
<tr>
<td>► Sent: Tuesday May 25, 2010</td>
</tr>
<tr>
<td>► Sent: Monday June 7, 2010</td>
</tr>
<tr>
<td>► Sent: Wednesday June 16, 2010</td>
</tr>
<tr>
<td>► Sent: Wednesday June 30, 2010</td>
</tr>
<tr>
<td>► Sent: Thursday July 1, 2010</td>
</tr>
<tr>
<td>► Sent: Tuesday July 6, 2010</td>
</tr>
<tr>
<td>► Sent: Thursday July 8, 2010</td>
</tr>
</tbody>
</table>
Right-click and ‘Open’ or Double-click on the To-Do item

<table>
<thead>
<tr>
<th>Label</th>
<th>Field Type</th>
<th>Required</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>To Do Information</td>
<td>Text Box</td>
<td>Display Only</td>
<td>This is the To Do items description and listing</td>
</tr>
<tr>
<td>Approve To Do Item</td>
<td>Radio Button</td>
<td>Yes</td>
<td>Approve-Yes or Approve-No the To Do item</td>
</tr>
<tr>
<td>View Detail</td>
<td>Command Button</td>
<td>No</td>
<td>Press this button to view the details of the assessment form that you are approving</td>
</tr>
<tr>
<td>Comments</td>
<td>Text Box</td>
<td>Yes</td>
<td>Complete the box with your comment re: the approval.</td>
</tr>
<tr>
<td>Submit button</td>
<td>Icon</td>
<td>Yes</td>
<td>Submit the form</td>
</tr>
</tbody>
</table>
Approve/Reject Treatment Plans

- Access To-Do list
- Navigate to date in question and open To-Do tree by double-clicking on green arrow

My To Do List

- My To Do List
  - Sent: Wednesday April 7, 2010
  - Sent: Wednesday April 14, 2010
  - Sent: Wednesday April 28, 2010
  - Sent: Friday May 14, 2010
  - Sent: Tuesday May 18, 2010
  - Sent: Tuesday May 25, 2010
  - Sent: Monday June 7, 2010
  - Sent: Wednesday June 16, 2010
  - Sent: Wednesday June 30, 2010
  - Sent: Thursday July 1, 2010
  - Sent: Tuesday July 6, 2010
  - Sent: Thursday July 8, 2010

  - 11:05 AM Client Treatment Plan ISAAC CLARKE (000000156) Draft Client Treatment Plan 'NEW TEST FOR WORKFLOW' For Reviewing Sent By: NETSMART GARY H ELPMAN

- Right-click and ‘Open’ or Double-click To Do item to open the To Do item
Open Closed ASI

- Open the form from the main menu or from your favorites or from search

- Select the client if not already selected
Select the Episode Number and the closed Addiction Severity Index.

You will get an error message if there is no closed ASI.

Submit
Delete/Re-Assign To Do Items

**Purpose:** To Re-Assign a To Do item from one user To Do list to another user To Do list.

- Access ‘Delete/Re-Assign To Do Item’ from the menu, by searching, or from your favorites.

<table>
<thead>
<tr>
<th>Label</th>
<th>Field Type</th>
<th>Required</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delete/Re-Assign</td>
<td>Single Select</td>
<td>Yes</td>
<td>Select whether this is a delete To Do item or a Re-Assign To Do item</td>
</tr>
<tr>
<td>Select User</td>
<td>Process Search</td>
<td>Yes</td>
<td>Search for the original user or currently has the To Do item</td>
</tr>
<tr>
<td>Select Target User</td>
<td>Process Search</td>
<td>Yes (if Re-Assign is selected)</td>
<td>Search for the user who will receive the To Do item</td>
</tr>
<tr>
<td>Label</td>
<td>Field Type</td>
<td>Required</td>
<td>Comments</td>
</tr>
<tr>
<td>---------------------</td>
<td>------------------</td>
<td>----------</td>
<td>--------------------------------------------------------------------------</td>
</tr>
<tr>
<td>To-Dos</td>
<td>Multiple Select box</td>
<td>Yes</td>
<td>After selecting the original user, all of those To Do items will appear in this box available for select. Select any of the To Do items you wish to Re-Assign.</td>
</tr>
<tr>
<td>Change Sending User ID to</td>
<td>Search</td>
<td>NO</td>
<td>No need to use.</td>
</tr>
<tr>
<td>Submit</td>
<td>Icon</td>
<td>Yes</td>
<td>Submit/Save the record and Re-Assign the To Do items to new Target User.</td>
</tr>
</tbody>
</table>