

FSS Workflow

(Ann) Wulei Tang

Compass Rose via EPIC Training Guide

Table of Contents

☐ [My Dashboard](#)

- ☐ [My Dashboard- Tabs](#)
- ☐ [My Dashboard \(continued\)](#)

☐ [My Identified Cases](#)

- ☐ [My Identified Cases](#)
- ☐ [Working from My Identified Cases](#)
- ☐ [Identified Cases- Assigned to Pool](#)

☐ [Workqueue](#)

- ☐ [How to locate the workqueue](#)
- ☐ [Locating the FSS workqueue](#)

☐ [FSS Encounter Workflow](#)

- ☐ [Client Outreach-Phone](#)
- ☐ [Outreach- Documentation How To's](#)
- ☐ [Unsuccessful Outreach](#)
- ☐ [Successful Outreach](#)
- ☐ [Patient Check-In](#)
- ☐ [Visit-FSS Tab](#)
- ☐ [Find Help Referral System](#)
- ☐ [Making a Referral-FSS Referral Made](#)
- ☐ [Making a Referral-Follow up](#)
- ☐ [Visit-Pediatric Session](#)
- ☐ [Visit- Care Management](#)
- ☐ [Care Coordination- Quick Encounter](#)
- ☐ [Session Visit vs Collateral Visits](#)

☐ [Targets &Tasks](#)

- ☐ [Incomplete Outreach Task](#)
- ☐ [Close Out a Case](#)

☐ [Referrals](#)

- ☐ [How to View Referral Received Information](#)
- ☐ [Referrals Received outside of EPIC](#)
- ☐ [Transcribed Referrals](#)
- ☐ [Z Codes](#)
- ☐ [How to link a Referral](#)

☐ [Appointment Workflow](#)

- ☐ [How to View your appointments](#)
- ☐ [No Show/Cancelled Appointments](#)

My Dashboard

My Dashboard- Tabs

Care Manager and Social Worker Home - FSS

Identified Cases
Report completed: Mon 12/19 03:14 PM
1 Total Cases

My Incomplete Outreach Tasks
Report completed: Mon 12/19 03:14 PM
0 Overdue
0 Due Today
0 Due within Next 7 Days

My Cases
Report completed: Mon 12/19 03:14 PM
3 Total Cases

My Identified Cases
> Identified

Upcoming Targets for My Cases
3 Overdue
0 Due Today

My Incomplete Outreach Tasks
Report completed: Mon 12/19 03:14 PM
Due Date
Overdue
Due Today
Due within Next 7 Days
Total Tasks
0
0
0

My Reports - RW
Last Refresh: 03:14:23 PM
Report Name
Unorganized (2)
FAMILY SUPPORT SERVICES (FSS) Referrals Triage: Reject
FAMILY SUPPORT SERVICES (FSS) Referrals
Finished At Results Status
Ready to run
Ready to run

My Cases
Episode Type (grouped by stat)
> Family Support Services
Total Cases

Case Team Member Cases
Last Refresh: 03:14:36 PM
Episode Type
Family Support Services
Total
3

Schedule at a Glance

In Basket Glance

	New	Total
Social Determinants of Health Referrals	61	982
Letter Queue	2	4
My Open Encounters	1	4

Annotations:

- New Cases Assigned to staff that are in need of outreach
- Targets that need to be completed soon or are over due
- Tasks that need follow up/review
- Active cases on case load (This includes both identified cases and enrolled cases)

My Dashboard (continued)

- All client's referrals will link to an episode automatically and fall into the Identified Cases- Assigned to Pool under the FSS staff's dashboard.
- After the manager/supervisor assigns the case to counselor, it will appear in staff's My Identified Cases.

The screenshot displays the EpicCare interface for a Family Support Services (FSS) staff member. The top navigation bar includes various tools like Remind Me, In Basket, and Encounter. The main dashboard is divided into several sections:

- Identified Cases - Assigned to Pool:** Shows a message "Your data source returned no rows." An arrow points to this section.
- My Identified Cases:** Shows a report completed on Fri 7/26 03:30 PM with 3 Total Cases. An arrow points to this section.
- My Incomplete Outreach Tasks:** Shows a report completed on Fri 7/26 03:30 PM with 5 Overdue, 0 Due Today, and 0 Due within Next 7 Days tasks.
- My Cases:** Shows a report completed on Fri 7/26 03:30 PM with 11 Total Cases.

Below these sections, there are more detailed views for each category, including "Upcoming Targets for My Cases" with a "Run report" button, "My Incomplete Checklist Tasks" with 2 Overdue, 3 Due Today, and 0 Due within Next 7 Days tasks, and "My Reports - RW" with a last refresh of 03:37:37 PM. The "FSS Report and Website Links" section includes links for Reports (Enrolled Patients for FSS, Enrolled Patients with Less Than 20 Minutes of Care) and Website (https://hitesite.org/, nyc.gov/accessshra).

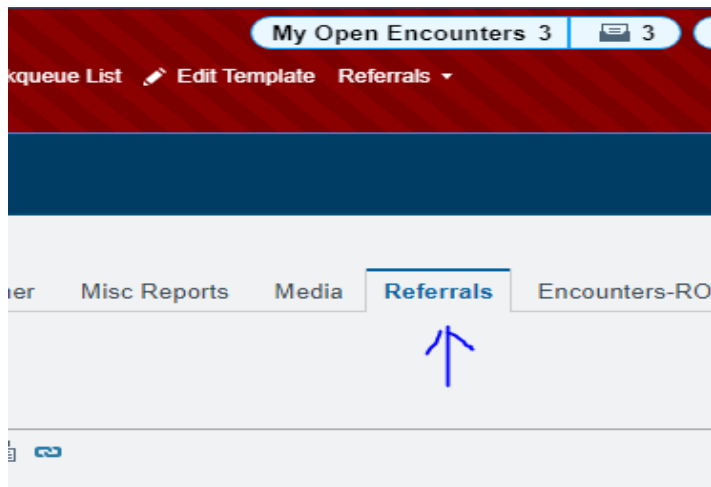
What is Episode?

- An episode represents the program a client is enrolled in. It links all documentation of all activities done with or for the benefit of the client while they are enrolled in that program. The Family Support Services (FSS) episode works best when the client's initial referral and all related encounter (enrollment, outreach, visits) documentation is linked to it.
- The client's basic enrollment information including the date the client was identified, started receiving services, stopped receiving services, and the client's enrollment status need to be accurately documented on the episode.
- For FSS' many clients who receive services at multiple, distinct points-in-time, it is vital that the start dates, end dates, and initial referral linked are matched to the correct episode. This will ensure that all encounters and their attached documentation, are associated with the correct service time period and are reported correctly.

My Identified Cases

My Identified Cases (continued)

- Under Chart Review, select the Referrals tab

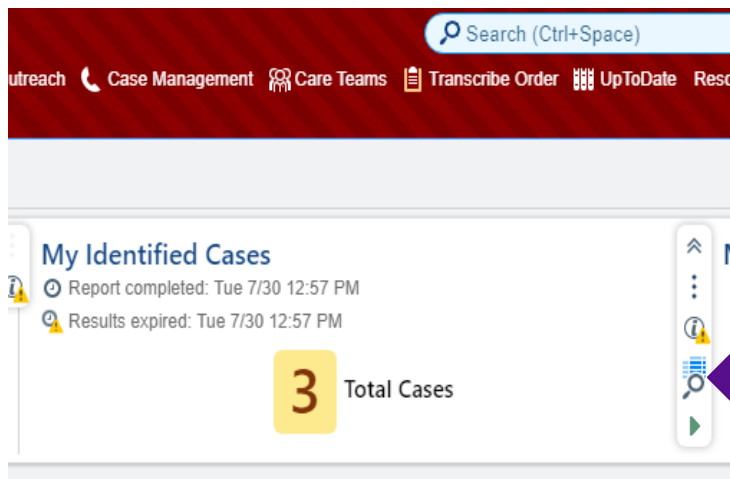


Click the blue hyperlink under Referral information

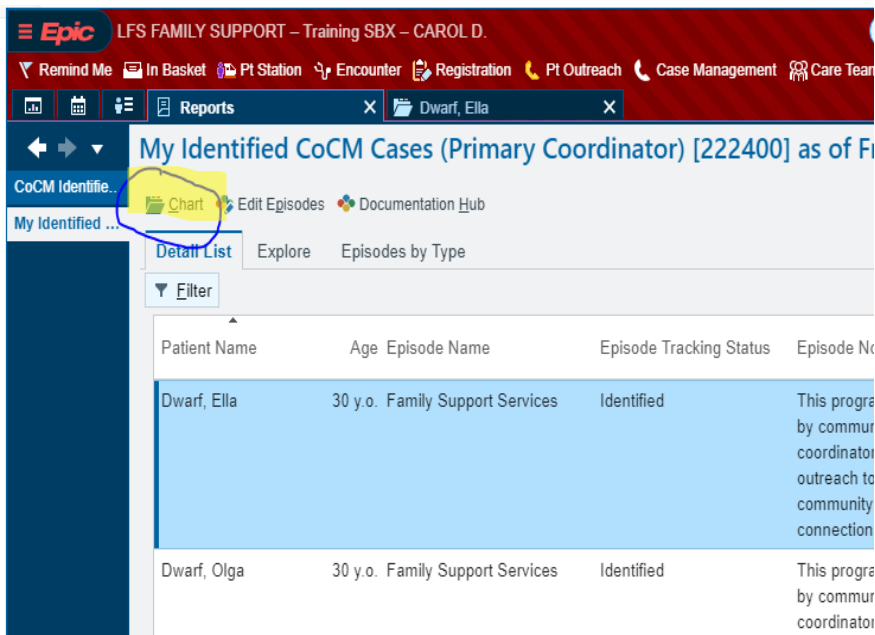
Referral				Referral # 16600
Referral Information				
Referral # # 16600	Creation Date 07/04/2024	Referral Status Authorized	Status Update 07/04/2024; Status History	
Status Reason No Approval Necessary - Patient Tracking	Referral Type Ancillary	Referral Reasons none	Referral Class Internal	
To Specialty Care Coordination	To Provider none	To Location/Place of Service none	To Department none	
To Vendor none	Referred By Pendres Gallaway, MD	By Location/Place of Service FAMILY HEALTH CENTERS AT NYU LANGONE - FLATBUSH	By Department LFH CA FAM MED	
Priority Routine	Start Date 07/04/2024	Expiration Date 07/04/2025	Referral Entered By Pendres Gallaway, MD	
Visits Requested 1	Visits Authorized 1	Visits Completed	Visits Scheduled	
Procedure Information				
Service Details Procedure REF981 - AMB REFERRAL TO FAMILY		Modifiers none	Provider	Requested 1 Approved 1

Working from My Identified Cases

- Under the My Identified Cases, select “view expired report”
- Select the patient then click “Chart”



View
Expired
Report



My Identified Cases (continued)

- View the Diagnoses & Reason for Referral
- Start Outreach to the Client (see Outreach Section)

The screenshot displays the EpicCare Referral Entry interface for a patient named Ella Dwarf. The interface is divided into several sections:

- Left Sidebar:** Contains patient information (Ella Dwarf, Female, 30 y.o., 5/25/1994), MRN (10071513), and various clinical details like MOLT, Code, and COVID Vaccine Eligibility. It also lists active providers (Pendres Galloway, MD) and active PTHs (None).
- Referral Entry Form:**
 - General:** Includes fields for Referral # (16600), Type (Ancillary), Priority (Routine), Class (Internal), and Referral Reasons.
 - Referral Status:** Shows Status (Authorized), Auth Reason (No Approval Necessary - Patient...), and Last Updated (7/4/2024).
 - Referred By/To:** Lists the Referring Provider (Pendres Galloway, MD) and the Referred To (Care Coordination).
 - Diagnoses:** A section with a yellow highlight and a blue arrow pointing to it. It lists two diagnoses: V68.1 ICD-9-CM Z59.1 ICD-10-CM Inadequate housing and V60.89 ICD-9-CM Z59.7 ICD-10-CM Insufficient social insurance and welfare support.
- Referral Sidebar (Right):** Contains Order Information (Order Details, Associated diagnoses), Order Questions (Reason for Referral: Financial Resource Strain), Coverage Information (MEDICAID/MEDICAID (Elapsed)), and Linked Encounters (None found).

Identified Cases- Assigned to Pool

- The entered referral for will appear in the Identified Cases-Assigned to Pool. Select “Edit Episodes” to assign this episode to staff.

Identified Cases - Assigned to Pool

Your data source returned no rows.

3 Total Cases

My Identified Cases

Report completed: Tue 7/30 12:57 PM

Results expired: Tue 7/30 12:57 PM

My Incomplete Outreach Tasks

Run report

Report: My Incomplete Episode Outreach Tasks

My Cases

Report completed: Tue 7/30 12:57 PM

Results expired: Tue 7/30 12:57 PM

11 Total Cases

CoCM Identified FSS Cases - Pool FHC [60882632] as of Tue 7/30/2024 1:36 PM

Chart Enrollment Enc FYI **Edit Episodes** Documentation Hub

Detail List Explore Summary by Status

Filter Clear All Filters

Re-run Report Refresh Selected Select All

Patient Name	MRN	Episode Type	Linked Program Episode Type	Episode Tracking Status	Episode Responsible Staff	Episode Department	Enroll Date	Episode Creation Date	Care Team Member	Episode Status
[REDACTED]	[REDACTED]	Family Support Services (FSS)		Identified	FHC FSS IDENTIFIED EPISODE OVER 18	LFS FAMILY SUPPORT [100048001]		07/30/2024		Active

Identified Cases- Assigned to Pool (con't)

Once you add yourself to the case team, the client will move to My-Identified Cases pool.

The screenshot displays the 'Family Support Services' interface. At the top, the 'Program' is set to 'Family Support Services (FSS)'. The 'Start Date' is '10/2/2024' and the 'Department' is 'LFS FAMILY SUPPORT'. The 'Enrollment Reason' is 'Identified using referral data'. Below this, the 'Status' is 'Identified', with buttons for 'Identified', 'Enrolled', 'Declined', and 'Closed'. A purple arrow points to the 'Enrollment Reason' field with the text 'Update the enrollment reason'.

The 'Case Team' section shows '+ Add New' and '+ Add Me' buttons. A purple arrow points to the '+ Add Me' button. Below this is a table with columns: Relationship, Review Frequency, Review Due, Start, and End. The table contains one entry: 'FHC FSS IDENTIFIED EPISODE' with a start date of '10/2/2024' and an 'End' button.

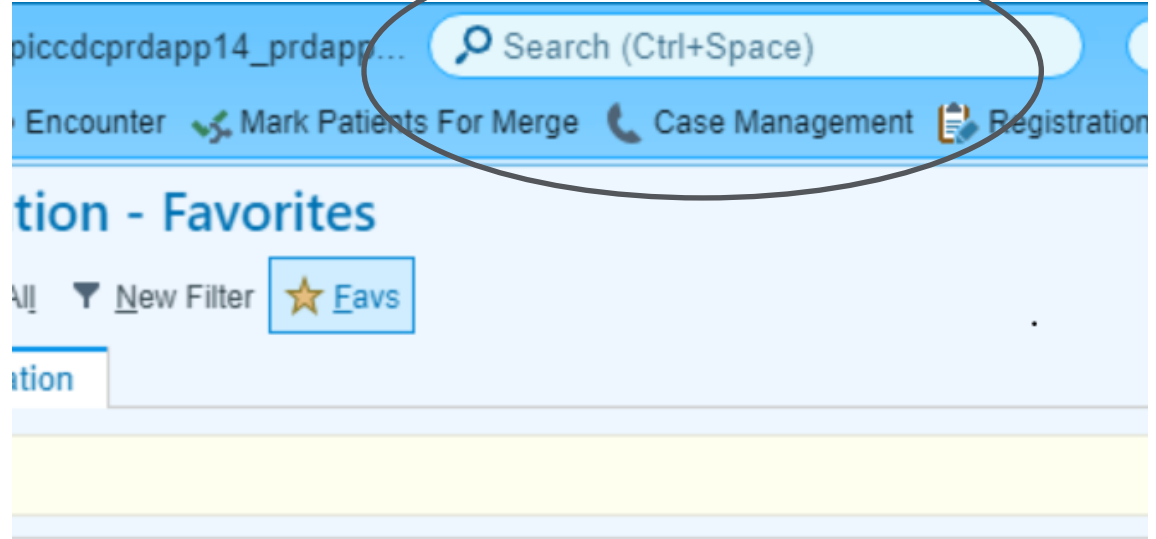
Below the table, the 'Case Team Member' section shows 'Wu Lei Ann Tang' as the 'Case Manager'. The 'Relationship' is 'Case Manager'. The 'Review Frequency' is set to 'Days'. The 'Last Reviewed' date is 'Never'. The 'Responsible Staff' checkbox is checked. A purple arrow points to the 'Responsible Staff' checkbox. The 'Pool' section shows 'Start Date' as '10/2/2024' and 'End Date' as empty. The 'Next Review Date' is set to 'Tomorrow'. The 'Accept' and 'Cancel' buttons are visible. A purple arrow points to the 'Accept' button.

At the bottom, the text 'Editing case for' is followed by a redacted name. The 'Accept' and 'Cancel' buttons are also present at the bottom right.

Workqueue

How to locate the workqueue

- Type on the search bar “workqueue” and it will bring you to the main page where all of NYU’s workqueues are.



Locating the FSS workqueue

- To find the workqueue, select **New Filter** and enter the WQ name or ID
- Select **Apply** once you have located the correct list
- Save it to your favorites (**Favs**). You can add it to your favorites by clicking on the **Star** ★ icon

The screenshot shows the 'Workqueue List - Referral/Authorization - Filtered' interface. A purple arrow points to the 'New Filter' button in the top right. Below the button, a filter dialog is open with 'Name Contains or ID' set to '54831'. A purple arrow points to the '54831' input field. The filter results show a table with columns 'F', 'ID Name', and 'Service Area'. The first row is highlighted in blue and contains a star icon, the ID '54831', the name 'FAMILY SUPPORT SERVICES REFERRALS', and the service area 'NYU LANGONE HEALTH'. A yellow circle highlights the star icon in the first column of this row. Below the screenshot, a table shows the filtered results:

F	ID Name	Service Area
★	58391 GLWD Referrals	NYU LA
★	54831 FAMILY SUPPORT SERVICES REFERRALS	NYU LA

Workqueue (con't)

- When Selecting 'Show mine' you will be able to see patients assigned to you by Program Manager or yourself.
- Double click on your patients row or use the side bar to review the referral

The screenshot displays the 'Referral/Authorization Workqueue FAMILY SUPPORT SERVICES REFERRALS [54831] --- Filtered View --- Last' interface. At the top, there are navigation buttons: 'Workqueue List', 'Pt Outreach', 'Appts', 'Edit Template', and 'Template Bu'. Below this is a 'Select Workqueue List' button. The main table has columns: 'Patient MRN', 'Name', 'Next Appoint...', 'Order Priority', 'Procedu', 'Coverage', and 'Pend Reason'. The table is filtered to show 107 items. A red callout points to the 'Show Mine' button in the top toolbar, with the text 'Select "Show Mine" to view your patients'. Another red callout points to a row in the table, with the text 'Double Click on your Patients row'. The table shows several rows of patient referrals, including 'AMB REFERRAL TO FAMILY SUPPORT SERV...' and 'HEALTHFIRST/HEALTHFIRST MEDICAID- NYU/LMC...'.

Patient MRN	Name	Next Appoint...	Order Priority	Procedu	Coverage	Pend Reason
100000	John Doe		Routine	AMB RE	HEALTHFIRST/HEALTHFIRST MEDICAID- NYU/LMC...	
100001	Jane Smith			AMB REFERRAL TO FAMILY SUPPORT SERV...		
100002	John Doe			AMB REFERRAL TO FAMILY SUPPORT SERV...	AETNA/AETNA OPEN ACCESS ELECT CHOICE (EPO)	
100003	Jane Smith			AMB REFERRAL TO FAMILY SUPPORT SERV...	SELF-PAY FHC FINANCIAL ASSISTANCE(HB ONLY)/...	
100004	John Doe			AMB REFERRAL TO FAMILY SUPPORT SERV...		
100005	Jane Smith		Routine	AMB REFERRAL TO FAMILY SUPPORT SERV...	EMPIRE BCBS HEALTH PLUS/BCBS HEALTHPLUS...	
100006	John Doe		Routine	AMB REFERRAL TO FAMILY SUPPORT SERV...	HEALTHFIRST/HEALTHFIRST MEDICAID- NYU/LMC...	
100007	Jane Smith		Routine	AMB RE	PORT SERV... MEDICAID/MEDICAID	
100008	John Doe		Routine	AMB RE	PORT SERV... EMPIRE BCBS HEALTH PLUS/BCBS HEALTHPLUS...	
100009	Jane Smith		Routine	AMB REFERRAL TO FAMILY SUPPORT SERV...	HEALTHFIRST/HEALTHFIRST MEDICAID	
100010	John Doe		Routine	AMB REFERRAL TO FAMILY SUPPORT SERV...	EMPIRE BCBS HEALTH PLUS/BCBS HEALTHPLUS...	
100011	Jane Smith		Routine	AMB REFERRAL TO FAMILY SUPPORT SERV...	EMPIRE BCBS HEALTH PLUS/BCBS HEALTHPLUS...	
100012	John Doe		Routine	AMB REFERRAL TO FAMILY SUPPORT SERV...	EMPIRE BCBS HEALTH PLUS/BCBS HEALTHPLUS...	

FSS Encounter Workflow

Client Outreach-Phone

- For Family Support Services, every client needs to be outreached **TWICE** with the exception of a successful outreach already happening during that 1st phone call or in the case of a refusal of services.
- Initial outreach should occur within 5 business days of referral assignment. Second outreach call (if initial call was unsuccessful) should occur within 5 business days of initial call.
- Outreach is considered successful when you call a client and they are receptive to services and they agree to a scheduled appointment or they agree to have an initial appointment on the phone at that time.
- If a counselor calls a client and they either don't answer the call, a voicemail is left, or they answer the call and decline the services that is considered an unsuccessful outreach attempt.

Outreach- Documentation How To's

In order to document both successful and unsuccessful patient outreach from the action buttons you will select Triage and then from the drop down menu you will select Pt Outreach, or select "Pt Outreach" tool bar.

Please note both successful and unsuccessful outreach are documented the same way, but successful outreach should lead to a booking of an appointment (How to book an appointment is under the Successful Outreach section)

The screenshot displays the EpicCare interface for the 'Referral/Authorization Workqueue FAMILY SUPPORT SERVICES REFERRALS [54831]'. The top navigation bar includes options like Schedule, Remind Me, In Basket, Chart, Encounter, Workqueue List, Pt Outreach, Apps, Edit Template, and Template Build Report. The main window shows a table of referrals with columns for Patient MRN, Name, Next Appt, Order Priority, Procedure Name, and Coverage. A red callout box with the text '1. Select Triage and from the drop down menu select Pt Outreach' points to the 'Triage' button and its dropdown menu, which includes options like 'Jump To Triage', 'Accept', 'Reject', 'Redirect', 'Request Info', and 'Pt Outreach'. Below the table, a dialog box titled 'Encounter Selection for Fake, Adam' is open, showing a table with columns for Date, Reason for Call, and Department. A red callout box with the text 'Step 2: Select New' points to the 'New' button in the dialog box. The bottom of the dialog box has buttons for 'New', 'Search >>', 'More', 'Accept', and 'Cancel'.

Outreach-Initiation Tab

- Once you select the client and click “Create an Encounter”, your encounter will open. You will be brought to the **Initiation tab** in which you will document initial call and if you were able to get in contact with someone
- You will then document an outcome based on your encounter. Be sure to check the appropriate settings for your encounter (type- phone, in-person, etc)

The screenshot displays the EpicCare interface for the 'Initiation' tab. The patient profile for Adam Fake (MRN: 15971496) is visible. The 'Reason for Outreach' section shows a list of outreach reasons, with 'Outgoing Call' highlighted. A purple arrow points from the 'Outgoing Call' button to the 'Communication' form. The 'Communication' form includes fields for 'Type' (Phone (Outgoing)), 'Date/Time' (02/03/2023 01:15:44 PM EST), 'Contact Info' (Fake, Adam (Self)), 'Contact name' (Fake, Adam), 'Relationship' (Self), 'Phone number' (555-123-4567), and 'Follow-Up' (Outcome: Left Message). A red callout box points to the 'Outcome' dropdown, stating: 'In outcome section you will select the outcome of the outreach and include additional comments as needed'. Another purple callout box points to the 'Contact Info' section, stating: 'Fill info of person you contacted'. The bottom of the screen shows the 'ADD ORDER' and 'ADD DX (0)' buttons, along with the 'LEVEL OF SERVICE' and 'SIGN ADDENDUM' buttons.

Outreach-Initiation Tab

- Begin with your **Contact Section** and fill in how the client was contacted (Incoming Call/Outgoing Call/Other, see previous page).
- Document the outreach reason accordingly. For example, if you are contacting a client from your referral WQ, please document the Outreach Reason as **“Referral Received.”**

The screenshot displays the 'Initiation' tab in a software application. The top navigation bar includes 'SnapShot', 'Chart Review', 'Initiation', 'FSS', 'Care Mgmt', 'Wrap-up', and 'Flowsheets'. Below this, the 'Initiation' section has sub-tabs: 'Admin', 'Benefits Inquiry', 'Scans', 'Dictations', 'Open Orders', 'Care Teams', 'Print AVS', 'Preview AVS', and 'Pt Decl'. The 'Outreach Reason' sub-tab is selected. Under 'Contacts', there are options for '+ Incoming Call', '+ Outgoing Call', and '+ Other'. A message states 'No contacts' and 'You can use the button to the upper left to add an item to the list.' Below this, the 'Outreach Reason' section has a header with '+ Add Group', '+ Add Row', '+ Add LDA', 'Responsible', and 'Macro Manager'. The 'Outreach Reason' section contains a list of reasons with checkboxes: 'Appointment - Reminder', 'Appointment - Missed', 'Referral Received', 'Session follow-up - referral outcome', and 'Session follow-up - other'. The 'Referral Received' checkbox is circled in blue. At the bottom, there are buttons for 'Restore', 'Close', and 'Cancel'.

Unsuccessful Outreach

- After two unsuccessful outreach attempts, receiving needed services from external programs, patient declines services, you have to manually close the referral within the WQ by selecting closed from the drop down menu under “Status”
- Closed referral outcome status needs to align with closed referral reason:
- For unsuccessful outreach attempts that have declined services, document the outreach effort using previous steps and change referral status in WQ to **“Patient Refused Service”**
- For unsuccessful outreach attempts in which a client reports receiving services from external source, document the outreach effort using previous steps and change referral status in WQ to **“Receiving Service Out of Network (OON)”**
- For unsuccessful outreach attempts that did not answer the initial and follow up call, document the outreach effort using previous steps and change referral status in WQ to **“Unable to contact patient after 2 attempts”**

The screenshot displays the WQ Communications interface. On the left, a sidebar lists various sections: General, Referred By/To, Diagnoses, Services, Treatment Plan, Communications (selected), Scheduling, Appointment List, Referral Details, and Authorization. The main area shows a 'Communications' tab with a 'History' section. A red arrow points to the 'Closed' option in the 'Status' dropdown menu. Below this, a 'Reason' dropdown menu is open, showing a list of reasons. The 'Patient Refused Service' option is highlighted in the reason list.

Title	Number
Authorized	4
Canceled	4
Closed	6
Denied	5
Error	1001
New Request	7
Open	2
Pending Review	3
Reaching Medicaid UT Limit	1000

Title	Number
Already receiving services / active client	15
Auth could not be secured post service	11
Caregiver kept appointment	14
Caregiver no show after 2 scheduled appointments	13
Coverage Terminated	3
Expired-Auto Closed	2
Insurance Not Accepted	6
No Referral Necessary	5
Not Clinically Appropriate	17
Order Canceled-Auto Closed	1
Patient Refused Service	4
Patient Scheduled External	18
Receiving Services At Other LFH-Dental Site	8
Receiving Services OON	7
Referral Assigned to Caregiver	16
Unable to Contact/Schedule patient (after 2 attempts)	12
Unable to Contact/Schedule patient (after 3 attempts)	10

Unsuccessful Outreach (con't)

If outreaches are unsuccessful, change from identified status to either the case declined or closed within the care management tab

Note: Graduated & Declined tab on this diagram are no longer valid. Use the Closed option, then choose the appropriate reason.

The screenshot displays the 'Care Mgmt' interface for 'Family Support Services'. The top navigation bar includes tabs for Snapshot, Chart Review, Initiation, FSS, Care Mgmt (highlighted with a purple arrow), Wrap-up, and Flowsheets. The left sidebar shows patient information for Adam Fake (Male, 62 y.o., 1/1/1960, MRN: 15971496) and a list of current programs, including Family Support Services (Identified). The main content area shows the program details for Family Support Services, including Start Date (12/15/2022), Enrollment Reason, Responsible Staff (RAMOS, JOSLYNN), Department (LFS FAMILY SUPPORT), and a table for Support & Services Provided. The table has columns for Type, Start Date, and End Date, with a row for Food Security (Start Date: 12/19/2022). At the bottom, the Status section shows tabs for Identified, Enrolled, Graduated, Declined, and Closed. A red arrow points to the Identified tab, and a red box highlights the Declined and Closed tabs.

Type	Start Date	End Date
Food Security	12/19/2022	

Status: Identified | Enrolled | Graduated | Declined | Closed

Successful Outreach

- If the client is interested in getting help but doesn't have time for a phone session during your outreach call, please schedule an appointment with the client.

- Go to the Appointment desk, search for patient **(Remember to correct identify patients by using 3 point identification- Last Name, First Name & DOB)**

The screenshot displays the Epic EHR interface. At the top, the 'Appointment Desk' is visible with a red callout bubble stating 'Step 1: Go to Appointment Desk'. Below this, the 'Referral for Fake, Adam' window shows patient details: MRN: 15971496, Insurance: No Coverage, and Pre-Auth Phone: No Coverage. To the right, the 'Referral Sidebar' shows 'Linked Future Encounters' (None found), 'Currently on Workqueues' (FAMILY SUPPORT SERVICES REFERRALS [54831]), and 'Referral Information' (Type: Clinician Referral, Class: Incoming, Routine, Date: 10/6/2022 - 10/6/2023). In the foreground, the 'Patient Lookup' window is open, showing the 'Recent Patients' tab. It contains fields for Last Name, First Name, Middle, SSN, Sex, DOB, MRN, Phone, CSN, and Enc. Provider. A red callout bubble points to the DOB field with the text 'Step 2: Search for patient'. The 'Find Patient' button is highlighted.

Successful Outreach (con't)

- Select **Book It** for appointments scheduled in the future & **Walk-In** for same day appointments.
- **Select** your visit type

Appointment Desk

Book It One Click Walk In Request Reports Patient Options Printing Outside Records OASIS Message History

Schedule appointments (Alt+B)

Patient Summary
Fake, Adam
1234 Main St
Brooklyn NY 11220
MRN: 15971496
DOB: 1/1/1960
SSN: [REDACTED]
Reg Status: New [2]

Step 3: Select BOOK It

Department: LFS FAMILY SUPPORT

NEW VISIT

Notes
Add a visit type
Add a provider

Visit Type

Specialty Visit Type	ID	General Visit Type	ID
FOLLOW UP-FSS	987	No matches found	
INITIAL-FSS	988		
TELEPHONE FOLLOW UP - FSS	1788		
TELEPHONE INITIAL - FSS	1789		
VIDEO VISIT - FOLLOW UP FSS	993		
VIDEO VISIT - INITIAL FSS	992		

Visit Types

Successful Outreach (con't)

- Add yourself as the provider (Counselor)
- Select a date and time that works for you and your client
- **Note:** Make sure you deselect the **In-Network** button

NOTE: Make sure to deselect the In-Network button

The screenshot displays the LFS FAMILY SUPPORT system interface. On the left, a sidebar shows the 'Book It' section with a 'Department' dropdown set to 'LFS FAMILY SUPPORT' and an 'Add Visit' button. Below this, a list of visits is shown, including one for 'Tue Nov 01 at 9:00 AM' with a duration of '1 hour' and a note 'Arrive by 9:00 AM'. The main area shows a 'Providers' list with 'joslynn' entered in the search bar. A red callout box points to the 'Add a provider' button and the search bar, stating 'Step 5: Add yourself as the provider (Counselors)'. Another red callout box points to the 'In-network only' checkbox, which is unchecked, stating 'Step 6: Select a date and time that works for you and your client'. A third red callout box points to the 'Tue Nov 01' date and '9:00 AM' time slot, stating 'Step 6: Select a date and time that works for you and your client'. A purple callout box points to the 'In-network only' checkbox, stating 'NOTE: Make sure to deselect the In-Network button'. The bottom right shows a calendar view for November 2022, with the date '11/1/2022' selected. The bottom left shows a 'Providers' section with a dropdown menu set to 'All' and buttons for 'Female' and 'Male'.

Successful Outreach (con't)

- You will know you have successfully created an appointment for your client when you see this in your appointment desk
- Note: The referral will auto-close from the referral WQ if you link the referral to the appointment. (See the How to linked referral section)

The screenshot displays the 'Appointment Desk' interface. On the left, a sidebar shows patient information for Adam Fake, including age (62), gender (Male), date of birth (01/01/1960), and contact details. The main area features a 'Patient Summary' card for Adam Fake (62 yrs) with fields for MRN, Sex, Mobile, E-mail, Address, DOB, Gender Identity, Home, Pt Type, SSN, Pref. Pronoun, Work, HM, Reg Status, and Lang. Below this is a 'Patient Guarantor Accounts' table. At the bottom, a table lists appointments, with one entry for 11/1/2022 at 9:00 a.m. for an initial FSS visit with provider Joslynn Ramos. A circular progress indicator on the right shows 33% completion (2 of 6) with the label 'No Shows'. A black arrow points from the text 'this in your appointment desk' to the appointment table.

Fake, Adam (62 yrs)	MRN	Sex	Mobile	E-mail
	15971496	Male [2]	555-123-4567	myemail@email.com
1234 Main Street	DOB	Gender Identity	Home	Pt Type
Brooklyn NY 11220	1/1/1960		555-123-4567	
	SSN	Pref. Pronoun	Work	HM
	Reg Status	Lang:	Intrpr	
	New [2]			

Guarantor Account Name	Guar Acct#	Status	SA	Type	Financial Class	Balance
FAKE, ADAM	6328980		NYUSA	P/F	SELF	0.00

Future	Past	Referrals	NYU Linked	R...	Encounter Date	Time	Len	Visit Type	Dept	Dept Spec	Provider	Interp Vendor	Appt Notes	CSN
					11/1/2022 Tue	9:00 a	60	INITIAL-FSS [988]	LFSES	Care	Joslynn Ramos			8932626

Successful Outreach (con't)

- If an outreach is successful at the point of successful contact client is enrolled into our program
- From the **Care management** tab please select “**New Program**” to add new program

The screenshot displays the 'Family Support Services (FSS)' enrollment form and its summary page. The form includes fields for Program, Start Date, Enrollment Reason, Responsible Staff, Department, and Support & Services Provided. A red callout box points to the Start Date field with the text 'Select FSS and a start date'. A purple callout box points to the Support & Services Provided section with the text 'Fill in the Support & Service Provided'. The Status section shows buttons for Identified, Enrolled, Graduated, Declined, and Closed. A red callout box points to the Enrolled button with the text 'Now that the patient is enrolled select enrolled'. The summary page shows the program details, including Effective Dates, Overview, Targets, and Timeline.

Form Fields:

- Program: Family Support Services (FSS)
- Start Date: 10/31/2022
- Enrollment Reason: [Empty]
- Responsible Staff: RAMOS, JOSLYNN
- Department: LFS FAMILY SUPPORT
- Support & Services Provided: [Table with Type, Start Date, End Date columns]

Status: Identified, Enrolled, Graduated, Declined, Closed

Overview: Insert SmartText

Family Support Services Summary:

- Effective Dates: 10/31/2022 - present
- Overview: This program is intended for use by community resource coordinators to track the outreach to and progress of community resources connections and patients.
- Targets: 0 Completed, 0 Overdue, 1 Upcoming (Next Target Due: 11/30/2022)
- Timeline: Today Patient Outreach with Joslynn Ramos, LCSW
- Related: More Information, Program Details Report

Outreach Notes- Examples

- If an outreach call turns into a visit then you should book the appointment through the walk in tab in appt desk while you are on the call. Outreach note will be documented through the appt reflected in the counselors schedule.
- Clients who came in through a referral (I.e. REDCAP, EPIC etc.) will have their appointment scheduled through book it within the appt desk. A hybrid note can be completed.

The screenshot displays the 'Appointment Desk' interface for a patient named Lillian Dwarf. The interface includes a sidebar with patient information, a main area with appointment options, and a patient summary pop-up.

Patient Information (from sidebar):

- Lillian Dwarf**
- Female, 30 y.o., 08/08/1994
- 212-555-2121
- MRN: 10071993
- TISCH - PARENT
- SSN: xxx-xx-9999
- CODE: None
- MOLST: None
- Registries: None
- COVID-19 Vaccine: Unknown

Appointment Desk Options:

- Book It
- One Click
- Walk In
- Request
- Reports
- Patient Options
- Printing
- Outside Records
- OASIS Message History

Patient Summary (Pop-up):

Patient Summary (Edit)				
Dwarf, Lillian (30 yrs)	MRN	Sex	Mobile	E-mail
123 Fourth Street	10071993	Female [1]		dina8777@gmail.com
Brooklyn NY 11237	DOB	Gender Identity	Home	Pt Type
	8/8/1994		212-555-2121	
	SSN	Pref. Pronoun	Work	
	xxx-xx-9999			
	Reg Status	Lang:	Intrpr	

Appointment Status:

- No past appts
- No Shows

Patient Check-In

Once the patient has arrived you will go to the appointment desk and look up the patient using Full Name, DOB and Sex

Once the patient arrives select the Appointment desk

Search for the patient using Patient Lookup

Open Patients

PATIENT NAME	NYU Langone MRN	LICH MRN	Sex	DOB	Street Address
Fake, Adam	15971496		M	1/1/1960	1234 Main Street, Brooklyn NY 1122

Patient Check-In (con't)

- Counselors will select the patient from the “Schedule” highlighting the patient’s information row
- Next the counselor will select the “**Check in**” activity button
- This will take the counselor to the check in screen where they will complete the **Communicable Disease Screening**

The screenshot shows a software interface for patient check-in. A purple arrow points to the 'Schedule' tab in the top navigation bar. Another purple arrow points to the 'Check in' button in the top right corner. A third purple arrow points to the patient information row in the schedule table. A black arrow points from the 'Communicable Disease Screening' text in the list to the corresponding section in the form.

Schedule Table:

Status	Prov	MyChart Update Time	Patient	Infection Risk	Type	Notes	Last Event	CSN	Patient MRN	Provider	Referring Provider	Registries	Same Da
Scheduled		9:00 AM	Test, LFHSPAT...		FOLLOW UP FSS			495047893	10076440	Diane Feliciano		Active OR Attributed to Payer Patients Wellness Registry: All...	

Form Fields:

Time taken: 9/17/2024 1536

Communicable Diseases- Initial Screening (Please offer a facemask to all patients who have symptoms)

Have you had a fever with cough and/or fever with rash in the last three days? .
No 44 taken 7 months ago

Yes No

Communicable Diseases- Travel History Screening

Have you traveled or had close contact with someone who has traveled in the last 14 days?"

Yes No

Create Note

Patient Check-In (con't)

- There are two parts to check in a patient first confirm all patient demographics.
- Second complete Communicable Disease screening[

Check In - FU FSS on 12/12/22 at 4:10 PM with RAMOS, JOSLY in LFSFS for 60 minutes

Communicable Disease Screening Undo Annt Rec Claim Info Referrals MSPQ Documents ABN New Recall Payment Collection Outside Records Visit Label More

FOLLOW UP-FSS

2. Complete Communicable Disease Screening

Patient Demographics for FAKE, ADAM [15971496]

DOB: 1/1/1960 SSN: Age: 62 yrs Sex: Male Home Phone: 555-123-4567 Work Phone: Address: 1234 Main Street E-Mail: myemail@email.com City/State/Zip: Brooklyn, NY 11220 Perm Comments:

1. Confirm Patient Demographics

Appointment Information

Name: Fake, Adam MRN: 15971496 CSN: 898293568 Status: Sch Date: 12/12/2022 Length: 60 Time: 4:10 PM Copay: \$0.00 Visit Type: FOLLOW UP-FSS [987] Department: LFS FAMILY SUPPORT Provider: Joslynn Ramos, LCSW Referral #: Referral Status: Referring Provider: Patient Type: Notes:

Selected Displays

☒ As Patient Demographics Style
☒ As Appointment Information Style

Patient Check-In (con't)

- After you have successfully checked in your patient return to the **Schedule** tab
- In order to open up the patients chart to begin your session visit documentation double click on the patients appointment row



The screenshot shows the 'Schedule' tab in an EHR system. At the top, there are navigation icons for 'Open Slots', 'Chart', 'Show Orders', 'Orders', 'Enter/Edit Results', 'Sign Encounter', 'Print AYS', 'Change Prov', 'No Show', 'Outlook Settings', and 'Document Group'. Below this is a filter bar for 'RAMOS, JOSLYNN' on 'Dec 12, 2022', with a 'Filter by Status' dropdown and 'Total: 1'. A table lists appointments with columns: Status, Prov, MyChart Update, Time, Patient, Infection Risk, Type, Notes, Last Event, CSN, Patient MRN, and Provide. One appointment is shown: 'Arrived' status, 'Checked in: 3:43 PM', '4:10 PM' time, 'Fake, Adam' patient (62 y.o. / M), 'FOLLOW UP-FSS' type, 'Department check-in complete' notes, CSN '898293568', Patient MRN '15971496', and provider 'Joslyn Ramos'. A purple arrow points to the 'Schedule' tab, and a mouse cursor points to the appointment row.

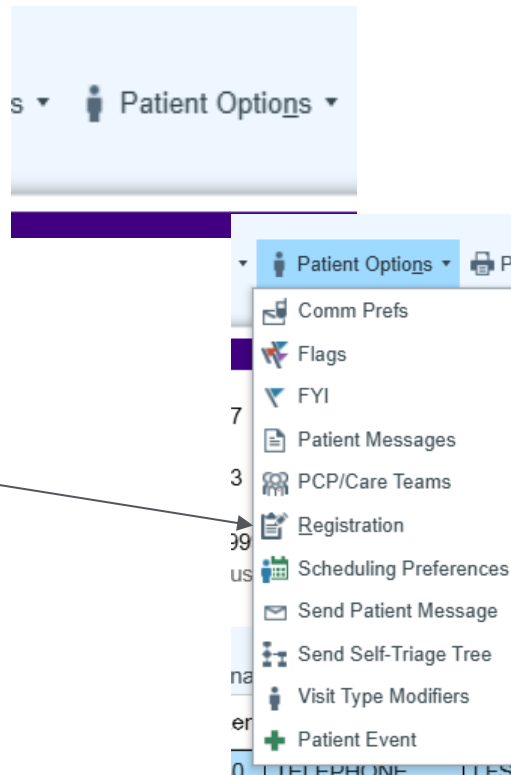
Status	Prov	MyChart Update	Time	Patient	Infection Risk	Type	Notes	Last Event	CSN	Patient MRN	Provide
Arrived			4:10 PM	Fake, Adam 62 y.o. / M		FOLLOW UP-FSS		Department check-in complete	898293568	15971496	Joslyn Ramos

- **Note:** If the client is enrolled in Medicaid, please use EPACE to verify whether the client is eligible to use the UnitedUs platform services. (Refer to the United Us Training PPT for instructions on how to document/navigate in Unite Us)

WAYS TO LOCATE INSURANCE INFORMATION

EPIC

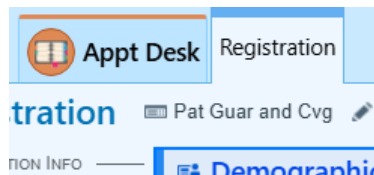
- To locate a client's insurance on EPIC there are several options to locate this
 - On EPIC from the appointment desk screen, you can navigate to



- Then click Registration

EPIC

- Once in Registration, find **Pat Guar and Cvg**. This is the insurance area within EPIC.
- You will be able to see if the client has Medicaid, Managed Care, Medicare, etc.



Filing Order	F/O	Coverage	Subscriber	Insurance ID	Effective Dates	Verification Status
	1	DENTAQUEST/HEALTHFIRST MCD DENTAL	[REDACTED]	SX72778A	01/01/2025 -	Contact Payor
	2	(Ineffective) E-HEALTHFIRST/HEALTHFIRST MEDICAID	[REDACTED]	SX72778A	02/01/2024 - 02/01/2025	Healthfirst Plan Mismatch
	3	E-HEALTHFIRST/HEALTHFIRST MEDICAID- NYU/LMC RISK	[REDACTED]	SX72778A	04/01/2024 -	Verified Electronically
	4	(Ineffective) E-MEDICAID/MEDICAID	[REDACTED]	SX72778A	01/01/2024 - 04/22/2024	Message sent

EPIC

- Another area where you can see the insurance is within the chart. If you are creating an encounter to document your notes, on the side bar of the client's chart there is an area where the insurance is located:
- **Reminder:** If the client is enrolled in Medicaid, please use EPACE to verify whether the client is eligible to use the UnitedUs platform services. (Refer to the United Us Training PPT for instructions on how to document/navigate in Unite Us)

The screenshot displays the EPIC patient chart sidebar. At the top, there is a pink circle with the letters 'LG' and a yellow sticky note icon. Below this, the patient's name is redacted with black bars. The patient's gender and date of birth are listed as 'Male, 2 y.o., 10/02/2023'. A yellow banner indicates 'Needs Interpreter: Spanish' with a speech icon, followed by 'SSN: xxx-xx-9999' and another yellow banner stating 'Amazon One?: Patient Under Age 13'. Below these are sections for 'CODE' (None), 'MOLST: None', 'Registries (7)', and 'Active FYIs (BHV): General, None'. The 'FIRST CONTACT PROVIDER' section says 'Contact the Attending'. The 'HIPAA: HIPAA' section shows a profile picture of Katie Sionov, MD, PCP - General. The 'COVERAGE & FINANCIAL INFO' section is circled in black and contains the following text: 'DENTAQUEST/HEALTHFIRST MCD DENTAL (+1)', 'Guarantor: P/F - Mother (+1)', 'HB Balance: \$0.00', 'PB Balance: \$0.00', and 'Self-Pay Bal: \$0.00'. At the bottom, the 'NO SHOWS' section shows '5%' in a green box and 'All departments'.

Visit-Initiation Tab

- Ensure that the Reason for Outreach and Outreach Management sections are filled in.
- **Outreach Management is filled in during Initial visits**

Reason for Outreach

Unselect All

Outreach	Due Date	Responsibility	Program
<input checked="" type="checkbox"/> Family Support Service Referral Received O...	9/25/2024	Fhc Fss Identified Episode Over 18	Family Support Services

Outreach Management

Family Support Services


Add outreach

+ Add

☐ Load All Outreaches

[Expand All](#) [Collapse All](#)

Family Support Service Referral Received Outreach



Completed Successfully [Undo](#)

Documented on 9/18/2024 by Clarissa Rios

Visit-FSS Tab

- Once your patients chart is open select the FSS tab
- From the left hand table of contents (see screenshot to the right) you will work your way down to complete patient documentation within each section
- Reminder: Screen Client for MIH case management eligibility and Benefits Eligibility (under Supplemental Screeners).**

The screenshot displays the 'FSS' (Family Support Services) tab within a patient's electronic health record. The interface includes a top navigation bar with tabs for SnapShot, Chart Review, Initiation, FSS, Care Mgmt, Wrap-up, and Flowsheets. The FSS tab is highlighted with a red box and a callout stating: '1. Counselors will Select the FSS Tab'. On the left, a sidebar menu lists various sections under FSS, including Demographics, Family Support Services Registration, FSS Registration, MIH Case Management, and Supplemental Screeners. A callout points to the 'MIH Case Mana...' option, stating: '2. Work through the sections under FSS'. The main content area shows patient information for Adam Fake, including demographics, contact info, and a list of documents. A large purple arrow labeled 'Benefits' points from the 'MIH Case Mana...' option to the 'Benefits' section in the main content area.

FSS

PATIENT INFO
Demographics
Sexual Orientatio...
Additional Pat Info
Documents

FAMILY SUPPORT SERVICES
REGISTRATION
FSS Registration
MIH Case Mana...

SCREENERS AND ASSESSMENTS
SDOH
Social Determina...
PHQ-2/9
FSS SCREENER
Supplemental Sc...

SESSION VISIT
FHC FSS Sessio...

FSS COLLATERAL VISIT
FSS Collateral Visit

REFERRALS
Prgm Communit...
FSS Referral Made

1. Counselors will Select the FSS Tab

2. Work through the sections under FSS

Benefits

Visit-FSS Tab Con't

- SDOH screener only needs to be completed if it has not been completed by referring provider (confirmed completion by going into providers medical visit note for assigned client).
- PHQ 2/9 should always be completed regardless of whether the SDOH screener was completed.
- Screeners will have a date completed below the header

Supplemental Screeners

Healthcare

Have you ever received medical services at NYU Langone Family Health Center?

Yes ← taken 2 months ago

Are you a current patient of FHC?

Yes ← taken 2 months ago

Do you have a current medical provider?

Yes ← taken 2 months ago

Are you in need of being connected to a medical provider?

No ← taken 2 months ago

Have you been unable to work for more than 12 months because of your medical or mental health status?

No ← taken 2 months ago

Benefits

Do you or do any of the people who live with you receive any of the following benefits?

Cash Assistance ← taken 1 week ago

Benefit Application and Outcome

Benefits Eligibility Screener Conducted

Yes ← taken 1 week ago

Legal

Do you have any legal concerns, such as custody, immigration, or adoption?

SDOH

Financial Resource Strain

How hard is it for you to pay for the very basics like food, housing, medical care, and heating?

Somewhat hard ← taken 2 months ago

Housing Stability

In the last 12 months, was there a time when you were not able to pay the mortgage or rent on time?

No ← taken 2 months ago

In the last 12 months, was there a time when you did not have a steady place to sleep or slept in a shelter (including now)?

No ← taken 2 months ago

Transportation Needs

In the past 12 months, has lack of transportation kept you from medical appointments or from getting medications?

Yes ← taken 2 months ago

In the past 12 months, has lack of transportation kept you from meetings, work, or from getting things needed for daily living?

No ← taken 2 months ago

Food Insecurity

Within the past 12 months, you worried that your food would run out before you got the money to buy more.

Sometimes true ← taken 2 months ago

Within the past 12 months, the food you bought just didn't last and you didn't have money to get more.

Often true ← taken 2 months ago

Intimate Partner Violence

Within the last year, have you been afraid of your partner or ex-partner?

No ← taken 2 months ago

Visit-FSS Session

- Once in the Session Note area, fill out the all information necessary, including session information, participants, areas of concern-which include Employment, Financial Resource Strain, Food Security, Housing and Utilities, and Transportation)
- Select your concern and fill in type of information and continue to your session/case note.
- For follow-up encounters (Application), when the benefit amount is available, you must go to the encounter of the original date of application, create an addendum encounter, and Fill in Application Outcome Date, Outcome, Benefit amount, and Frequency.**

FSS

PATIENT INFO
Demographics
Additional Pat Info
Documents

FAMILY SUPPORT SERVICES REGISTRATION
FSS Registration

SCREENERS AND ASSESSMENTS
SDOH
Social Determina...
PHQ-2/9

FSS SCREENER
Supplemental Sc...

SESSION VISIT
FHC FSS Sessio...

FSS COLLATERAL VISIT
FSS Collateral Visit

REFERRALS
Prgrm Commun...
FSS Referral Made

Food Security - Application Type
SNAP Application – New; SNAP Application - Recertification ◀ taken today
☒ SNAP Application – New ☐ SNAP Application - Recertification ☐ Other Food Security Application

SNAP New - Application Status
Completed and submitted ◀ taken today
Started but did not complete Completed but did not submit **Completed and submitted**

SNAP New - Application Outcome Date
[Date Picker]

SNAP New - Application Outcome
Approved ◀ taken today
Pending **Approved** Denied Client no longer interested Lost to follow-up

Is the benefit amount available?
Yes ◀ taken today
Yes No Not applicable

Benefit Amount (\$)
[Text Input]

Benefit Payment Frequency
One-time payment Daily Weekly Bi-weekly **Monthly** Annually Other

Was an Expedited Benefit given?
Yes ◀ taken today
Yes No Unknown

Expedited Benefit Amount (\$)
[Text Input]

Visit-FSS Session (Create Addendum)

- Under Chart Review
- Select the date of encounter that you want to addend
- Right click and select “Edit or Addend Encounter”
- Click “Create Addendum”
- After finishing the edit or addend, sign the addendum encounter by clicking “SIGN ADDENDUM”

The screenshot shows the 'Chart Review' interface with the 'Encounters' tab selected. A table of 'Recent Visits' is displayed with columns for Research, When, Type, and With. The first row is highlighted, and a right-click context menu is open, showing options like 'Show Preview', 'Display in Chart Sidebar', 'Copy Links', 'Copy Links to PasteBoard', 'Add to Bookmarks', 'Edit Comments', 'Edit or Addend Encounter', 'Reset All Column Widths', and 'Modify Columns'. A purple arrow points to the 'Edit or Addend Encounter' option.

Research	When	Type	With
	09/25/2024	Telephone S	
	09/06/2024	Telephone S	
	07/17/2024	Telephone S	
	07/03/2024	Social Care	
	06/14/2024	Social Care	
	05/20/2024	Telephone S	
5 Years Ago			
	07/17/2017	Telephone	

Open Encounter

ⓘ This visit is already signed. Would you like to addend it?
Create an addendum if you need to make changes to the documentation.

➡ Create Addendum Cancel

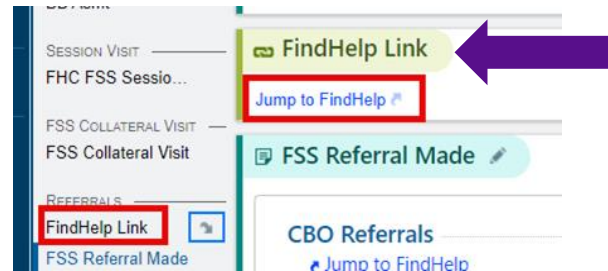
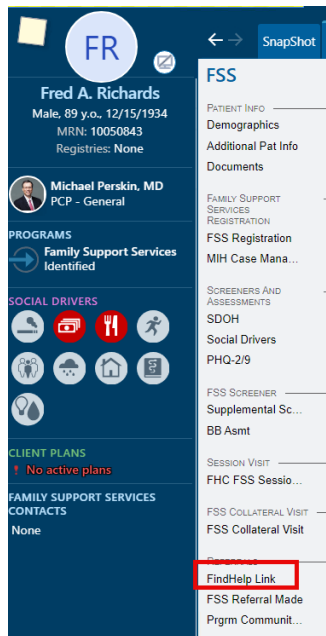
➡

LEVEL OF SERVICE PRINT AVS SIGN ADDENDUM

NYU Langone Health

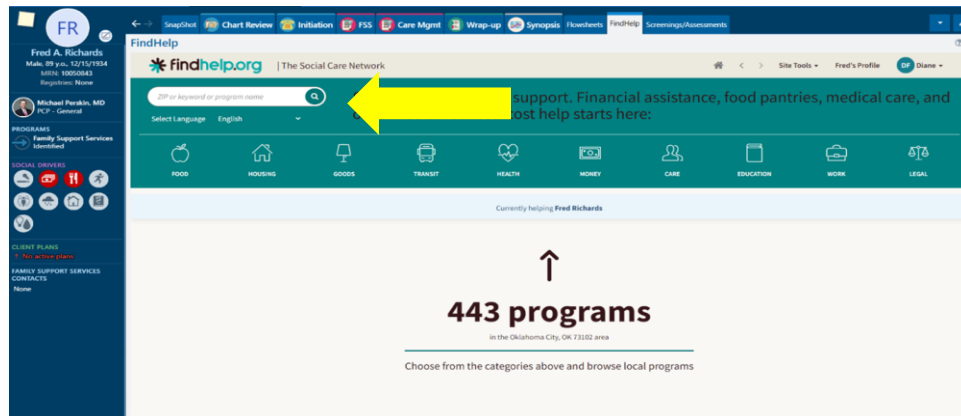
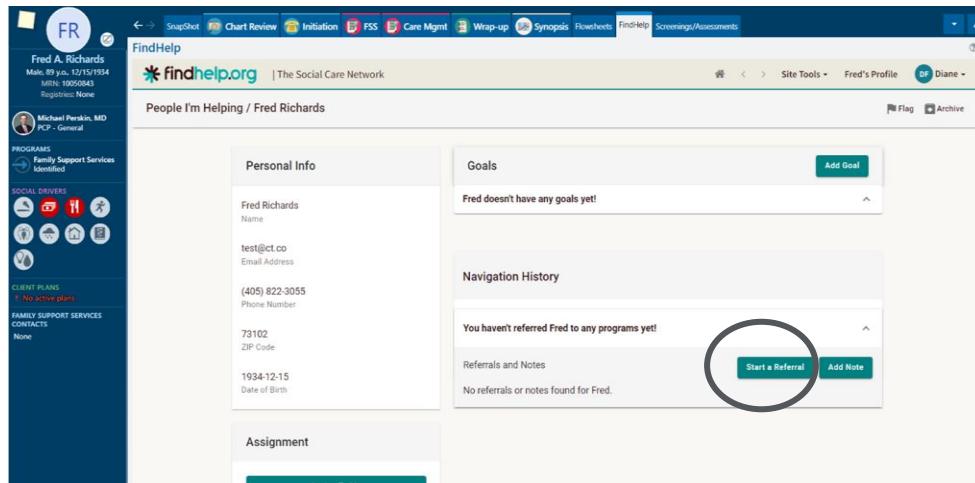
Find Help Referral System

- Any time you are making a referral you should first click on FindHelp to see if the organization you want to refer to has a claimed account.
- On the FSS tab on a patient chart, you can find "FindHelp Link" in the Referral section.
- To access, select the arrow or the hyperlink within the "FindHelp Link" section.



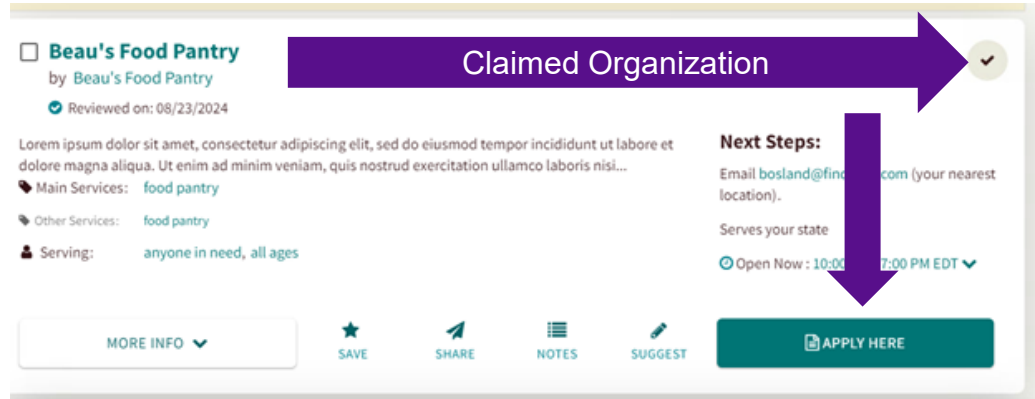
Find help (con't)

- After selecting the link, a separate FindHelp tab will open with the FindHelp tool integrated directly into the chart. From the patient profile, verify the correct patient and select **"Start a Referral"**.
- Use the search function to find appropriate resources, or explore the category tiles



Find Help (con't)

- When you are ready to connect your patient to a resource, select the teal action button in the bottom left of the program card. In our example below, it is labeled “**Apply Here**”.
- Reminder: Only refer clients to the Claimed Organization, which has a green checkmark.**



Note: The teal action button will have different available actions depending on the resources. See the FindHelp – Refer to Programs tip sheet for more information. The link below will bring you to the resource. Please log in using your Kerberos ID and password to access <https://central.nyumc.org/clin/epic/tips/Epic%20Tip%20Sheets/FindHelp%20-%20Refer%20to%20Programs.aspx>

Find Help (con't)

- Complete any screeners or information request and select "Next".
- A confirmation window appears with further steps concerning the referral.

Start a screener for this program x

Your Name *

Tell us about the person you're helping:

Their Name *

Their Email Address

Their Phone Number

Their Language

Best way to reach them* ☐ Email ☐ Text message ☐ Phone call ☐ Don't reach out

Comment [Add a comment...](#)

Confirm Consent * ☐ I have appropriate consent from the person or their guardian (if under 18) to:

- Send their contact info and additional info through this system to this agency, and
- Send them info **about this program** through the NYU Langone platform (including any responses sent to them by the program).

The program provider has a few more questions!

Choose "Next" to continue to the program's form.

[NEXT](#)

Thanks! We sent your referral. x

We emailed your referral to **Beau's Food Pantry**. We also sent Fred their contact information.

What's Next?

1. Fred should contact the agency directly:

[Print Program Details](#)

2. To track and update the status of this referral go to [Fred's profile page](#).

Important! We'll do our best to send them your information, but it's possible that we may not be able to reach the agency or get a quick response. If you are in an emergency situation, call 911.

Find Help (con't)

- You will be able to see the referral on the patient's profile page.
- Note:** When your work in FindHelp is complete, continue documentation in Epic's FSS Referral Made section as always.

The screenshot displays the 'FindHelp' interface for a patient named Fred Richards. The left sidebar contains personal details: Name (test@ct.co), Email Address (test@ct.co), Phone Number ((405) 822-3055), ZIP Code (73102), Date of Birth (1934-12-15), Home Phone (405-822-3055), Gender (male), Home Address (938 OHIO STREET), City (OKLAHOMA CITY), and State (OK).

The main content area is titled 'People I'm Helping / Fred Richards'. It features a 'Navigation History' section stating 'You have referred Fred to 1 programs.' Below this is a 'Referrals and Notes' section with buttons for 'Start a Referral' and 'Add Note'. A card for 'Beau's Food Pantry' is shown, indicating the status is 'Got help'. An 'Add Note' button is present. A table lists the referral history:

Date	Status	Referral
9/19/24	Status set to 'got help'	Michelle P.
9/19/24	Status set to 'not updated'	Diane F. (NYU Langone)
9/19/24	Referred by Diane F. (NYU Langone)	

Making a Referral-FSS Referral Made

- The first step is to check if the organization you want to refer to is listed under FindHelp as a claimed organization. If so, refer the client using Find Help. The second step is documenting the referral using the FSS Referral Made smart form.
- You will complete both the Program Community Resource and FSS Referral Made sections
- Using the magnifying class to select the organization you are referring the patient to. Please complete every section within Referral made with the exception of Referral outcome and referral outcome date.

FSS

PATIENT INFO

Beyond Bridges Asmt

FHC FSS Session Visit

FSS Collateral Visit

FindHelp Link

FSS Referral Made

Community Based Organization Referrals

Made For	Referred To	Referral Reason	Outcome	Outcome Date	Other Org Name (If applicable)
1 Client	CAMBA - Work, Learn, and Grow	Financial Resource			
2					

Close Cancel Previous Next

Making a Referral-FSS Referral Made (Con't)

- The Referral outcome date and outcome sections should be left empty the day of referral
- FSS internal workflow policy is that all counselors must follow up with patient in regards to the referral within 45 days of the referral and input a referral outcome and date of outcome

The screenshot shows the 'FSS Referral Made' form within a clinical software interface. The left sidebar contains patient information for Fred A. Richards and Michael Perskin, MD. The main area displays a list of FSS services: Beyond Bridges Asmt, FHC FSS Session Visit, and FSS Collateral Visit. Below these is a 'FindHelp Link' section. The 'FSS Referral Made' section is highlighted, showing a table for referrals. The table has columns for Made For, Referred To, Referral Reason, Outcome, Outcome Date, and Other Org Name (if applicable). The first row shows a referral for 'Client' to 'CAMBA - Work, Learn, and Grow' with the referral reason 'Financial Resource'. Arrows point to the 'Outcome', 'Outcome Date', and 'Other Org Name' fields, which are currently empty. The form includes 'Close' and 'Cancel' buttons at the bottom.

Made For	Referred To	Referral Reason	Outcome	Outcome Date	Other Org Name (if applicable)
1 Client	CAMBA - Work, Learn, and Grow	Financial Resource			

Making a Referral-Follow up

- If you want to follow up with a patient who you previously created a referral for, please create a patient outreach encounter, then document the referral outcome.
- This will allow you to view the appointment date that aligns with the date the referral was made

FSS Referral Made

Community Based Organization Referrals

[Jump to FindHelp](#)

	Made For	Referred To	Referral Reason	Outcome	Outcome Date
1	Client	CAMBA - HomeBase	Housing and Utilities	Lost to follow up	9/30/2024
2	Client	Center for Family Life - Adult Employment Serv...	Employment	Name	
3	Client	Other Organization	Employment	Case accepted	
4	Client	Legal Aid Society - Brooklyn	Financial Resource ...	Case declined	
5	Client		Food Security	Client no longer interested	
6				Lost to follow up	

Close

Cancel

Pending Client action

Client declined

Visit-Pediatric Session

- When you receive a pediatric referral, you will first document your outreach efforts in the child's chart. Select the "Caregiver (pediatric patient)" tab appears under FSS registration.
- If the outreach to the family is successful and the caregiver agrees to a visit you should click: "**Client's caretaker**" under "**FSS registration**" under the "**FSS**" tab unless you are meeting with a pregnant teen that is under 18 in which case you should click "client".
- If you click the client's caretaker tab, please enter the caretaker's information including MRN #. All additional questions (education, country of birth etc.) should be answered from the perspective of the caretaker. If you put, "Client", all questions are answered from the client's perspective.

The screenshot shows the EHR interface for FSS Registration. The left sidebar lists patient information for Andrew Clementine, including MRN 10085633 and legal guardians (ELMother, ELFather). The main content area displays the FSS Registration form. A purple arrow points to the 'Client's caretaker (pediatric patients only)' tab, which is selected. The form fields include:

- Registration: Screening responses pertain to: **Client's caretaker (pediatric patients only)**
- Caretaker Last Name: [Text Field]
- Caretaker First Name: [Text Field]
- Caretaker Date of Birth: [Date Picker]
- Caretaker has an MRN: Yes No [Radio Buttons]
- Caretaker MRN: [Text Field]
- Do you live in Red Hook, Brooklyn?: Yes No Refused to Answer [Radio Buttons]
- Okay to call and identify?: Yes No Refused to answer [Radio Buttons]
- What is your country of birth?: [Text Field]
- What is the highest grade or degree you completed?: [Grid of options]
- Do you have children under the age of 19?: [Text Field]

No formal schooling	Pre-K	Kindergarten	1st grade	2nd grade	3rd grade	4th grade	5th grade	6th grade	7th grade
8th grade	9th grade	10th grade	11th grade	12th grade	High school diploma	High school equiv...	Individualized Ed...	Associate degree	Vocational/ Trade...
Bachelor's degree	Master's degree	Doctoral degree	Professional deg...	Foreign degree	Other				

Visit- Care Management

Episode status under Care Management tab:

- **Identified** – Refers to all clients who have been assigned to a counselor and need outreach
- **Enrolled**- Active client cases. Refers to clients who are receptive/verbally consented to enroll in Family Support Services
- **Closed**- Inactive client cases who are no longer in need of services for FSS

Note: Graduated & Declined tab on this diagram are no longer valid. Use the Closed option, then choose the appropriate reason

The screenshot displays the 'Care Mgmt' tab in a software interface. The 'Program' dropdown is set to 'Family Support Services (FSS)'. The 'Start Date' is '12/7/2022'. The 'Enrollment Reason' field is empty. The 'Status' section shows 'Identified' as the selected status, with other options like 'Enrolled', 'Graduated', 'Declined', and 'Closed'. The 'Overview' section contains a text box stating: 'This program is intended for use by community resource coordinators to track the outreach to and progress of community resources connections and patients.' The 'Linked Referrals' section has an 'Add' button. The bottom right has 'Accept' and 'Cancel' buttons.

Visit- Care Management (con't)

- Next navigate to the Care Management Tab and select +New Program to add Family Support Services
- Keep identified status for all clients until they are enrolled
- Clients should be enrolled in FSS program when they agree to receive services from FSS and when an appointment is scheduled

The screenshot displays the 'Care Mgmt' application interface. The top navigation bar includes tabs for SnapShot, Chart Review, Initiation, FSS, Care Mgmt, Wrap-up, and Flowsheets. The patient profile for Adam Fake is shown on the left sidebar. The main content area is titled 'Care Mgmt' and features a 'Programs' section. A callout bubble points to the 'New Program' button, and another callout bubble points to the 'Identified' status button. A third callout bubble points to the 'Support & Services Provided' section.

Visit- Care Management (con't)

- When creating a new program make sure to document reason for referral, enrollment start date and Enrollment Reason
- Enrollment start should reflect the date client verbally consented enrollment into FSS
- Under Support and Services provided please include referral reason

Care Mgmt

PROGRAM ENROLLMENT Programs Targets Med Management Case Team Prgm Comm

Family Support Services

Start Date: 12/15/2022

Enrollment Reason: **Select Enrollment Reason**

Reason why the referral was assigned

Status: Identified [Identified] [Enrolled] [Graduated] [Declined] [Closed]

Overview

Support & Services Provided

Type	Start Date	End Date
Food Security	12/19/2022	

Responsible Staff

Provider: RAMOS, JOSLYNN

Department: LFS FAMILY SUPPORT

Change Program Type

Visit- Care Management (Con't)

1. Link all the encounters to the episode, such as Pt Outreach, Case Management, and Social Care Visit encounters. If there is more than one episode, you need to select the Family Support Service episode (to link the encounter)

2. Once you select the bubble to link the FSS episode, the encounter that you are in will be linked to it:

The screenshot shows the 'Care Mgmt' interface with a table of programs. The first row, 'Family Support Services', is highlighted with a red box. A red arrow points to the status bubble (a circle with a dot) in the 'Status' column for this row. Below the table, the text 'Current Support & Services Provided: Food Security' is visible.

Linked	Program	Status	Responsible Staff	Start Date	Department	Actions
<input checked="" type="radio"/>	Family Support Services	Enrolled	Sonia Velazquez	9/27/2024	LFS FAMILY SUPPORT	Enrollment X
<input type="radio"/>	HealthySteps - Tier 2	Enrolled	Maria Gonzalez, LMSW	7/17/2024	LFS SPC PEDS	Enrollment X
<input type="radio"/>	Healthy Steps - VIP Tier 1	Enrolled	Massiel Jimenez-Rodriguez	9/18/2023	LFS SPC PEDS	Enrollment X

Linked Encounters [+ Add](#) [+ Add External](#) [View More](#)

3/17/2025 - Social Care Visit with Sonia Velazquez
3/12/2025 - Patient Outreach with Sophy Graulau

Visit- Care Management-Targets

- Under the Care Management Tab, counselors are able to document patient targets and tasks to support counselors with tracking service progress
- Targets are similar to goals clients are interested in working on. Tasks are similar to the steps taken to accomplish the goal.

Care Mgmt

Adam Fake
Male, 62 y.o., 1/1/1960
MRN: 15971496
Code: Not on file (no ACP doc)

Care Team: No PCP

CURRENT PROGRAMS

Family Support Services Enrolled

SOCIAL DETERMINANTS

RISK SCORES

11% Admission or ED Risk
1 General Risk

Targets

Family Support Services

Add targets

Targets

Upcoming

Schedule a FSS session within 1 months of receiving referral

Medication Management

Target Templates

- ☐ Assess client's needs within 10 days of receipt of referral
- ☐ Complete Initial Support & Services Provided Assessment
- ☐ FSS Education: Submit an Application
- ☐ FSS Financial Resource Strain: Submit an Application
- ☐ FSS Health: Submit an Application
- ☐ FSS Transportation: Submit an Application
- ☐ HealthySteps Autism Screening Target
- ☐ HealthySteps Developmental Screening Target
- ☐ HealthySteps Learning Resources
- ☐ HealthySteps SDOH Yearly Screening
- ☐ HealthySteps Tier 2: Complete a Developmental Milestone at Consultation Visit
- ☐ HealthySteps Well-Child Visits
- ☐ Initial Outreach within 5 days of Receipt of FSS Referral
- ☐ Schedule a HealthySteps Consultation (Tier 2)
- ☐ Schedule Initial FSS Session
- ☐ Second FSS Referral Received Outreach Attempt

Family Support Services

Add targets

FSS Financial Resource Strain: Cash Assistance Application - New

- ☐ Cash Assistance Application - New: Reviewed list of documents. Jeslynn Ramos, LCSW
- ☐ Cash Assistance Application - New: Uploaded documents. Jeslynn Ramos, LCSW
- ☐ Cash Assistance Application - New: Complete application. Jeslynn Ramos, LCSW

FSS Food Security Application: SNAP Application - New

- ☐ SNAP Application - New: Reviewed list of documents. Jeslynn Ramos, LCSW
- ☐ SNAP Application - New: Uploaded documents. Jeslynn Ramos, LCSW
- ☐ SNAP Application - New: Complete application. Jeslynn Ramos, LCSW

Learning resources)

- ☐ HealthySteps Depression Screening Target
- ☐ HealthySteps Feeding Assessment Target
- ☐ HealthySteps Parenting Guidance
- ☐ HealthySteps Socio-Emotional Screening Target
- ☐ HealthySteps VIP Visits
- ☐ Initial Outreach within 10 days of Receipt of HS Referral
- ☐ Initiating High-Risk Care Management Targets
- ☐ Schedule a HealthySteps Initial Visit within 3 months of referral receipt
- ☐ Second Follow-up (within 60 days) Referral Placed Outreach Attempt Target
- ☐ Second HS Referral Received Outreach Attempt

Comments

Visit- Wrap Up

- At the end of the visit, go to the Wrap-up tab and complete the "Time Spent with Patient" section.
- After you have completed this you can sign the encounter and you've successfully documented a FSS visit.

The screenshot shows the 'Wrap-up' tab in the Epic EMR interface for a patient named Adam Fake. The left sidebar contains patient information: Adam Fake, Male, 62 y.o., 1/1/1960, MRN: 15971496, Code: Not on file (no ACP docs). Below this are sections for 'CURRENT PROGRAMS' (Family Support Services Enrolled), 'SOCIAL DETERMINANTS', and 'RISK SCORES' (11% Admission or ED Risk, 1 General Risk). The main content area has tabs for WRAP-UP, Communications, Pt. Instructions, Routing, Minutes, Case Review, Visit Diagnoses, and Charge Capture. The 'WRAP-UP' tab is active, showing a 'Time Spent with Patient' section with input fields for 'Time spent with patient (minutes):' (15), 'Time spent performing chart review (minutes):' (15), and 'Total time (minutes):' (30). A red callout bubble points to the 'Wrap-up' tab with the text 'Finally you will select the wrap up tab'. Another red callout bubble points to the 'Time Spent with Patient' section with the text 'And Fill in "Time Spent with Patient" Section'. A 'Close Workspace' button is visible in the top right corner.

Adam Fake
Male, 62 y.o., 1/1/1960
MRN: 15971496
Code: Not on file (no ACP docs)

Search

Care Team: No PCP

CURRENT PROGRAMS
Family Support Services Enrolled

SOCIAL DETERMINANTS

RISK SCORES
11% Admission or ED Risk
1 General Risk

CLIENT PLANS
None

Wrap-up

Print AYS Preview AYS

WRAP-UP Communications Pt. Instructions Routing Minutes Case Review Visit Diagnoses Charge Capture

Enter non-clinical routing comments

Edit Fax Recipients

View Routing History

Time Spent with Patient

Time spent with patient (minutes): 15

Time spent performing chart review (minutes): 15

Total time (minutes): 30

Were you required to make moderate to high complexity clinical decisions during the visit? yes no

Open Time Spent with Patient

Close Workspace

Care Coordination- Quick Encounter

Care coordination = A communication with a service provider for a purpose that serves the client, and the client is not present when call made.

If you are coordinating care of a client with another professional then that should be document under “Case Management” (is located on your tool bar) – “Initiation” tab - “Care Coordination” session.

Example scenarios for Care Coordination (the client is not present when call made):

1. You contact CAMBA to follow up on the client's housing application or referral.
2. You contact Healthy Families to follow up on your referral for the client.
3. You speak to a lawyer/case manager for ACS case/case coordinator for early intervention services, etc.

Case Management is located on your tool bar

The bottom screenshot displays the 'Initiation' tab with the following data:

Encounters	Notes	HP/Consult	Lab	Microbiology	Imaging	Procedures	Cardiac	EKG	Medications	Episodes	Letters	Consents	Other	Misc Reports	Media	Referrals	Encounters-ROI	LDA
Today	Today	Case Management	Me	LFSPS														
Today	Today	Case Management	Me	LFSPS														
Today	Today	Case Management	Me	LFSPS														
Today	Today	Patient Outreach	Me	LFSPS														

Recent Visits:

Encounter	Date	Type	With	Department	Description
9/25/2024	9/25/2024	Patient Outreach	Me	LFSPS	
9/24/2024	9/24/2024	Patient Outreach	Care Coordin - Acquire	S	LBCHW
9/24/2024	9/24/2024	Patient Outreach	Care Coordin - Acquire	S	LBCHW
9/24/2024	9/24/2024	Office Visit	Fam Med - Galloway, P	LPH CA/FAM M	Hyperglycemia associated
9/23/2024	9/23/2024	Patient Outreach	Care Coordin - Acquire	S	LBCHW

Case Management

Card Dwarf
Social Work

Additional Documentation

Vitals: LUP 06/17/2024
Care Coordination

Encounter Info: Billing Info, History, Allergies, Detailed Report

Instructions

Created by: Card Dwarf on 07/16/2024 10:30 AM

Care Coordination- Quick Encounter (Con't)

Initiation

Session Date: 10/14/2024

Service Provider Organization/Program: God's Love We Deliver

Service Provider First Name: Ann

Service Provider Last Name: Fake

Service Provider Phone Number:

Service Provider Email: Ann.Fake@GLWD.org

Areas of Concern: ☒ Health

Service Type: ☒ Advocacy

Session Duration (minutes): 5

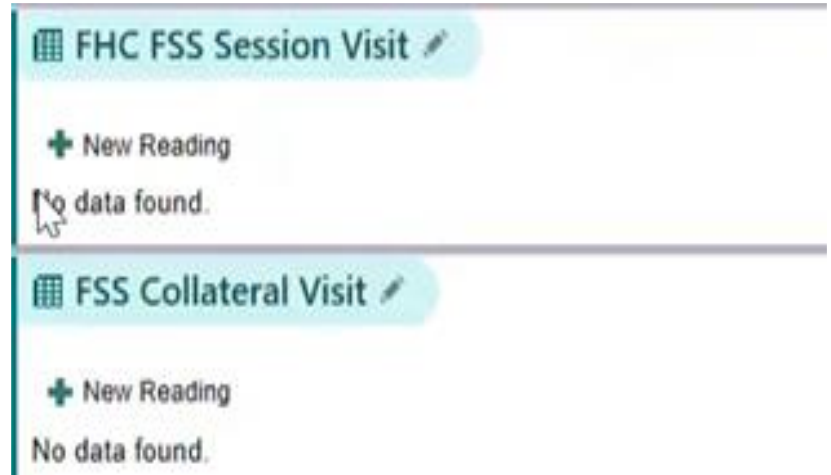
Notes:

Complete the Care Coordination session accordingly, then sign the encounter.

+ ADD ORDER + ADD DX (0) SIGN ENCOUNTER

Session Visit vs Collateral Visits

- Session Visit = Service provided (if a referral, assessment, screening, or other service is provided) = A session/appointment that takes place with the client.
- Collateral visit = A session/appointment completed with caregiver, family member etc. where the client is not present.



The screenshot displays a software interface with two distinct sections for visit management. The top section is titled 'FHC FSS Session Visit' and includes a '+ New Reading' button and a 'No data found.' message. The bottom section is titled 'FSS Collateral Visit' and also features a '+ New Reading' button and a 'No data found.' message. Both sections are separated by a horizontal line and have a light blue header bar with a grid icon and an edit icon.

Targets & Tasks

Incomplete Outreach Task Pool

Under “My Incomplete Outreach Tasks” pool: Select “Run expired report”, then select the client.

Click the “Chart” tool bar

Under “Chart Review”, select the visit encounter then right click to Create Addendum

The screenshot displays the Epic LFS Family Support - Training SBX interface. The top navigation bar includes the Epic logo, user information (LFS FAMILY SUPPORT - Training SBX - CAROL D.), a search bar, and various navigation links. The main content area shows four panels: 'Identified Cases - Assigned to Pool', 'My Identified Cases', 'My Incomplete Outreach Tasks', and 'My Cases'. The 'My Incomplete Outreach Tasks' panel shows 5 total cases, with 0 completed and 0 pending. Below this panel, a table titled 'My Incomplete Episode Outreach Tasks [222413] as of Tue 7/30/2024 3:35 PM' lists tasks. The first task is 'Family Support Service Referral Received Outreach' for patient 'Dwarf, Tina' with MRN '10071635'. The task status is 'Incomplete'. The table has columns: Due, Task, Patient Name, MRN, Call Attempts, Comments, Task Status, Episode Name, Episode Creation Date, Episode Tracking Status, and Episode Responsible Staff. Below the table, an 'Open Encounter' dialog box is shown, asking 'This visit is already signed. Would you like to addend it?' and providing a 'Create Addendum' button.

Due	Task	Patient Name	MRN	Call Attempts	Comments	Task Status	Episode Name	Episode Creation Date	Episode Tracking Status	Episode Responsible Staff
07/05/2024	Family Support Service Referral Received Outreach	Dwarf, Tina	10071635	0		Incomplete	Family Support Services	06/15/2024	Enrolled	Carol Dwarf

Incomplete Outreach Task

- Under the Initiation tab, mark the reason for outreach and outreach management; otherwise, the client will appear as an incomplete outreach task and fall into your Incomplete Outreach Task WQ.
- Once the outreach target is selected, you can document the progress of the outreach.

The screenshot displays the outreach management interface. The top section, 'Reason for Outreach', shows a table with columns: Outreach, Due Date, Responsibility, and Program. A row is listed: Family Support Service Referral Received Outreach, 7/2/2024, Andy You, Family Support Services. A purple arrow points to the 'Select All' button in the 'Reason for Outreach' tab. The bottom section, 'Outreach Management', shows a table with columns: Outreach, Due Date, Responsibility, and Program. A row is listed: Family Support Service Referral Received Outreach, 7/2/2024, Andy You, Family Support Services. A purple arrow points to the 'In Progress' status dropdown in the 'Outreach Management' tab.

Reason for Outreach

No outreach selected
Open Reason for Outreach to indicate outreaches you are addressing

☐ Do not show again

☒ Select All

Outreach	Due Date	Responsibility	Program
Family Support Service Referral Received Outreach	7/2/2024	Andy You	Family Support Services

Outreach Management

Family Support Services

Family Support Service Referral Received Outreach

☐ Load All Outreaches

Scheduled

7/2/2024
Andy You

Reason for Outreach

Outreach	Due Date	Responsibility	Program
✓ Family Support Service Referral Received Outreach	7/2/2024	Andy You	Family Support Services

Outreach Management

Family Support Services

Family Support Service Referral Received Outreach

☐ Load All Outreaches

In Progress

7/2/2024
Andy You

Outcome

Once the outreach target is selected, you can document the progress of the outreach.

Incomplete Outreach Task (con't)

- Once you re-run the report, it will refresh, and the client will be removed from the Incomplete Outreach Tasks pool.

My Incomplete Episode Outreach Tasks [222413] as of Tue 7/30/2024 3:35 PM

PT Outreach | Chart | Communication | Delete | Edit Tasks | Assign Me | Start Outreach

Detail List | Explore

Filter

Re-run Report | Refresh Selected | Select All

Due	Task	Patient Name	MRN	Call Attempts	Comments	Task Status	Episode Name	Episode Creation Date	Episode Tracking Status	Episode Responsible Staff
07/05/2024	Family Support Service Referral Received Outreach	Dwarf, Tina	10071635	0		Completed	Family Support Services	06/15/2024	Enrolled	Carol Dwarf

Close Out a Case

How to Close Out a Case

From the dashboard, open My Cases pool

Care Manager and Social Worker Home - FSS

Identified Cases Report completed: Mon 12/19 03:14 PM

1 Total Cases

My Incomplete Outreach Tasks Report completed: Mon 12/19 03:14 PM

0 Overdue 0 Due Today 0 Due within Next 7 Days

My Cases Report completed: Mon 12/19 03:14 PM

3 Total Cases

My Identified Cases

> Identified

Upcoming Targets for My Cases

3 Overdue **0** Due Today

Due

> Overdue

Due Today

Due Within 3 Days

Due Between 4 and 14 Days

> [No Value]

My Incomplete Checklist Tasks Report completed: Mon 12/19 03:14 PM

My Incomplete Outreach Tasks Report completed: Mon 12/19 03:14 PM

Due Date Total Tasks

Overdue 0

Due Today 0

Due within Next 7 Days

My Reports - RW Last Refresh: 03:14:23 PM

Report Name Finished At Results Status

Unorganized (2)

FAMILY SUPPORT SERVICES (FSS) Referrals Triage - Reject Ready to run

FAMILY SUPPORT SERVICES (FSS) Referrals Ready to run

My Cases Episode Type (grouped by stat)

> Family Support Services

Total Cases

Case Team Member Cases Last Refresh: 03:14:36 PM

Episode Type Total

Family Support Services 3

Schedule at a Glance

In Basket Glance

	New	Total
Social Determinants of Health Referrals	61	982
Letter Queue	2	4
My Open Encounters	1	4

New Cases Assigned to staff that are in need of outreach

Targets that need to be completed soon or are over due

Tasks that need follow up/review

Active cases on case load (This includes both identified cases and enrolled cases)

How to Close Out a Case (con't)

- Select the case, then click “Edit Episodes” (double check to ensure all targets/tasks are completed before you close a case)
- Change the status to Closed, enter the end date, and choose the reason for closure of case

My CoCM Cases (Primary Coordinator) [222419] as of Mon 10/28/2024 4:13 PM

Chart Edit Episodes Documentation Hub

Detail List Explore Summary by Status Summary by Type Identified Cases

Filter

Patient Name	Age	Episode Name	Episode Tracking Status	Episode Notes	Episode Responsib
Dwarf, Corinna	30 y.o.	Family Support Services	Closed	This program is intended for use by community resource coordinators to track the outreach to and progress of	Carol Dwarf

Family Support Services

Program: Family Support Services (FSS)

Start Date: 9/13/2024 Department: LFS FAMILY SUPPORT

Enrollment Reason:

Status: Closed Identified Enrolled Declined Closed

Enrollment Date: 9/13/2024 End Date: 10/28/2024 Closed Reason: Patient's needs have been a

The selected status mark All active case team relations may need to be manually clos

Case Team

Add New Add Me

Carol Dwarf Social Worker

targets linked to the episode

Show: Past Staff

Start: 9/13/2024 End: 10/28/2024

Editing case for Dwarf, Corinna

Accept Cancel

Referrals

How to View Referral Received Information

- On the referral, you can see patient's information by clicking the Sidebar
- Under the Referral Information section you can learn why your patient was referred

Note: All referrals must have a Z code for Patient Diagnoses

Referral Information

Type:	Clinician Referral
Class:	Incoming
Priority:	Routine
Start-Exp:	10/6/2022 - 10/6/2023
Referred By:	
Place of Service:	Family Health Centers at NYU Langone - The Table Food Pantry
Referred To:	
Department:	LFS FAMILY SUPPORT
Provider:	Nelly Meade
Network Level:	Out Of Network
Dx/Px:	Z59.41 (ICD-10-CM) - Food insecurity

Referral Status

Status:	Authorized	Auth Reason:	None	Deny
Last Updated:	10/6/2022			

Referral Reasons

Referral # 25684458, Type Clinician Referral, Priority Routine, Class Incoming

Referral Information

Referral Status: Authorized

Auth Reason: None

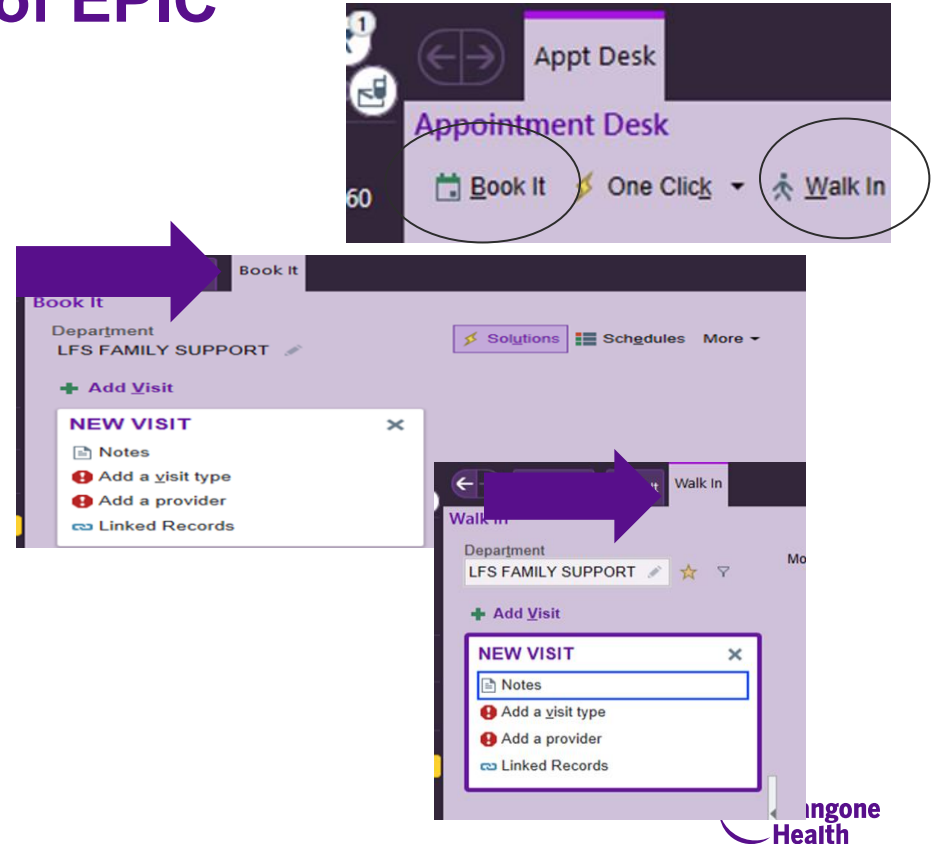
Deny

Auto Assign

Learn more about your patient by clicking on the sidebar

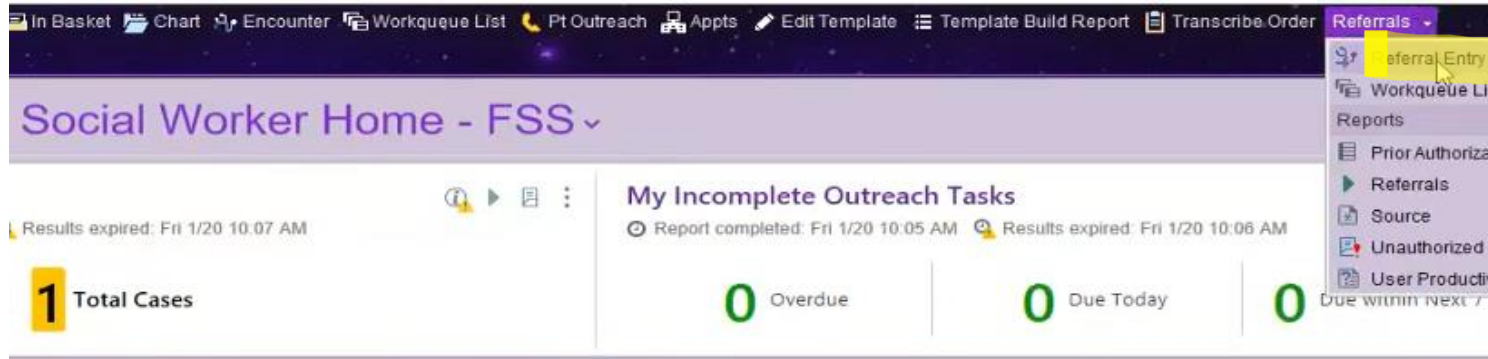
Referrals Received outside of EPIC

- Referrals received outside of EPIC include:
 - WIC
 - RedCap
- Self Referrals do not need to be transcribed. They can be entered utilizing the **Walk-In or Book it.**



Transcribed Referrals

- In order to manually enter Referrals received from **REDCAP**, and **WIC**, go to the home screen and select **Referrals**. From the drop down select **Referral entry**



Transcribed Referrals (con't)

- You will then be prompted to locate patient using **Patient Look Up**
- Enter the patient's information using key identifying information (last name, first name, date of birth). Ensure you are choosing the correct patient to prevent duplicate charts.
- If the patient is not found, click on **New** to enter patient's information

The screenshot displays the 'Referral Lookup' window, which includes a 'Select Referral' tab and a 'Custom Search' section. Below this, there are input fields for 'Patient' and 'Referral #', along with a 'Search' button and a checkbox for 'Exclude auth/cert'. A second window, titled 'Search Patients', is overlaid on top. This window contains several input fields: 'Last Name', 'First Name', 'Middle', 'SSN', 'Sex', 'DOB', 'MRN', 'Phone', 'CSN', and 'Enc. Provider'. Each field has a corresponding search icon. A checkbox labeled 'Use sounds like' is located at the bottom left of the 'Search Patients' window. The 'New' button is circled in red. Three large red arrows are overlaid on the image: one points to the 'Last Name' field, another points to the 'Referral #' field, and a third points to the 'DOB' field. The 'New' button is also highlighted with a red circle.

Trascribed Referrals (con't)

When EPIC profile is non existent, MRN needs to be created Please follow the steps below to create new chart

Step 1: Search for patient using all known credentials (LAST NAME, FIRST NAME, DATE OF BIRTH)

Step 2: Once EPIC notifies you that a matching patient is not found, you will proceed to fill in appropriate information and hit **NEW** to create a new chart. **ENSURE YOU ARE NOT CREATING A DUPLICATE CHART.**

The screenshot shows the 'Patient Lookup' window. The 'Search' tab is active. Fields for 'Last Name' (fakeley), 'First Name' (adam), 'Middle', 'Sex', 'MRN', and 'CSN' are visible. A yellow warning icon and the message 'A matching patient was not found.' are displayed. The 'New' button at the bottom left is highlighted with a red box. Other buttons include 'Find Patient', 'Clear', 'Accept', and 'Cancel'.

Step 3:
Select
Accept to
Create

This screenshot is similar to the previous one, showing the 'Patient Lookup' window. The 'Last Name' is 'fakeley', 'First Name' is 'adam', and 'DOB' is '1/1/1900'. The 'New' button at the bottom left is highlighted with a red box.

The screenshot shows the 'Name Edit' window. It displays the patient's name 'Adam Fakeley' and fields for 'Title', 'First name', 'Middle name', 'Last name', 'Suffix', 'Academic', and 'Preferred name'. The 'Accept' button at the bottom is highlighted with a purple box. A 'Skip' button is also visible.

Transcribing Referrals (con't)

- In order to Complete Referral entry for referrals, you must complete the first 4 sections and then select close after completing each section to save

The screenshot shows the EpicCare Referral Entry interface for a patient named Adam Fake. The interface is divided into several sections, with callouts providing instructions for completing the first four sections:

- General:** A callout states, "Counselors must complete the first 4 sections". The General section includes fields for Referral # (27309816), Type (None), Priority (Routine), and Class (None). A dropdown menu for Type is open, showing options: Ancillary (150), Auth/Cert (19), Clinician Referral (A10), Durable Med Equipment (DM1), HH Auth Cert, Home Health, Oncology Medication Prior Authorization, Physician Referral, and Rehabilitation. A callout for this section states, "For the General section in type section will always be Ancillary".
- Referred By/To:** A callout states, "For the Class section you will always select internal". The Referred By/To section includes fields for Referred By, Location/POS, Department (LFS SPC PEDS), and Provider & Address.
- Referred To:** A callout states, "For the Class section you will always select internal". The Referred To section includes fields for Referred To, Location/POS, Department (LFS FAMILY SUPPORT), and Provider & Address (RAMOS, JOSLYNN).

The interface also includes a sidebar with navigation options (General, Referred By/To, Diagnoses, Services, Treatment Plan, Communications, Scheduling, Appointment List, Referral Details, Authorization) and a bottom status bar showing "Referred By: No Provider Selected" and "Referred To: No Provider Selected".

Z Codes

Z Codes

- In EPIC, FSS will use:
 1. The Diagnoses section to document the referral reason(s). All referrals received should have at least one diagnoses code entered.
 2. These Z-Codes align with the Z-Codes used on the clinical side re: positive SDOH screener results.
 3. The Referral Reason section to document “tags” for grant reporting (workaround to ensure information is captured in a reportable way) These “tags” are ones we normally see, such as “food insecurity, education, employment”, etc.
 4. Please use list of Z codes on next slide rather than searching for a code in EPIC.

Z Codes (con't)

Referral Reason to FSS	Description of Items that Fit in this Referral Reason Bucket	Enter in EPIC under Diagnoses <Z-Code>	Enter in EPIC under Referral Reason <drop-down>
Education	<ul style="list-style-type: none"> - Adult education (e.g. English as a Second Language, Adult Basic Education, High School Equivalency/ General Education Diploma) - Childcare or school - Child afterschool - Child early intervention or special education - Child summer program - Legal issues or rights related to adult or child education 	Z 55.9 Problems related to education and literacy, unspecified Z76.2 Child Care	NA
Employment	<ul style="list-style-type: none"> - Employment - Benefits related to employment including: Unemployment insurance - Legal issues and rights related to employment 	Z 56.9 Employment problem	NA
Financial Resource Strain	<ul style="list-style-type: none"> - Undefined/ general support related to financial resource strain - Benefits related to general financial resource strain including: Cash Assistance; One Shot Deal; Social Security Disability Insurance (SSDI); Supplemental Social Security Income (SSI) - Legal issues and rights related to financial resource strain <p>NOTE: Other topics related to financial resource strain should be documented in the more specific category, e.g. food insecurity.</p>	Z 59.9 Financial Difficulties	NA
Food Insecurity	<ul style="list-style-type: none"> - Food assistance - Benefits related to food insecurity, including: SNAP, WIC, - Legal issues and rights related to food insecurity 	Z 59.41 Food Insecurity	NA
Health	<ul style="list-style-type: none"> - Child development - COVID-19 vaccine - General or physical health - Health coverage - Benefits relate to health, including: Medicaid, Medicare - Legal issues related to health <p>NOTE: Mental health is a separate reason/ category</p>	Z 59.7 Insufficient social insurance and welfare support Z 23 Need for COVID19 Vaccine	If person was referred for COVID vaccine information or appointments, select: Community COVID vaccine referral
Housing and Utilities	<ul style="list-style-type: none"> - Device assistance - Housing - Internet access - Benefits related to housing and utilities, including: Home Energy Assistance Program (HEAP) 	Z 59.89 Housing Instability	

Referral Reason to FSS	Description of Items that Fit in this Referral Reason Bucket	Enter in EPIC under Diagnoses <Z-Code>	Enter in EPIC under Referral Reason <drop-down>
	<ul style="list-style-type: none"> - Legal issues and rights related to housing and utilities 		
Immigration	<ul style="list-style-type: none"> - Immigration - Legal issues and rights related to immigration 	Z 65.3 Problems related to other legal circumstance	
Mental Health	<ul style="list-style-type: none"> - Bereavement - Health coverage - Mental health - Stress management - Self care - Legal issues and rights related to mental health 	F 48.9 Mental Health Problem	
Relationships and Social Connections	<ul style="list-style-type: none"> - Child-caregiver relationships - Partner-spouse relationships - Other relationships - Social isolation - Legal issues and rights related to relationships and social connections <p>NOTE: Intimate Partner Violence and Elder Abuse should be documented under Safety</p>	Z 60.4 Social Isolation	
Safety	<ul style="list-style-type: none"> - Intimate partner violence - Elder abuse - Help with filing a police report or Order of Protection - Help with developing a safety plan - Legal issues and rights related to safety 	T 74.91XA Domestic Violence of Adult	
Transportation	<ul style="list-style-type: none"> - Transportation - Benefits related to transportation, including: Fair Fares Access-A-Rise, and Fair Fares Reduced Fare - Legal issues and rights related to transportation 	Z 74.8 Assistance with transportation	
Other	All/ most "other" responses a referring program/ org enters is likely captured above.	Choose from the Z-Codes above; all/ vast majority are covered in the list above	
All Referrals to FSS			If person is a Red Hook resident, select: Red Hook Resident

Transcribing referrals (con't)

- Once Completed with all 4 sections you will then select **ACCEPT**

Referral for Fake, Adam

Scan Patient Forms Member's Cases Appt Desk WQ Summary Accept and Schedule Accept and Assign Summaries

Fake, Adam

MRN: 15971496
Insurance: No Coverage
Pre-Auth Phone: No Coverage

General

Referred By/To

Diagnoses

Services

Treatment Plan

Communications

Scheduling

Appointment List

Referral Details

Authorization

General

Authorized
No Approval Necessary -
Patient Tracking

Referral #
27309816

Type
Ancillary

Priority
Routine

Class
Internal

Referral Reasons
None

Referred On
1/20/2023

Referred By/To

Referred By
LS LFH SPC PEDS

Referred To
JR RAMOS, JOSLYNN
LFS FAMILY SUPPORT
Care Coordination

Diagnoses

Z59.9 ICD-10-CM Problem related to...
...ces, unspecified

Services

Service

Provider

Requested

Approved

Covered Status

Auth Required

REF981 - AMB REFERRAL TO FAMILY SUPPORT SERVICES (FSS)

—

1

1

—

—

For the Services Section we will always select REF981

Transcribing referrals (end)

Referral for Fake, Adam

Print on Accept | Scan Patient Forms | Add Trace | View History | Members Cases | Appt Desk | WQ Summary | Accept and Schedule | Accept and Assign | Summaries

Fake, Adam

MRN: 15971496
Insurance: No Coverage
Pre Auth Phone: No Coverage

General

Referred By/To

Diagnoses

Services

Treatment Plan

Communications

Authorization

General

Authorized 10/10/2022 Referral # 25729796 Type Clinician Referral Priority Routine Class Incoming Referral Reasons None Referred On 10/10/2022

Referred By/To

Referred By: Family Health Centers at NYU Langone - Healthy Families

Referred To: RAMOS, JOSLYNN LFS FAMILY SUPPORT Family Health Centers at NYU Langone - Family Support Care Coordination

Diagnoses

Z59.9 ICD-10-CM Problem related to housing and economic circumstances, unspecified

Services

Service	Provider	Requested	Approved	Covered Status	Auth Required
REF981 - AMB REFERRAL TO FAMILY SUPPORT SERVICES (FSS)	—	1	1	✗	—

Close

Previous Next

Treatment Plan

Referral is not linked to any treatment or therapy plan

Communications

Note Com

25729796 Status: Authorized Reason: None Auto Assign

Accept & Stay Accept Cancel

Click "Accept"

How to link a Referral

- Referral from WQ needs to be linked to the enrollment episode in order to track referral outcome
- In order to link a Referral select the +ADD button and search for the referral to link
- If there are multiple referrals, choose the one with FSS Referral ID # 981, hover over each referral until you see FSS Referral ID #981
- If there are 2 referrals for the same client different reasons look at the Z code to identify referral that aligns with enrollment episode
- If the referral is not already linked, you must use this “Linked Referrals” to manually link the referral in order to track the referral outcome.

The referral look up status should reflect the referral under Referral ID #981

How to Link a Referral to Appointment

- From the FSS referral work queue, highlight select & highlight the referral and click “Assign”.
- Click “Book It” to schedule an appointment.

Note: In order for the referrals to automatically close after the 1st completed appointment, link the referral to the appointment. After you make appointments from the “Assign” (this slide) or the “referral” tab (next slide), the referral will also be automatically off from your WQ.

Referral/Authorization Workqueue FAMILY SUPPORT SERVICES REFERRALS [54831] Last refreshed: 12/1/20

Refresh Filter Edit Defer Assign Show Mine Notes Edit w/ Re Assign Chart

Active (Total: 102) Deferred (Total: 0)

Next Appoint...	Patient MRN	Procedure Name	Order Priority	Name	Coverage
		AMB REFERRAL TO FAMILY SUPPORT SERVICE...	Routine		HEALTHFIRST/HI
		AMB REFERRAL TO FAMILY SUPPORT SERVICE...	Routine	Diana	EMPIRE BCBS HI

Department Appointments ... Referral/Authorization ... X

FAMILY SUPPORT SERVICES REFERRALS Description: Family support services referrals which require triage 54831, NYU LANGONE HEALTH [10]

Appointment List for Diana

FAMILY SUPP ... Refresh Flip Assign Unassign Book It Remove Filters

How to Link a Referral to Appointment (con't)


- On the client's dashboard from the Appointment tab, click **"Schedule from Referral"**
- See as well tab labeled **Referral** and schedule from there


Future

Past

Referrals

Finalized Requests


Referra...	Referred By	Re...	Class	Status	Sched/Co...
25043...		LFS FAMILY SUPPORT	Care Coordination	Authorized	1 / 0
25360...	Red Hook Initiative	Clarissa Rios	Care Coordination	Inco...	Closed 0 / 0
25361...	Center for Court Innovation - Red Hook Community Justice Center	Clarissa Rios	Care Coordination	Inco...	Closed 0 / 0
25681...	Family Health Centers at NYU Langone - Women, Infants, and Children	Nelly Meade	Care Coordination	Inco...	Closed 0 / 0
25682...	Family Health Centers at NYU Langone - Healthy Families	Nelly Meade	Care Coordination	Inco...	Closed 0 / 0
34...	Family Health	Nelly Meade	Care	Inco...	Closed 0 / 0


View Referral
Counts
New Referral
Edit Referral

How to link a referral that has been scheduled

- You can assign an authorized referral that has already been scheduled.
- View** the referral from the **Referrals** tab to determine it is appropriate for the appointment
- Select the Future or Past** appointment tab for the scheduled appointment.
- Right-Click** on the appointment and select **Assign Referral**.

Future Past Referrals									
Referral	Referred By	Referred To	Referred to ...	Class	Status	Sched/Co...	Sched Status	Payor	Orders
27372	Socrates Thomas Kangadis, MD	FHC CAD TRN CARD	Cardiology	Internal	Authorized	0 / 0	Ready for Initial Scheduling	UNITED HEALTHCARE [1105] BLUE CROSS BLUE SHIELD [1036] STATE INSURANCE FUND [1115]	REF12 - AMB REFERRAL TO CARDIOLOG...

Future Past Referrals											
NYU Linked	R	Encounter Date	Time	Appt St.	Visit Type	Provider	Dept	Dept Spec	Appt N		
		11/21/2023 Tue	5:15 PM	Sch	ECHO STRE TEST [10015]		thy FHC TRN CARD [24]	Cardiology	cardio		
<div>Assign Referral Cancel Check In Cancel/Reschedule Change Appointment Check In</div>											

How to link a referral that has been scheduled (con't)

- The referral action activity launches showing the appointment information in the top pane, and the referral in the lower pane. Click **Assign** on the activity tool bar.
- A check mark will appear next to the selected appointment to indicate the referral was assigned.
- Exit by clicking the **X** in the upper right corner. The appointment desk's **Referral & Authorization Status** columns will now display these icons

The screenshot shows the 'Referral Action' interface for 'Edinburgh, Evan'. The top pane displays 'Appointment Information' and 'Patient Demographics for EDINBURGH, EVAN [10077490]'. The bottom pane shows a table of referrals with columns: Referral ID, A. Ms Referred By, Referred To, Orders, Class, Status, Starts, Expires, and Sched/Con.

Appointment Information:

Name:	Edinburgh, Evan	MRN:	10077490
Date:	11/21/2023	Status:	Sch
Time:	5:15 PM	Length:	45
Visit Type:	ECHO STRESS TEST [10015]	Copay:	\$0.00
Provider:	Tracy Sheehan McCarthy	Department:	FHC CAD TRN CARD
Referral #:		Referral Status:	
Notes:	cardiology	By:	CADENCE, INTEGRATED FRONT DESK
Made On:	11/28/2023 1:39 PM		

Patient Demographics for EDINBURGH, EVAN [10077490]

Birth date:	11/13/1968	SSN:	xxx-xx-6302
Age:	55 yrs	Sex:	Male
Home phone:	718-499-5623	Work phone:	646-522-3251
Address:	482 Carroll Street Brooklyn NY 11215	E-mail:	bkeilliot60@gmail.com
Permanent comments:			

Referral Information [27372]

Filtering On: Appt Department

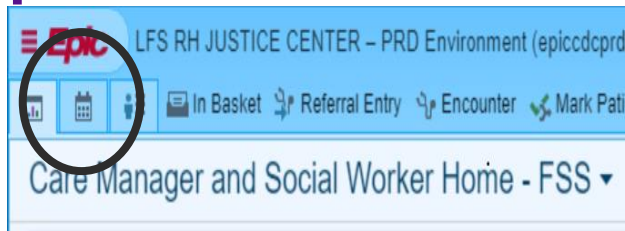
Referral ID	A. Ms Referred By	Referred To	Orders	Class	Status	Starts	Expires	Sched/Con
27372	Socrates Th...	FHC CAD T...	REF12 - AMB REFERRAL TO...	Internal	Authorized	11/01/2023	11/27/2024	0 / 0

A red box highlights the 'Assign' button in the top toolbar. A purple arrow points from the 'Assign' button to the checkmark in the 'A. Ms Referred By' column of the referral table. Another purple arrow points from the 'Rfl' column header to the 'Rfl' column of the table, which contains a checkmark icon. A third purple arrow points from the 'Auth Stat...' column header to the 'Auth Stat...' column of the table, which contains a green checkmark icon.

Appointment Workflow

How to View your appointments

- When logging in, your first view is your dashboard. To view your appointments, you can **Click the Calendar**
- You can also **View your Schedule at a Glance**
- Ensure that you are logged into the correct location (FSS Counselors should be logged into FSS Family Support or any location you are working from)



Schedule at a Glance ↗

Last Refresh: 11:52:10 AM

Provider

Wrap Text? ☐ No ☒ Yes

Date 9/17/2024 📅

Display Patient Name? ☐ No ☒ Yes

No appointments

Change Login Information

Department: LFS FAMILY SUPPORT 🔍

ContinueCancel

How to View your appointments (con't)

- Click the Calendar
- To view your schedule, click on **LFS FAMILY SUPPORT**, then choose your name. This will allow you to view your specific schedule.
- Counselors are to filter to see patients they are assigned to and are scheduled to see via an appointment. Counselors can see their clients on their schedules for the day, week or month

The screenshot shows the Epic EHR interface for the LFS RH JUSTICE CENTER - PRD Environment. The top navigation bar includes icons for Calendar, In Basket, Referral Entry, Encounter, Mark Patients For Merge, Case Management, Registration, Pt Outreach, Apts, Chart, and More. The 'Calendar' icon is circled in purple. Below the navigation bar, the 'LFS FAMILY SUPPORT (All Providers)' dropdown menu is highlighted with a purple arrow. The main area displays a list of appointments with columns for Status, Status Details, Pr..., MyChart Up..., Time, Patient, and Notes. The date 'Sep 11, 2024' is selected in the calendar view. The patient name 'CLARISSA' is highlighted in the dropdown menu.

Status	Status Details	Pr...	MyChart Up...	Time	Patient	Notes
Signed	Checked out: ...			10:00	Miese	
Signed	Checked out: ...			10:00	Hern	
Signed	Checked out: ...			10:30	Jimer	
Signed	Checked out: ...			11:00	estr	
Scheduled				11:00		
Signed	Checked in: 1...			11:00	Huan	
Signed	Checked out: ...			11:00	Basili	
Signed	Checked out: ...			11:00	Sen,	
Signed	Checked out: ...			11:45	Lope	
Arrived	Checked in: 1...			12:00	Garc	
Scheduled			Not Offered	1:00 PM	Guac	
Scheduled			Not Offered	2:00 PM	Cos S	
Scheduled			Not Offered	2:00 PM	Luo, I	
Signed	Checked out: ...			2:00 PM	Guille	
Signed	Checked out: ...			3:00 PM	Garcia Juare...	30 y.o. / F

How to View your appointments (con't)

The screenshot displays the EpicCare interface for viewing appointments. A purple callout bubble points to the 'Filter by Status' dropdown, stating: "Counselors are able to filter to display only their patients by selecting counselor name". Another purple callout bubble points to the date filter, stating: "You can filter using date as well".

The interface shows the following components:

- Header:** EpicCare logo, user name (JOSLYNN R.), and navigation tabs (Schedule, Remind Me, In Basket, Chart, Encounter, Workqueue List, Pt Outreach, Appts, Edit Template, Template Build Report).
- Left Sidebar:** A list of departments and counselors under the heading "LFS FAMILY SUPPORT Department (All Pro...". The list includes: RAMOS, JOSLYNN; ALVAREZ, NETANYA; DELEON, MARIA; FELICIANO, DIANE; GARCIA, MICHAEL; LFS PEDS CLINIC 5160; LFS PRY 14TH STREET; LFS PS 15; LFS REDHOOK INITIATIVE; LFS REDHOOK JUSTICE CENTER; LFS SPA ADLT MED & SPC; LOPEZ, DAISY; and MEADE, NENNY.
- Main Content Area:** Displays appointment details for "GARCIA, MICHAEL" on "Dec 12, 2022". The table shows the following appointments:

Status	Prov	MyChart Up	Time	Patient	Infection Risk	Type	Notes	Last Event	CSN	Patient MRN	Provide
Signed											
Checked in: 11:40 AM						FOLLOW UP-FSS	SNAP Recertification	Visit Complete			Michae
Arrived						INITIAL-FSS		Department check-in complete			Michae
Checked in: 2:24 PM											
Scheduled						INITIAL-FSS					Michae
			4:00 PM								

No Show/Cancelled Appointments

Hyperspace - LFS FAMILY SUPPORT - PRD Environment (epicdcrapp02_pndapp01) - JOSLYNN R.

Staff Message 3 Letter Queue 61 Social Determinants of Hea...

Epic Schedule Remind Me In Basket Chart by Encounter Workqueue List PI Outreach Appts Edit Template Template Build Report

JOSLYNN R. EpicCare

Schedule

Open Slots Chart Show Orders Orders Epilink Results Sign Encounter Print AYS Change Flow No Show Outlook Settings Document Group Check In

LFS FAMILY SUPPORT Department (All Providers) Feb 03, 2023 Filter by Status Total: 15 No Show Documentation List (Alt-W) Preview

Status	Prov	MyChart Update	Time	Patient	Infection Risk	Type	Last Event	CSN	Patient MRN	Provider
Not Seen		Not Offered				INITIAL-FSS		902668958	14973654	Emilia Ortiz-B
No Show		Not Offered				FOLLOW UP-FSS		998228835	16040412	Netany Alvarez
Arrived		Not Offered				TELEPHONE INITIAL - FSS		903329627	15465301	Vanesa Romua
Checked in: 10:18 AM		Not Offered				FOLLOW UP-FSS		904335609	15640482	Emilia Ortiz-B
Signed		Not Offered				TELEPHONE INITIAL - FSS	Checked Out	904608568	15025238	Andy Y
Checked in: 10:04 AM		Not Offered				FOLLOW UP-FSS		904615812	15971496	Joslynn Ramos
Checked out: 1:13 PM		Not Offered				FOLLOW UP-FSS		903868513	14199314	Netany Alvarez
Signed		Not Offered				FOLLOW UP-FSS		903432979	16174262	Andy Y
Checked out: 1:03 PM		Not Offered				PERIODIC REPORT-S...		903871431	11851007	Netany Alvarez

Make sure to highlight the patients row and select "no show" from the action buttons

Fake, Adam

Appt Desk

Adam Fake
Male 63 yrs, 01/01/1960
555-123-4567
MRN: 15971496
SSN: xxx-xx-9999

150CH - PARENT
1234 Main Street
Brooklyn NY 11220

Book It One Click Walk In Request Reports Patient Options Printing Outside Records CASIS Message History

Patient Summary (alt-r)
Fake, Adam (63 yrs)

MRN	Sex	Mobile	E-mail
15971496	Male [2]	555-123-4567	myemail@gmail.com

DOB	Gender Identity	Home	PH Type
1/1/1960		555-123-4567	

SSN	Prof. Pronoun	Work	HM
xxx-xx-9999			

Reg Status	Lang	Intpr
New [2]	English [22]	No [2]

Comments
contact pt's friend XYZ

44%
7 of 16
No Shows

Patient Guarantor Accounts

Guarantor Account Name	Guar AcctID	Status	SA	Type	Financial Class	Balance
FAKE ADAM	6328980		NYUSA	PIF	SELF	0.00

COVERAGE & FINANCIAL INFO
Guarantor: PIF - Self
HB Balance Due: \$0.00
PI Balance Due: \$0.00
Self-Pay Bal Due: \$0.00

NO SHOWS
50% LFS FAMILY SUPPORT
44% All departments

Future	Past	Referrals	Recalls	Active Requests	Finalized Requests						
NYU Linked...	R	Encounter Date	Time	Len	Visit Type	Dept	Dept Spec	Provider	Interp Vendor	Appt Notes	CSN
		2/3/2023 Fri	2:20 p(Ar)	60	FOLLOW UP-FSS [807]	LFSFS [100048001]	Care Coordination	Joslynn Ramos [45483]			9046158

NEXT APPOINTMENT
2/3 FOLLOW UP-FSS
2:20 PM (Today)

Sign In Reg Appointment Contact Check In Check Out Cancel/Reschedule Change Appointment Edit Appointment Notes Edit Appointment Info Copy into Book It Recur

No Show/Cancelled Appointments (con't)

- Counselors will choose the appropriate cancellation reason that best aligns with cancellation/rescheduling of appointment

Appointment Desk

Cancel Appointments

Patient: Adam Fake

☒ **Friday Feb 3, 2023**

FOLLOW UP-FSS 4:10 PM
LFS FAMILY SUPPORT Joslynn Ramos, LCSW

Cancel/Reschedule Reason

Cancel/Reschedule Comment

Cancel Appts Reschedule Close

NYU Linked...	R...	Encounter Date	Time	Len	Visit Type	Dept	Dept Spec	Provider	Interp Vendor	Appt Notes	CSN
		2/3/2023 Fri	4:10 p	60	FOLLOW UP-FSS [987]	LF SFS [100048001]	Care Coordination	Joslynn Ramos [45483]			9046

Sign In Reg Appointment Contact Check In Check Out **Cancel/Reschedule** Change Appointment Edit Appointment Notes Edit Appointment Info Copy into Book It Recur



Thank You