Changing the Default Procedure in Multiple Facesheets

Netsmart
Helper
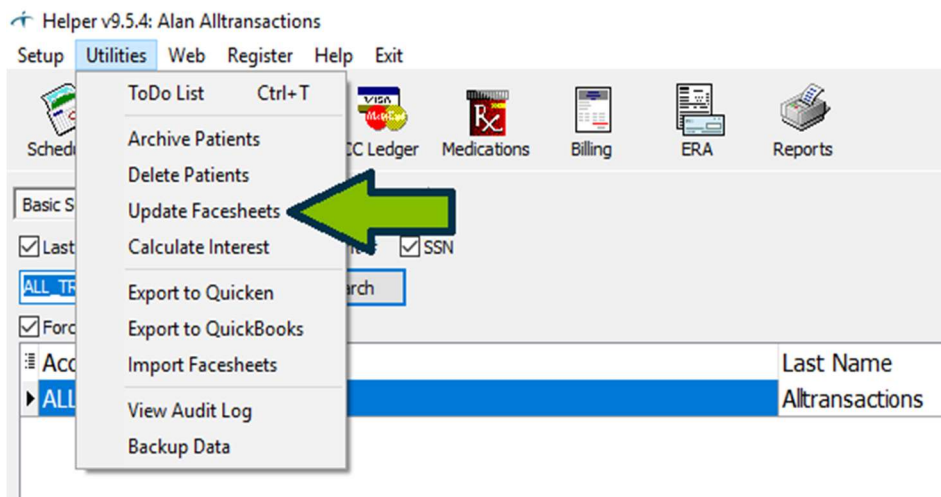
Running the Update Facesheet Wizard in Helper
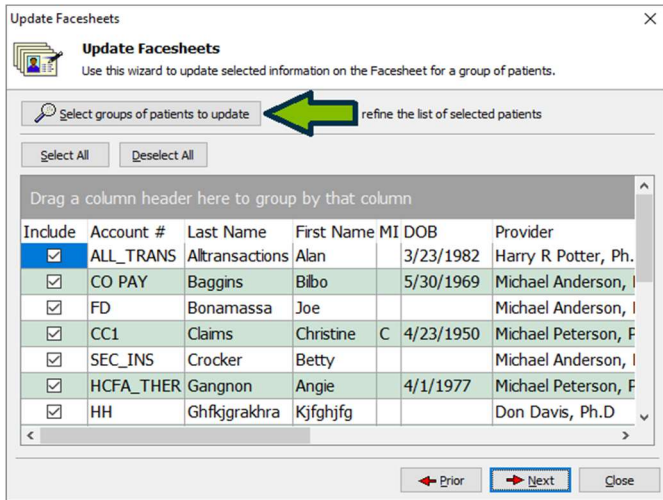
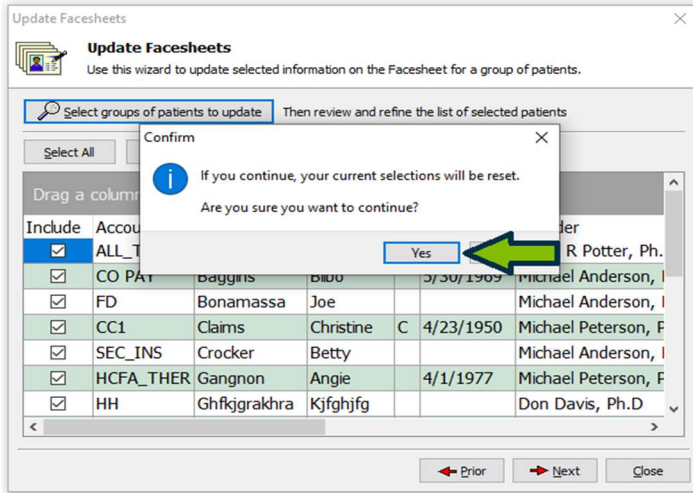1. Click 'Utilities' on Helper's main menu. Select 'Update Facesheets'.

2. Check the box beside 'General patient information' and click 'Next'.
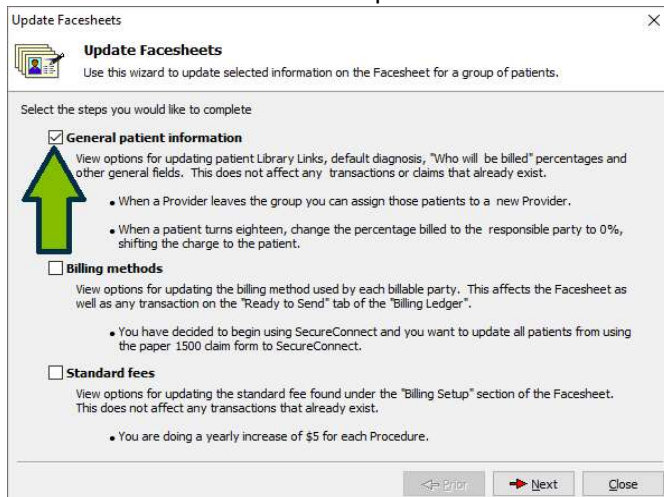
3. We will now select patients who have a default procedure we would like to update. Click on 'Select groups of patients to update'.

4. You will see the following warning screen. Click on 'Yes' to acknowledge the warning and continue.

5. We will select all patients who have a default procedure we would like to change. Select the 'Library Links' tab. Next, click on the ellipses button to the right of the Standard Procedure field.
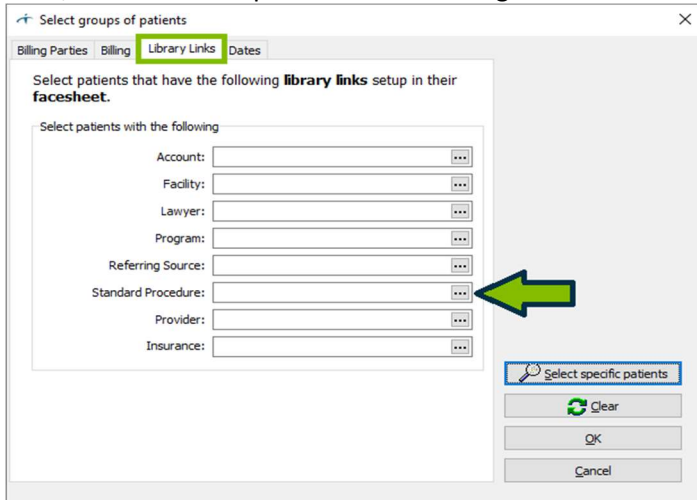
6. Find and highlight the Procedure with the CPT® Code you would like to replace and click 'OK'.
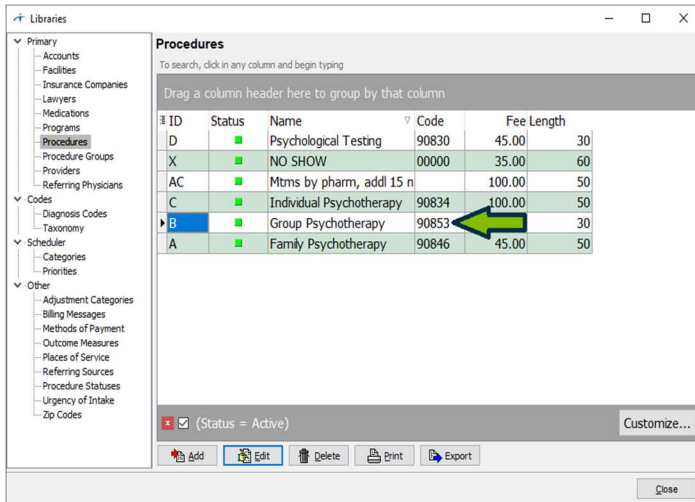
7. The patient list will now contain all patients who contain the procedure you chose. Verify the procedure and CPT® Code you selected in the previous step is displayed under the Procedure column. Click 'Next'.
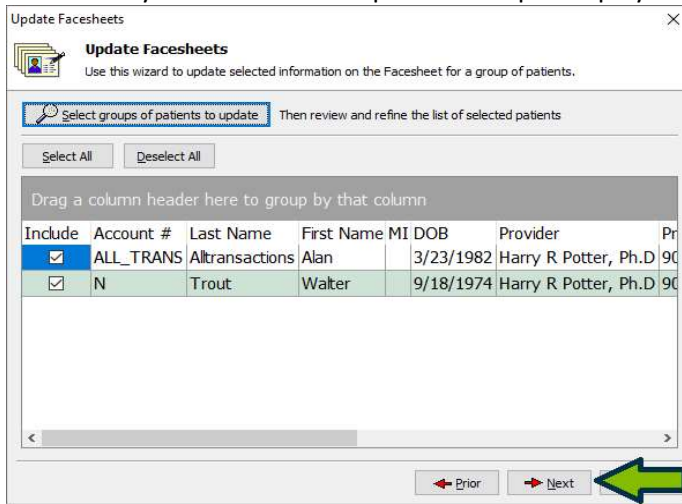
8. We are not updating any Library Links at this time. Leave all fields blank and click 'Next'.

9. Click the ellipses button to the right of the Procedure field.
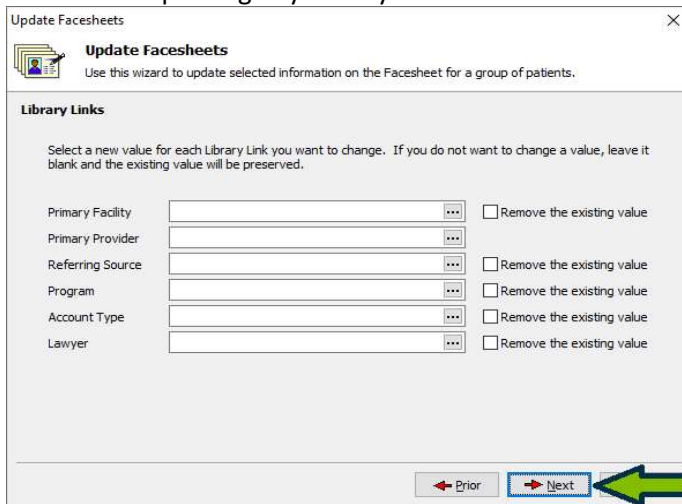
Update Facesheets

Use this wizard to update selected information on the Facesheet for a group of patients.

Billing Defaults

Select a new value for each field you want to change. If you do not want to change a value, leave it blank and the existing value will be preserved.

Procedure	[........] [...]	☑ Preserve other fields
Referring Physician	[........] [...]	☐ Remove the existing value
Place of Service	[........] [...]	☐ Remove the existing value
Resp. #1 Billing %	0% ☑ Preserve existing percentage	
Resp. #2 Billing %	0% ☑ Preserve existing percentage	

← Prior   → Next   Close

10. If you have already added the new Procedure you would like to change to, select it now and skip to step 15, otherwise, click 'Add' and continue to step 11

Libraries

Procedures

To search, click in any column and begin typing

Drag a column header here to group by that column

ID	Status	Name	Code	Fee	Length
D	■	Psychological Testing	90830	45.00	30
X	■	NO SHOW	00000	35.00	60
AC	■	Mtms by pharm, addl 15 n		100.00	50
C	■	Individual Psychotherapy	90834	100.00	50
▶ B	■	Group Psychotherapy	90853	45.00	30
A	■	Family Psychotherapy	90846	45.00	50

☒ ☑ (Status = Active)   Customize...

➕ Add   🗑 Delete   🖨 Print   ➡ Export

OK   Cancel

11. Click the ellipses to the right of the CPT® Code field to begin your search and continue to step 12. Otherwise, you can type in the proper CPT® Code without using the reference library and skip to step 13.

New Library Entry

General Information

CPT® Code:	[ ] [...]
Name:	[........]
Days/Units:	0
Length:	0
Fee:	$0.00
Allowed:	$0.00
☐ Charge a co-pay for this Procedure	

Other Information

Place of Service:	[........] [...]
Type of Service:	[........]
Family Plan:	[ ]
EMG:	[ ]
COB Code:	[ ]
NDC:	[........]

Managed Care

Units/Visits: 1

Extra Info

Fee Schedule

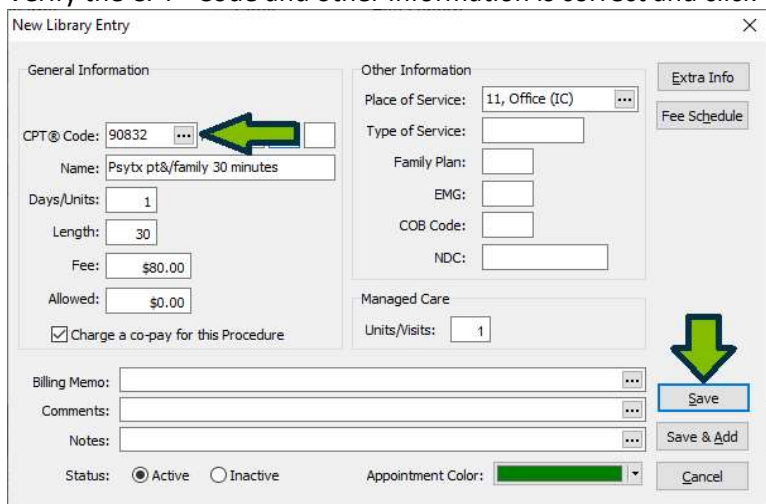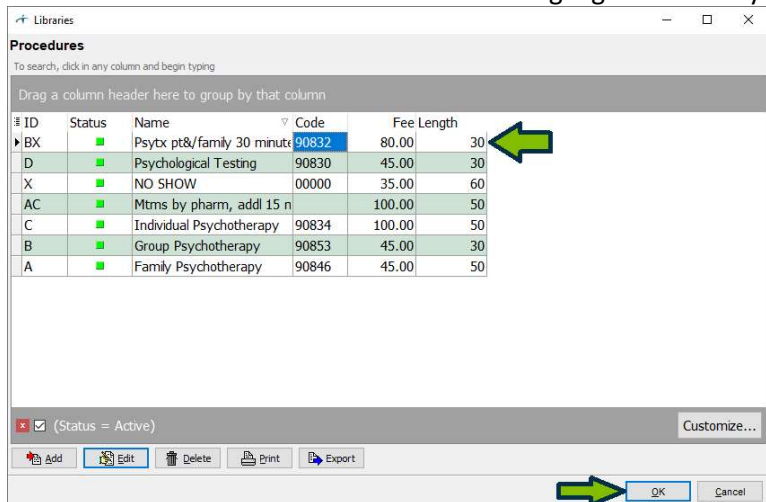|	
Billing Memo:	[........] [...]
Comments:	[........] [...]
Notes:	[........] [...]
Status:	⦿ Active ○ Inactive	Appointment Color: [████] ▾

Save

Save & Add

Cancel

12. Find and highlight the new CPT® Code you would like to use and click 'OK'.
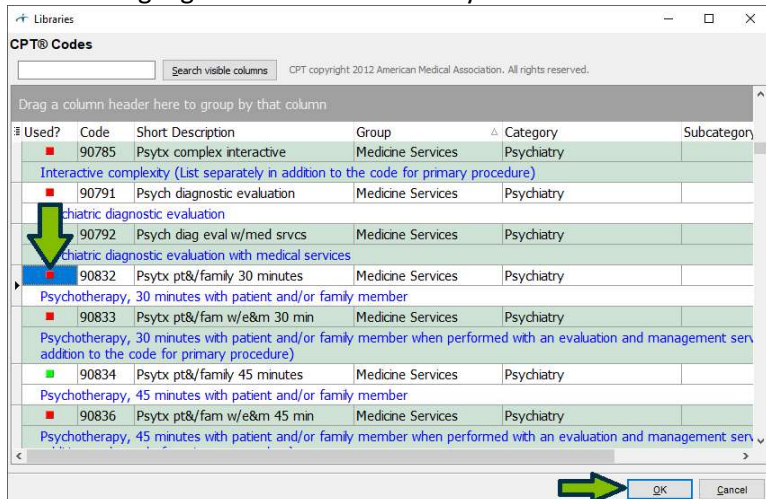
13. Verify the CPT® Code and other information is correct and click 'Save'.

14. You will be returned to the Procedures list. Highlight the code you added and click 'OK'.

15. Verify the correct code is in the Procedure field. The default is to leave 'Preserve Other Fields' checked.

When checked, only the Procedure field in the Facesheet will be updated.

If you uncheck this option, the Procedure field as well as other fields (e.g. Length, Fee, Place of Service) from the Procedure Library will also be updated in the Facesheets.

NOTE: It's best practice to uncheck this box if multiple fields are changing.
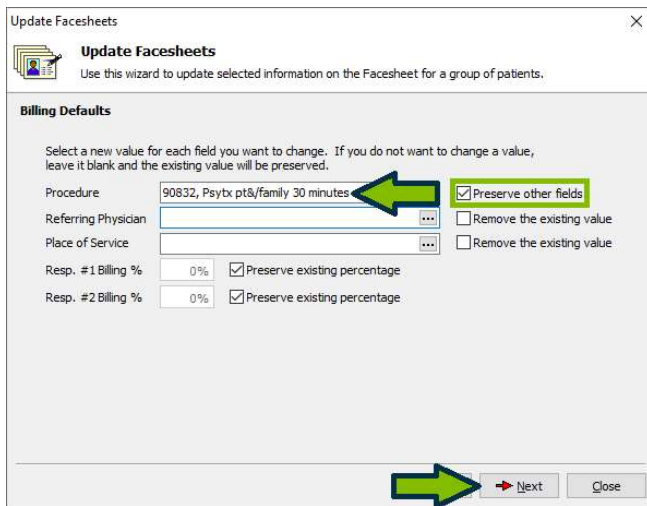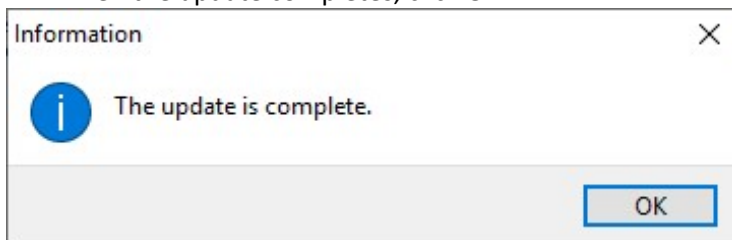

Once you have verified your selection(s) click 'Next'.

16. You have completed all selections. Click 'Update the Selected Patients' to complete the process and update the selected Facesheets.
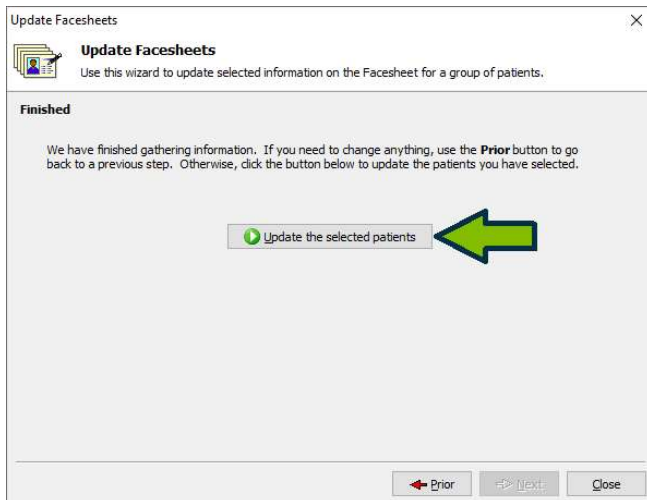
17. When the update completes, click OK.

Congratulations! You have completed changing the default procedure for those selected patients.

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