Go to Pimsy face page (with the flowers on it).

Left-Click on the CLIENTS tab (just below the UTILITIES)

When your clients appear, left-click on the narrow column next to the client's name you want to access – the entire line will turn blue.

<u>ASSESSMENTS</u>

1. You must first enter diagnosis for your client in the DIAGNOSIS tab which is in the row of tabs starting with CLIENT DETAILS on the right hand side of the screen.

2. You have the ENTERING DIAGNOSIS instructions – refer to that step by step procedure to enter the diagnosis in Pimsy. You MUST have the diagnosis in before you can enter your assessment.

3. On the same row as the CLIENT DETAILS and DIAGNOSIS tabs, slide your cursor over to NOTES.

4. In that window, select NEW PROGRESS NOTE tab. Left-click on that.

5. When the note template appears; enter SERVICE DATE by clicking on the number to change, where it will turn blue and type in date of service. The enter TIME in and TIME out in traditional hours and minutes (i.e, 1:30 PM – <u>not</u> military time or 13:30) Pimsy will calculate the duration for you.

6. **Do not enter info in the LOCATION CODE section on the next line – that will automatically enter when you release the note for review.**

7. Go to the BILLING CODE line (which is highlighted in brown) and left click on the down arrow to drop down the list. Click on DIAGNOSTIC INTERVIEW/ASSESSMENT (90791)

8. Skip a line down and go to NOTE TYPE; click on the down arrow and select ASSESSMENT NEW 90791.

9. SAVE immediately. The SAVE tab is in the upper left hand corner of the template, just above the client's name.

INSTRUCTIONS FOR ENTERING NOTES IN PIMSY

STEP #1

1. Simply type in the information in the upper part of the assessment from your notes. Put on 'X' in front of selections that offer multiple choices.

2. Complete the information down to the end of MENTAL STATUS EXAM

STEP #2

1. To fill out the second part of the assessment, starting with DIAGNOSTIC IMPRESSIONS & TREATMENT PLAN, start with:

2. ANTICIPATED DURATION is always 3 months;   # OF SESSIONS is most often 12 estimating one visit per week, unless there are plans to see the client more than that (i.e., 2x a week which would be 24) or less than that (i.e., bi-monthly which would be 6). There is some variance in the # of sessions but it is safe to always enter 12.

3. DSM-V/ICD-10 DIAGNOSIS Enter the proper title of the diagnosis and the ICD-10 diagnosis code as reflected in the DIAGNOSIS TAB.

4. The next line states: "Treatment of patient is medically necessary as patient has a diagnosis of:" and just enter the diagnosis; "and presents with the following symptoms"; here enter the symptoms you have observed the patient to present.

5. ASSESSMENT OF PROBLEM: simply type on 'X' in front of the most appropriate descriptions of patient's problems

6. The next line offers you a choice of two sentences: Pt has ACUTE or pt has CHRONIC mental health issues. Choose one of the sentences that best describes your patient's status and delete the other.

7. The next 3 sentences are questions that ask for the appropriateness of therapy for patient.

   a. Are they open to counseling?
   b. Are they cognitively able to benefit from counseling?
   c. Are the symptoms severe enough to warrant counseling?
   d. You must answer yes to continue treatment for this person.

As it is your first meeting with the client, you may find out later that your patient is not appropriate for treatment and services can be terminated for whatever reason. But, to the best of your knowledge from impressions gained during the assessment, answer the 3 questions as you determine. Even if you answer 'NO' to one of the questions, we still must fill out and enter an assessment in Pimsy in order to process billing/payment for your time and efforts.

8. METHODS OF THERAPY – simply type an 'X' in front of the most appropriate methods you choose but always include COGNITIVE or COGNITIVE-BEHAVIORAL with other methods.

9. PLANNED MEASURABLE & ACHIEVABLE GOALS

Go to blank space below this last section. Left-click/and then right/click with your cursor on the blank space, not on any text. A little menu will appear starting with UNDO. Go toward the bottom of the drop down and choose TEMPLATES. A new window will appear. The first 2 sections of this window will display symptoms (Sx's) for Depression and Anxiety. These are very helpful when filling out section for behavioral symptoms. As you carefully scroll down (it is recommended you simply click on the down arrow as it is easy to miss a section if you drag the bar) you will see goals for various problems starting with ADJUSTMENT and going to BMI at the bottom. To choose a goal, click in the narrow column to the left turning all 3 sections blue. If you want more than one goal, hold your "CONTROL" or CTRL key down on your keyboard and click on multiple choices. When you have finished choosing your goals, click on the CLOSE tab in the upper right hand corner of this small TEMPLATES window. The information will automatically transfer to the bottom of your assessment.

10. SAVE (the tab above the client's name) and your assessment is done.