Timesheet Procedure for Support Staff

1. Timesheets are submitted
   a. Timesheets will be submitted with supporting documentation. This could be a hard copy document or in the EHR.
2. Timesheets are checked by support staff
   a. Check any hard copy documents against the timesheet first.
   b. Open EHR and check for documentation in the "Forms Forwarded for me to Review"
      i. Sort by date and possibly by client name, if there are a lot of notes in the folder.
      ii. It is very important that neither the Progress Note nor the Super Bill are signed off on until the two are matched to each other and the timesheet.
         1. Please reference the example Progress Note and Super Bill in order to see what should be looked at for accuracy.
   c. If mistakes are found, please send the timesheet, the correction slip and the documents that are incorrect back to the staff member.
      i. If simple mistakes have been made, support staff may edit the document. Please see the example Progress Note and Super Bill to see what support staff may correct.
      ii. Please note on the correction slip if the document is in EHR.
3. All hard copy documents are scanned to holding tank by the person checking the timesheet.
   a. Each hard copy document (**except telehealth Super Bills**) should be scanned into the holding tank. An 'S' should be written at the top right hand side of the document. This indicates that it has been scanned.
      i. If using the Suite 12 scanner, scan to Users and save the document to: Billing – EHR Uploads – "Your Name". Name the document the title of the document.
      ii. If using the Suite 30 scanner, select Scanner – Folder – "Your Name". Scan the document. Name the document the title of the document.
4. All scanned documents in holding tank are uploaded to EHR
   a. Everyday all documents in the holding tank will be uploaded to the EHR and indexed.
      i. Support Staff will open EHR and go to "Documents" from the Dashboard. Click on "Select Documents". This will open a box that links to your computer. Navigate to your EHR Upload folder and select the documents for upload. Use Ctrl+A to select all documents for upload and click "Open". Once the documents have uploaded, go to "Index/Link to Chart". To view the documents you uploaded, select the "Uploaded

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By" option. Then Index each document. Remove all documents from the holding tank in the "EHR Upload" folder after upload.

5. All hard copy documents are to be filed for a term of 1 year after scanning occurs.

   a. Current clients should be filed in a section within their hard copy chart labeled "NEW EHR".

      i. On a quarterly basis, verification will occur that the documents are in the EHR by the director of the discipline and then shredded.

   b. New Admits will be filed in a monthly tickler system housed in a designated area within each discipline.

      i. As the year rotates, verification will occur that the documents are in the EHR by the director of the discipline and then shredded.

DO NOT SHRED UNTIL FURTHER NOTICE

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