

Batch Service Entry Tip Sheet

This Tip Sheet will walk users through how to use the Batch Service screen. The Batch Service Screen is a permission that is given after attending Provider Admin Training. This tip sheet may change as trainings are updated. Please view our webpage for the most up to date version. If any additional help is needed, please contact us at bhs-ehrsupport@sacounty.gov.

What is Batch Service Entry?

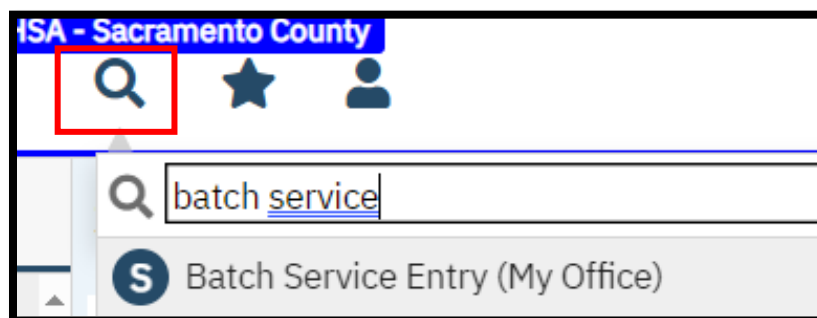
Batch Service Entry is a way for admin staff to enter multiple services for either one client or various clients within a program. This tool is particularly useful for residential or NTP programs who have their own EHR, since the services are a set rate and have no progress note attached.

Special Considerations for Batch Service Entry

- As stated above, a progress note is not attached to the services entered in Batch Service Entry. Since there is no progress note attached, you would not want to use this feature if you are entering a service that requires a progress note in SmartCare.
- Clinical staff do not have access to this feature. Admin staff will be the ones to enter services within Batch Service Entry.
- If you include too many services, the system may lock you out of the screen. It is typically safe to enter around 10-15 services without being locked out. You can enter more, however, if you get locked out of the screen (receive an error message when trying to access Batch Service Entry) you will need to contact the help desk to unlock the screen (bhs-ehrsupport@sacounty.gov).

Batch Service Entry for a Single Client

1. Search **Batch Service Entry (My Office)** on the search icon.



- The filters at the top will default to what was entered prior. Those filters will determine which clients are being displayed below. You'll want to make sure you have the **Date**, the **Program** selected, and select the **Last Name Begins With**. The other filters can be left blank. Click **Apply Filter** to view your results.

Batch Service Entry

01/01/2024 Staff Name All Procedure Groups **Apply Filter**

Client Preference M TU W TH F Also Include Complete/Show Services for the day Only Show Clients Seen In Last 90 Days

Last Name Begins With **Organizational Hierarchy**

- The Default Values section will show all clients enrolled in that program during that time whose last name begins with the letter selected. The date of service will begin on the date you selected. Before adjusting anything next to the client's name, enter the **Staff**, **Procedure Code**, **Time In**, **Time Out**, **Duration**, and **Location**. For residential services a Time out is not required.

Default Values

Staff	Procedure Code	Time In	Time Out	Dur.	Location
Callahan,Stacey	Adult Residential Day	8:00 AM	8:00 AM	60	Residential Substance Abuse

	Client Name	Staff	Procedure Code	Date	Time In	Time Out	Dur.
<input type="checkbox"/>	Test Client (788367041)	<input type="checkbox"/>	<input type="text"/>	01/01/202 <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Test Entry (758277000)	<input type="checkbox"/>	<input type="text"/>	01/01/202 <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Test Reina (800000538)	<input type="checkbox"/>	<input type="text"/>	01/01/202 <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

- Click on the **Plus Sign** for the client you want to enter services for. Each time you click on the plus sign a new line will open. All the information entered above will carry forward to the line below. You will just need to adjust the **date** for each line. You can ignore the top line, that only has the date.

Client Name	Staff	Procedure Code	Date	Time In	Time Out	Dur.	Location
Test Client (788367041)	Callahan, Stacey	Adult Residential Day	01/01/2022	8:00 AM	8:00 AM	60	Residential Substance Abuse
	Callahan, Stacey	Adult Residential Day	01/01/2022	8:00 AM	8:00 AM	60	Residential Substance Abuse
	Callahan, Stacey	Adult Residential Day	01/01/2022	8:00 AM	8:00 AM	60	Residential Substance Abuse

- Once complete, click **Save** at the upper right of the screen.

Client Name	Staff	Procedure Code	Date	Time In	Time Out	Dur.	Location	Comments
Test Client (788367041)	Callahan, Stacey	Adult Residential Day	01/01/2022	8:00 AM	8:00 AM	60	Residential Substance Abuse	
	Callahan, Stacey	Adult Residential Day	01/02/2022	8:00 AM	8:00 AM	60	Residential Substance Abuse	
	Callahan, Stacey	Adult Residential Day	01/03/2022	8:00 AM	8:00 AM	60	Residential Substance Abuse	

Batch Service Entry for Multiple Client

- Search **Batch Service Entry (My Office)** on the search icon.

- The filters at the top will default to what was entered prior. Those filters will determine which clients are being displayed below. You'll want to make sure you have the **Date** and the applicable **Program** selected. The other filters can be left blank. Click **Apply Filter** to view your results.

01/01/2024 M TU W TH F Also Include Complete/Show Services for the day Only Show Clients Seen In Last 90 Days

xxxxSacCo-APSS-Broadway(34CZK Staff Name All Procedure Groups **Apply Filter**

Last Name Begins With Last Name Begins With... **Organizational Hierarchy**

- The Default Values section will show all clients enrolled in that program during that time. The date of service will begin on the date you selected. Before adjusting anything next to the client's name, enter the **Staff**, **Procedure Code**, **Time In**, **Time Out**, **Duration**, and **Location**. For residential services a Time out is not required.

Default Values

Staff: Callahan,Stacey | Procedure Code: Adult Residential Day | Time In: 8:00 AM | Time Out: 8:00 AM | Dur.: 60 | Location: Residential Substance Abuse

	Client Name	Staff	Procedure Code	Date	Time In	Time Out	Dur.
<input type="checkbox"/>	Test Client (788367041)	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	01/01/202	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Test Entry (758277000)	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	01/01/202	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Test Reina (800000538)	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	01/01/202	<input type="text"/>	<input type="text"/>

- Click the **plus sign** for each client. This will bill the information on the line above for each of those clients.

Staff: Callahan,Stacey | Procedure Code: Adult Residential Day | Time In: 8:00 AM | Time Out: 8:00 AM | Dur.: 60 | Location: Residential Substance Abuse

	Client Name	Staff	Procedure Code	Date	Time In	Time Out	Dur.	Location
<input checked="" type="checkbox"/>	Test Client (788367041)	<input checked="" type="checkbox"/> Callahan,Stacey	Adult Residential Day	01/01/202	8:00 AM	8:00 AM	60	Residential Substance Abuse
<input checked="" type="checkbox"/>	Test Entry (758277000)	<input checked="" type="checkbox"/> Callahan,Stacey	Adult Residential Day	01/01/202	8:00 AM	8:00 AM	60	Residential Substance Abuse
<input checked="" type="checkbox"/>	Test Reina (800000538)	<input checked="" type="checkbox"/> Callahan,Stacey	Adult Residential Day	01/01/202	8:00 AM	8:00 AM	60	Residential Substance Abuse

5. Click **Save** to save the services.

Batch Service Entry ⚙️ ? **Save** ✕

01/01/2024 Staff Name All Procedure Groups **Apply Filter**

Client Preference M TU W TH F Also Include Complete/Show Services for the day Only Show Clients Seen In Last 90 Days

Last Name Begins With **Organizational Hierarchy**

Default Values

Staff: Callahan,Stacey | Procedure Code: Adult Residential Day | Time In: 8:00 AM | Time Out: 8:00 AM | Dur.: 60 | Location: Residential Substance Abuse

	Client Name	Staff	Procedure Code	Date	Time In	Time Out	Dur.	Location	Comments
+	Test Client (788367041)	<input type="checkbox"/> <input type="text"/>	<input type="text"/>	01/01/2022	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
		<input checked="" type="checkbox"/> Callahan,Stacey	Adult Residential Day	01/01/2022	8:00 AM	8:00 AM	60	Residential Substance Abuse	
+	Test Entry (758277000)	<input type="checkbox"/> <input type="text"/>	<input type="text"/>	01/01/2022	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
		<input checked="" type="checkbox"/> Callahan,Stacey	Adult Residential Day	01/01/2022	8:00 AM	8:00 AM	60	Residential Substance Abuse	
+	Test Reina (800000538)	<input type="checkbox"/> <input type="text"/>	<input type="text"/>	01/01/2022	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
		<input checked="" type="checkbox"/> Callahan,Stacey	Adult Residential Day	01/01/2022	8:00 AM	8:00 AM	60	Residential Substance Abuse	