

Supervisee & Supervisor-bhworks Guided Workflow

NOTE: The case notes supervision workflow was established to create a more efficient process to document supervision for limited licensed staff while also maintaining documentation within the platform to support the supervisory relationship. Please also note that supervisor sign off is not a billing requirement, but rather a medicaid requirement to review the logs for limited license providers.

Supervision within bhworks is set up based on provider credentials. Any staff member holding a limited license would be required to submit case notes for approval for any billable service that is logged in the platform. Non-billable services can be logged and finalized without needing supervision (unless indicated otherwise by the organization).

SUPERVISEE WORKFLOW:

Supervisees:(Person who is being supervised):

NOTE: The Supervisee will continue to document all service encounters through the case notes option in bhworks.

- Within the participants record, click on the “Case Notes” subfolder.
- Click + New Case Note.

CASE NOTES							
Date	Service	Provider	Encounter Status	Duration	Status	Approval	Updated
04/11/2023	Psychotherapy per hour	Rowley, Jaime	Finished	01:00:00	Preliminary	Rejected (school demo 04/11/2023)	04/11/2023 02:43 PM

- Enter in all the required information, noted with an asterisk.
- When completed the user will be prompted with two options.
 - **Save and Return-** To save the current note and return to it at a later time before submitting for approval
 - **Save and Submit for Approval-** To submit the case note for supervisor approval.

Documentation Time min.

Travel Time min.

Supporting Materials PDF, PNG and JPG only

Attach documents

* Notes

Behavior

Intervention

Response

Plan

NOTE: This holds the note in a preliminary or pending status. No changes can be made to the case note while in this status. The supervisor will need to approve or reject the note before any additional changes can be made.

Summary	Tasks	Referrals	Telehealth	Case Notes	Episodes of Care	+ New Case Note	
CASE NOTES							
Date	Service	Provider	Encounter Status	Duration	Status	Approval	Updated
04/11/2023	Psychotherapy per hour	Rowley, Jaime	Finished	01:00:00	Preliminary	Rejected (school demo 04/11/2023)	04/11/2023 02:43 PM
03/20/2023	Psychotherapy per hour	Rowley, Jaime	Finished	01:00:00	Preliminary	Rejected (jasmine ISDDemo 03/20/2023)	03/20/2023 10:10 AM
03/20/2023	Psychotherapy per hour	Rowley, Jaime	Finished	01:00:00	Final	Approved (jasmine ISDDemo 03/20/2023)	03/20/2023 10:07 AM

Checking Supervisees Notes Status:

- The user can check the status of their notes by running the “Case Notes Supervision Log”.
- This can be accessed from the Reports tab in the sidebar menu.
- The report can be run by selecting the time period and/or filtering by program or approval status (All, Pending, Approved, Rejected).

- Until the supervisor has reviewed the note, the note will stay in “Pending” status.

If the Supervisor “Accepts” the note: The supervisee will not receive an email but under the subtitle “Approval” they can see it has been “Approved”. This will automatically change the note to a “finalized” status.

If the Supervisor “Rejects” the note: The supervisee will receive an email stating that the note was rejected and can click the link in the email to view the comments made by the supervisor.

SUPERVISORS:

NOTE: Staff members who are providing supervision to limited licensed staff members will be able to see case notes that are pending approval.

The following reports are meant for Supervisors to help keep track of their workload: If the supervisor doesn’t see the reports as an option for them.. They can add them by accessing their user account and scroll down to “Assign Dashboards and Reports” and add them. If the user doesn’t have access to their user account, they will need to contact another Admin and or the bhworks customer support desk.

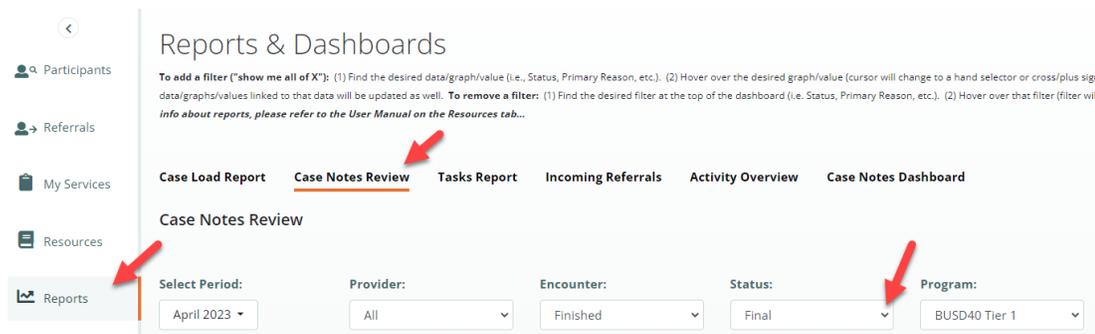
- **Case Note Review**-Provides a high level overview of student encounters
- **Service Report**-Shows approvals that are pending status.

- **Case Note Supervisor Review-** Allows a supervisor to filter by time period, provider, program and approval status.

NOTE: If the ISD/Organization requires the supervisor to review the supervisee’s Plan Of Care or any other documents outside of case notes, the supervisor will need to check on those functions outside of this process.

To run reports, go to the “Report” tab located in the sidebar.

- Click on the desired report
- Filter each report by using the drop downs within each report.



Example of Case Notes Review Report:

- Click on the individual case note within the report to review that specific case note.

Case Notes Supervisor Review Report

Select Period: March 2023

Provider: All Program: All Approval: Pending

PARTICIPANT	PROGRAM	STATUS	APPROVAL	REVIEW DATE	SERVICE	ENCOUNTER	DURATION	CANCELLED REASON	GROUP SIZE	SITE	PROGRESS	REASON TO TREAT
two, Test												
03/16/2023	Rowley, Jaime	ISD/RESA Demo Site	Pending Approval	Pending	Psychotherapy per hour	Finished	01:00:00		1	Nearing Completion		Counseling; Tobacco abuse counseling

Click on the actual Case Note itself to view note.

NOTE: A pop-up window will appear, allowing the reviewer to see all fields captured within the note.

- At the bottom of the page, there will be an option to add comments that the supervisor would like to provide to the Supervisee or comments as to why the supervisor is rejecting the note. Click either “Approve” or “Reject”, whichever is applicable.

NOTE: By approving a note, the supervisee will not be notified that the note was approved. They will have to check the status of their case notes to see the status. If the note is rejected the supervisee will receive an email stating that the note has been rejected. There is a link within the email that they can click taking them directly to the rejected casenote. The supervisee will be able to see the supervisor’s comments and make the necessary changes, so the note can be resubmitted for approval.