



## Santa Barbara County Department of Behavioral Wellness

### How-To

#### **How to get a note “unstuck” in Clinician’s Gateway:**

If you are unable to finalize an old note it is likely due to one of five reasons:

1. There is an updated template in Clinician’s Gateway since you started the note:
  - a. Copy and paste text from old template.
  - b. Select the current template in Clinician’s Gateway.
  - c. Paste text from old template into current template in Clinician’s Gateway. All demographic information should remain the same, ie dates of service.
  - d. Finalize service in current template in Clinician’s Gateway.
  - e. Open the old template, scroll down to the bottom of the page and delete the old service in Clinician’s Gateway.
2. The client was closed out to the facility/program (fac/prog) in which you documented the service prior to the service date:
  - a. Search client’s name in ShareCare. Please note, if you don’t have access to ShareCare contact your patient rep and have the patient rep follow the ShareCare steps below. You are responsible for Clinician’s Gateway process.
  - b. Select the client’s name and select admissions in ShareCare
  - c. Reopen the client’s admission in ShareCare for the fac/prog in which you documented the service prior to the service date.
  - d. In Clinician’s Gateway open the template, scroll down to the bottom of the page and finalize the service. Please note, it may take a few minutes for Clinician’s Gateway to recognize that the client’s admission was reopened to fac/prog in which you documented the service prior to the service date.

- e. Close the client's admission in ShareCare by selecting discharge.  
Enter the original discharge date and select update in ShareCare.
3. You have been closed out to the fac/prog in which you documented the service prior to the service date:
  - a. Contact QCM and request access to the fac/prog in which you documented the service prior to the service date.
  - b. Open the template, scroll down at the bottom of the page and finalize the service in Clinician's Gateway.
  - c. Contact QCM and request access to the fac/prog be end dated.
4. Your assigned note reviewer was closed out to the fac/prog in which you documented the service prior to the service date:
  - a. Contact QCM and request previous note reviewer have access to the fac/prog in which you documented the service prior to the service date.
  - b. Open the template, scroll down at the bottom of the page, select previous note reviewer's name and submit service.
  - c. Contact QCM once the service has been finalized and request the previous note reviewer's access to the fac/prog be end dated.
5. You were previously on note review and you documented the service prior to getting off note review:
  - a. Contact QCM and request to be put back on note review.
  - b. Open the template, scroll down at the bottom of the page and selected approved note reviewer and submit service.
  - c. Contact QCM once the service has been finalized and request to be removed from note review.

**If none of the above steps work, submit a service now ticket with the following information: client number and service number with # with a screenshot of the error message. Example below.**

Client ID: 987654321

Service #: 123456

Note cannot be submitted to review, save as pending or finalized due to expired Electronic Signature Agreement!

Cancel Spell Check Save and Continue Save as Pending Save as Draft Finalize

Error message:  
cannot submit  
due to expired  
signature

Updated: 10/5/20