

BHPN TRANSFER REPORT TEMPLATE

01 NOVEMBER 2019

🔒 HEADER ----- 2

1. Client Full Name
2. Patient Insured ID

☰ CLIENT INFORMATION ----- 3

1. Provider Full Name
2. Client Full Name
3. Patient Insured ID
4. Client Birth Date
5. Contact Full Name
6. Client Address
7. Client Home Phone
8. Client Claims Diagnosis


☰ TREATMENT PLAN ----- 7

1. Name
2. Status Criteria
3. Mastery Criteria
4. Generalization Criteria
5. Assessment
6. Baseline Information

☰ GUIDELINES ----- 8

1. Provider Full Name
2. Provider Credentials
3. Provider Occupation

🔒 HEADER -----

	Client Name: <input type="text" value="Client Full Name"/> ← 1
	MRN: <input type="text" value="Patient Insured Id"/> ← 2
	Date of Report: <input type="text" value="Date"/> 📅
	Addendum Report: <input type="text" value="Date"/> 📅

1. Pulls from the [Basics section](#) of the client's profile. ↴

Navigate to client's account > Profile > Basics

First Name	<input type="text" value="First"/>
MI	<input type="text" value="Middle Initial"/>
Last Name	<input type="text" value="Last"/>

2. Patient insured ID listed under client's [payor profile](#). ↴

Navigate to client's account > Profile > Payors > Add or edit payor > Patient

Insured ID	<input type="text" value="Insured ID"/> ↻
------------	---

≡ CLIENT INFORMATION -----

Provider Name OR 1	Provider Full Name
Provider Logo (optional)	

Client Full Legal Name: 2	Client Full Name
Medical Record Number: 3	Patient Insured Id
Date of Birth: 4	Client Birth Date
Client Age in Years, Months: (e.g., 02 years, 08 months)	02 years, 08 months
Date of Report:	Date
Parent/Guardian Name: 5	Contact Full Name
Parent/ Guardian Address: 6	Client Address
Out of Service Area (OOSA) Yes or No: <input type="checkbox"/> : (If Yes, provide area)	Text box
Phone Number: 7	Client Home Phone
KP Case Manager Name:	Text box
BHPN Clinical Case Manager Name (if known):	Text box
Treatment Team (include contact email and phone for supervisor):	Text area
Diagnosis (listed on authorization)	
Client Claims Diagnosis 8	

Provider Full Name 1. Pulls from the [Basics section](#) of the employee's profile. ↓

Navigate to employee's account > Profile > Basics

First Name	First
MI	Middle Initial
Last Name	Last

Client Full Name 2. Pulls from the [Basics section](#) of the client's profile. ↴

Navigate to client's account > Profile > Basics

First Name	First
MI	Middle Initial
Last Name	Last

Patient Insured Id 3. Patient insured ID listed under client's [payor profile](#). ↴

Navigate to client's account > Profile > Payors > Add or edit payor > Patient

Insured ID	Insured ID	↻
------------	------------	---

Client Birth Date 4. Pulls from the [Basics section](#) of the client's profile. ↴

Navigate to client's account > Profile > Basics

DOB	mm	dd	yyyy
-----	----	----	------

Contact Full Name 5. Pulls from the [Basics section](#) of the client's profile. ↴

Navigate to client's account > Profile > Basics

Parent/Guardian First Name	Parent/Guardian First Name
Parent/Guardian Last Name	Parent/Guardian Last Name

Client Address 6. Pulls from the [Basics section](#) of the client's profile. ↴

Navigate to client's account > Profile > Basics > Address

Address	<input type="text" value="Address"/>
Address #2	<input type="text" value="Address #2"/>
City	<input type="text" value="City"/>
State	<input type="text" value="State"/> <input type="button" value="Outside of the US?"/>
Zip/Postal Code	<input type="text" value="Zip/Postal Code"/>

Client Home Phone 7. Pulls from the [Basics section](#) of the client's profile. ↴

Navigate to client's account > Profile > Basics > Address

Home	<input type="text" value="000"/>	<input type="text" value="000"/>	<input type="text" value="0000"/>	<input type="text" value="Opt description"/>
------	----------------------------------	----------------------------------	-----------------------------------	--

Client Claims Diagnosis 8. Diagnosis code listed [within client's authorization](#). ↴

Diagnosis Codes 	<input type="text" value="Search for ICD-9 and ICD-10 diagnosis codes"/>
---	--

≡ TREATMENT PLAN

Objective: Name ← 1

Goal Status: Status ← 2

Mastery Criterion: Mastery Criteria ← 3

Generalization Criterion: Generalization Criteria ← 4

Maintenance Plan (if applicable): Text box ✎

Assessment Tool Source: Assessment ← 5

Baseline: Baseline Information ← 6

Name

1. Pulls from the name of the learning tree branch. ↴

Navigate to client's learning tree > Select Branch > Edit > Branch Title

Branch Name


[Click here to add labels...](#)

Status

2. Pulls from the status listed under the branch's goal details. ↴

Navigate to client's learning tree > Select Branch > View Goal > Status

Status

Not Active
In Progress
On Hold
Met
Discontinued 

Mastery Criteria 3. Pulls from the branch details within a learning tree. ↴

Navigate to client's learning tree > Select Branch > Edit > Mastery Criteria



A screenshot of a software interface showing a text input field for 'Mastery Criteria'. The field is highlighted with a red dashed border. To the left of the field is a blue information icon. To the right is a 'Sync from Criteria' button.

Generalization Criteria 4. Pulls from the branch details within a learning tree. ↴

Navigate to client's learning tree > Select Branch > Edit > Generalization Criteria



A screenshot of a software interface showing a text input field for 'Generalization Criteria'. The field is highlighted with a red dashed border. To the left of the field is a blue information icon. To the right is a 'Sync from Criteria' button.

Assessment 5. Assessment dropdown listed under branch's goal details. ↴

Navigate to client's learning tree > Select Branch > View Goal > Assessment



A screenshot of a software interface showing a dropdown menu for 'Assessment'. The dropdown is highlighted with a red dashed border. The text 'Choose an assessment' is visible inside the dropdown, along with a downward arrow icon.

Baseline Information 6. Pulls from the branch details within a learning tree. ↴

Navigate to client's learning tree > Select Branch > Edit > Baseline Information



A screenshot of a software interface showing a text input field for 'Baseline Information'. The field is highlighted with a red dashed border. To the left of the field is a blue information icon. To the right is a 'Sync from Data' button.

GUIDELINES -----

Please contact us or your [BHPN Clinical Case Manager](#) at 855-843-2476 (855-the-BHPN) directly with any additional questions or comments related to this report.

Respectfully Submitted,

1 2 3

Provider Signature

Provider Full Name , Provider Credentials Provider Occupation License/Cert.#

Provider Full Name 1. Pulls from the [Basics section](#) of the employee's profile. ↴

Navigate to employee's account > Profile > Basics

First Name First

MI Middle Initial

Last Name Last

Provider Credentials 2. Pulls from the [Basics section](#) of the employee's profile. ↴

Navigate to employee's account > Profile > Basics

Credentials BCBA MA etc

(e.g. PhD, MA, etc.)

Provider Occupation 3. Pulls from the [Basics section](#) of the employee's profile. ↴

Navigate to employee's account > Profile > Basics

Occupation Occupation