

PORTAL GUIDANCE DOCUMENT

To login in to the NYCPG portal, please go to: <https://my.nyproblemgambling.org/login>

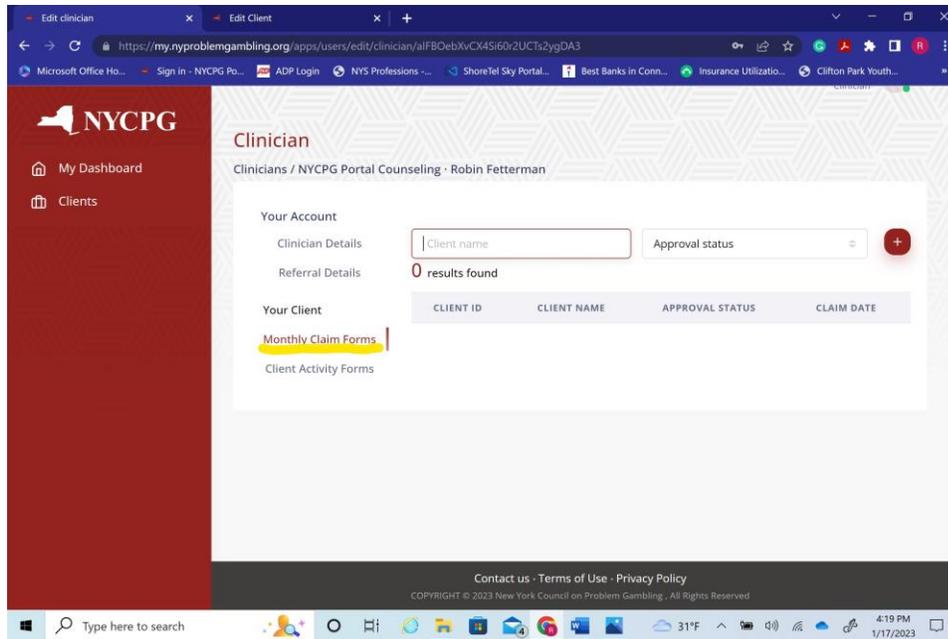
Enter your email address and password (you can easily reset your password by clicking on reset password link and going to your email to get the link. Make sure to check junk/spam/other folders if you can't locate in your inbox).

Claim Form

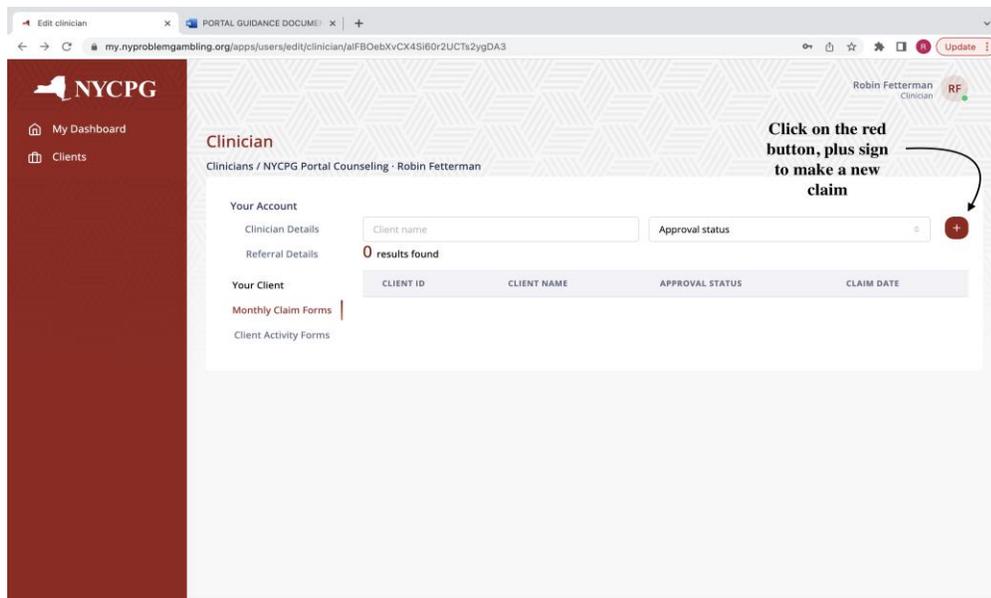
Go to My Dashboard



Then scroll down to monthly claim form



Click on the red button with plus sign to make a new claim form



Please select the client's name from the drop-down menu that will appear when you click on client name. Click on the month and year text box and select from pre-filled options. You can click directly on the year to manually type it in so you do not have to scroll through the listed options.

If the client does not appear, please contact your regional program manager or portalhelp@nyproblemgambling.org. Most likely, the client will still need to be assigned to you in the portal.

The screenshot shows a web browser window with the URL `my.nyproblemgambling.org/apps/users/edit/clinician/a1FB0ebXvCX45i80r2UCTs2ygDA3`. The page title is "Clinician" and the user is identified as "Robin Fetterman, Clinician". The form is titled "Your Account" and includes the following sections:

- Clinician Details:** Name: NYCPCG Portal Counseling - Robin Fetterman
- Referral Details:** Claim Date Month: January, Claim Date Year: 2023
- Your Client:** Client: Nancy TestPPP (#225914)
- Client Activity Forms:**
 - Client Progress This Month: Client Progress This Month
 - Client Reports Satisfaction with Treatment Sessions: Client Reports Satisfaction with Treatment Sessions
 - Amount Billed to PGRC: \$0.00

On the right side of the form, there are several summary statistics:

- # of Individual In-Person Sessions: # of I
- # of Group Sessions: # of G
- # of Remote Sessions: # of R
- # of Assessment Sessions: # of A
- # of Couple Sessions: # of C
- # of Family Sessions: # of F

A red box highlights the "+ Add Session" button, and an arrow points to it from the text instruction: "Select the client from the drop down menu and click + Add Session button".

Next, select the +Add Session button and this will bring up a new section with pre-populated responses in the drop-down menus. Click on each text box and complete the appropriate response.

You will see they all have an Astérix so if you miss one and hit save at the bottom right corner, it will direct you to complete the missed field. Repeat the +Add Session button for every date the client attended an individual (this includes in person or remote option), group, couples, or a family session. An "Assessment Session" will be for 90 minute session that are pre-approved by your Program Manager. Please select 45minutes for all sessions that are 45-60 minutes in length.

The session boxes to the right auto-fill based on the answers provided in the drop-down menus. This will also auto-calculate the correct amount owed based on self-pay, sliding scale, and insurance reimbursement amounts. Please see the image below for reference (note: rate is based on upstate rate of \$120 individual and \$60 group counseling reimbursement rates. Downstate and NYC is \$140 and \$70).

PORTAL GUIDANCE DOCUMENT | Edit clinician

my.nyproblemgambling.org/apps/users/edit/clinician/aIFB0ebXvCX4SI60r2UCTs2ygDA3

NYCPG

My Dashboard
Clients

Monthly Claim Forms
Client Activity Forms

January 2023

Client *
Nancy TestFPP (#225914)

Session # 1

Day of Session *
03

Length of Session *
45 minutes

Remote Option *
Video

Type of Session *
Individual

How Conducted *
Remote

Is insurance utilized for session *
Yes

Enter name of insurance company *
fidelis

Enter amount insurance company will pay for session *
80

Did client provide copy? *
Yes

Did client utilize sliding scale? *
No

Copy Amount *
25

Subtotal billed to PGRC
\$15.00

of Individual In-Person Sessions: 0
of Group Sessions: 0
of Remote Sessions: 1
of Assessment Sessions: 0
of Couple Sessions: 0
of Family Sessions: 0

These boxes will auto fill depending on your answers to the left.

The subtotal billed to PGRC will also autocalculate depending on insurance rate, sliding scale, or copay amounts provided.

hit +Add Session for each date a client attends either an individual (in person), group, remote, couple, family, or assessment session with you.

Delete

+ Add Session

Client Progress This Month *

After you have completed all sessions for the month, answer the final two questions for client progress and satisfaction and make sure to hit the save button. A text box will pop up telling you the claim has been saved successfully. If this does not occur and it brings you back to the body of the claim form, it means you may have missed one of the required answers. Complete the missed field and hit save. Make sure you receive the saved client claim updated or client claim saved auto response.

Video Yes

Enter name of insurance company *
fidelis

Enter amount insurance company will pay for session *
80

Did client provide copy? *
Yes

Did client utilize sliding scale? *
No

Copy Amount *
25

Subtotal billed to PGRC
\$15.00

Delete

+ Add Session

Client Progress This Month *
Improved

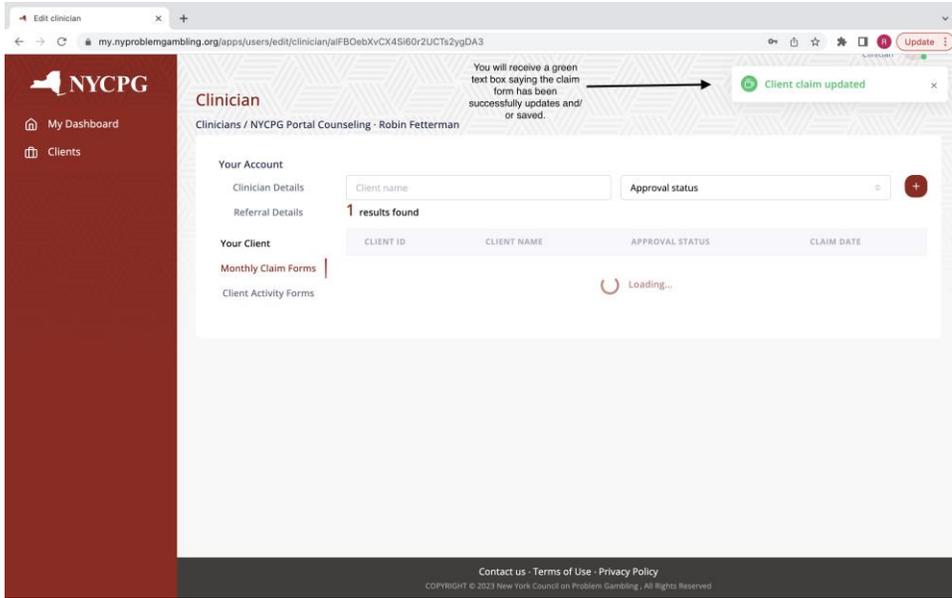
Client Reports Satisfaction with Treatment Sessions *
Yes

Amount Billed to PGRC
\$30

Make sure to hit save after you answer the client progress and satisfaction answers. A green text box will appear saying the claim was saved successfully.

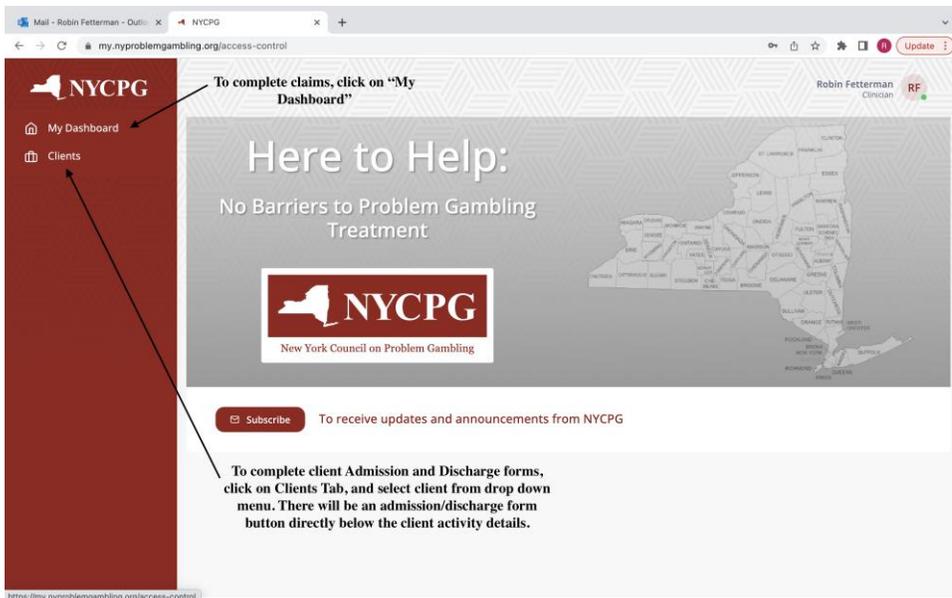
Back to list Save

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Admission and Discharge Forms

To complete an Admission Form, click on the Clients tab directly below your “My Dashboard” tab. Select the client from your automated list and click on their name. Next, select client activity and directly below the client activity information, you will see a green button called “Enter Admission/Discharge Information.” Once you click this button, it will open both the admission and discharge forms. Make sure to hit the save button in the lower right corner. You will see a green text box appear that says Client Activity Updated. And the client activity bar will now indicate admitted.



See the images below for reference:

Client

Clients > Jane Test

Client Details	STATUS	CONTACT DATE	ADMISSION DATE	DISCHARGE DATE
Client Activity	Engaged	01-27-2023		

You will see your client is listed as engaged. Click on this bar and it will open up their activity form with an admission/discharge option.

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Caller Type: Problem Gambler

Referred By: Existing or past CFE client

Initial Appointment Date: January 27, 2023 | Time: 09:00 AM

Was the call helpful? Yes

Information Kit Accepted: Yes

Regional PGRC Receiving the Call: Regional PGRC Receiving the Call

Readmission: No

Connected to Peer Advocate: No

Enter Admission/Discharge information

Click on green button to open up an admission form

Back to list | Save

Once the form opens, you can click on each text box and menu options will appear. When applicable, select as many correct responses as needed. There is also an “other” and “Notes” box for you to add any details you feel are important for their admission record. Please complete as many of the demographic questions as you can as this helps us in our education and awareness advocacy efforts.

The discharge form can be located below the admission form. You will access this form by the same pathway as the admission form. It is important to note you will need to know how many sessions the client attended to fill in the text box. This information can be easily gathered from claim forms you have completed and can be located in “My Dashboard.”

Also, for discharge status, please only indicate “dropout” if you have lost all contact with the client. Part of the NYCPG process is to include the Program Manager when a client has stopped attending sessions and is not responding to the clinician’s attempts to contact them. Please ask your regional PGRC PM to attempt to reconnect with the client. The PM will try three times to re-engage the client into services. If neither the clinician nor the PM is successful, they will be marked “dropout.” If the client lets the clinician know they are stopping treatment, it is considered “planned” even if this is not the clinician’s recommendation. The remaining text boxes will have auto prompts for the most appropriate response. Remember to hit save.

February 28, 2023

Discharge Status: Planned

Planned discharge reasons: Other

Clinician recommended the client stay in counseling services but she would like to attend gambling recovery meetings for support.

You will need to know how many sessions the client attended in total. You can easily pull this number from claim forms you have completed.

Number of Sessions Attended: 6

Diagnostic Criteria Met at Admission was Reduced: Yes

Diagnostic Criteria Met at Discharge: Diagnostic Criteria Met at Admission was Reduced

Goals Met: Partially Achieved

Current Gambling Compared to Admission: Reduced gambling

Client Involved with Self-Help at Discharge: Yes

Client Referred for Continued Services: Yes

If so, what services were recommended: Attending recovery meetings

Please see notes on Planned vs. Dropout for discharge status.

Make sure to hit the save button. A green text box will appear saying "Client Activity Updated"

Back to list Save

If you encounter any issues please contact your Program Manager for assistance or email portalhelp@nycpg.org.