Manage Client Diagnosis

Description: In this topic, the user will learn how to add a diagnosis code to a client profile. The diagnosis code is an ICD-10 or other code type that enables the client's eligibility for service, as required by some funding sources.

The diagnosis code can be added:

- To an existing client profile as indicated in the directions below
- Using the client diagnosis import - Import > Diagnosis Codes > Client Diagnosis

*Please note: The Allow Diagnosis Code setting on the service code must be set to Yes for the diagnosis code to appear when an employee adds an entry for the service code.

When creating and editing a client profile, the primary diagnosis field (located on the Client Information tab of the client profile) is visible but not editable.

Role Required: Super User

Permission Required: Client Admin

Add Diagnosis Code to Client Profile

1. Log in to DCI
2. Click **Home** on the main menu
3. Click **Clients** on the submenu
4. Enter the client's name in the filter and click **Search**
5. **Click anywhere in the client row** to open the Client Details page
6. Click **Actions**
7. Select **Add Diagnosis** from the drop-down menu
8. Complete the Add Diagnosis form wizard
    a. Diagnosis Code Type: Select from the drop-down options
    b. Diagnosis Code: Type and select the diagnosis code from the drop-down
    c. Description: This field pre-populates based on the diagnosis code selected
    d. Primary: Select Yes if this is the primary diagnosis code for the client, or No if it is not the primary diagnosis code.
        i. If Yes is selected, the primary diagnosis information displays in the Other Details widget and on the Diagnosis tab on the client details page.
        ii. If No is selected, the non-primary diagnosis displays only on the Diagnosis tab located on the client details page
    e. Diagnosis Date: Click the field to open the calendar and select the date of the diagnosis
    f. Status: Select Active or Inactive
9. Click **Save** and **Yes** to confirm

Edit Diagnosis Code

1. Log in to DCI
2. Click **Home** on the main menu
3. Click **Clients** on the submenu
4. Enter the client's name in the filter and click **Search**
5. **Click anywhere in the client row** to open the Client Details page
6. Scroll down to click the **Diagnosis** tab
7. **Click anywhere on the diagnosis line** to open the Diagnosis Details page
8. Click **Actions**
9. Select **Edit Diagnosis** from the drop-down menu
10. Update the Primary field and/or the Status field as needed
11. Click **Save** and **Yes** to confirm

Add Note to Diagnosis

1. Log in to DCI
2. Click **Home** on the main menu
3. Click **Clients** on the submenu
4. Enter the client's name in the filter and click **Search**
5. **Click anywhere in the client row** to open the Client Details page
6. Scroll down to click the **Diagnosis** tab
7. **Click anywhere on the diagnosis line** to open the Diagnosis Details page
8. Click **Actions**
9. Select **New Note** from the drop-down menu
10. Complete the New Note form
11. Note Type **(required)** - Select note type from the drop-down menu
    a. Options include Note, Comment, Error, Authentication, and Custom.
12. Selecting Custom opens the Note Sub Type field **(required)**
    a. The Note Sub Type selected may prepopulate a template for the Subject and Body. This template text is editable.
    b. Subject **(required)** - Summary of the note or prepopulated if included in note sub type template
    c. Body **(required)** - Add note content. The note body may include a template if included in the note sub type. Must contain at least five characters.
    d. Attachment (optional) - Click the **Choose File** button to select and upload an attachment
13. Click **Save** and **Yes** to confirm

The note has been added and will appear in the table on the Notes tab of the diagnosis details page. Notes added by other users will also appear in the table.

Add Attachment to Diagnosis

1. Log in to DCI
2. Click **Home** on the main menu
3. Click **Clients** on the submenu
4. Enter the client's name in the filter and click **Search**
5. **Click anywhere in the client row** to open the Client Details page
6. Scroll down to click the **Diagnosis** tab
7. **Click anywhere on the diagnosis line** to open the Diagnosis Details page
8. Click **Actions**
9. Select **New Attachment** from the drop-down menu
10. Add a name for the attachment
11. In the Attachment field, click the **Choose File** button.
12. Double-click the file to be attached or select it and click **Open**
    a. Only one attachment can be uploaded
13. The upload is now complete, and the file will display below the Attachment field.
    a. Click the blue **Minus (-)** sign to remove the attachment if needed
14. Click **Save** and **Yes** to confirm

The attachment has been added and will appear in the table on the Attachments tab of the diagnosis details page. Attachments added by other users will also appear in the table.

Related articles

- Import Formats - Admin Guide
- Group Service - Supervisor Guide
- Reports Guide
- Business Rule List
- Business Rules