



# Avatar NX Corrections in the EHR Training Guide

Sacramento County Avatar NX Training and Support

## Purpose of this Training Guide:

Users must attend Corrections in the EHR Training before gaining access to the forms and reports shown in this guide. This guide is designed to be an additional tool for Avatar NX users who have attended Corrections in the EHR Training. The Training Guide may change as Avatar NX trainings are updated. If you have any additional questions please contact Avatar Support at 916-876-5806 or [Avatar@Saccounty.net](mailto:Avatar@Saccounty.net).

## Practice Management Review:

**OCDR Process-** The OCDR process is done to delete a service that is in Open or Closed status. A service may need to be deleted if it cannot be edited by using the Edit Service Information form, the service is a duplicate, the service was billed in error, or the service is in closed status and cannot be edited. OCDR's are sent to QM for Mental Health programs ([OCDR@saccounty.net](mailto:OCDR@saccounty.net)) or Sacramento County SUPT from SUPT programs ([SUPT-OCDR@Saccounty.net](mailto:SUPT-OCDR@Saccounty.net)).

**Claims Correction Spreadsheet (CCS)-** The CCS process is done if a service needs to be voided or replaced but it has already been claimed. You would use the CCS to correct a service that was done in error after the service has been claimed. All CCS's are sent to Avatar-Fiscal at [Avatar-Fiscal@saccounty.net](mailto:Avatar-Fiscal@saccounty.net).

## Orphaned Progress Notes:

Most services in Avatar are generated by entering a progress note. When a clinician enters a progress note for a client there are two pieces to the form. The top portion of the Progress Note Entry form generates a service charge and the bottom portion of the form is the clinician's documentation for the service.

Progress Note

Client: TEST ENTRY v MR:70407906	Admit Date: 10/1/19			
Location: 10 - Topping/100-458	Discharge Date: 12/31/19			
Service Date: 12/31/19	Admit Date: 10/01/19	Discharge Date: 12/31/19	Days	C.S.#/MCH
Service: 0205 6-M New Patient OHS	Order Date:	Order Service:	0	
Order Type: Standard	Provider: CHARLES E. J. MURPHY	Documentation:	5	
Location: Unspecified Facility	Cd: 0000	Form:		
AMEDSVC: Unusual	Number in Group:	Total Discharges:	21	
EBP:	Fee to Fee: Yes			
Submitted by JAMES CHAMBERS @Psychiatry on 2019-09-04 at 02:07 PM				

Progress Note:

Psychiatric-IP

CC

HPL

Post Psych HL

Post Op

Subst Tx

Subst Tx

Subst Tx

Subst Tx

Subst Tx

Current Medication:

Allergies:

Social Hx:

Substance Hx:

Family Hx:

Family Psych

Family Substance

Family Genetic History

Family Medical

← Service Information

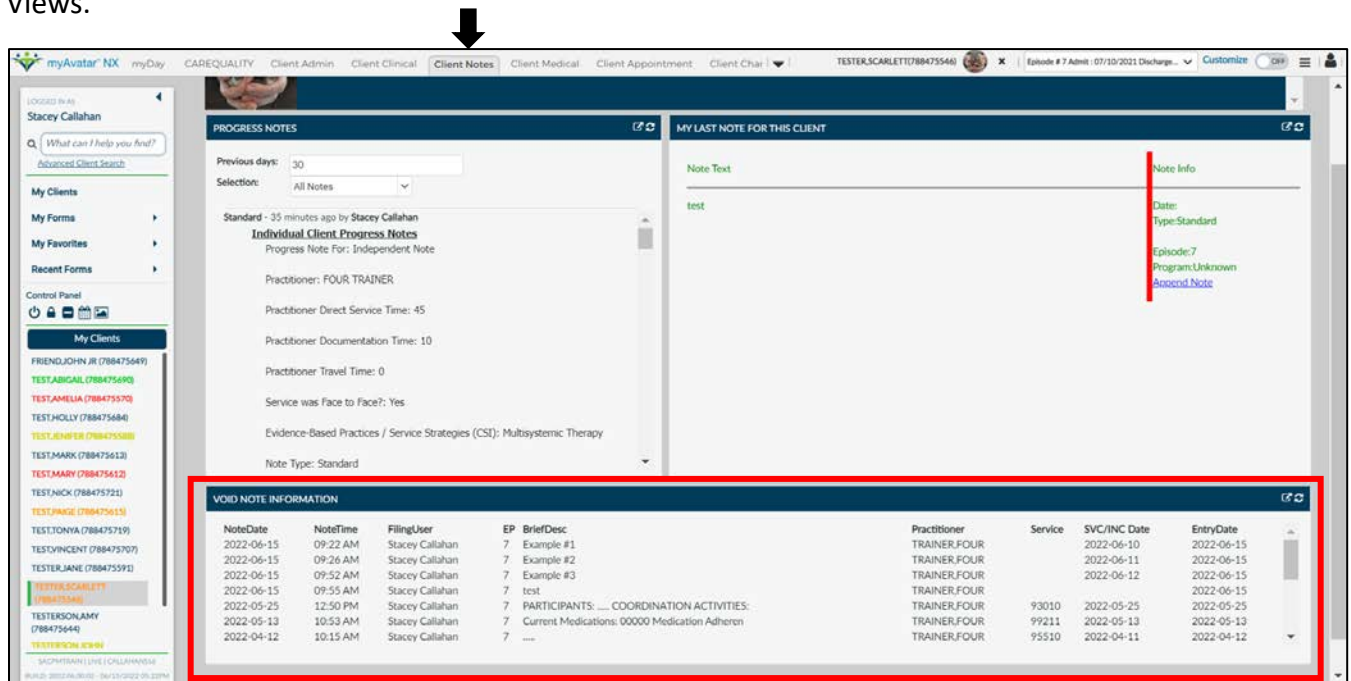
← Clinician's Documentation

When a service is removed by going through the OCDR or CCS process that creates an Orphaned Progress Note, the progress note has no services attached to it. In order to fix this a new service needs to be created by using the Client Charge Input form and attached to the progress note using the Attach Individual Notes to Existing Services/Appointments form.

## Tools for locating Orphaned Progress Notes

### Void Note Information Widget

The Void Note Information Widget is located in your Client Notes Console under your My Views.



This widget will show all progress notes for your client. If there is missing service information for the progress note you will know you have an orphaned progress note.

NoteDate	NoteTime	FilingUser	EP	BriefDesc	Practitioner	Service	SVC/INC Date	EntryDate
2022-06-15	09:22 AM	Stacey Callahan	7	Example #1	TRAINER.FOUR		2022-06-10	2022-06-15
2022-06-15	09:26 AM	Stacey Callahan	7	Example #2	TRAINER.FOUR		2022-06-11	2022-06-15
2022-06-15	09:52 AM	Stacey Callahan	7	Example #3	TRAINER.FOUR		2022-06-12	2022-06-15
2022-06-15	09:55 AM	Stacey Callahan	7	test	TRAINER.FOUR		2022-06-12	2022-06-15
2022-05-25	12:50 PM	Stacey Callahan	7	PARTICIPANTS: ... COORDINATION ACTIVITIES:	TRAINER.FOUR	93010	2022-05-25	2022-05-25
2022-05-13	10:53 AM	Stacey Callahan	7	Current Medications: 00000 Medication Adheren	TRAINER.FOUR	99211	2022-05-13	2022-05-13
2022-04-12	10:15 AM	Stacey Callahan	7	...	TRAINER.FOUR	95510	2022-04-11	2022-04-12

No service information

## Progress Note Summary Report

Enter the criteria for the note you are looking for. Under "Status" choose "F" for Final and under "Has an associated service?" choose "No". By pulling notes in Final status with no service attached this will show any orphaned notes.

Process Discard Add to Favorites

▼

**For Notes Between \***  📅 T Y **And \***  📅 T Y

The following are optional, but will improve performance if used

If none of these are selected, all notes in your System Code in the date range above will be returned

**Status**

 ✕ ▼

**Program**

 ✕ ▼

**Practitioner**

 🔍

**Has an associated service?**

 ✕ ▼

**Sacramento County DHHS**

**Progress Notes Summary**

**For Note Dates Between 6/12/2022 and 6/17/2022**

**For Program 34CNPZ For all Practitioners For notes without Services With a Status of: Final Only**

Name	ID	Ep	Note Date	Note Type	Entered	Service	Service ID	Status
TRAINER,FOUR (010562) TESTER,SCARLETT	788475546	7	6/15/2022	Standard	6/15/2022	Unknown		Final

## Attaching a Service to an Orphaned Note

1. After the incorrect service has been removed by the OCDR or CCS process, open the Client Charge Input form and enter a new service with the correct service information for your client.
2. Open the “Attach Individual Notes to Existing Services/Appointments” form.
3. Enter the Client ID and episode number to enable the other sections of the form.

The screenshot shows a web form titled "ATTACH INDIVIDUAL NOTES TO EXISTING SERVICES/APPOINTMENTS". At the top right are buttons for "Submit", "Discard", and "Add to Favorites". The form contains the following elements:

- Client ID:** TESTER,SCARLETT,(788475546)
- Episode Number:** Episode # 7 Admit : 07/10/2021 Discharge : None Program : APCC-TWC-14th Ave
- Select Note To Attach:** A button highlighted with a red box.
- Start Date:** 06/10/2022
- End Date:** (Empty field)
- Link Note To:** Radio buttons for "Appointments" and "Services".
- Note Type:** A list of checkboxes including "Clinician Treatment Summary", "Diabetes Education (Co-Sig Required)", "Diabetes Education", "Dietary (Co-Sig Required)", "Dietary", "Discharge (Co-Sig Required)", and "Discharge".
- Start Date (Appointment/Service):** 07/10/2021
- End Date (Appointment/Service):** (Empty field)
- Appointments/Services:** A dropdown menu with "Select" as the current option.

4. The Start Date will default to the Admission date. You can change the Start Date and enter an End Date to narrow your search. On the left hand side of the form you are entering information for the orphaned progress note. You can put as much or as little criteria as you choose.
5. Once you’ve entered the date range and/or criteria click on the Select Note to Attach button. A box will populate that shows any orphaned notes that fit your search criteria. Choose the note that needs to be attached to the service. Click OK.

**Select Note To Attach**

Client: TESTER,SCARLETT ( 788475546 )  
 Episode Number: 7

Note Date	Note Time	Filing User	Brief Description
06/15/2022	09:22 AM	Stacey Callahan	Example #1
06/15/2022	09:26 AM	Stacey Callahan	Example #2
06/15/2022	09:52 AM	Stacey Callahan	Example #3
06/15/2022	09:55 AM	Stacey Callahan	test

Buttons: OK, Cancel

6. There is an option to print the note. You can use this to verify you selected the correct note.
7. Choose what you want to link the note to. In most cases you will select Service. Selecting Appointment will link the note to an appointment created in the Scheduling Calendar. Only agencies who use the Avatar Scheduling Calendar would use this option.
8. The bottom right-hand section is where you will enter in your service information. The Start Date will default to the admission date. You are able to update the criteria to the date of the service.
9. Click on the Appointment/Services drop-down to choose the service you want to link to the progress note. This will be the service you entered into the Client Charge Input form. Click Submit to save.

## Voiding a Progress Note

There may be times when you do not want to attach a new service to a progress note. If the note was done in error, for the wrong client, or if there are too many documentation errors you may want to void the service and progress note altogether. In this instance you would follow the same OCDR or CCS process, but instead of creating and attaching a new service you will void the progress note.

The permissions to void a progress note will not be given to everyone who attends corrections training. The Authorized Approver at your site will have to specifically request those permissions for your account. Only two representatives at each program will have the ability to void progress notes.

## Steps to Voiding a Progress Note:

1. Open the Void Progress Notes form. Enter the client ID and episode number.
2. Enter your Note Information. This criteria will help you locate the orphaned progress note. You can enter as much or as little criteria as you choose.
3. If the service information is still attached to the note you can enter the service information. If the service has already been deleted you can leave this section blank.

The screenshot shows a web application interface for voiding progress notes. At the top, there are buttons for 'Submit', 'Discard', and 'Add to Favorites'. Below these are two search fields: 'Client ID' with the value 'TESTER, SCARLETT, (788475546)' and 'Episode Number' with the value 'Episode # 7 Admit : 07/10/2021 Discharge : None Program : APCC-TWC-14th Ave'. The 'Note Information' section includes a 'Start Date' of '06/10/2022' and an empty 'End Date' field. A 'Note Type' list is shown with 'Standard' selected. The 'Service/Appointment Information' section has fields for 'Date Of Service', 'Duration', and 'Service Code'. The 'Void Progress Note' section features a 'Select Note To Void' button (highlighted with a red box), a 'Reason For Voiding The Note' dropdown menu, and a large 'Comments' text area.

4. Click the Select Note To Void button. A box will populate that includes all progress notes (orphaned and non-orphaned notes) that fits the criteria you entered above. Choose the note that needs to be voided. You can figure out which note needs to be voided by viewing the details of each note. In the example below, the last note has no service information below it. That would be the note that needs to be voided. Click on your note then click OK.

**Select Note To Void**

Client: TESTER, SCARLETT ( 788475546 )

Note Date	Note For	Note Brief Description	Entry Date	Entry Time	Entry By (Option)
--> Service: Assessment - without medical services (93010)					
--> Service Date: 12/29/2021 Duration: 72					
03/16/2022	New Service	.....	03/16/2022	12:07 PM	Stacey Callahan
--> Service: Assessment - without medical services (93010)					
--> Service Date: 03/16/2022 Duration: 59					
05/25/2022	New Service	PARTICIPANTS: .....COORDINATION ACTIVITIES: R	05/25/2022	12:50 PM	Stacey Callahan
06/15/2022	Independent	Example #1	06/15/2022	09:22 AM	Stacey Callahan
06/15/2022	Independent	Example #2	06/15/2022	09:26 AM	Stacey Callahan
06/15/2022	Independent	Example #3	06/15/2022	09:52 AM	Stacey Callahan
06/15/2022	Independent	test	06/15/2022	09:55 AM	Stacey Callahan

- Once a note is chosen the bottom Void Progress Note portion of the form will become enabled. You can click the Print Progress Note button to view the note details and print the note for your records.
- Choose your reason for voiding the note from the drop down. Below that enter your comments. Each agency may require different information in the Comments section. Click Submit to save.

**Void Progress Note**

**Reason For Voiding The Note \***

Select

- Duplicate Note
- Incorrect Client
- Incorrect Episode
- Incorrect Information-Typing Error



7. You can run the “Progress Notes Voiced Report” to view any progress notes that have been voided at your agency.



## Sacramento County DBHS Progress Notes Voiced Report

**Notes Voiced For El Hogar-RST-Bercut Between 6/1/2020 and 8/18/2020**

**Original Entry By Staff: Stacey Callahan**

<b>Date of Note</b>	<b>Note Time</b>	<b>Note Type</b>	<b>Voided By</b>	<b>Reason for Void</b>
<a href="#">07/30/2020</a>	09:25 AM	Standard	Stacey Callahan	Incorrect Client
<a href="#">07/31/2020</a>	09:01 AM	Intake	Stacey Callahan	Incorrect Client
<a href="#">08/07/2020</a>	08:42 AM	Standard	Stacey Callahan	Duplicate Note