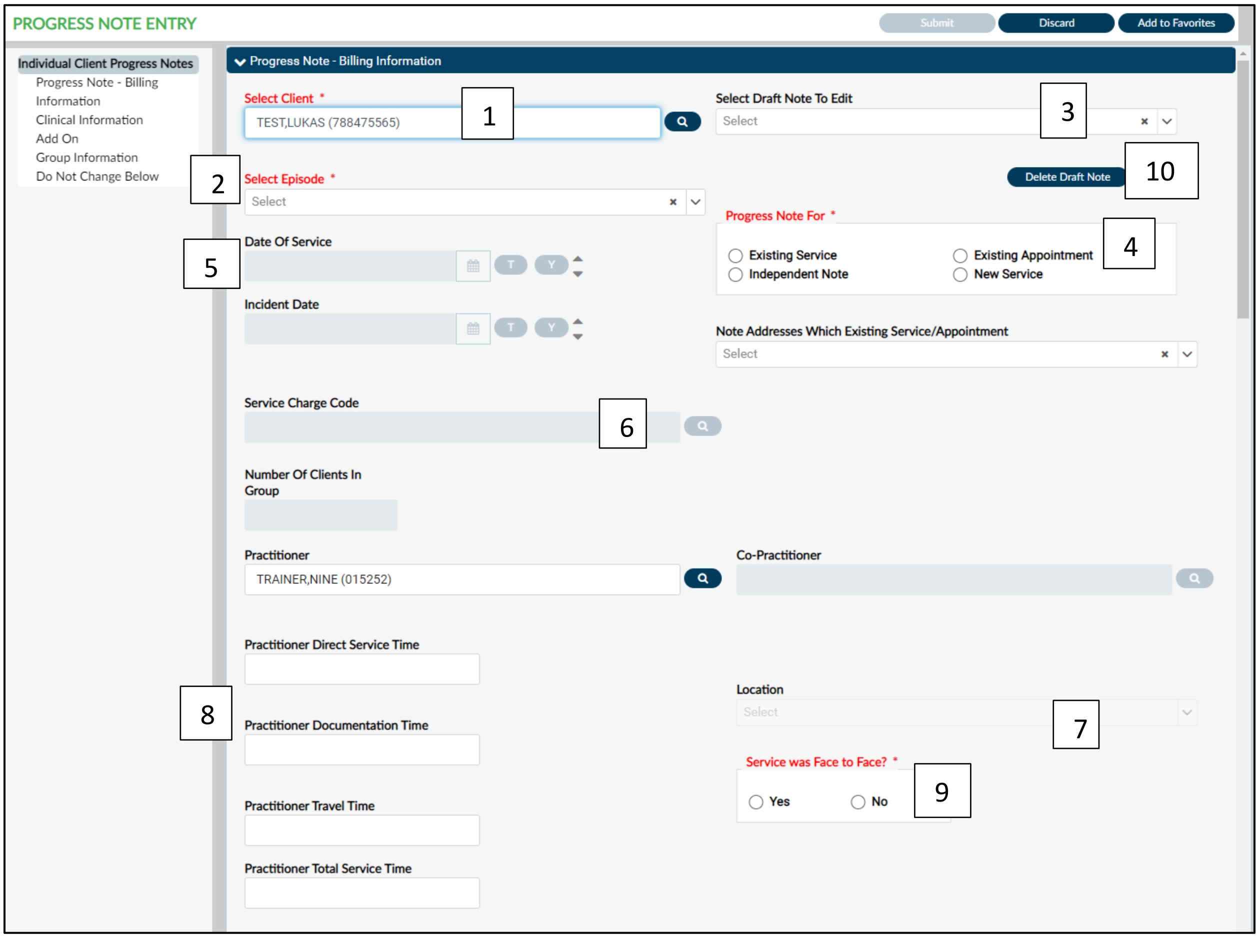
SUPT Progress Note Entry Tip Sheet

This Tip Sheet may change as our trainings and systems are updated. Please visit our website https://dhs.saccounty.gov/BHS/Avatar/Pages/Avatar.aspx for the most updated version. If any additional help is needed you can contact us at Avatar@saccounty.net.

Progress Note Entry Form

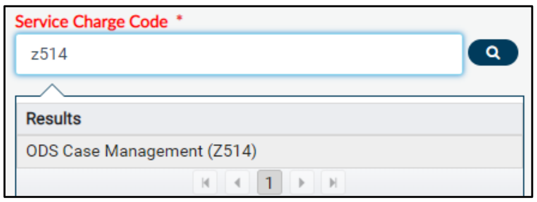
The Progress Note Entry form has two pieces to it. The top portion of the form (steps 1-9), contain the service information. This portion of the form will generate a billable or non-billable service charge. The bottom portion of the form (steps 11-19) is the documentation portion. This portion is where you will document your service activities. For information on the documentation requirements please contact QMInformation@saccounty.net.



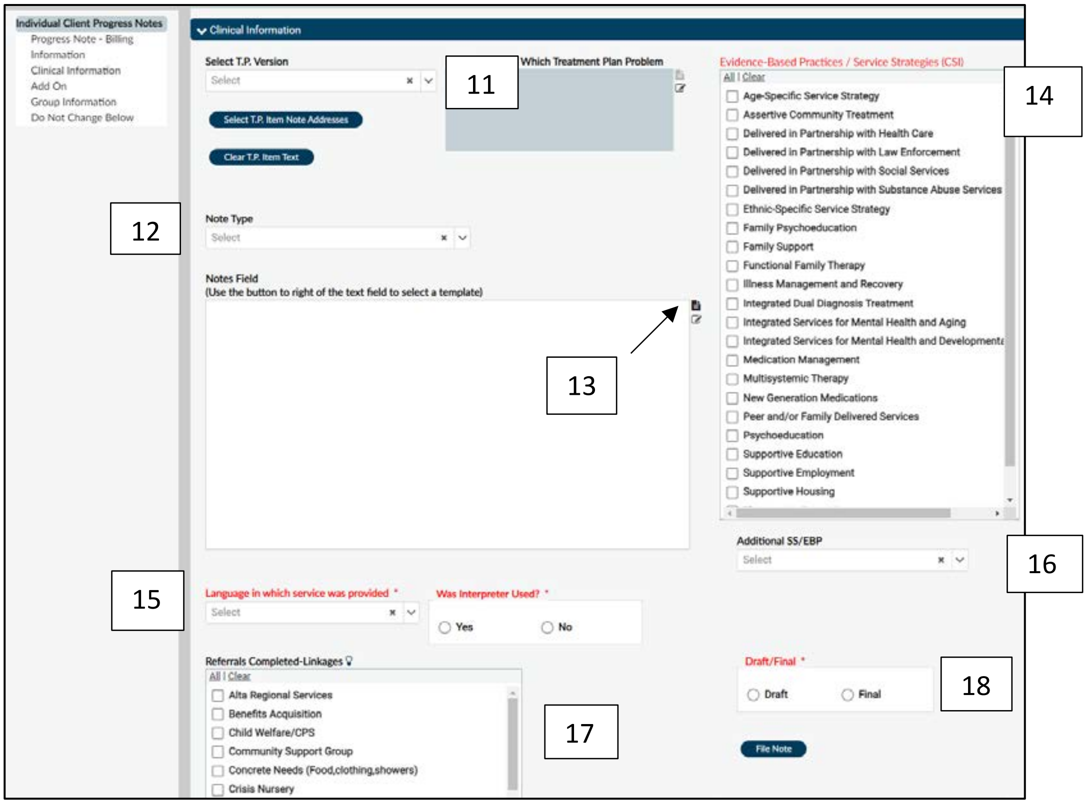
1. Open the Progress Note Entry form for the client you are working on. If you select your client prior to opening the form your client's name will populate. Your name will also populate in the Practitioner field. Make sure not to enter anyone into the Co-Practitioner field. If there was a co-practitioner they will have to do their own progress note.
2. Select your Episode from the drop down.
3. If you have a note in Draft status you can find it in the Select Draft Note To Edit drop-down. If you do not have any notes in Draft there will be nothing in the drop down. If you are creating a new progress note you will not need to select anything from the drop-down.
4. Progress Note For is where you select the type of progress note you are entering.
    a. Existing Service- Used primarily for corrections. This is used if a service charge has been entered and a progress note needs to be attached to the service.
    b. Independent Note- Used primarily by Sacramento County MHTC. This note will not create a billable or non-billable service.

c. Existing Appointment- Used in conjunction with the Avatar Scheduling Calendar. This option will allow you to link a progress note to an appointment. Choose the appointment you want to link from the drop-down below.
d. New Service- Most of the time this will be the option chosen. This will generate a new service charge, either billable or non-billable.

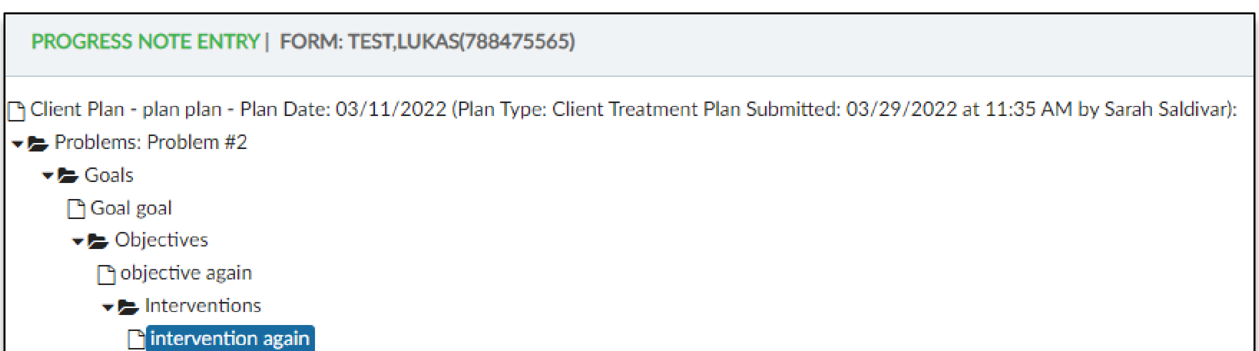
5. Enter the Date of the service. If Independent Note was chosen you will enter the Incident Date.
6. Enter the service code. This is a search field, when the service code is entered you will double click on the service below.



7. Select the Location of the service.
8. Enter the Direct Service Time, Documentation Time, and Travel Time. When you tab through the sections it will calculate your Total Service Time at the bottom. Make sure not to change the Total Service Time.
9. Indicate whether the service was Face to Face. This means the clinician was face to face with the client, not with a family member or caregiver. This option would be marked Yes if the clinician chose Telehealth as the location.
10. If a draft progress note needs to be deleted you are able to delete the note. Once the note has been finalized you are no longer able to delete the note. There are two representatives from each agency with the permissions to void progress notes. If a finalized progress note needs to be voided you will need to contact that person at your agency to void the note for you.



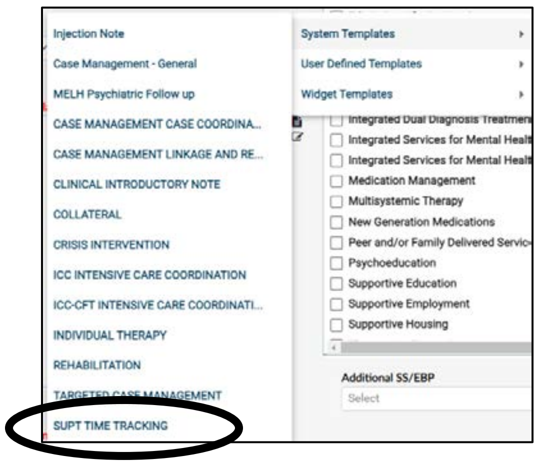
11. You are able to link the client's client plan to the progress note. Click on the T.P. drop down and choose the treatment plan type. Click on the Select T.P. Item Note Addresses button, an outline of your most current treatment plan will populate. If there is no outline, that is because there is no treatment plan for that episode. Click on the section of the treatment plan that this progress note is addressing. Click Return at the bottom of the page to get back to the progress note. If the wrong section is chosen you can click on the Clear T.P. Item Text button.



12. Choose your Note Type from the drop-down. If you require a co-signature, the note types will say co-signature next to each note type. If there are no note types in the drop

down, please have your supervisor contact QM Staff Registration to update your staff registration paperwork.

13. The Notes Field is where you enter your documentation. There is a template for SUPT providers to document their stop and start times. The template is called SUPT Time Tracking Template, this should be used for each progress note. The remainder of the documentation can be entered below or above the template.. To access the templates, click on the template icon to the right of text field, select System Templates, and click on the Template available.

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Direct Service = Start Time:_____ End Time:_____
Doc Time= Start Time:_____ End Time:_____
Travel Time To Location = Start Time:_____ End Time:_____
Travel Time From location = Start Time:_____ End Time:_____
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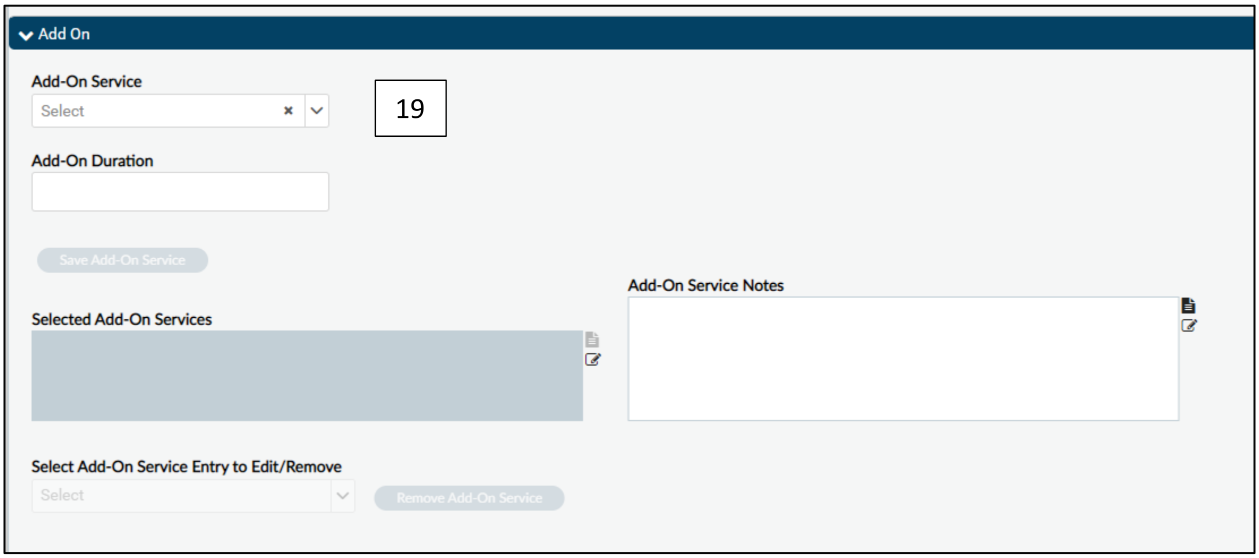
1. This section is primarily for Mental Health providers. You can click on the option for Unknown.
2. Choose the language the service was provided in and indicate whether there was an interpreter used.
3. These EBP's are Sacramento County specific, this does not get reported to the state and therefore is not a required field. Your agency may however collect this data, make sure to check with your agency to find out which EBP's you should be using. Each agency has specific EBP's that they use, make sure you are selecting something appropriate to your agency.
4. Mark any referrals (if applicable) you may have made to your client that pertain to this progress note.

5. The Workflow Control is where you are able to save your work. Your work will not be saved until you click the File Note button. You will have to save your work in either Draft or Final Status. Draft status means you are still working on the note and will need to come back to it. Final status means you have completed the note, if you require a co-signer by choosing Final you are sending the note to your supervisor. If you do not require a co-signer the note will be finalized and no longer editable.

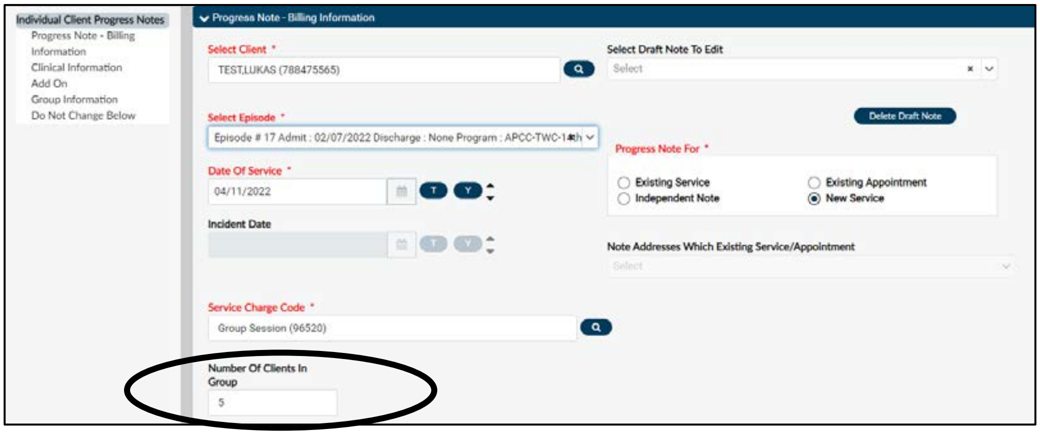


6. Certain service codes allow for add-on services. If the service code you are using allows for an add-on these fields (or parts of these fields) will become enabled. Make sure you are following documentation guidelines when using add-ons. For any questions on when it is appropriate to use an add-on code please contact QMInformation@saccounty.net.

Progress Note Entry for Group Notes

Group Notes for NTP, Outpatient, and Recovery Services are all documented differently. The difference in documentation is shown on step #3.

1. Open Progress Note Entry form. The note will be filled out the same as above. A note will need to be filled out for each person in the group.
2. When a service code for a group progress note is entered the Group field on the form will become enabled. Enter how many people were in the group.



3a. When entering in Service Times use the following formula for **Outpatient Groups**:

a. Practitioner Direct Service Time- This will be the total time of the group session. This will be the same amount for everyone in the group.
b. Practitioner Documentation Time- This will vary for each group member. Take the total documentation time for the participant you are documenting and multiply it by the total number of people in the group.
c. Practitioner Total Travel Time- Enter in the time it took to and from the location if there was any travel involved. This will be the same amount for everyone in the group.

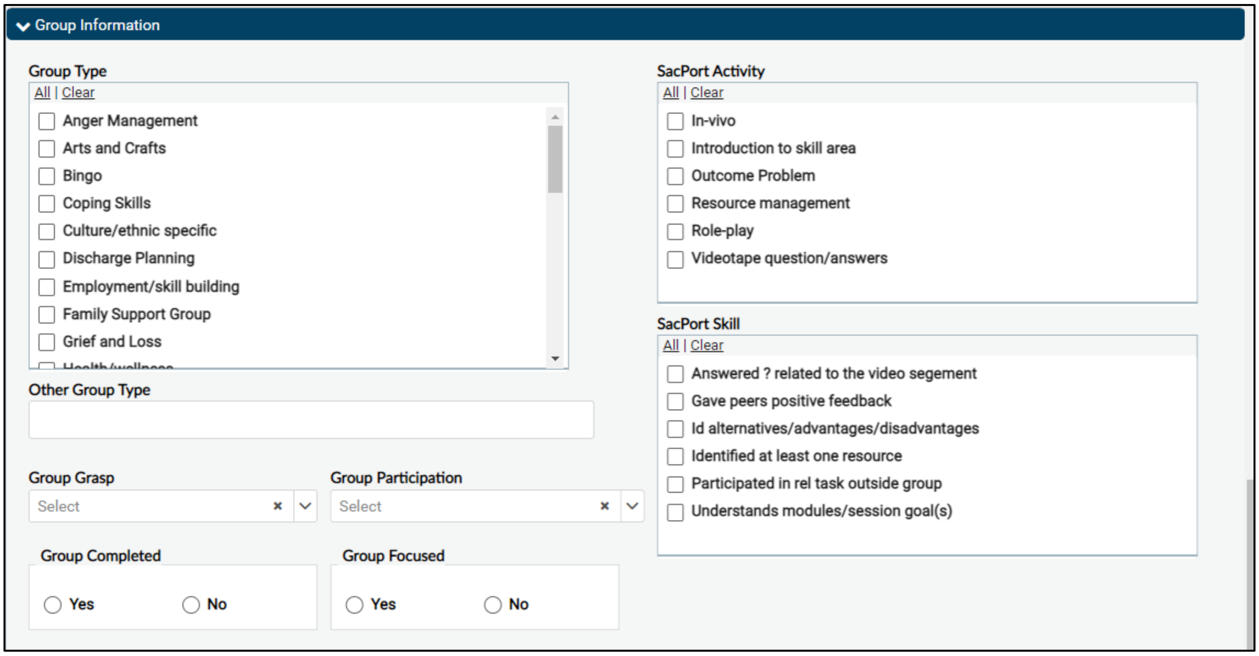
3b. When entering in Service Times use the following formula for **NTP Groups**:

a. Practitioner Direct Service Time- This will be the total time of the group session. This will be the same amount for everyone in the group.
b. Practitioner Documentation Time- This is not needed for NTP group services.
c. Practitioner Total Travel Time- This is not needed for NTP group services.

3c. When entering in Service Times use the following formula for **Recovery Groups**:

a. Practitioner Direct Service Time- This will be the total time of the group session divided by the number of individuals in the group.
b. Practitioner Documentation Time- This will vary for each group member. Enter the actual documentation time for the individual.
c. Practitioner Total Travel Time- Enter in the total travel time divided by the number of individuals in the group.

4. At the bottom of the Progress Note Entry form there is a section for group information. Fill out any information that applies to your group, such as Group Type.



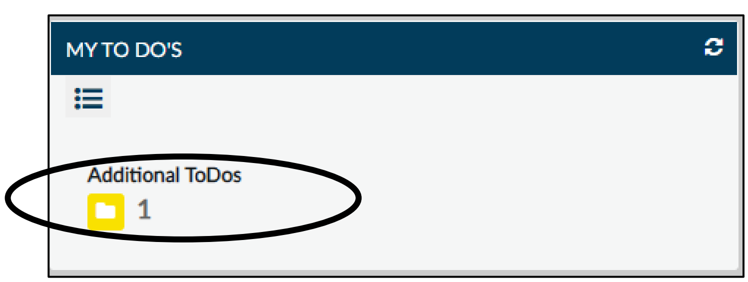
Accessing a Draft Progress Note

There are several ways to access a progress note that was filed as a draft. Below are three different ways to access a progress note saved in draft.

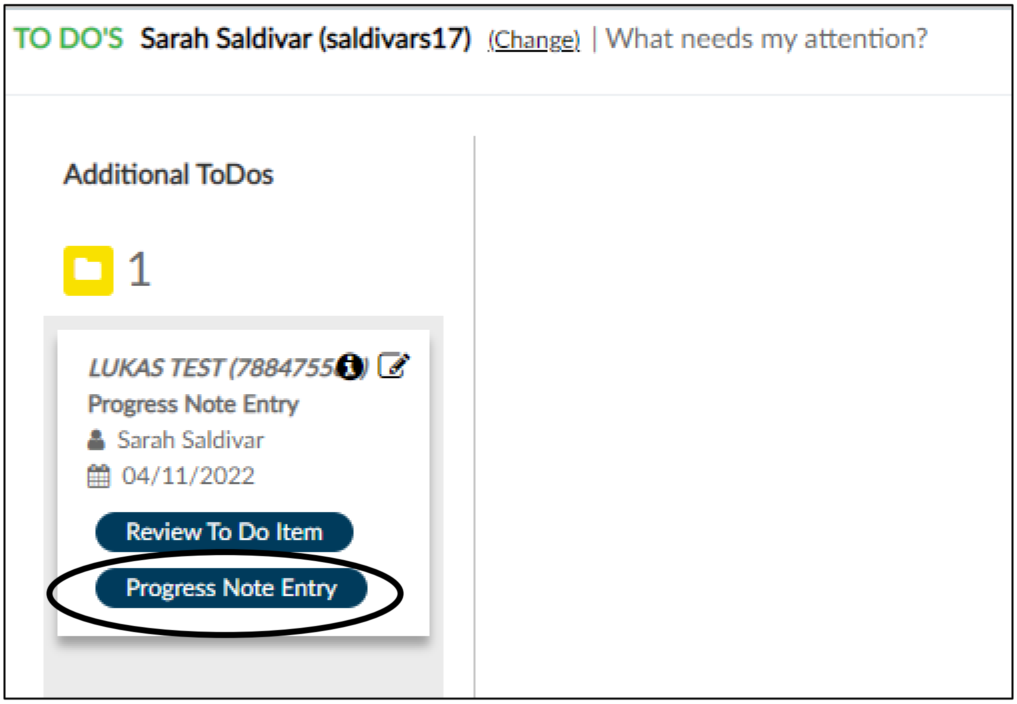
My To Do's Widget

The My To Do's widget is located on your myDay view. It will list any items you either need to review or have been left in draft status.

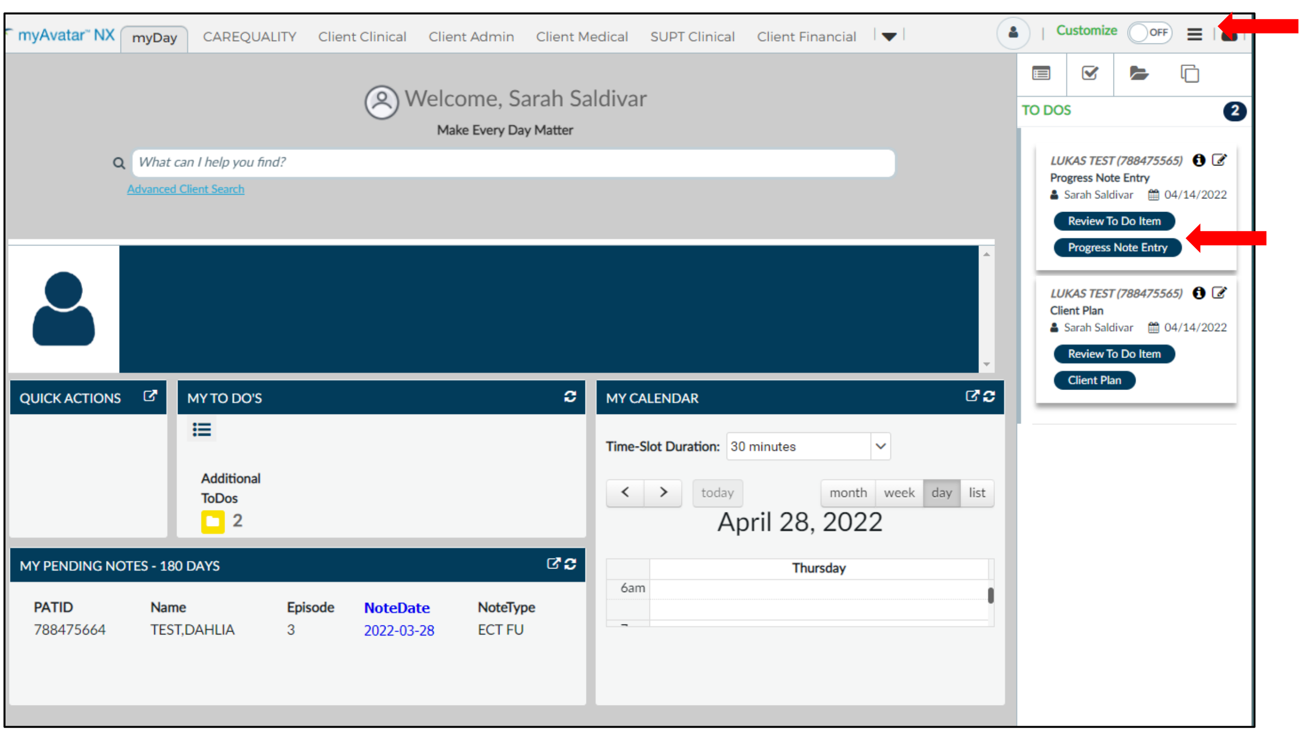
1. To access a note in draft, click on the Additional ToDos button.



2. A new window will open and display a list of your ToDos. Clicking on the form name will take you back to the draft item.

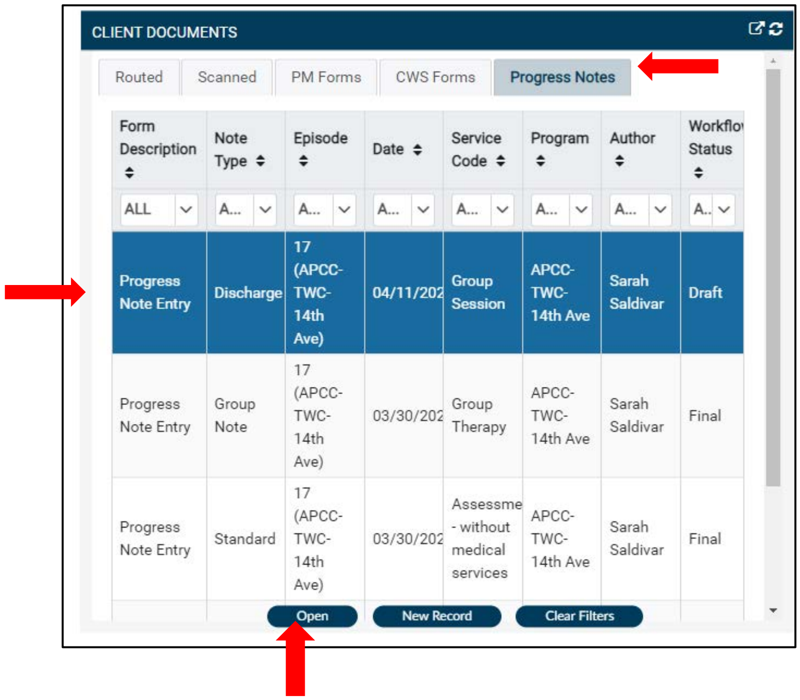


3. Your ToDos can also be accessed through the My Activity section, selecting the ToDos tab. Clicking on the form name will take you back to the draft item.



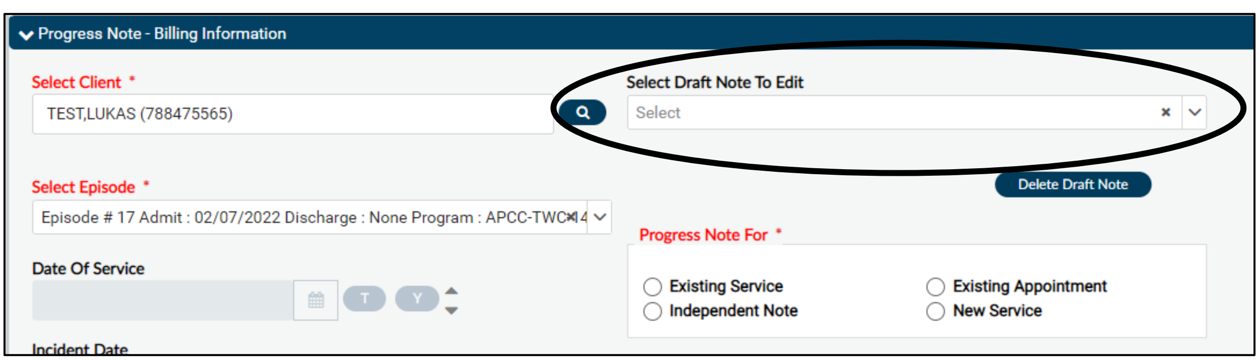
Client's Dashboard

Open the client's dashboard and locate the Client Document widget on the left-hand side. Find the note you need to edit, click on the row to highlight it and click the Open button on the bottom of the widget.



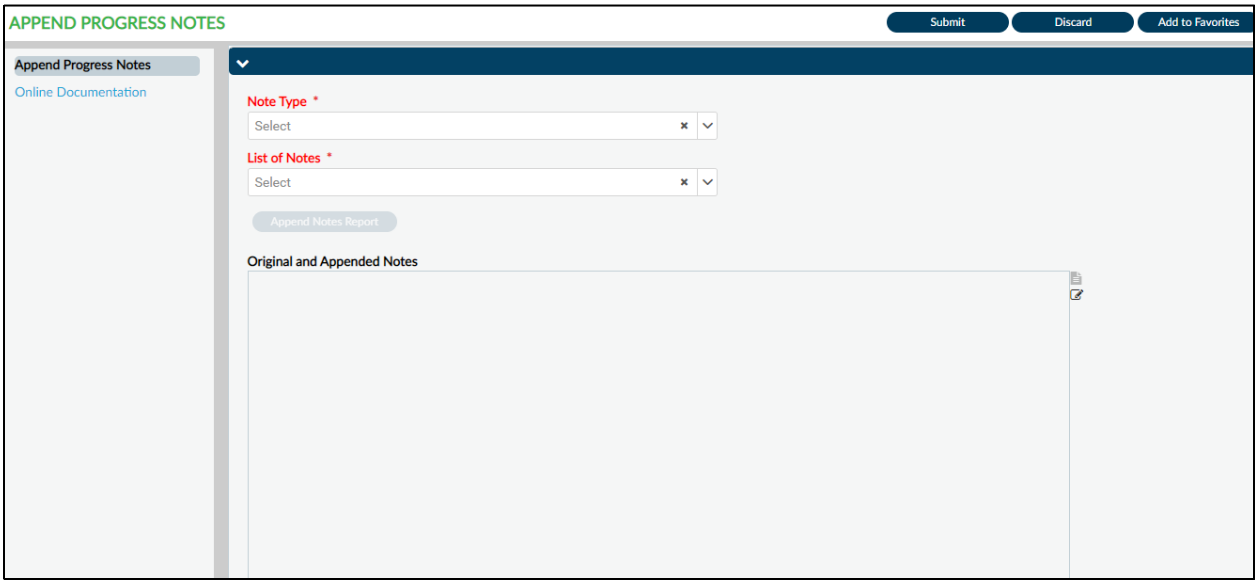
Blank Progress Note Entry Form

From the myDay view open the Progress Note Entry form. You can highlight your client prior to open it specifically for that client or enter in the client's information once the form has been opened. Select the appropriate episode on the Episode drop-down. Click on the Select Draft Note To Edit drop-down. Select the draft note you want to edit.

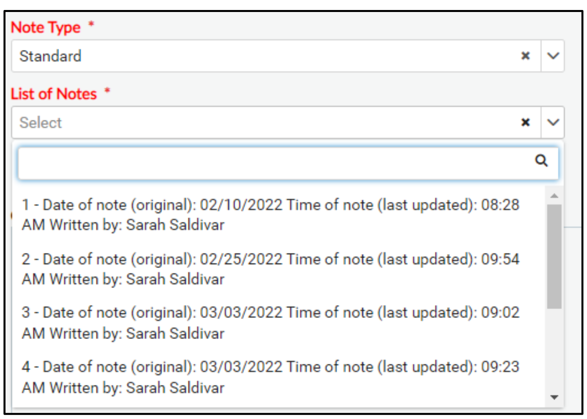


Appending Progress Notes

Once a note has been finalized you cannot edit the note, however in certain circumstances you can append a progress note. You cannot change the content of the original note, you can only add additional information. In order to append a progress note it has to be within 45 days of the note and you are only able to append a note if you do not require a co-signature for progress notes. You can access Append Progress Note by opening the Append Progress Note form.



1. Locate the note you wish to append. You will locate the note by choosing the note type and then find your note in the list of Notes drop-down. Click on the note that needs to be appended.



2. The original content of the note will populate below. This cannot be edited. Below the original note there will be a section for you to add new comments. Add your comments and click Submit to save.