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			Progress Notes (Group and		1 of 8
			Individual)		

1.0 Policy

It is the Policy of the Division of Public and Behavioral Health (DPBH), Substance Abuse, Prevention, and Treatment Agency (SAPTA) that all providers, in accordance with 505 (a) of the Public Health Service Act (42 US code 290aa-4) which directs the Administrator of the Substance Abuse and Mental Health Services Administration (SAMHSA), to collect items including admission and discharge data.

All providers must document progress notes for all services completed.

The two options for progress notes in Avatar are:

- 1. Ambulatory Progress Notes
- 2. Progress Notes (Group and Individual)

2.0 Procedure

INDIVIDUAL PROGRESS NOTES

- 1. In the Search Forms field, type progress notes (group and individual).
 - a. Double-click the Progress Notes (Group and Individual)

Name	Menu Path
Progress Notes (Group and Individual)	Avatar CWS / Progress Notes
Inpatient Progress Notes (Diagnosis Entry)	Avatar CWS / Progress Notes
Ambulatory Progress Notes (Diagnosis Entry)	Avatar CWS / Progress Notes
progress notes (

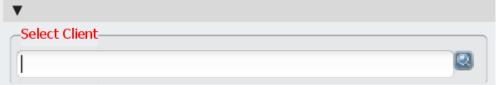
2. The Progress Note screen will display.



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	Group Name or Number	
		2
Select Episode	Note Date	
	Select Note To Edit	
Desenses Note Extent		
Progress Note Entry		
Existing Service Existing Appointment	Note Type	
Independent Note New Service		
Note Addresses Which Existing Service/Appointment	User To Send Co-Sign To Do Item To	
	File Note	
Notes Field		
	- D y	
	- 🖾	
_		
▼ Select T.P. Version		
Select I.P. Version	Location	
Select T.P. Item Note Addresses	Service Duration	
Select T.P. Item Note Addresses	Service Duration	
	Service Duration	
Select T.P. Item Note Addresses Clear 'Note Addresses Which Treatment Plan Problem' Text.	Service Duration	0
Select T.P. Item Note Addresses	Service Duration	2
Select T.P. Item Note Addresses Clear 'Note Addresses Which Treatment Plan Problem' Text.	Service Duration File Note Practitioner	0
Select T.P. Item Note Addresses Clear 'Note Addresses Which Treatment Plan Problem' Text.	Service Duration File Note Practitioner	2
Select T.P. Item Note Addresses Clear 'Note Addresses Which Treatment Plan Problem' Text.	Service Duration File Note Practitioner	2
Select T.P. Item Note Addresses Clear 'Note Addresses Which Treatment Plan Problem' Text.	Service Duration File Note Practitioner	2
Select T.P. Item Note Addresses Clear 'Note Addresses Which Treatment Plan Problem' Text. Note Addresses Which Treatment Plan Problem	Service Duration File Note Practitioner Additional Service Information Psychotherapy Add-On Duration	2
Select T.P. Item Note Addresses Clear 'Note Addresses Which Treatment Plan Problem' Text. Note Addresses Which Treatment Plan Problem Date Of Service	Service Duration File Note Practitioner Additional Service Information	
Select T.P. Item Note Addresses Clear 'Note Addresses Which Treatment Plan Problem' Text. Note Addresses Which Treatment Plan Problem	Service Duration File Note Practitioner Additional Service Information Psychotherapy Add-On Duration	
Select T.P. Item Note Addresses Clear 'Note Addresses Which Treatment Plan Problem' Text. Note Addresses Which Treatment Plan Problem Date Of Service	Service Duration File Note Practitioner Additional Service Information Psychotherapy Add-On Duration	2
Select T.P. Item Note Addresses Clear 'Note Addresses Which Treatment Plan Problem' Text. Note Addresses Which Treatment Plan Problem Date Of Service T Y ==	Service Duration File Note Practitioner Additional Service Information Psychotherapy Add-On Duration	2
Select T.P. Item Note Addresses Clear 'Note Addresses Which Treatment Plan Problem' Text. Note Addresses Which Treatment Plan Problem Date Of Service T Y ==	Service Duration File Note Practitioner Additional Service Information Psychotherapy Add-On Duration	

- 3. Mandatory fields are noted in red.
- 4. To begin, search for the client in the Select Client field by Client ID or Last Name.



5. Select the episode the note is associated with.

Select Episode

Episode # 3 Admit : 07/24/2015 Discharge : None Program : R. -

- 6. Choose the type of note in the **Progress Note For** field.
 - Existing Service
 - Independent Note
 - Existing Appointment

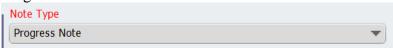


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-		Service			
		ogress Note For Existing Service Independent Note	Existing Appointment		

- 7. The **Note Addresses Which Existing Service/Appointment** is greyed out unless you've chosen Existing Service from #6.
- 8. Enter Notes in the **Notes Field**.
- 9. Group Name or Number is only used for Group Notes. (See information below)
- 10. <u>The Note Date field in the system is not marked mandatory but it should always be</u> completed in order to document the date of the note.
 - a. T for today
 - b. Y for yesterday
 - c. Type in date Note Date

-Note Date-				 	
	т	Y	<u>→</u>		

- 11. The **Select Note to Edit** field is a field that is not currently used.
- 12. Select the Note Type.
 - a. This is a mandatory field.
 - Assessment
 - Case Management
 - Chart Note
 - Group
 - Progress Note.



- 13. The User to Send Co-Sign To Do Item To will be available on some types of notes. This field allows you to choose someone to have co-sign the note. It will send them a "to-do".
- 14. The Select T.P. Version is a field that can link to the Treatment Plan.
- 15. If applicable, enter Date of Service.
- 16. If applicable, enter Service Charge Code.
 - a. This will populate a charge on the Client Ledger based on the Service Code.
 - b. To document a progress note without a charge, use the non-billable code of 900.



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			Individual)		

17. The **Service Program** will auto-populate based on the episode chosen.

18. The Location may auto populate. Change if needed.

Service Charge Code

- 19. Enter the Service Duration.
- 20. Enter the **Practitioner**.
- 21. If the interactive complexity code was chosen, enter in the **Psychotherapy Add-On Duration** and **Add-On Notes**.

Psychotherapy Add-On Duration	
Add-On Notes	
	v

- 22. If applicable, complete the Clinical Instructions and Recommended Decision Aids.
- 23. If applicable, choose the Reason for Visit.

Clinical Instructions	Recommended Decision Aids	
	Reason for Visit	-

- 24. When completed, click **FILE NOTE** in the middle right of the page.
 - a. The screen will say, "note filed", meaning that your note has been successfully saved.



b. Do NOT click the Save button on the upper left hand side. This will NOT file the note.

Date d 5 of 8

Group Progress Notes

The setup for group progress notes is similar to the setup for individual progress notes. The differences will be noted here.

- 1. To start a group progress note, in the Search Forms field, type progress notes.
 - a. Double-click Progress Notes (Group and Individual):

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Name	Menu Path	
Progress Notes (Group and Individual)	Avatar CWS / Progress Notes	
Append Progress Notes	Avatar CWS / Progress Notes	
Ambulatory Progress Notes	Avatar CWS / Progress Notes	
Void Progress Notes	Avatar CWS / Progress Notes	
Progress Note Viewer	Avatar CWS / Progress Notes	
orogress		

2. Once the progress notes form opens, you will choose the Group Default Notes tab on the upper left hand column.

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			Individual Progress Notes Group Default Notes		
			Submit		

- 3. There will be five required fields to begin the process of inputting a group progress note
 - Date of Group
 - Practitioner
 - Progress Note For (Existing Service, etc.)
 - Note
 - Note Type
- 4. Enter Date of Group
 - a. T for today
 - b. Y for yesterday
 - c. Enter date
- 5. Enter **Practitioner**.
- 6. Choose a note option in the **Progress Note For** field.
- 7. Select the Group Name or Number based on the data in the search field.
 - a. This data is facility specific.
- 8. Select the User to Send Scratch Note To-Do Item To.
 - a. This person will receive a to-do item to create individual progress notes based on the group progress note.

Date Of Group

Practitione

Progress Note Fo

Existing Service

Independent Note

Group Name Or Number

To

Т

User To Send Scratch Note To-Do Item To

--

Existing Appointment

New Service

- 9. Enter Note.
- 10. Enter Note Type.
 - Choose Group note.
- 11. If you are entering the progress note as a new service, or indeed anything except as an independent note, then you will also need to fill in the following columns
 - Service charge code this will create a charge on the Client Ledger
 - Service Program this should auto populate with the Program.
 - Location this should auto populate. Change if needed.

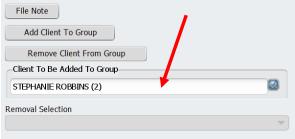


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- Service Duration enter as minutes.
- 12. There are two options at this point
 - a. Option 1: File the note by pressing the file note button in the middle of the screen
 - b. Option 2: Add or remove clients from the group before filing the note.
 - As this is a group note, you may add as many clients as are needed in order to be able to account for everyone who participated in the group. Removing clients from a group also allows you to update it as people drop out or have left. The add client and remove client buttons are on the bottom of the screen as shown:
- 13. To add a client, hit the add client button

File Note	
Add Client To Group 🔫	
Remove Client From Group	
Client To Be Added To Group	
1	2
Removal Selection	
	~

14. This will open up the Client to Be Added to Group field.



- 15. Choose the client to be added in the Client To Be Added To Group field. Avatar will ask you to confirm the addition with a yes or no confirmation button. Choose yes if this is the correct client:
- 28) Repeat step 27 as necessary to finish adding clients to the group.
- 29) When completed, hit the File Note button in the middle of the screen:

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		Date		
Progress N	otes (Group and		8 of 8	
Ind	lividual)			
Date Of Group 07/31/2015 T Y # Practitioner FEDOR, BETSY (000041) Progress Note For Existing Service Existing Service Croup Name Or Number ADULT GROUP - MONDAY (9) User To Send Scratch Note To-Do Item To	Note Type Group User To Send Co-Sign To-Do Item To Note Addresses Which Existing Service/Appo Client Who Attended Group	intment	•	
	File Note			

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Note: There are two file buttons in the middle of the screen. Either one will work to file the note.

30) Once the note has been filed, the form can be closed by clicking the red "x" on the upper left hand side of the screen to return to the Avatar homepage:

	Progre	1 - 1 - 1 - A -
	Submit	į
	101	10
6	14	

Note: It is possible to append individual notes to a group note such as when an individual demonstrates a behavior that needs to be noted for future reference (refusal to participate, angry, etc.) the process for doing this is the same as appending a note to an individual progress note. So you pull up the progress note of the individual who displayed the behavior, and append to the note using the instructions listed above in steps 9-15.

Also note: to remove a client, simply hit the remove client button, choose the client to be removed from the list of current clients and confirm. This is almost identical to the process for adding a client. When finished, go to step 29.

File Note Add Client To Group	
Remove Client From Group	
Client To Be Added To Group	2
Removal Selection	-