Division of Public and Behavioral Health
Policy

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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.

Before attempting to void a progress note, read the guidelines listed below. It's important to remember that ==**progress notes are linked to services behind the scenes. By voiding a progress note, you also need to delete the service. At this time, this is a two-step process! Failing to complete both processes will lead to erroneous billing!**==

- If the service has been billed, closed, and claimed you MUST contact the SAPTA Avatar HelpDesk for support. This is an additional few steps in order to get the progress notes voided to match up with the billings that will then need to be deleted.

- If the progress note is submitted for the wrong date, the note will need to be voided and the service deleted. Complete this procedure then complete **Delete Service** procedure.

- If the progress note was submitted for the wrong service code (as long as it's not going from a group code to an individual code), see the **Edit Service Information** procedure. The note doesn't need to be voided.

- If the progress note was entered for the wrong person, complete this procedure to void the note then see **Delete Service** procedure.

- DO NOT VOID a progress note if it's a non-billable service. The note should remain but use the **Edit Service Information** form to change the service code to a non-billable service.

- DO NOT VOID a progress note because you're attempting to manipulate billing, etc. Again, use the **Edit Service Information** to change the billable code to a non-billable code.

Only designated Superusers from each facility will have the ability to access the **Void Progress Note** form**.** Questions and concerns should be directed to the Avatar Training and Support Team.

2.0   Procedure
1. Before voiding a progress note, check the **Client Ledger** to ensure the service is posted and the charge is open.

EPISODE NUMBER	DATE	SERV	UNT	CHG	GUAR	GUARANTOR LIABILITY	AMOUNT RCVD	POSTING CODE	POSTING CODE TYPE	DATE POSTED	DATE BILLED	CLAIM NUMBER	LINE BALANCE
1	2	03082016	H0005	1.00	32.57	60	32.57	-------	-----	-----			OPEN	32.57

(GRAND TOTAL: 32.57)

TOTAL BALANCE BY GUARANTOR

1)   SAPTA LT   60:   32.57

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2. If the service code that needs to be changed reflects **OPEN** in the **Claim Number** column, you are okay to proceed.
    a. If not, contact the SAPTA Avatar HelpDesk.

3. Navigate to the **HOME** screen.

4. In the **Search Forms** field, type in **Void Progress Notes.**
    a. Double-click on the highlighted form.
    b. If this form does not display in your feed, contact your local Superuser, or contact the Avatar HelpDesk for further assistance.

5. The form will appear.

6. Enter the client name in the **Client ID** field.
    a. Search for client by last name or ID.

7. Choose the **Episode Number** from the dropdown to the right of **Client ID.**

8. The **Note Information Start Date** and **End Date** are NOT the date of service. Leave these fields blank.

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9. You can sort your results by the **Note Type** or do not choose anything and the results will pull all note types.

10. In order to be very specific on the note that needs to be deleted, enter the **Date of Service** in the **Service/Appointment Information.**

11. Leave blank **Duration** and **Service Code.**
    a. This is just additional search criteria.

12. Next, click **Select Note to Void.**

13. The **Select Note to Void** window will display. If you've entered a specific date of service, only notes for that date of service will appear, which is the ideal way to search notes to void.

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14. If there are more than one note listed here, scroll through and ensure you are selecting the correct note to void.
    a. Do not let the **Note Date** confuse you. This is NOT the date of service!

15. Click on the note selection.
    a. The note line will be highlighted in green.

16. Click **OK.**

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17. You will be re-directed to the original **Void Progress Note** form.

18. In the **Reason For Voiding The Note,** choose a reason.
    a. If a specific reason is not listed in the dropdown, please contact the SAPTA Avatar HelpDesk for support. Reference this field.

19. Enter specific comments on why the note was voided in the **Comments** field. This information will be stored behind the scenes to document why this note was voided.
    a. Ensure you enter your initials after the comments entered.

20. When completed with choosing the note and documenting the specific comments, click **Submit** on the left hand side.

21. Next, the service must be deleted. This is a very crucial step to avoiding erroneous billings. See **Delete Service** policy and procedure!

22. Contact the Avatar Training and Support Team for further assistance, if needed.