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.

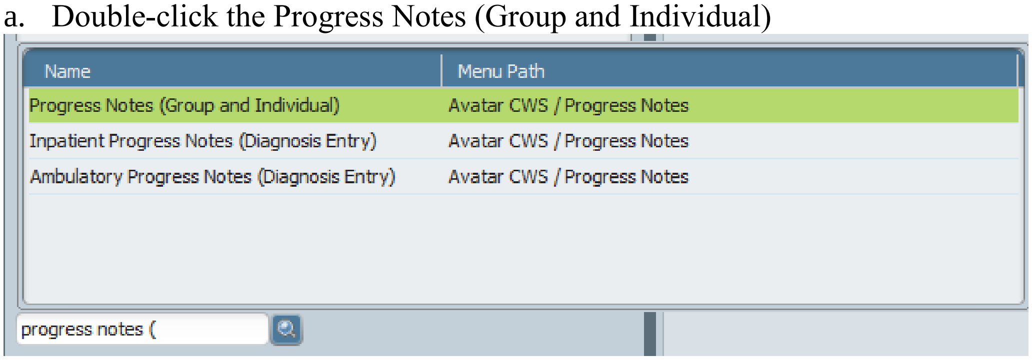
The two options for progress notes in Avatar are:

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

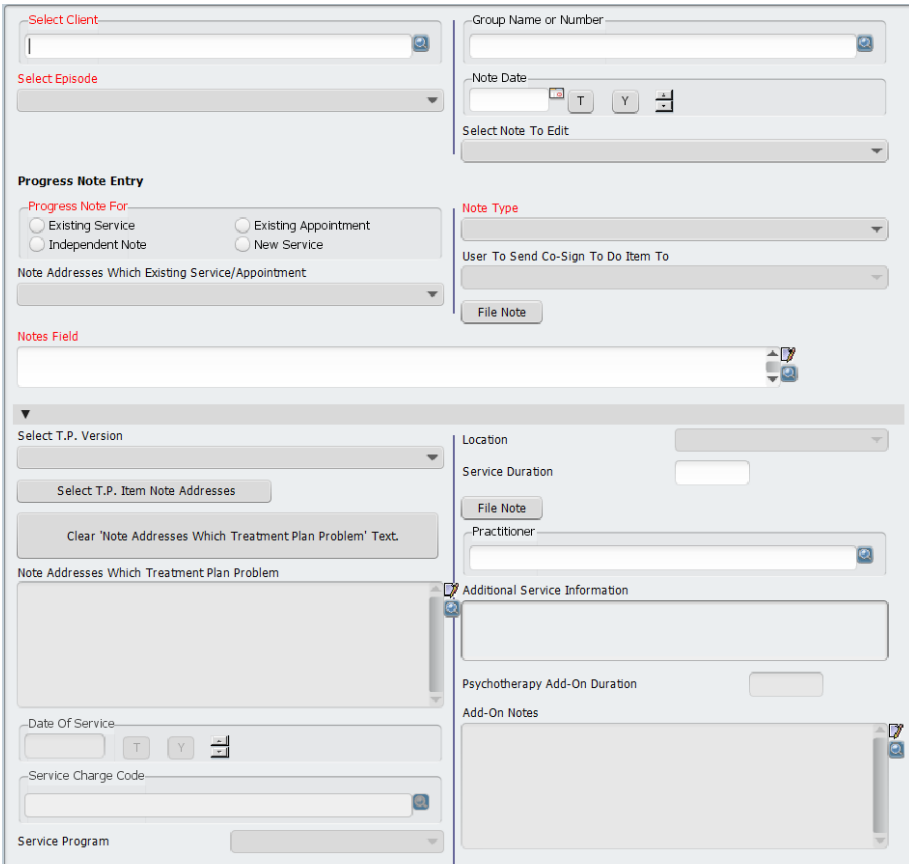
2.0 Procedure

INDIVIDUAL PROGRESS NOTES

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

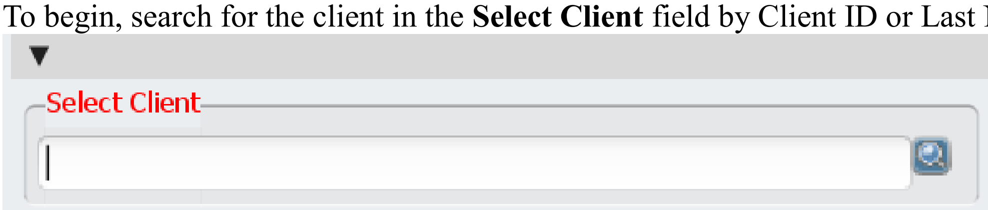


2. The Progress Note screen will display.

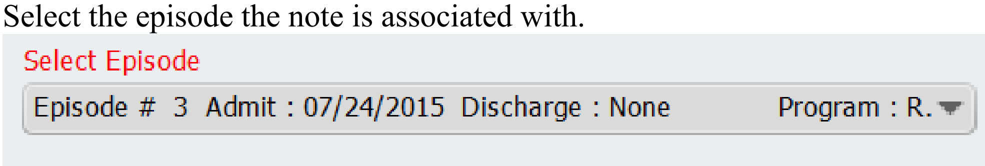


3. Mandatory fields are noted in red.

4. To begin, search for the client in the **Select Client** field by Client ID or Last Name.

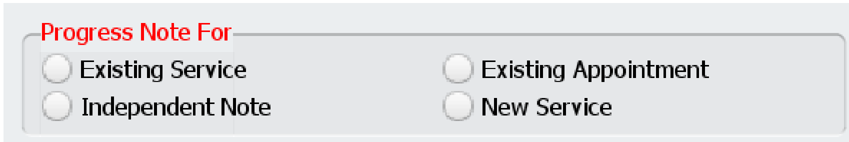


5. Select the episode the note is associated with.



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

- New Service

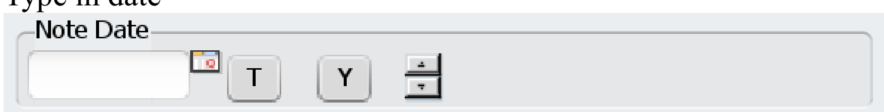


7. The **Note Addresses Which Existing Service/Appointment** is greyed out unless you've chosen Existing Service from #6.

8. Enter Notes in the **Notes Field**.

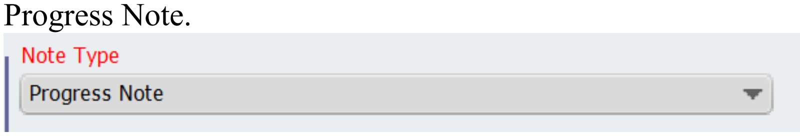
9. **Group Name or Number** is only used for Group Notes. (See information below)

10. <u>The **Note Date** field in the system is not marked mandatory but it should always be completed in order to document the date of the note</u>.
    a. T for today
    b. Y for yesterday
    c. Type in date



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.

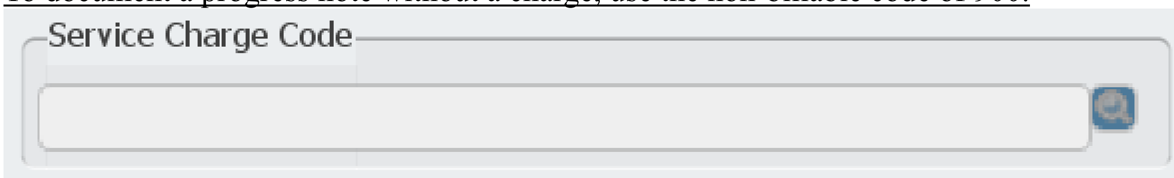


13. The **User to Send Co-Sign To Do Item To** will be available on some types of notes. This field allows you to choose someone to have co-sign the note. It will send them a "to-do".

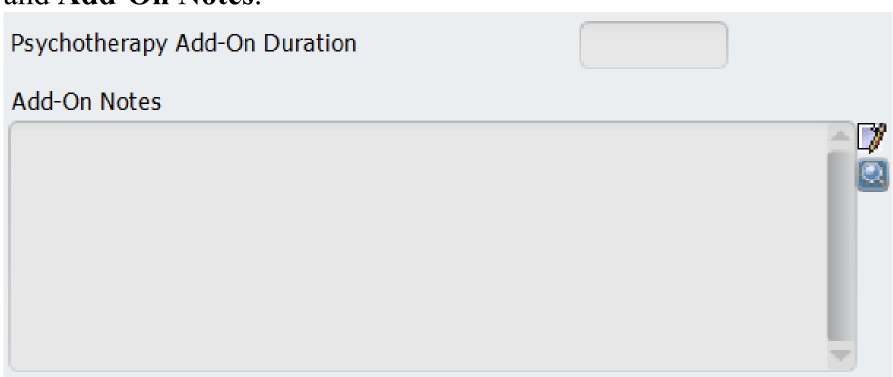
14. The **Select T.P. Version** is a field that can link to the Treatment Plan.

15. If applicable, enter **Date of Service**.

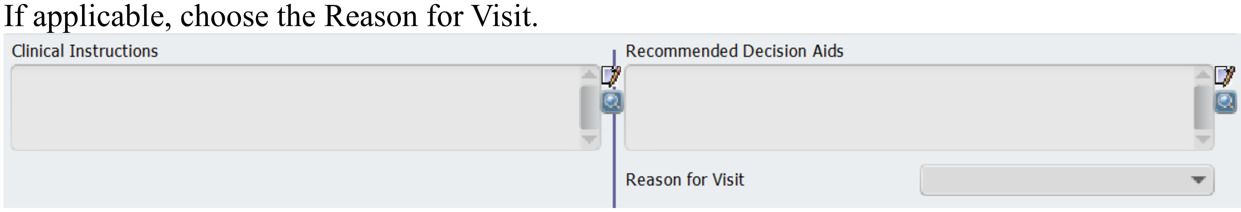
16. If applicable, enter **Service Charge Code**.
    a. This will populate a charge on the Client Ledger based on the Service Code.
    b. To document a progress note without a charge, use the non-billable code of 900.



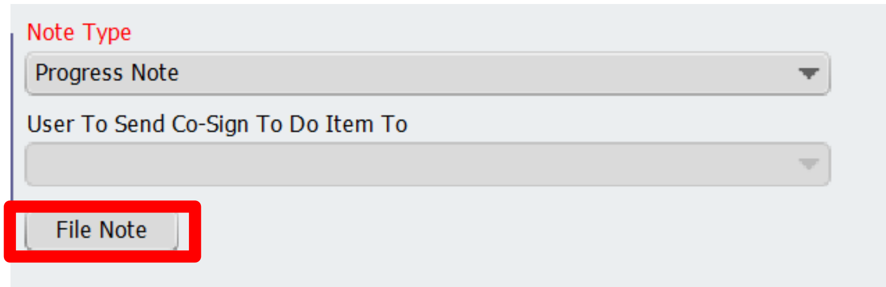
17. The **Service Program** will auto-populate based on the episode chosen.
18. The **Location** may auto populate. Change if needed.
19. Enter the **Service Duration**.
20. Enter the **Practitioner**.
21. If the interactive complexity code was chosen, enter in the **Psychotherapy Add-On Duration** and **Add-On Notes**.



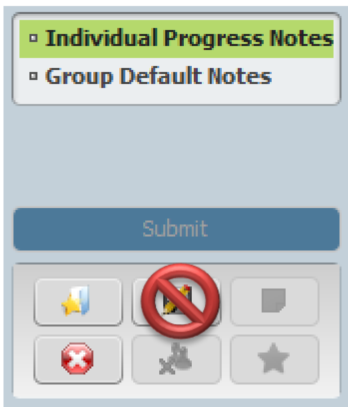
22. If applicable, complete the Clinical Instructions and Recommended Decision Aids.
23. If applicable, choose the Reason for Visit.



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.



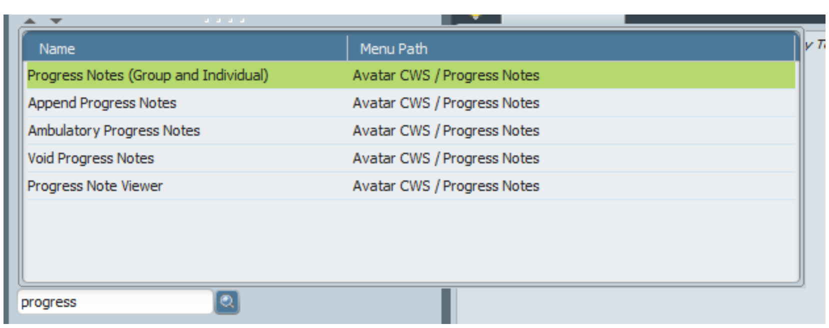
b. Do NOT click the Save button on the upper left hand side. This will NOT file the note.



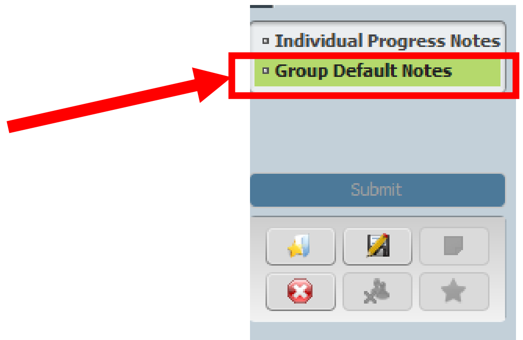
Group Progress Notes

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

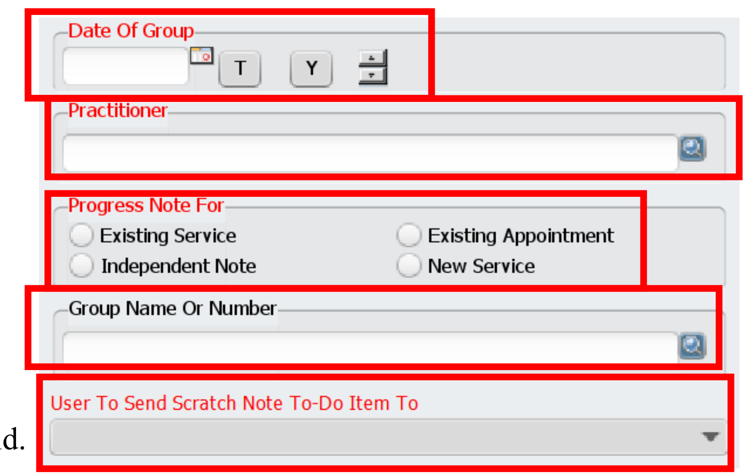
1. To start a group progress note, in the Search Forms field, type progress notes.
   a. Double-click Progress Notes (Group and Individual):



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



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.

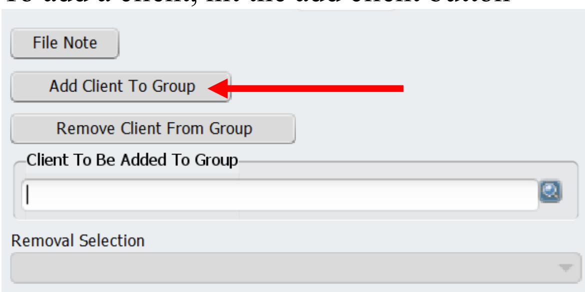
9. Enter **Note.**

10. Enter **Note Type**.
    - Choose **Group** note.

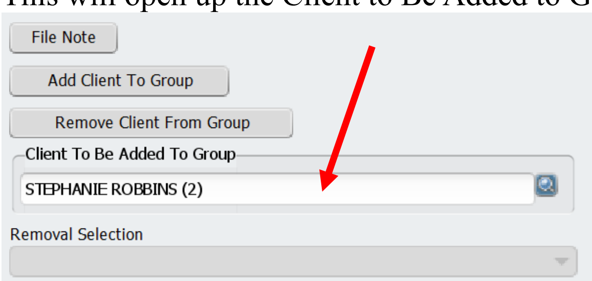
11. If you are entering the progress note as a new service, or indeed anything except as an independent note, then you will also need to fill in the following columns
    - Service charge code – this will create a charge on the Client Ledger
    - Service Program – this should auto populate with the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



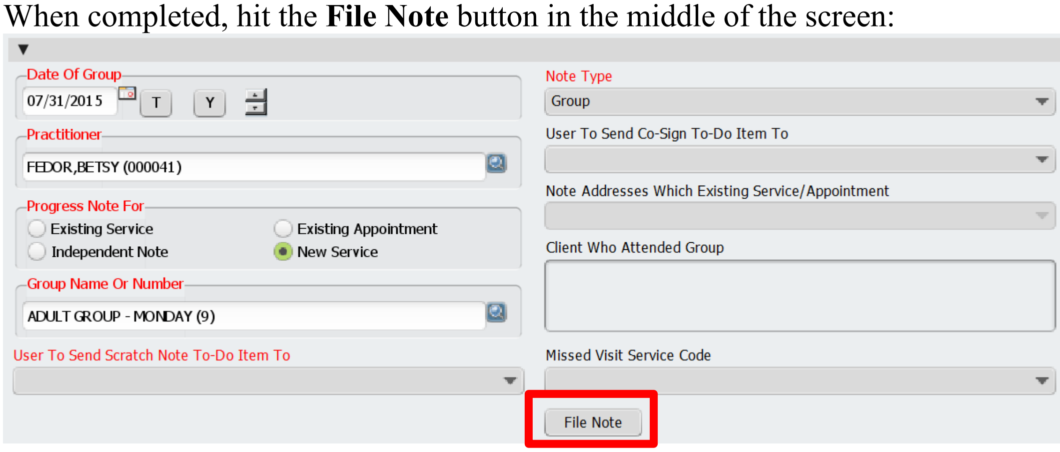
14. This will open up the Client to Be Added to Group field.



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:

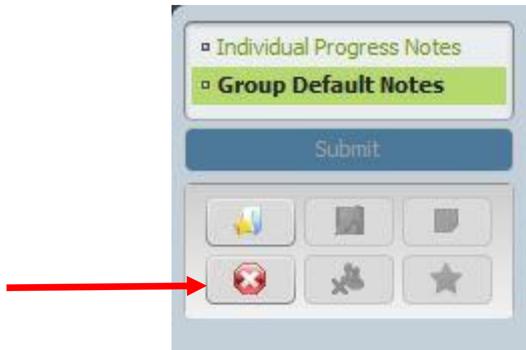
28) Repeat step 27 as necessary to finish adding clients to the group.

29) When completed, hit the **File Note** button in the middle of the screen:

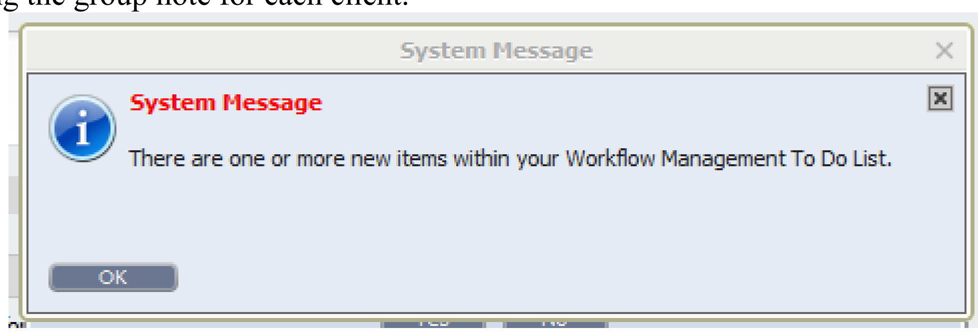


Note: There are two file buttons in the middle of the screen. Either one will work to file the note.

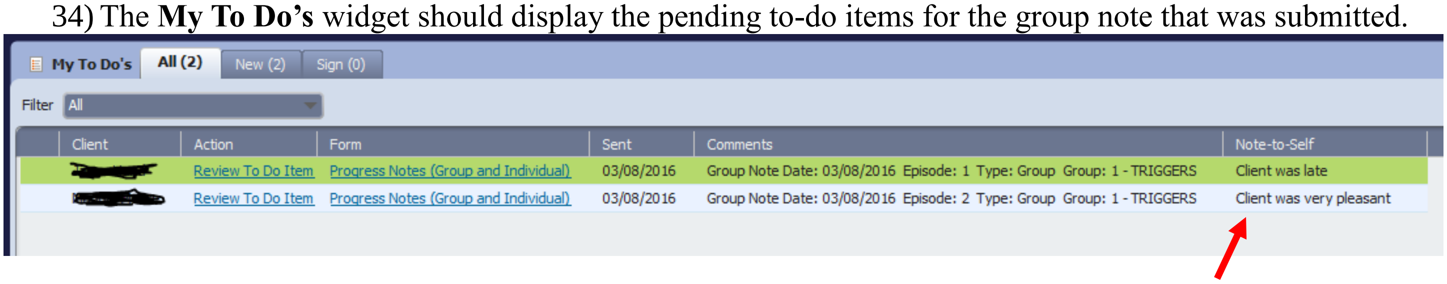
30) Once the note has been filed, the form can be closed by clicking the red "x" on the upper left hand side of the screen to return to the Avatar homepage:



31) When the group note has been filed, the practitioner listed in the **User to Send Scratch Note To-Do Item To** will receive a system message that they have to-dos to be completed. This is the step of individualizing the group note for each client.



32) Click **OK** on the system message.
33) Navigate to the **HOME** screen.
34) The **My To Do's** widget should display the pending to-do items for the group note that was submitted.

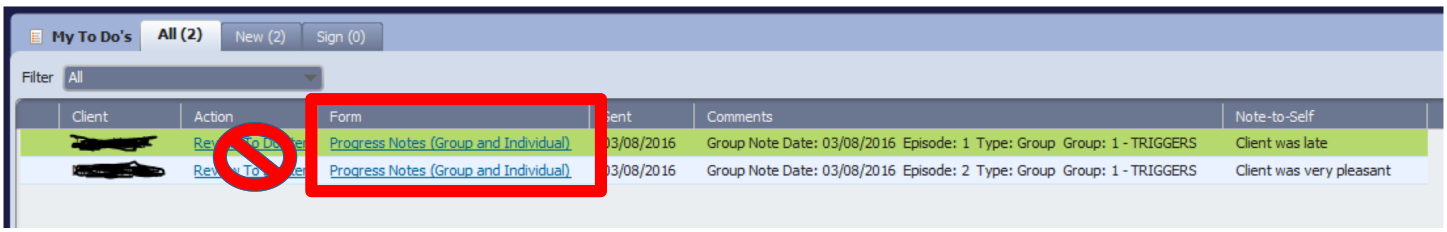


35) To jot down a quick note-to-self, use the far right column to make a quick note to remind yourself to add into the individualized note.

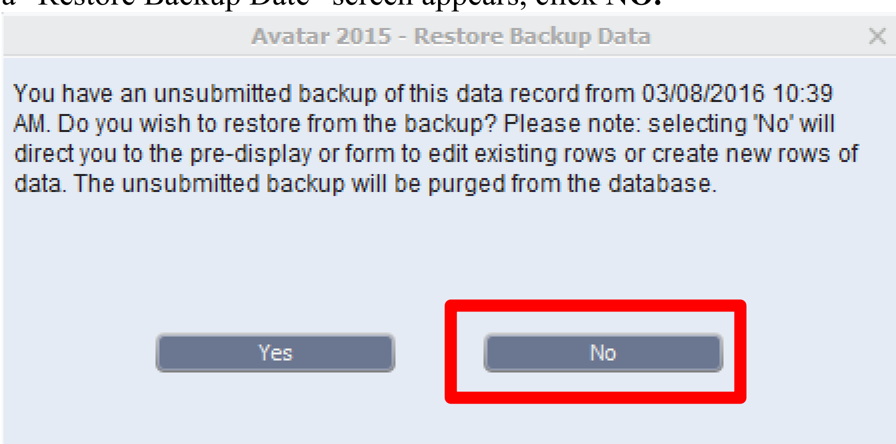
36) The group note is **not** complete until the individual notes have been submitted. The pending group note will not be reflected in the **Service History Widget,** the **Client Ledger,** or the **Progress Note Widget** because it's not deemed a complete note until the to-do item is fulfilled.

37) In order to complete the note, you must click on **Progress Notes (Group and Individual)** in the to-do item. (SEE BELOW SCREENSHOT)

NOTE: DO NOT CLICK ON THE "REVIEW TO DO ITEM". THIS DOES NOT NAVIGATE YOU TO THE CORRECT SCREEN TO INDIVIDUALIZE THE NOTE!



38) Once you click on **Progress Notes (Group and Individual)** for the first person listed in the to-do list**,** if a "Restore Backup Date" screen appears, click **NO.**



39) The system will navigate you to the **Individual Progress Note** for the first client in that group.
   a. You will notice that all the fields are populated with the data from the group note.

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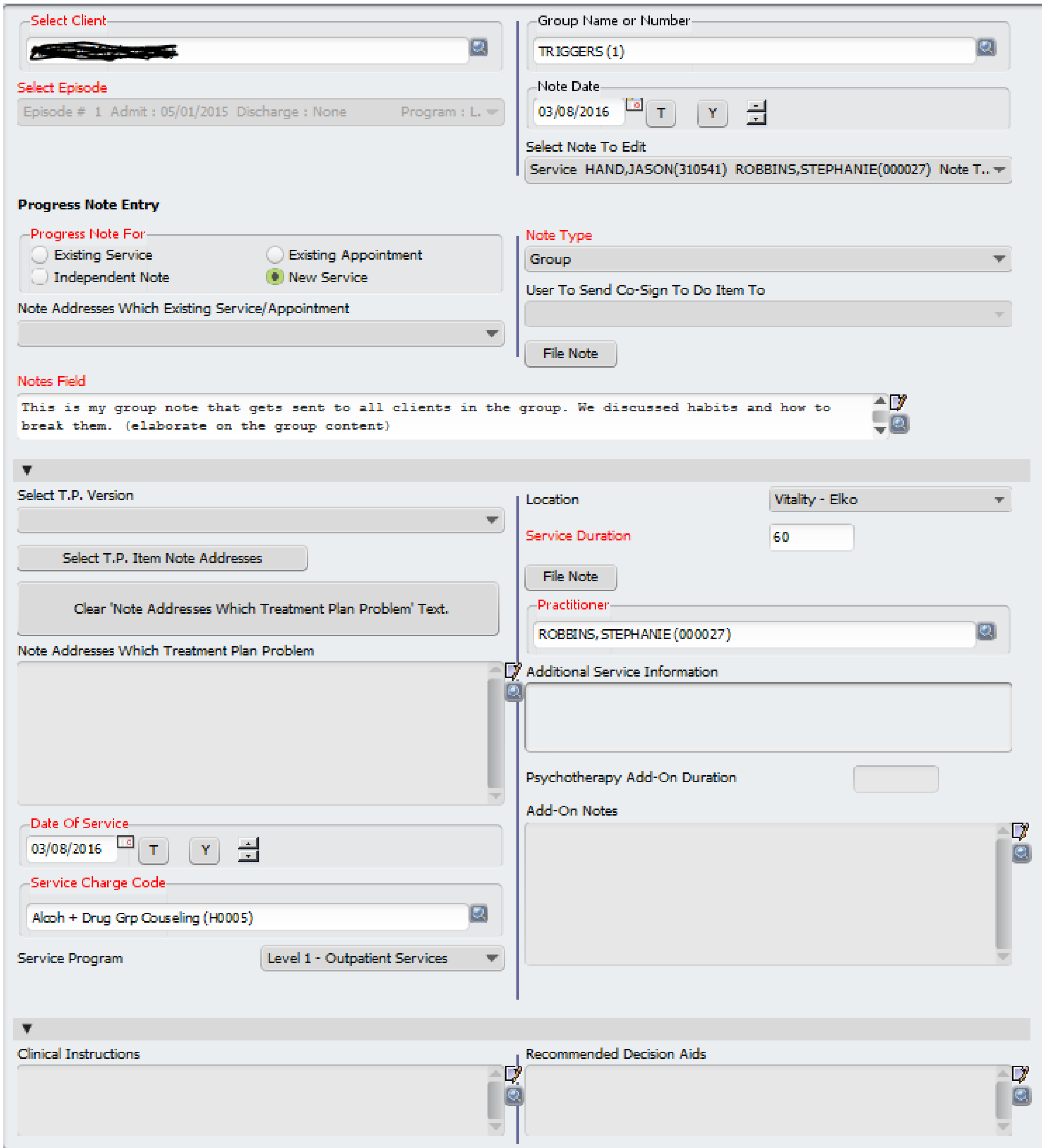
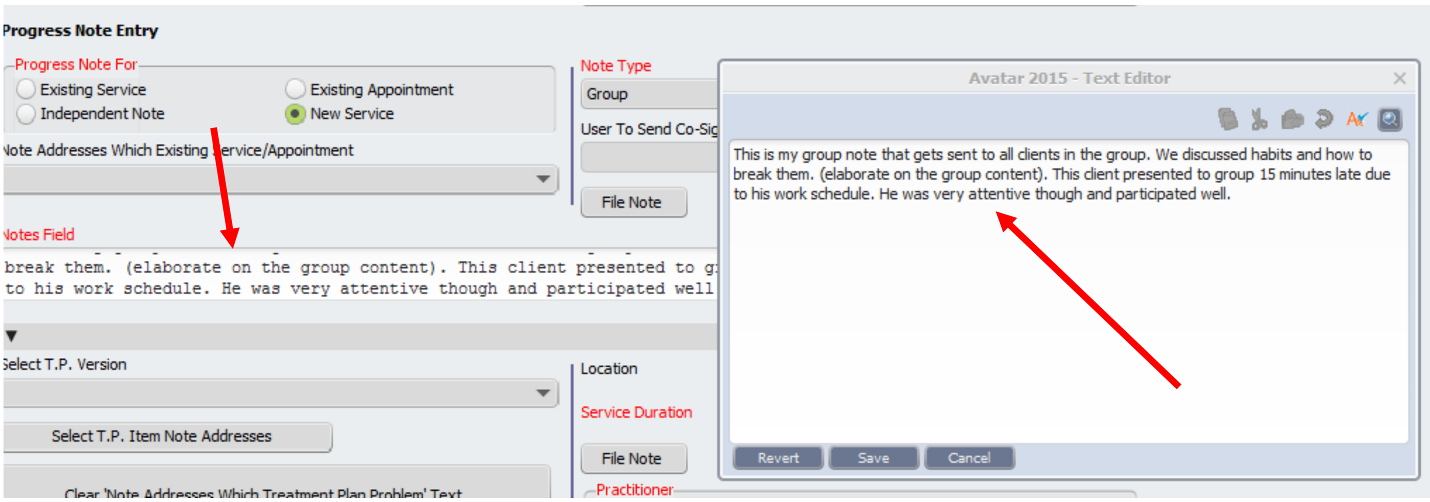
Control #	Rev.	Type	Title	Effective Date	Page
			Progress Notes (Group and Individual)	03-08-16	10 of 13

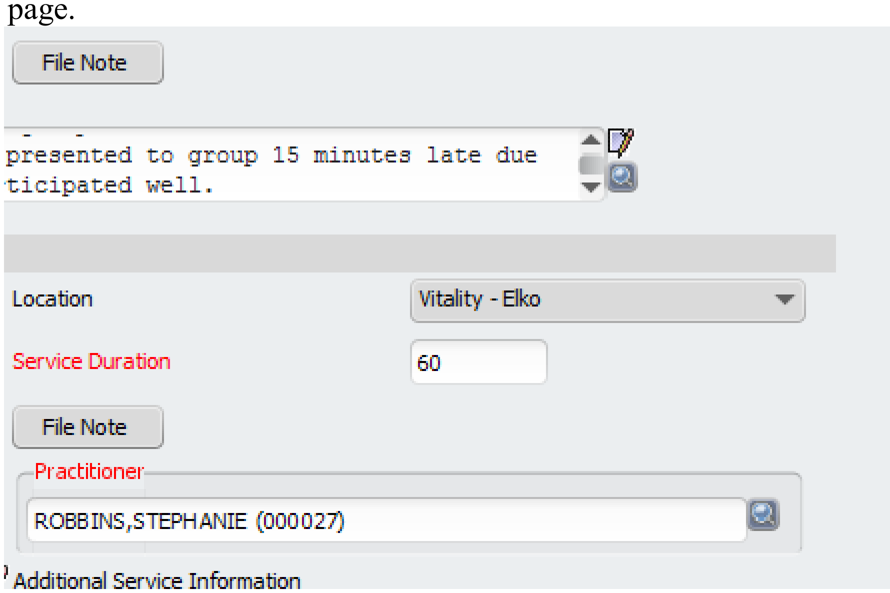


40) Click into the **Notes Field** to add more text relating to the client individually.

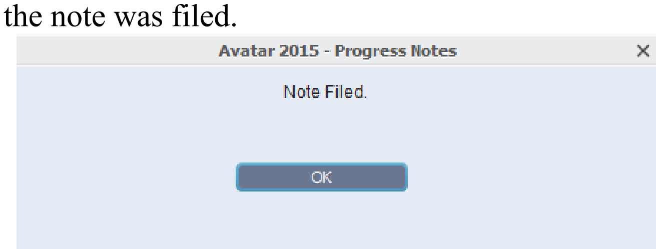


41) Once the note has been individualized, you can link the T.P. to the note using the **Select T.P. Version.** (See STEP14 above).

42) This group note has now been individualized. To file the note, click on **File Note** (either of the two) in the middle of the page.

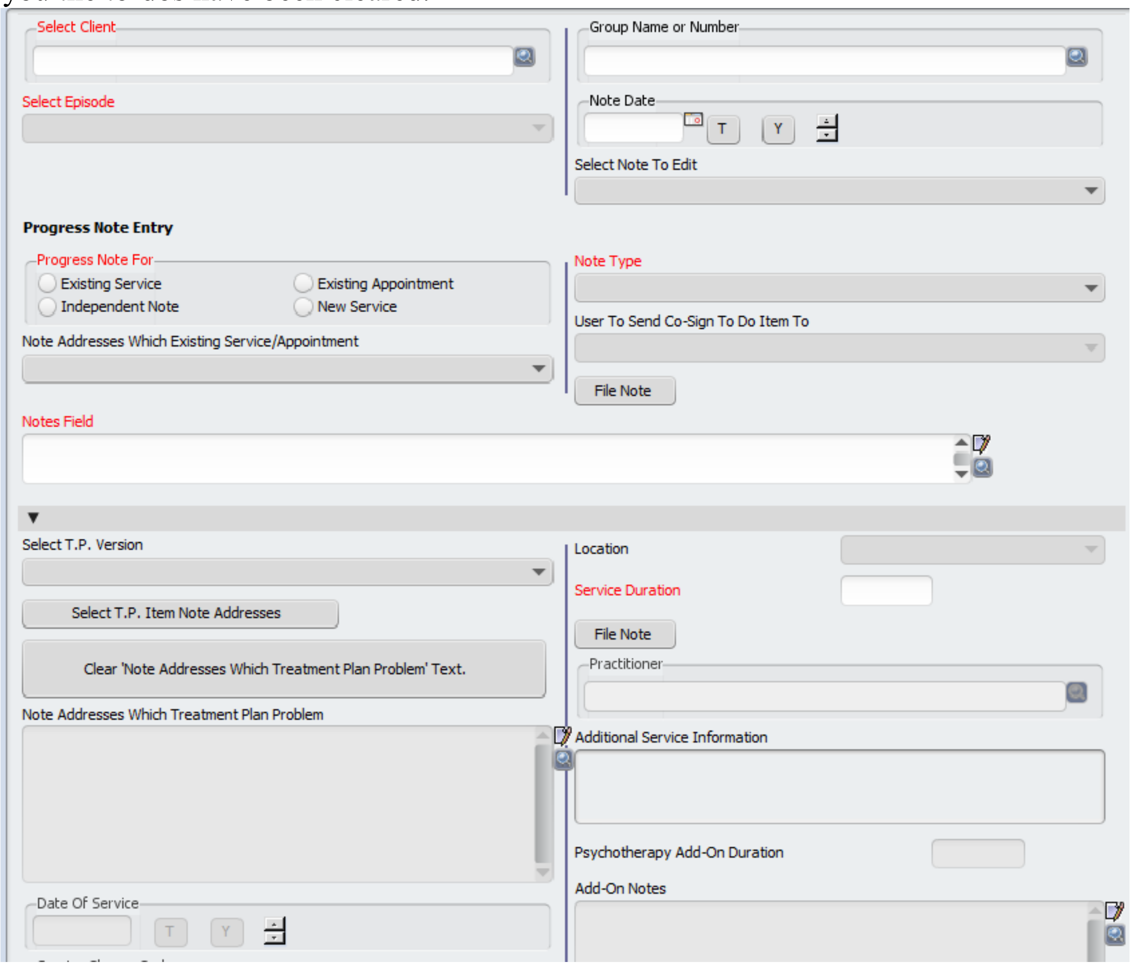


43) Click **OK** to confirm that the note was filed.



44) After the note has been filed for the first client, the system will automatically generate the next client's note for you to individualize. Follow the same steps.

45) Once you've completed all the individualized notes, the system will generate a blank progress note. This tells you the to-dos have been cleared.

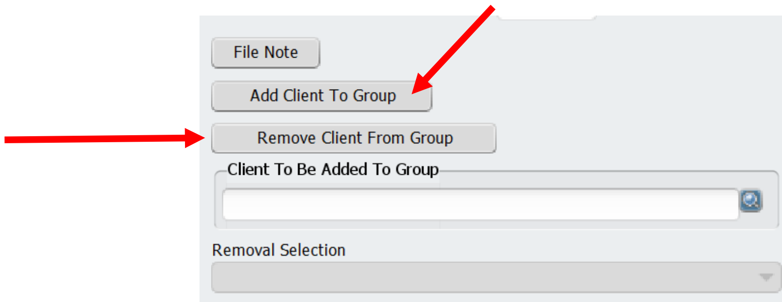


46) The **Client Ledger, Service History Widget,** and **Progress Note Widget** should all reflect the service information for that note.

47) The process of submitting a group note and individualizing each note is now complete.

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
Removal Selection