Tips for Progress Notes

Co-signature
In order to choose the co-signer, choose the Note Type as **Clinic, Supervised** or **Intern / Student**. Once choosing Final and File Note, the note will be routed to the chosen co-signer (choose *Accept and Route*, if applicable, in order to enter the Avatar password and choose the co-signer, then Submit).

My To-Do
1. The co-signer will get a message that there are items in the To Do list.
2. In the To Do list, click on the Review/Co-Sign Notes link.

3. This leads to the form where the content of the note is viewable and the co-signer is able to click Yes or No to Approve.
4. If Yes, the item will be completely finalized and no longer on the To Do list—DONE. If No, enter comments, and the item will be removed from the co-signer's To Do list, set back to Draft and sent to the writer's To Do list.

5. The writer will be able to view the co-signer's comments by clicking on the Review To Do Item link.
6. There is no need to click on Reviewed—just close the form and then re-enter the appropriate Progress Note in order to Select Draft Note to Edit and finalize based on the co-signer's comments.
7. The co-signer will once again get a message that there are items in the To Do list. Upon clicking on the Review link and submitting Yes to the updated note, will approve and remove the item from the To Do list—DONE.

Delete/Reassign To Do Items
Use this form to remove items from My To Do's that have been accounted for.

Group Note
Once a Group Default Note is written, the Note Date is the date the note is written, not necessarily the date of service. If you enter today's date with the group chosen, you will see the group members.

Treatment Plan Info
Choosing an item from the Individualized Action Plan (NYSCRI) section will populate from the IAP.

Assessments / Addendums

Find a list of NYSCRI Assessments and Addendums:
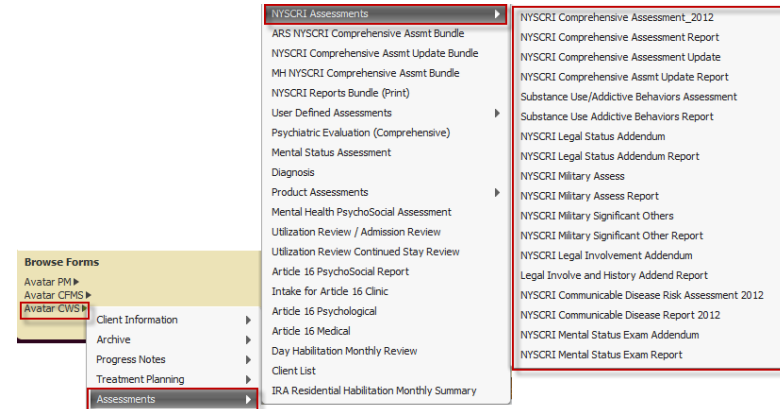
Use the "bundles" in order to sequentially fill out commonly used forms:

| ARS NYSCRI Comprehensive Assmt Bundle	NYSCRI Comprehensive Assmt Update Bundle
1 Substance Use/Addictive Behaviors Assessment	1 NYSCRI Comprehensive Assessment Update
2 Adult Columbia Suicide Severity Rating Scale	2 Substance Use/Addictive Behaviors Assessment
3 NYSCRI Legal Involvement Addendum	3 NYSCRI Legal Involvement Addendum
4 NYSCRI Mental Status Exam Addendum	4 NYSCRI Communicable Disease Risk Assessment 2012
5 NYSCRI Communicable Disease Risk Assessment 2012	5 NYSCRI Mental Status Exam Addendum
6 NYSCRI Comprehensive Assessment_2012	6 Diagnosis
7 NYSCRI Initial Determination LOCADTR	
8 Diagnosis	

Bundles are used for convenience
- If a form within the bundle is utilized, click Submit to save it.
- If a form within the bundle is not utilized, click the Close button to move on.

Edit Assessments and Addendums saved as Draft
- No need to re-use the bundle!
- Re-enter the form for the client, choose the Draft item, then submit as Final.
- Click Backup Form to periodically save assessments/addendums.

View Assessments/Addendums
- View the "Chart view" by double-clicking on a client and selecting the link to the document to view and print desired progress note documentation
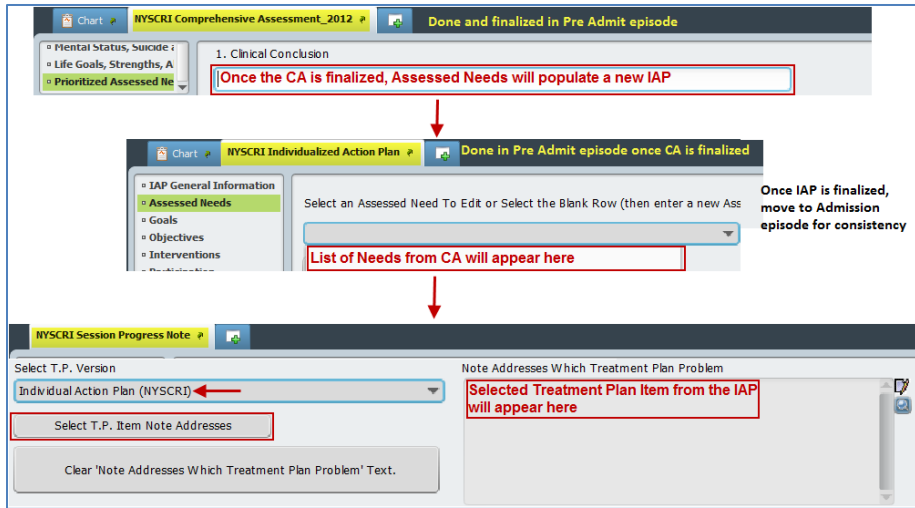
Progress Notes

- Write a Session Progress Note to record notes about an individual session
- Write a Group Progress Note to record notes about a group session

   These options are the same for all notes
   - Write note against <u>Existing Appointment</u>, whether or not the client attended (appointment is available until posted)
   - Write note against <u>Existing Service</u> if appointment has been posted
   - <u>Never</u> use the <u>New Service</u> option
   - Write an <u>Independent note</u> for phone calls, and to record any other collaboration not related to a service for the client
     · For Independent Notes, always put the date in the Notes (Interventions) field
   Click Final and File Note, and if applicable, choose *Accept* (or *Accept and Route* to choose co-signer). The Avatar password must be entered to complete the Accept option. If Reject is chosen, the note will not be filed.

View Progress Notes
- View Scheduling Calendar for appointments with note written against appointment
  - If no blue "F" icon on a checked in appointment (green check mark), a note needs to be written against Existing Appointment
  - If no blue "F" icon on a checked out appointment (green arrow), a note needs to be written against Existing Service
  - If a draft note is attached, it will show a blue "D"
  If an Independent Note is written, no icon is displayed but the note can later be attached to the appointment

- View the Progress Notes widget on the home screen to view various progress notes for the chosen client

- View the Chart view by double-clicking on a client and selecting the link to view and print desired progress note documentation

- Run NYSCRI Progress Note Reports to view and print the note in NYSCRI format

Edit Progress Notes saved as Draft
- Re-enter the form, enter the client and choose the Draft from the "Select Draft Note to Edit" field, then submit as Final.

Append Progress Notes
- Add comments to a finalized note

Void Progress Notes
- Request that the note is voided if it is incorrect in any way

Group Default Notes are optional!
To enter a Group Note that pertains to the entire group:
1. Click the "Group Default Notes" section.
2. Enter the date of the group session.
3. Enter your practitioner #.
4. Choose Existing Appointment.
5. Your name appears in the User to Send Scratch Note To-Do Item To field. (This will send you a reminder notification in your To Do list).
6. Select Note Type.
7. Select the appropriate group from Note Addresses Which Existing Service/Appointment.
8. Verify group members in Group Service Member Information.
9. In the Note field, write the note that will apply for everyone.
10. Click File Note to save the Group Default Note.
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To individualize the group note for each group member:
1. After completing the Group Default Note, click the "NYSCRI Group Note" section.
2. Enter the group name or number.
3. Enter the date the note was written (not necessarily the date of the session).
4. Select the client to individualize (from the drop-down list).

For missed visits, select the client and choose the appropriate no show / cancelled option.