

myAvatar
- NYSCRI Session Progress Note

Avatar Support Team
April 2014

PSCH Inc.
142-02 20th Ave.
Flushing, NY 11351

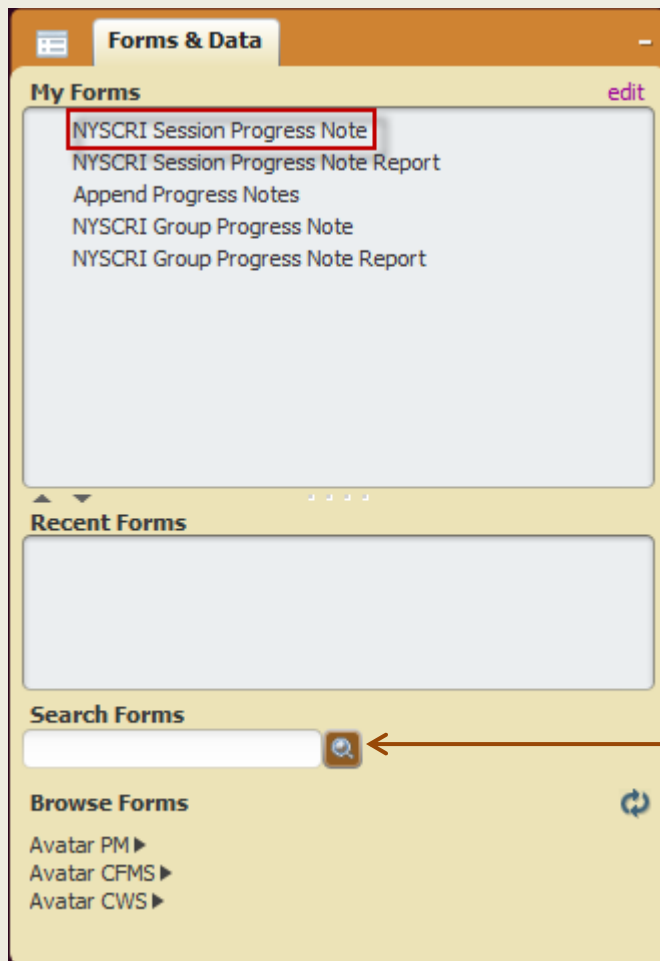
Tasks

- Enter Session Progress Note
 - should be completed soon after the service for an individual is rendered
- Edit a Draft note (in order to make Final)
- Append Progress Notes (if there is additional information relating to the session that should be added to a note that is Final)

Void Progress Notes (if the note contains incorrect information and is Final) (Administration will void, as necessary)

NYSCRI Session Progress Note

From My Forms, click on NYSCRI Session Progress Note



If you need to search for the form, type in Progress Note in the Search Forms box

Steps to Enter the Progress Note

Enter the following information for an individual progress note:

1. Enter Client name and program.
2. Progress Note For:
 - a. Select “Existing Appointment” to write the note against the appointment on the calendar.
 - b. Select “Independent Note” for missed appointments and to record other non-billable notes. (Enter the date and details in the “Intervention(s) / Method(s) Provided” field.)
3. Select Note Type (Discipline) – *Therapist/Counselor*
 - a. For those who need co-signatures, use *Intern/Student* or *Clinic, Supervised*
4. Select the appropriate appointment from Note Addresses Which Existing Service/Appointment.
5. Date of Service, Time, Duration, and Service Code automatically populate.

▶ **NYSCRI Information**

▶ **Individual's Condition**

▶ **Risk Assessment**

Steps to Enter the Progress Note

6. Select appropriate options for NYSCRI Information, Individual's Condition, and Risk Assessment.
7. Enter appropriate content in the Intervention(s) / Method(s) Provided and Response to Intervention and Progress Toward Goals and Objectives fields:
 - a. **Intervention:** enter Goals, Objectives, any other Symptoms not previously noted
 - b. **Response:** enter the response to intervention
8. Choose whether to save the note as Draft or Final.
9. Click File Note.

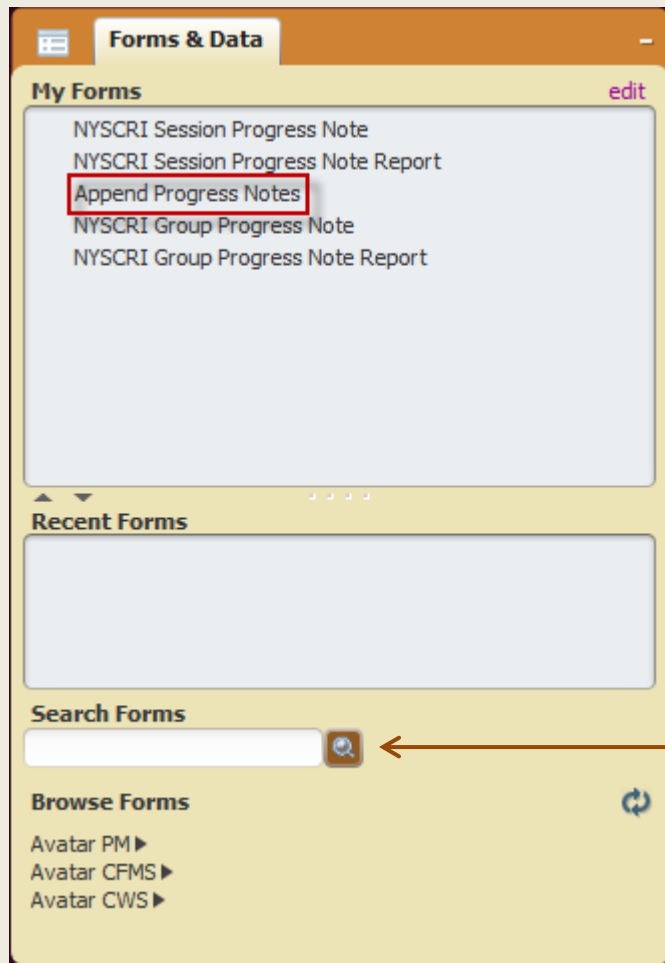
The screenshot shows the 'Progress Note Entry' form. At the top, there is a 'Draft/Final' section with two radio buttons: 'Draft' and 'Final'. A red arrow labeled '1' points to the 'Draft' radio button. Below this is a 'Note Type' dropdown menu. In the main form area, there is a 'Progress Note For' section with four radio buttons: 'Existing Service', 'Existing Appointment', 'Independent Note', and 'New Service'. At the bottom left, there is a 'File Note' button, which is highlighted with a red box and a red arrow labeled '2' pointing to it.

Steps to Edit a Draft Note

1. Open NYSCRI Session Progress Note.
2. Enter Client name and program.
3. Click the drop down . . . “Select Draft Note to Edit”
4. All existing draft notes for that consumer/episode will now be available.
5. Select the note. All the fields will then be populated from the saved draft note. Make any required changes.
6. Click Final then File Note.

Append Progress Notes

From My Forms, click on Append Progress Notes



If you need to search for the form, type Append Progress Notes in the Search Forms box

Steps to Append Progress Notes

1. Enter Client name and program.
 2. In the “Note Type” field, select the note type.
 3. In the “List of Notes” field, select the progress note in which to append.
 4. In the New Comments to Be Appended to the Original Note field, enter the additional comments.
 5. Click Submit to Save.
- Notes that have been finalized cannot be edited. If the original note is incorrect, contact your administrator to request that the note is voided.
 - Notes that have been co-signed cannot be appended.

Append Progress Notes

The screenshot displays the 'Append Progress Notes' interface. At the top, there is a navigation bar with a 'Chart' icon and the title 'Append Progress Notes'. Below this, a sidebar on the left contains a 'Submit' button (circled with a '4') and a section for 'Online Documentation'. The main content area features a 'Note Type' dropdown (circled with a '1'), a 'List of Notes' dropdown (circled with a '2'), and an 'Append Notes Report' button. Below these is a large text area titled 'Original and Appended Notes'. At the bottom of the interface, there is a section for 'New Comments to Be Appended to the Original Note' (circled with a '3').

4

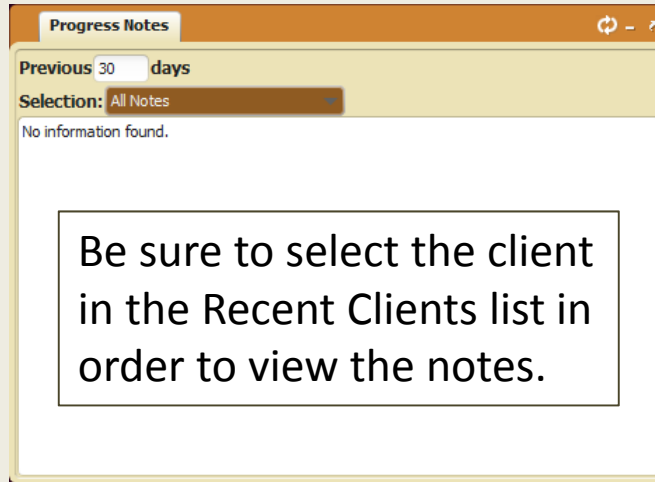
1

2

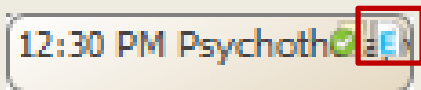
3

Notes:

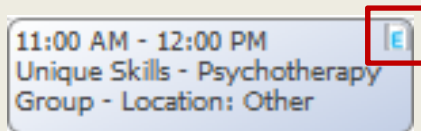
- View progress notes from the home screen in the Progress Notes widget:



- View your calendar from the home screen:



Note is finalized for an individual session



Notes are finalized for a group session

 - Progress note exists.

If you need additional assistance,
please contact:

Who? Help-Desk
or the HIS Trainer

How? Go to *online.psych.org*
and click on the *IT HelpDesk* link
or call (718) 559-0559

HIS Trainer: 718-559-0558

myAvatar
- NYSCRI Group Progress Note

Avatar Support Team
April 2014

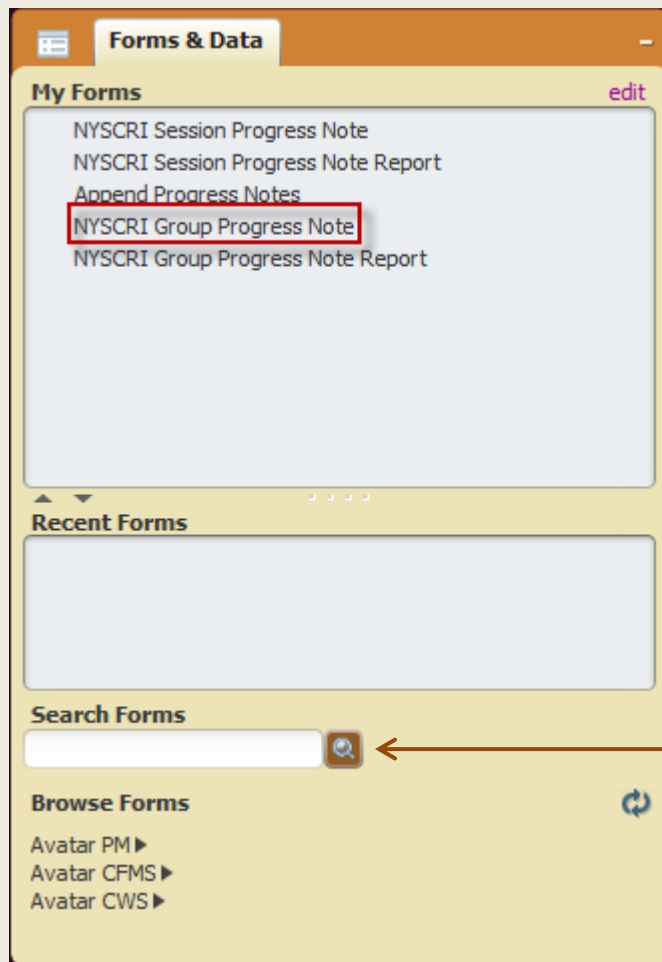
PSCH Inc.
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Tasks

- Enter Group Progress Note
 - The NYSCRI Group Progress Note is specific for individuals who attended a session in a group setting.

NYSCRI Group Progress Note

From My Forms, click on NYSCRI Group Progress Note



If you need to search for the form, type in Progress Note in the Search Forms box

Enter the Group Note for an Individual

Enter the following information for a group progress note for an individual:

1. Enter Client name and program.
2. Progress Note For:
 - a. Select “Existing Appointment” to write the note against the appointment on the calendar.
 - b. Select “Independent Note” for missed appointments and to record other non-billable notes. (Enter the date and details in the “Intervention(s) / Method(s) Provided” field.)
3. Select Note Type (Discipline) – *Therapist/Counselor*
 - a. For those who need co-signatures, use *Intern/Student* or *Clinic, Supervised*
4. Select the appropriate appointment from Note Addresses Which Existing Service/Appointment.
5. Date of Service, Time, Duration, and Service Code automatically populate.
6. Enter Group name, Number of Attendees and Number of Staff in the NYSCRI Information section (this information will transform to the printed report).

Enter the Group Note for an Individual

7. Select appropriate options for Behavior in Group and Individual's Mood, and enter comments in Intervention(s) / Method(s) Provided and Response to Intervention(s) and Progress Toward Goals and Objectives accordingly.
8. Choose whether to save the note as Draft or Final.
9. Click File Note.

Form:

The screenshot shows a web-based form interface. At the top, there are buttons for "Select T.P. Item Note Addresses" and "Clear Note Addresses Which Treatment Plan Problem Text". Below these, there are several input fields: "Group Name", "Number of Staff" (with a value of 1), "Unique Skills" (with a value of 1), and "Number of Attendees" (with a value of 3). There is also a checkbox for "Admission Note (Check only once per episode of care)" which is checked. The form is titled "NYS-CRI Information" and has a "Group Name" field.

Report:

The screenshot shows a printed report titled "Group Progress Note" with a revision date of "11-1-12". The report includes the NYS-CRI logo and logos for OASAS and PCC-MHC Valley Stream. The report contains the following information: "Organization Name:", "Individual's Name:", "Admission Note (Check only once per episode of care)", "Group Name: Unique Skills", "Program Name: PCC-MHC Valley Stream", "Record #:", "Page: 2 of 2", "Number of Staff: 1", "DOB: 12/10/2004", and "Number of Attendees: 3".

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or the HIS Trainer

How? Go to *online.psych.org*
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or call (718) 559-0559

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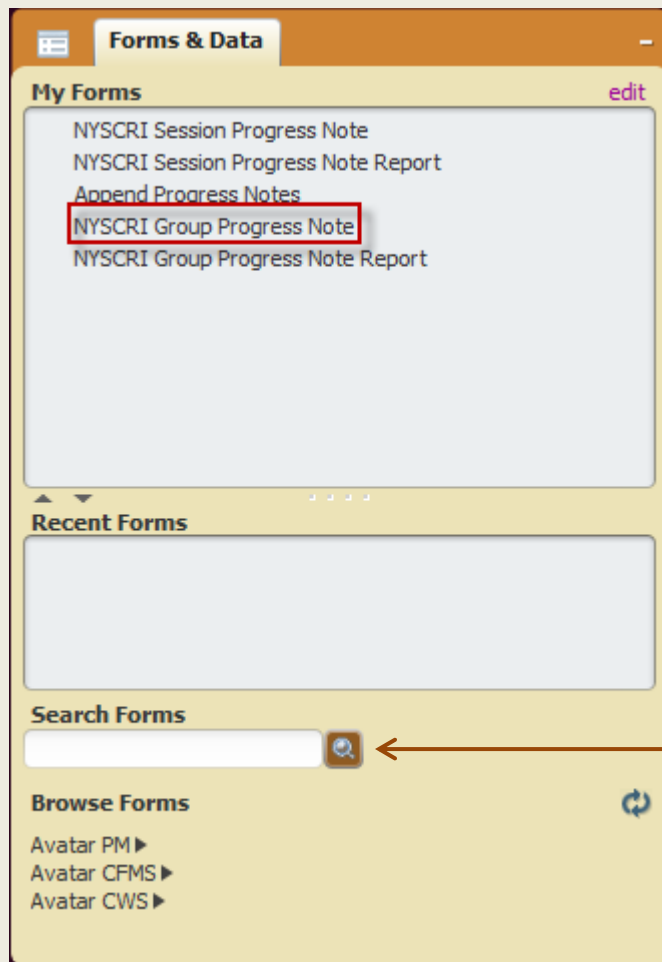
myAvatar
- Group Default Note (optional)

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NYSCRI Group Progress Note

From My Forms, click on NYSCRI Group Progress Note

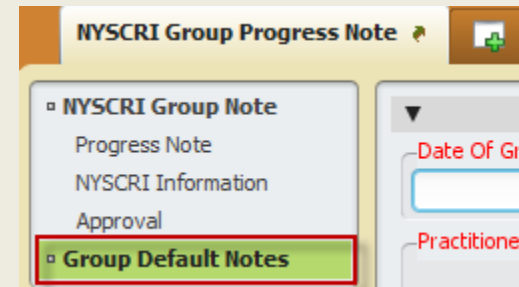


If you need to search for the form, type in Progress Note in the Search Forms box

Enter a Default Group Note

To enter a Group Note that pertains to the entire group:

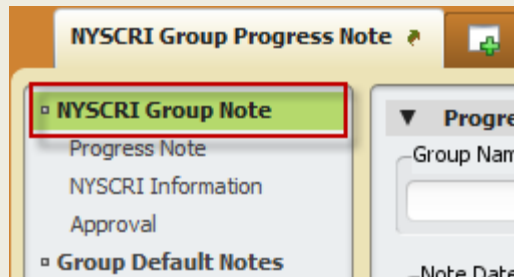
1. Click the “Group Default Notes” section.
2. Enter the date of the group session.
3. Enter your practitioner #.
4. Choose Existing Appointment.
5. Your name appears in the User to Send Scratch Note To-Do Item To field. (This will send you a reminder notification in your To Do list).
6. Select Note 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.



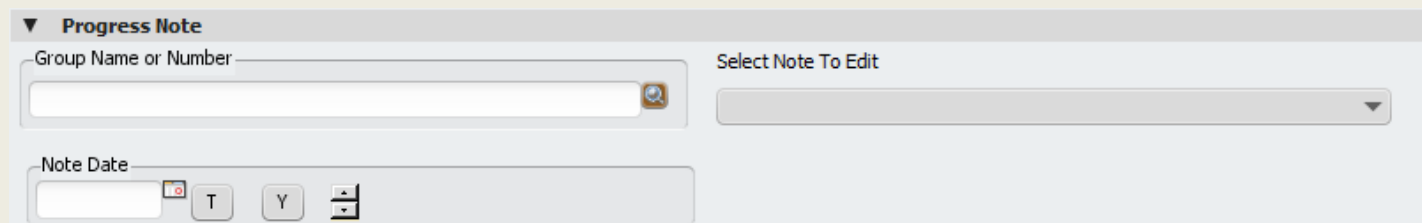
*See the next section in order to individualize the group note for each group member.

Individualization section

- Click the “NYSCRI Group Note” section.

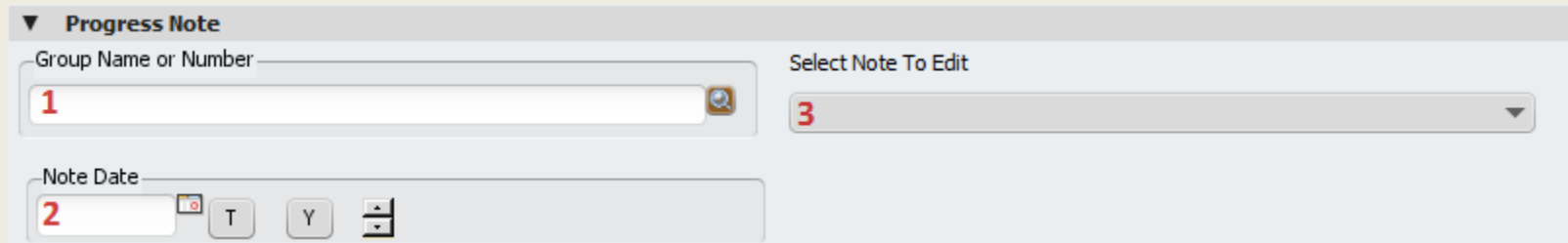


- You will individualize the group note in the NYSCRI Group Note section.

A screenshot of the "Progress Note" form. The form has a title "Progress Note" with a dropdown arrow. Below the title, there are three main sections: 1. "Group Name or Number" with a text input field and a magnifying glass icon. 2. "Note Date" with a date input field, a "T" button, a "Y" button, and a calendar icon. 3. "Select Note To Edit" with a dropdown menu.

Choose the Group to Individualize

1. Enter the group name or number.
2. Enter the date the note was written (not necessarily the date of the session).
3. Select the client to individualize (from the drop-down list).



The screenshot shows a software interface for editing a progress note. At the top, there is a section header "Progress Note" with a downward arrow. Below this, there are three main input areas:

- Group Name or Number:** A text input field containing the number "1". To the right of the field is a magnifying glass icon.
- Note Date:** A date input field containing the number "2". To the right of the field are three buttons labeled "M", "T", and "Y", and a calendar icon.
- Select Note To Edit:** A dropdown menu containing the number "3".

Individualize the default note

Once an individual note is chosen, the individual client information will populate in the individual fields in the form.

1. The note that was written for the group will appear in the Intervention(s) / Method(s) Provided field, and should now be edited for the individual: goal, objective, symptoms, intervention.
2. Enter the Response to Intervention.
3. Enter Group name, Number of Attendees and Number of Staff in the NYSCRI Information section (this information will transform to the printed report).
4. Select appropriate options for Behavior in Group and Individual's Mood, and enter comments in Intervention(s) / Method(s) Provided and Response to Intervention(s) and Progress Toward Goals and Objectives accordingly.
5. Choose whether to save the individual note as Draft or Final.
6. Click File Note at the bottom of the screen.
7. Scroll up to the Individualization section in order to select the next client that attended and repeat the process until all attendees in the drop down have had an individual note filed. (For missed appointments, just enter the client name in the Select Client field and choose Independent Note)

Enter the Group Note for an Individual

Form:

A screenshot of a web form for entering a group note. The form includes a dropdown menu for 'Group Name' with 'Unique Skills' selected, and a text input for 'Number of Staff' with the value '1'. A 'Number of Attendees' field shows '3'. There is a checkbox for 'Admission Note (Check only once per episode of care)' which is checked. The form also has buttons for 'No Show', 'Canceled', and 'Explanation'.

Report:

A screenshot of a 'Group Progress Note' report. The report header includes the NYS-CRI logo and the title 'Group Progress Note' with a revision date of '11-1-12'. The report contains the following information: Organization Name, Individual's Name, Group Name: Unique Skills, Program Name: PCC-MHC Valley Stream, Record #, DOB: 12/10/2004, Number of Staff: 1, and Number of Attendees: 3. The report is on page 2 of 2.

8. Choose whether to save the note as Draft or Final.
9. Click File Note.

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