



Practitioner corrections to Progress Notes

The purpose of this desk reference is to provide guidance on how to change a practitioner in a finalized Progress Notes (Group and Individual). These corrections can only be completed by Avatar users with the permissions to access the Edit Service Information form where these corrections will be made.

Menu Path

1. Use Menu path: Avatar PM > Services > Outpatient Services > Edit Service Information or enter “Edit Service Information” under Search Forms:

Name	Menu Path
Edit Service Information	Avatar PM / Services / Outpatient Services

Details

1. The Progress Note requiring correction must be in Final status to make corrections using Edit Service Information.
2. The service must be in an Open status before proceeding with a correction. See Checking Open Status desk reference for instruction on determining service status. If the service is not in an open status do not proceed, contact the HHS Fiscal department.

Steps

- Open the Edit Service Information form.
1. Enter the “Client ID”, select the “Episode Number” in which the note was filed and enter the “Service Start Date” then click “Select Service(s) To Edit”

TESTCLIENT, YOLO (000011136)
 Preferred Name: George
 Personal Pronouns: He/Him/His
 F, 11, 03/13/2012

Ep: -
 Problem P: -
 DX P: -
 Phone #: 530-666-6666

Edit Service Information

Edit Service Information

Client ID: TESTCLIENT, YOLO, (11136)

Service Start Date: 09/01/2023

Service End Date: [Date Picker]

Episode Number: Episode # 97 Admit : 08/17/2022 Discharge : None Program : 1...

Service Selection Default: All None

Select Service(s) To Edit

Practitioner: [Text Field]

Modifiers: [Text Field]

Submit

Online Documentation

2. A pop up box with your selections will appear, place a checkmark in the box on the note you want to correct then click “OK.”

myAvatar 2023 - Select Service(s) To Edit

Client: TESTCLIENT, YOLO (11136)
 Episode Number: 97

Service Date	Service Code	Program	Practitioner	Status	Document	Claim Number
<input checked="" type="checkbox"/> 09/11/2023	YT1017	HHS-15-400	SIDHU, PAM	Open	-	
<input type="checkbox"/> 09/29/2023	H0031MH	HHS-15-200	JOHNSON, TIMOTHY LER	Open	-	

OK Cancel

3. Upon making your selection, the note details (Service Code, Program, Place of Service, Times and Practitioner) will autofill. In the Practitioner field, replace the existing name with the correct practitioner's name.

The screenshot shows a form for editing service information. The Client ID is TESTCLIENT, YOLO, (11136). The current Episode Number is # 97, but the 'Episode Number (Edit)' dropdown is set to # 105. The Service Code is MH ASSESSMENT BY NON-MD(15 MINS) (H0031MH). The Practitioner field is circled in red and contains the text JOHNSON, TIMOTHY LEROY (000957). Other fields include Service Start Date, Service End Date, Service Selection Default (All), Modifiers, Claim Number, and a table for Direct Time, Documentation Time, Travel Time, Duration (Minutes), and Cost Of Service.

4. If no further changes are needed, click Submit.

The screenshot shows the same service information form, but now the 'Submit' button is circled in red. The Client ID is TESTCLIENT, YOLO (000011136). The Preferred Name is George, and Personal Pronouns are He/Him/His. The Episode Number is # 97. The Practitioner field now contains SIDHU, PAM (000017). The Service Start Date is 09/01/2023. The Submit button is highlighted with a red circle.