INNOVATION AND TECHNOLOGY SERVICES DEPARTMENT



AVATAR SYSTEM ADMINISTRATION

USER DESK REFERENCE

Duplicate note corrections

The purpose of this desk reference is to provide guidance on how to void a duplicate note of a finalized Progress Note (Group and Individual). For the purpose of this desk guide, "duplicate note" refers to the unintended entry of an additional progress note for a single service. It does not include when more than one service of the same type is provided by the same staff for the same client on the same date of service (refer to QM guidance on the correct documentation and claim requirements for these situations). These corrections can only be completed by Avatar users with the permissions to access the Progress Note Corrections form.

Menu Path

1. Use Menu path: Avatar CWS > Progress Notes > Progress Note Corrections or enter "Progress Note Corrections" under Search Forms:

Menu Path
Avatar CWS / Progress Notes

Details

- 1. The Progress Note requiring correction must be in Final status to make corrections using the Progress Note Corrections form.
- 2. The service must be in an Open status before proceeding with a correction. See Avatar Service Correction PowerPoint for instruction on determining service status. If the service is not in an open status do not proceed, contact the HHSA Fiscal department.
- 3. This functionality should only be used when the note is truly a DUPLICATE. If the note has a wrong date or was entered into the incorrect client record, this falls into other

correction categories unless the provider wrote a new note in the correct client's chart. Please contact <u>HHSAQualityManagement@yolocounty.org</u> for further assistance.

Steps

- > Open the Progress Note Corrections form.
- Enter the "Client ID" and select the "Episode Number" in which the note was filed. The Start Date will auto populate with the start of the episode date. To narrow the search results the Start Date can be changed. This date is based on the date the note was started by the provider, NOT the Date of Service. If desired, enter an End Date and click on applicable Note Types. Click on Select Note to Correct button.

F, 11, 03/13/2012		Phone #: \$30-666-6666
Progress Note Correction	s P 🛃	
Progress Note Correctio Submit	Cherk ID TESTCLIENT, VOLO, (11136) Episode Rumber Episode #105 Admit : 02/28/2023 Discharge : None Program Start Date 02/28/2023 T Y End Date	Select Note to Correct Correction Action Net Progress Note Reason for Correction Comments
Inline Documentation	Note Type AMFT-Co-\$ Agnature Needed AMFT APCC-Co-\$ Agnature Needed APCC ASW-Co-\$ gnature Needed	Delete Service

2. A pop-up box with your selections will appear, click on the line item of the duplicate note you want to void and then click "OK."

			myAvatar 2023 - Select Note To Correct				\times
Client: TESTC	LIENT, YOLO (11136)					
Note No	lote	Note		Entry	Entry	Entry	
Date F	or	Brief Des	scription	Date	Time	By (Optio:	
10/24/2023 N	New Service	Testing 1	TestingTestingTestingTestingTe	10/24/2023	03:00 PM	TIMOTH	
> Service:	NON-BILLABLE	ASSESSME	ENT CODE (YASSESMH)				
> Service	Date: 10/09/2	2023 Dura	ation: 60				
11/01/2023 N	lew Service	TEST NOTE	E FOR TRAINING.	11/01/2023	02:46 PM	TIMOTH	
> Service:	MH ASSESSMEN	NT BY NON-	-MD(15 MINS) (H0031MH)				
> Service	Date: 10/01/2	2023 Dura	ation: 40				
11/01/2023 N	lew Service	TEST CRIS	SIS NOTE.	11/01/2023	02:47 PM	TIMOTH	
> Service:	THERAPY FOR	CRISIS(FI	IRST 30-74 MINS) (90839MH)				
> Service	Date: 09/01/2	2023 Dura	ation: 15				
11/01/2023 N	lew Service	NON-BILLA	ABLE TEST NOTE.	11/01/2023	02:53 PM	TIMOTH	
> Service:	NON-BILLABLE	E REHABILI	ITATION CODE (YREHABMH)				
> Service	Date: 11/01/2	2023 Dura	ation: 50				
11/01/2023 N	New Service	TEST ASSE	ESSMENT NOTE.	11/01/2023	02:54 PM	TIMOTH	
> Service:	MH ASSESSMEN	T BY NON-	-MD(15 MINS) (H0031MH)				
> Service	Date: 09/15/2	2023 Dura	ation: 120			-	
4						•	
	/			_			
	(OK Cancel				

3. Upon making your selection, the Correction Action, Reason for Correction, Comments and Delete Service fields will become mandatory (turn red). In the Correction Action field click on Void Progress Note.

TESTCLIENT, YOLO (000011136) Preferred Name: George Personal Pronouns: He/Him/His F, 11, 03/13/2012	Ep: 105 : Hope Cooperative-FSP Problem P: - DX P: - Phone #: 530-666-6666	Location: 25 MAIN ST, WOO Attn. Pract.: - Adm. Pract.: PAM SIDHU	DLAND,
Progress Note Corrections 🔹 🛃			
Submit Episode Number Episode #105 Admit Sat Date 02/28/2023	11136) 02/28/2023 Discharge : None Program : Reaso	Void Progress Note Revert Final Note to Draft	
ine Documentation	re Needed	ne lu	
ASW-Co-Signat	e Needed	lete Service Yes No	Ŷ

4. In the Reason for Correction drop down, select Duplicate Note.

rogress Note Correctio		
	Client ID TESTCLIENT, YOLO, (11136)	Select Note to Correct
Submit	Episode Number	Void Progress Note
	Episode #105 Admit : 02/28/2023 Discharge : None Program : • Start Date	Reason for Correction
* *	10/01/2023 T T E	Duplicate Note Payment Reform Correction Revert to Draft
	Note Type	Revertwork
ne Documentation	AMFT-Co-Signature Needed AMFT APCC-Co-Signature Needed	
	ASW-Co-Signature Needed	Ves No

5. In the Comments field, enter a summary as to the reason why the duplicate note is being voided. Example: "<Date> <Initials> Clinician reported accidentally writing two notes for the same service and requested the second one be voided."

Home Progress Note C Image: Submit Frequences Submit Clerkt ID Epicode Number Figloode #105 Admit : 02/28/2023 Discharge : None Progress Note Correction Start Date 02/28/2023 T Start Date 02/28/2023 Discharge : None Progress Note Correction Start Date 02/28/2023 T Start Date 02/28/2023 Discharge : None Progress To be to correct on the same service accident of the					
TESTCLIENT, YOLO (000011136) Ep: 105 : Hope Cooperative-FSP Location: 25 M Preferred Name: George Problem P: - DX P: - Phone #: 530-666-6666 DX P: - Adm. Pract: - Progress Note Corrections Image: Correction of the same service as a context of the second one be voided.]				s Note C	Home Progress No
Progress Note Corrections • Progress Note Correction Submit Submit Episode Number Episode #105 Admit : 02/28/2023 Discharge : None Program : Start Date 02/28/2023 IT End Date Image: Start Date Outplate Note Date Image: Note Type	Location: 25 MAIN ST, WOODLAND, Attn. Pract.: - Adm. Pract.: PAM SIDHU		Ep: 105 : Hope Cooperative-FSP Problem P: - DX P: - Phone #: 530-666-6666	Preferred Name: George Personal Pronouns: He/Him/His F, 11, 03/13/2012	
Progress Note Correctio. Submit Submit Submit Episode #105 Admit : 02/28/2023 Discharge : None Program : Start Date O2/28/2023 I V Comments End Date Comments Note Type				ons a	Progress Note Corrections
Submit Select Note to Correct Episode Number Correction Action Episode ±105 Admit : 02/28/2023 Discharge : None Program : Y Start Date Duplicate Note 02/28/2023 T T End Date 11/28/23 TJ: Clinician reported accident. Vote Type Note Type					Progress Note Correctio
Submit TESTCLIENT, YOLO, (11136) Episode Number Correction Action Episode #105 Admit : 02/28/2023 Discharge : None Program : Start Date Duplicate Note 02/28/2023 T T End Date Duplicate Note Image: Start Date Duplicate Note Duplicate Note Duplicate Note Note Type Note Type		ract	Calact Note to Co	Client ID	
Submit Episode Number Episode #105 Admit : 02/28/2023 Discharge : None Program : ▼ Start Date 02/28/2023 Immodel Terminal Note to Draft Reason for Correction Dupkcate Note Dupkcate Note Comments I1/28/203 TJ: Clinician reported accident. Note Type		ect	Correction Action	TESTCLIENT, YOLO, (11136)	
Episode #105 Admit: 02/28/2023 Discharge: None Program : ▼ Rewort Final Note to Draft Start Date 02/28/2023 T T T End Date 11/28/223 TJ: Clinician reported accident. Note Type Note Type		e	Void Progress No	Episode Number	Submit
Start Date Start		to Draft	arge : None Program :	Episode #105 Admit : 02/28/2023	
Comments End Date Image: The second one be voided. Note Type Comments			Duplicate Note	-Start Date	
End Date I1/28/23 TJ: Clinician reported accident. writing two notes for the same service and requested the second one be voided.			Comments	02/28/2023	₩ X® ₩
Note Type writing two notes for the same service as requested the second one be voided.	identally	inician reported accident	11/28/23 TJ: C1	End Date	
Note i ype	ice and	es for the same service a econd one be voided.	writing two not requested the s		
Online Documentation				AMET-Co-Signature Needed	nline Documentation
AMFT				AMFT	
APCC-Co-Signature Needed	*			APCC-Co-Signature Needed	
ASW-Co-Signature Needed		No	Delete Service Vee	ASW-Co-Signature Needed	
		Unio I			

6. In the Delete Service field, select Yes.

			myAvatar 2023	
A Home Progress No	ote C			
TESTCLIENT, YOLG Preferred Name: G Personal Pronouns F, 11, 03/13/2012	0 (000011136) ieorge s: He/Him/His	Ep: 105 : Hope Cooperativ Problem P: - DX P: - Phone #: 530-666-6666	e-FSP	Location: 25 MAIN ST, WOODLAND, Attn. Pract.: - Adm. Pract.: PAM SIDHU
Progress Note Corrections	•			
Progress Note Correctio Submit Submit Submit Submit Submit Subm	Client ID TESTCLIENT,YOLO, (11136) Episode Number Episode 105 Admit : 02/28/2023 Start Date 02/28/2023 Find Date End Date AMFT AMET-Co-Signature Needed AMFT APCC-Co-Signature Needed ASW-Co-Signature Needed	Discharge : None Program : V	Select Note to Correct Correction Action Void Progress Note Reason for Correction Duplicate Note Comments 11/28/23 TJ: Clinician writing two notes for t requested the second on Delete Service Ves	reported accidentally the same service and the be voided.

7. Click Submit.

