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:

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 HHSAQualityManagement@yolocounty.org for further assistance.

Steps

➢ Open the Progress Note Corrections form.

1. 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.

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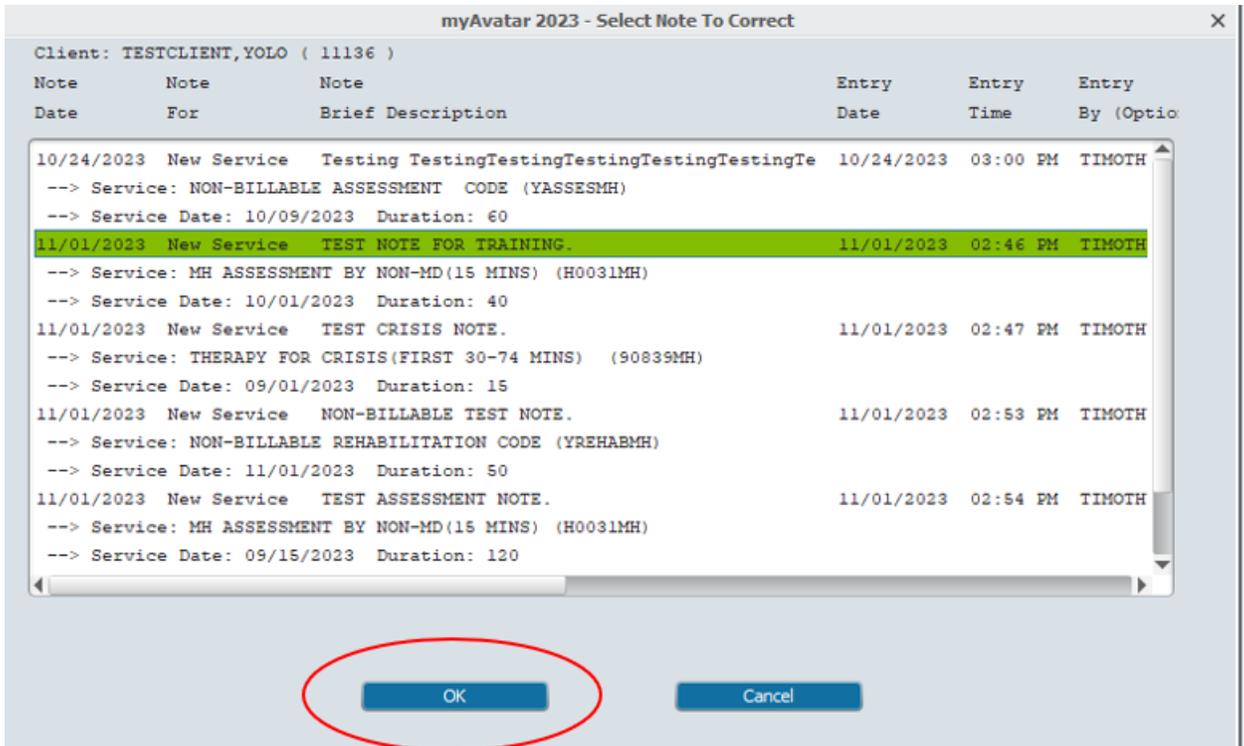
3. Upon making your selection, the Correction Action, Reason for Correction, Comments and Delete Service fields will become mandatory (turn red). In the Correction Action field click on Void Progress Note.
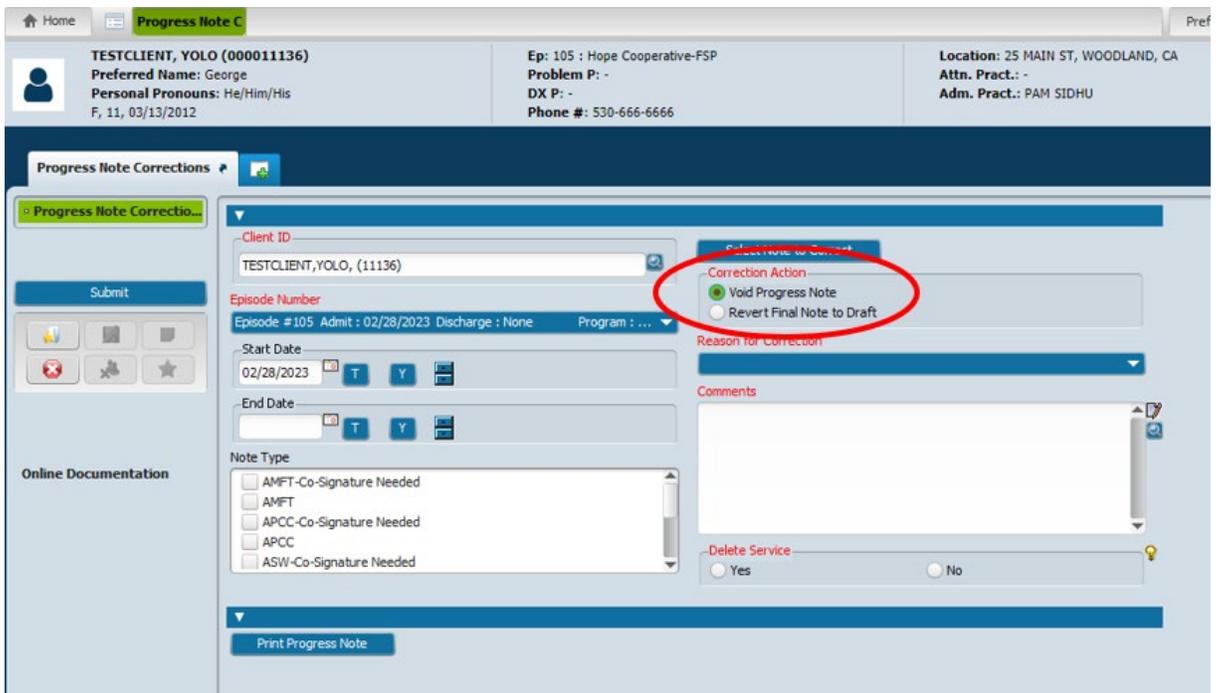
4. In the Reason for Correction drop down, select Duplicate Note.

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."

6. In the Delete Service field, select Yes.

7. Click Submit.