



## *Place of Service corrections to Progress Notes*

The purpose of this desk reference is to provide guidance on how to change the Place of Service 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:

The screenshot shows a search interface with a text box containing 'edit service information' and a magnifying glass icon. Below the search box is a table with two columns: 'Name' and 'Menu Path'. The table has one row with the following data:

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, Practitioner, Program and Place of Service) will autofill. In the Place of Service drop down, select the correct location.

The screenshot shows a service entry form for Client ID TESTCLIENT, YOLO, (11136). The form includes fields for Service Start Date, Service End Date, Episode Number (Episode # 97), Service Code (MH ASSESSMENT BY NON-MD(15 MINS) (H0031MH)), Program (West Sac Clinic), and Place of Service (Community Mental Health Center, which is circled in red). Other fields include Direct Time, Documentation Time, Travel Time, Duration (Minutes), Cost Of Service, and Practitioner (JOHNSON, TIMOTHY LEROY (000957)).

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

The screenshot shows the same service entry form as above, but with the 'Submit' button circled in red. The form also displays client information: TESTCLIENT, YOLO (000011136), Preferred Name: George, Personal Pronouns: He/Him/His, F, 11, 03/13/2012. The Episode Number is Episode # 97, Admit: 08/17/2022, Discharge: None, Program: 1... The Service Start Date is 09/01/2023, and the Service End Date is empty. The Practitioner is SIDHU, PAM (000017).