

# PROGRESS NOTES ERROR RESOLUTION GUIDE

Need	Responsible Party	Comments
<b>Add additional notation or clarifying statements to a finalized note</b> ( <i>service data remains the same</i> )	Documenting Staff	Use 'Append Progress Notes' form
<b>Change minutes of Direct Time, Documentation Time or Travel Time</b> ( <i>only allowed if within same month of the service or by the 15<sup>th</sup> of the following month</i> <b>OR</b> if "Status" displays as 'Open' in 'Edit Service Information' form)	Supervisors or Managers	Use 'Edit Service Information' form (see Supervisor Guide) <a href="#">MyAvatar Resources   Yolo County</a>
<b>Change Service Code</b> ( <i>only allowed if within same month of the service or by the 15<sup>th</sup> of the following month</i> <b>OR</b> if "Status" displays as 'Open' in 'Edit Service Information' form)	Supervisors or Managers	Use 'Edit Service Information' form (see Supervisor Guide) <a href="#">MyAvatar Resources   Yolo County</a>
<b>Change Service Program</b> ( <i>only allowed if within same month of the service or by the 15<sup>th</sup> of the following month</i> <b>OR</b> if "Status" displays as 'Open' in 'Edit Service Information' form)	Supervisors or Managers	Use 'Edit Service Information' form (see Supervisor Guide) <a href="#">MyAvatar Resources   Yolo County</a>
<b>Change Episode within same MR#</b> ( <i>only allowed if within same month of the service or by the 15<sup>th</sup> of the following month</i> <b>OR</b> if "Status" displays as 'Open' in 'Edit Service Information' form)	Supervisors or Managers	Use 'Edit Service Information' form (see Supervisor Guide) <a href="#">MyAvatar Resources   Yolo County</a>
<b>Change Practitioner</b> ( <i>only allowed if within same month of the service or by the 15<sup>th</sup> of the following month</i> <b>OR</b> if "Status" displays as 'Open' in 'Edit Service Information' form)	Supervisors or Managers	Use 'Edit Service Information' form (see Supervisor Guide) <a href="#">MyAvatar Resources   Yolo County</a>
<b>Change Location</b> ( <i>only allowed if within same month of the service or by the 15<sup>th</sup> of the following month</i> <b>OR</b> if "Status" displays as 'Open' in 'Edit Service Information' form)	Supervisors or Managers	Use 'Edit Service Information' form (see Supervisor Guide) <a href="#">MyAvatar Resources   Yolo County</a>

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<p><b>Revert Note back to draft</b> <i>(only allowed if within same month of the service or by the 15<sup>th</sup> of the following month)</i></p>	<p>Supervisors or Managers</p>	<p>Use 'Progress Note Corrections' (see Supervisor Guide) <b>ONLY</b> if the correction scenario is not listed above &amp; cannot be resolved with 'Edit Service Information' form. <a href="#">MyAvatar Resources   Yolo County</a></p> <p>After reverting to draft, Supervisor is responsible for ensuring the correction is made and finalized within 24 hours. <b>Note: Service Date cannot be changed by reverting a note to draft.</b></p>
<p><b>Change Service Date</b></p>	<p>Quality Management</p>	<p>Use "Service Date change" desk reference</p> <p>Supervisor or Managers must be included on the request.</p>
<p><b>Void/Delete a Progress Note</b> <i>(only allowed for <b>DUPLICATE NOTES</b> within the same month of the service or by the 15<sup>th</sup> of the following month)</i></p>	<p>Supervisors or Managers</p>	<p>Use 'Progress Note Corrections' form (see Supervisor Guide) <a href="#">MyAvatar Resources   Yolo County</a></p> <p><b>Voiding/deleting notes should not be completed beyond the identified timeframe and MUST be escalated to QM and fiscal for discussion prior to any action taken.</b></p>
<p><b>Move Progress Note to another client's chart</b> <i>(entered Note in wrong chart)</i></p>	<p>Quality Management</p>	<p>Use 'Move Selected Data'</p> <p>Clinical staff should NOT create a new note under the correct chart. Supervisor or Managers must be included in the staff's request for this action.</p>

Required information to complete corrections (please note, a from and to may be required as applicable):

- Medical Record #
- Date of Service
- Units of Service
- Service Program Name
- Episode name
- Episode #
- Practitioner Name

Avatar documentation and/or content questions should still be directed to your immediate supervisor who may escalate the question to QM ([HHSAQualityManagement@yolocounty.org](mailto:HHSAQualityManagement@yolocounty.org)) if needed.