# **PROGRESS NOTE** CORRECTIONS FOR ADMIN AND **CLINICAL STAFF**

5/16/18

# PROGRESS NOTE CORRECTIONS MANUALS

### PROGRESS NOTE CORRECTIONS FOR ADMINISTRATIVE STAFF



### PROGRESS NOTE CORRECTIONS FOR CLINICAL STAFF



# USING THE FLOW CHART IN THE MANUALS



### **USING THE MASTER MATRIX**

					P	ROG	iRE	SS	NOTE	COR	RECT		ИАТЕ	RIX - I	MA	STER													
				D	o not u	se this ir	n plac	This r e of th	matrix is used he appendix in Using the	to identify structions! e matrix yo	which app This matri u should w	endix to us ix does not /ork from le	e for PN c include in ft to right	orrections. nportant ite	ems in t	he append	ices.												
															BASIC		TION ST	PS											
	В	illing	Stati	us	Арр	endix					Admin St	taff							P	rogre	ss Not	e Users	5				Sup	port D	esk 🛛
TYPE OF ERROR	UNCLAIMED	CLAIMED	PAID	DENIED	ADMIN APPENDIX	CLINICAL APPENDIX	CHECK BILLING STATUS	ENTER 998 SERVICE	RUN 998 REPORT TO MONITOR CLAIM STATUS UNTIL PAID OR DENIED	SEND VOID SERVICE REQUEST TO MHBU (IF PAID)	SEND DISALLOWANCE & DELETE FORM TO MHBU <b>(IF DENIED)</b>	SEND REPLACEMENT SERVICE REQUEST TO MHBU	HEAR BACK FROM MHBU REQUEST WAS PROCESSED	NOTIFY PN STAFF NOTE IS READY FOR CORRECTION	DELETE THE INPUTTED 998 SERVICE	CONSULT WITH ADMIN STAFF FOR BILLING STATUS	ADMIN STAFF NOTIFIES YOU NOTE ISREADY FOR CORRECTION	CALL THE OPTUM SUPPORT DESK	VOID ENCOUNTER		(if planned)	VOID & REPLICATE ENCOUNTER	EDIT ENCOUNTER	EDIT PN RE ENTER CORRECT ENCOUNTER	RE ENTER NON BILLABLE SERVICE CODE	ENTER INFO PROGRESS NOTE	VOID NOTE	VOID & REPLICATE NOTE	DELETE PN
Encounter did not occur	Y				1	2	2							3		1	4	5									6		
Encounter did not occur		Y			2	2	2	3	4	5	5		6	7	9	1	8	10		12								11	13
Encounter did not occur			Y		3	2	2			3	5		4	5		1	6	7		9								8	10
Encounter did not occur				Y	3	2	2				3		4	5		1	6	7		9								8	10
Wrong client chart/Wrong date of encounter	Y				1	2	2							3		1	4	5									6		
Wrong client chart/Wrong date of encounter		Y			2	2	2	3	4	5	5		6	7	9	1	8	10		12								11	13
Wrong client chart/Wrong date of encounter			Y		3	2	2			3			4	5		1	6	7		9								8	10
Wrong client chart/Wrong date of encounter				Y	3	2	2				3		4	5		1	6	7		9								8	10
Duplicate progress note & encounter	Υ				1	2	2							3		1	4	5									6		
Duplicate progress note & encounter		Y			2	2	2	3	4	5	5		6	7	9	1	8	10		12								11	<b>13</b>
Duplicate progress note & encounter			Υ		3	2	2			3			4	5		1	6	7		9								8	10
Duplicate progress note & encounter				Y	3	2	2				3		4	5		1	6	7		9								8	10
Change encounter to never billable activity (clerical, etc)	Y				1	2	2							3		1	4	5								7	6		
Change encounter to never billable activity (clerical, etc)		Y			2	2	2	3	4	5	5		6	7	9	1	8	10		12						14		11	13
Change encounter to never billable activity (clerical, etc)			Y		3	2	2			3			4	5		1	6	7		9						11		8	10
Change encounter to never billable activity (clerical, etc)				Y	3	2	2				3		4	5		1	6	7		9						11		8	10
Change non-billable service code to an informational progress note	Y				1	2												1								3	2		
Wrong or insufficient info in client narrative (within 14 days)	Y				1	3	2							3		1	4	5						7				6	
Wrong or insufficient info in client narrative		Y	Y	Y	1	3							ONTAC	T QI MAT	TERS	@ QIMa	tters.HH	SA@so	lcou	nty.o	ca.go	/							
Wrong billing indicator which affects billing (Lockouts, No-Show, DAS)	Y				1	4	2							3		1	4	5				7	8					6	
Wrong billing indicator which affects billing (Lockouts, No-Show, DAS)		Y			2	5	2	3	4	5	5		6	7	9	1	8	10	:	12				13				11	
Wrong billing indicator which affect billing (Lockouts, No-Show, DAS)			Y		3	5	2			3			4	5		1	6	7		9				10				8	
Wrong billing indicator which affects billing				Y	3	5	2				3		4	5		1	6	7		9				10				8	

This matrix is used to identify which appendix to use for PN corrections. Do not use this in place of the appendix instructions! This matrix does not include important items in the appendices. Using the matrix you should work from left to right.

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#### TYPE OF ERROR

Encounter did not occur
Encounter did not occur
Encounter did not occur
Encounter did not occur
Wrong client chart/Wrong date of encounter
Duplicate progress note & encounter
Duplicate progress note & encounter
Duplicate progress note & encounter
Duplicate progress note & encounter
Change encounter to never billable activity (clerical, etc)
Change encounter to never billable activity (clerical, etc)
Change encounter to never billable activity (clerical, etc)
Change encounter to never billable activity (clerical, etc)
Change non-billable service code to an informational progress note
Wrong or insufficient info in client narrative (within 14 days)
Wrong or insufficient info in client narrative
Wrong billing indicator which affects billing (Lockouts, No-Show, DAS)
Wrong billing indicator which affects billing (Lockouts, No-Show, DAS)
Wrong billing indicator which affect billing (Lockouts, No-Show, DAS)
Wrong billing indicator which affects billing

This first column shows the different types of common progress note errors.



This section lists the billing status of the claim which you can find out in Display Client Services.

P	ROG	
o not u	se this ir	1
Арре	endix	
ADMIN APPENDIX	CLINICAL APPENDIX	
1	2	
2	2	
3	2	
3	2	
1	2	
2	2	
3	2	
3	2	
1	2	
2	2	
3	2	
3	2	
1	2	
2	2	
3	2	
3	2	
1	2	
1	3	
1	3	
1	4	
2	5	
3	5	
3	5	

These two columns refer you to the appendix in either the Admin or Clinical Progress Note Correction manual.

These column headers \_ shows what steps to take.

For each type of error, these rows show the order in which to take the steps and who is responsible: admin staff, clinical staff, or the Optum Support Desk.

#### **RESS NOTE CORRECTION MATRIX - MASTER**

This matrix is used to identify which appendix to use for PN corrections.

place of the appendix instructions! This matrix does not include important items in the appendices.

Using the matrix you should work from left to right.

									DASIC	CONNEC	TION STE											1 1	1	
					Admin St	aff							Prog	ress No	te User	s					Sup	oport D	<mark>esk</mark>	
<b>→</b>	CHECK BILLING STATUS	ENTER 998 SERVICE	RUN 998 REPORT TO MONITOR CLAIM STATUS UNTIL PAID OR DENIED	SEND VOID SERVICE REQUEST TO MHBU <b>(IF PAID)</b>	SEND DISALLOWANCE & DELETE FORM TO MHBU (IF DENIED)	SEND REPLACEMENT SERVICE REQUEST TO MHBU	HEAR BACK FROM MHBU REQUEST WAS PROCESSED	NOTIFY PN STAFF NOTE IS READY FOR CORRECTION	DELETE THE INPUTTED 998 SERVICE	CONSULT WITH ADMIN STAFF FOR BILLING STATUS	ADMIN STAFF NOTIFIES YOU NOTE ISREADY FOR CORRECTION	CALL THE OPTUM SUPPORT DESK	VOID ENCOUNTER	REMOVE ENCOUNTER	UNLINK OBJECTIVE (if planned)	VOID & REPLICATE ENCOUNTER	EDIT ENCOUNTER	EDIT PN	RE ENTER CORRECT ENCOUNTER	RE ENTER NON BILLABLE SERVICE CODE	ENTER INFO PROGRESS NOTE	VOID NOTE	VOID & REPLICATE NOTE	DELETE PN
	2							3		1	4	5										6		
	2	3	4	5	5		6	7	9	1	8	10		12									11	13
	2			3	5		4	5		1	6	7		9									8	10
	2				3		4	5		1	6	7		9									8	10
	2							3		1	4	5										6		
$\rightarrow$	2	3	4	5	5		6	7	9	1	8	10		12									11	13
•	2			3			4	5		1	6	7		9									8	10
	2				3		4	5		1	6	7		9									8	10
	2							3		1	4	5										6		
	2	3	4	5	5		6	7	9	1	8	10		12									11	13
	2			3			4	5		1	6	7		9									8	10
	2				3		4	5		1	6	7		9									8	10
	2							3		1	4	5									7	6		
	2	3	4	5	5		6	7	9	1	8	10		12							14		11	13
	2			3			4	5		1	6	7		9							11		8	10
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	2	3	4	5	5		6	7	9	1	8	10		12					13				11	
	2			3			4	5		1	6	7		9					10				8	
	2				3		4	5		1	6	7		9					10				8	

BASIC CORRECTION STER

### **USING THE APPENDICES**

### PROGRESS NOTE CORRECTIONS FOR ADMINISTRATIVE STAFF



### PROGRESS NOTE CORRECTIONS FOR CLINICAL STAFF



### TABLE OF CONTENTS

Table of contents	2
Individual progress notes	3
Basic flow chart of correction process	4
Clinical correction matrix	5
Encounter did not occur	7
Wrong client chart/Wrong date of encounter	7
Duplicate progress note & encounter	7
Change encounter to never billable activity	8
Change non-billable service code to information ote	8
Wrong or insufficient information in the contained mative	8
Wrong billing indicator which affects	9
Wrong billing indicator which does NOT affect billing	9
Wrong service code	10
Time data entry error	10
No active client plan OR progress note final approved after 14 days	11
Change service code to a non-billable service code	12
Multiple scenarios	12

#### Time data entry error:

This correction should not be used to fix unsubstantiated time. It should only be used to fix a data entry error when, the amount of time entered on the encounter portion is greater than the time documented within the content of the narrative and the note is:

#### Not final approved (Appendix 1):

• Double click on the encounter to open the encounter for editing. Edit the time data error and final approve the note as normal.

#### Final approved (unclaimed) (Appendix 4):

- Contact your administrative support staff to check the billing status.
- Call the Optum Support Desk to void & replicate the progress note.
- Void & Replicate the encounter. Edit the time data error and final approve the note as normal.

#### Final approved (claimed/paid/denied) (Appendix 7):

- Contact your administrative support staff to check the billing status.
- Your administrative support staff may have to work through their process to take care
  of the entered encounter. There will be a waiting period if the encounter has been
  claimed, paid or denied.

#### CLINICAL CORRECTIONS 11/2017



Administrative Appendix #1

Check the billing status- there are several instances in which no action will be needed from the administrative staff. At most, administrative staff will need to check the billing status. This can occur in the following situations:

- Encounter did not occur- when the encounter is not claimed
- ✓ Wrong client chart- when the encounter is not claimed
- ✓ Wrong date of encounter- when the encounter is not claimed
- ✓ Duplicate progress note and encounter- when the encounter is not claimed
- Change encounter to never billable activity- when the encounter is not claimed
- ✓ Change non-billable service code to an informational progress note
- 800 codes are never claimed; the note is always ready for correction
   V Wrong or insufficient information in the client narrative- when the encounter is not
- claimed/ claimed/ paid/ denied
- V Wrong billing indicator which affects billing- when the encounter is not claimed V Wrong billing indicator which affects does NOT billing- when the encounter is not claimed/pail/denied
- Wrong service code- same or different procedure code- when the encounter is not claimed
- Wrong service code- same procedure code- when the encounter is claimed/paid/ or denied
- Time data entry error- when the encounter is not claimed
- ✓ No active client plan- when the encounter is not claimed
- ✓ Progress note was final approved after 14 days- when the encounter is not claimed
- ✓ Change service code to non-billable service code- when the encounter is not claimed

#### To check the status of an encounter-

#### 1. Open "Display Client Services."

Reviews	<b>Client Services</b>	ATP System 1	Tools	PN	<b>Client Profile</b>	Tools	Window	His
	Client Servic Transactions	e Entry Menu I Services Menu	•	Indi	vidual Client Se un Services Mai	rvices M ntenano	aintenance •	
	Client Service	es Reports Menu	۰Ľ	Disp	lay Client Servi	:es		

#### Administrative Appendix #1

2

 Enter the client's case number, uncheck the box to filter by the last 30 days (if more than 30 days from the date of encounter), and locate the encounter (sort by form number or date of encounter).

- Elow		_												
Sort Nam	FAKE, TES	я <b>т</b>				9	Admite	d	S&I					-
Separat	_													
Fon #	Date	Thru	Time	Unit	SLINE	Saver	Nana	Service	Deac	Proc	Price	Balance PSrc	Plan	
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	12/29/2016	2/20/2016	10.00 AM	9900	9901	6236	ALSHE, DOUBLA	5 31	PSYCHOTHERAPY - G		\$0.00	\$0.00 5955	0	
	12/01/2016	2/01/2016	04:15 PM	9900	9991	7013	GRUSS, DAWN (0	3 31	PSYCHOTHERAPY - G		\$0.00	\$6.00 (9999)	0	
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E Sentio	e Details													
Autho	ristions													

- Claims - Payments - Bill Trace

Options

#### 3. Under "Options", click on the 'Payments'/ 'Claims' branch from billing status.

Currently Viewing Information for Payments

Service Details Authorizations	Sve	35938 Ivate Pay Source	08/02/2016	\$0.00					\$0.00		
Claims	Type	Description	Date	Price	Adj	SIGMAP	WiteOff	Payment	Balance	Denial	-
- Pormenta - Enri Hace - Cross Test				\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$9.00		

#### The encounter has not been claimed yet:

Options	Curre	ntly Yiewing Information	for Payme	ints							
E-Service Details Authorizations	Svo	1004NED1-CAL P9112	05/05/2016	\$595.00					\$595.00		i
Chierra	Type	Description	Date	Price	àci	SIGMAP	Write Off	Pageor	Balance	Deniel +	1
Payments oill trace				\$0.00	\$0.00	\$0.00	\$0.02	\$0.00	\$0.00		
- Cross Test										100	

#### The encounter has been claimed and is pending payment or denial:

Options	Cu	rrently Yie	wing Info	mation	lor P <mark>ayme</mark>	nts						
- Service Details - Authorizations	Sve	100 MED	CAL P9112		04/19/2016	\$50.20					\$50.20	
Claims	Tu	a Descript	ion.		( Date	Pare	6:5	SHUMAP	Wite Diff.	Paract	Balance	Deniel
Payments	Ωn	Batch	Dim	Ln 1	06/23/2016	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$50.20	
Bill Trace												
Cross Test												

Currently View	ng Informati	ion for Payme	nte					
is Svo 100-HEDICA	LIP9112	01/21/2016	\$177.24			n or lo		\$177.24
Chn Batch: Pay 0064420476	Om Lr .5237	τ 1 (5 03/28/2016 05/18/2016	\$0.00 \$0.00	\$0.00 \$98.62	\$0.00 \$0.00	\$0.00 \$0.00	\$0.00 \$99.62	\$177.24 \$0.00
1								
unter has been cla	aimed ar	nd denied:						
Currently Viewi	ng Informati	on for Paymen	ts					
Swe 100 HEDI CA	L P9112	09/29/2012	\$674.55					\$674.56 Re
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4. Inform the clinical staff of the status of the encounter.

### TABLE OF CONTENTS

Table of Contents	2
Introduction to Corrections	3
Basic Flow Chart of Correction Process	4
Admin Correction Matrix	5
Encounter did not occur	7
Wrong client chart/Wrong date of encounter	7
Duplicate progress note & encounter	8
Change encounter to never billable activity	8
Change non-billable service code to information	9
Wrong or insufficient information in the clier	9
Wrong billing indicator which affects billi	10
Wrong billing indicator which does NOT affects billing	10
Wrong service code	10
Time data entry error	10
No active client plan OR progress note was final approved after 14 days	11
Change service code to a non-billable service code	11

#### Time data entry error:

This correction should not be used to fix unsubstantiated time. It should only be used to fix a data entry error when, the amount of time entered on the encounter portion is greater than the time documented within the content of the narrative and the encounter is:

#### Unclaimed (Appendix 1):

• Let the PN staff know the note is ready for correction.

#### Claimed (Appendix 2):

- Enter a 998 service in the Individual Service Entry screen, utilizing the same encounter ID as the original encounter.
- Monitor the claim status by running the Client Services Report: 998 Client Progress Note Audit Report. Check the claim status of the original claim in Display Client Services. Continue to do this until the original claim has been paid or denied.
- Send Replacement Service Request to MHBU
- · The MHBU will let you know via email once your request has been processed.
- Let the PN staff know the note is ready for correction.
- Delete the 998 service that was created.

#### Paid/denied (Appendix 3):

Send Replacement Service Request to MHBU

ADMIN CORRECTIONS 11/2017

10

- The MHBU will let you know via email once your request has been processed.
- Let the PN staff know the note is ready for correction.

Administrative Appendix #3

**Encounter is paid or denied**- in most instances when an encounter has been paid or denied the administrative staff needs to take care of the original encounter before the correction to the note can take place. This can occur in the following situations:

- ✓ Encounter did not occur- when the encounter is paid/or denied
- ✓ Wrong client chart- when the encounter is paid/or denied
- ✓ Wrong date of encounter- when the encounter is paid/or denied
- Duplicate progress note and encounter- when the encounter is paid/or denied
- ✓ Change encounter to never billable activity- when the encounter is paid/or denied
- ✓ Wrong billing indicator which affects billing- when the encounter is paid/or denied
- ✓ Wrong service code- different procedure code- when the encounter is paid/or denied
- Time data entry error- when the encounter is paid/or denied
- ✓ No active client plan- when the encounter is paid/or denied
- ✓ Progress note was final approved after 14 days- when the encounter is paid/or denied
- ✓ Change service code to non-billable service code- when the encounter is paid/or denied
- Once the encounter has been paid/ denied, by the State, check the matrix to see which request needs to be sent to the MHBU (Void Service Request, Disallowance and Delete Form, or the Replacement Service Request ~ which can be located on the Optum San Diego website). There will be a waiting period until your request is processed.
  - For instructions on filling out these forms, please refer to the Financial Billing Manual. For questions regarding these forms, please contact the MHBU directly.
- When the MHBU has completed your request, they will notify you. You can also check in Display Client Services to verify the status. Inform the clinical staff the progress note is now ready for correction.

## PROGRESS NOTES REPORT

C	P PN	Sequestering	DHP	Client Profile	Tools	Window						
I.	Clien	ts without Trea	tment	Plans Report								
L	Planning Groups Listing											
L	Treatment Plans with Inactive Service Codes Report											
L	Planning Tiers Listing											
L	Review Types Table											
L	Planning Tier Categories Table											
L	Stan	dard Text Table	:									
L	Clien	t Service Life C	yde Ar	nalysis Report								
L	Trea	tment Plan Fam	ilies Ta	ble								
L	Trea	tment Plan Type	es Tabl	e								
L	Plan	ning Groups Mai	ntenar	nce								
L	Signa	ature Line Head	ings Ta	able								
L	Plan	ning Tiers Table										
L	Stan	dard Text Table	:									
L	Prog	ress Note Type	Table									
V	Prog	ress Note Narra	tive T	ype Table								
	Progress Notes Report											

ad Template for Progress Notes Report				
Description	Created On	Created By	Last Used	
Non-Final Approved PN Report by Created ID	04/16/2018	10633	04/23/2018	
von-rinal Approved Progress Notes Report	0272172010	16002	0472372010	
				_
				-
	-			
×D	elete 🛛 📿 Find	t 🖂 Loa	d XICan	ncel
				-

The report can also be found via Quick View: System button > Menu > System Tools > Quick View > Progress Notes Report

### PROGRESS NOTES REPORT

A	Progress Notes Report (Administrative Access)	_ 🗆 🗙
[	Selections1 Selections2 Print Columns Sort/Subtotal/Title	
	Clients All	
	Progress Note Start Dates 01/01/2018 📰 thru 04/01/2018 📰	
	Progress Note Types 📶	
	Staff Signature All	
	Signature Complete All	
	Final Approval Status N - Pending Progress Notes N	
	<ul> <li>Include Progress Notes with Addendum(s) Only</li> <li>Include Voided Progress Notes Only</li> <li>Include Replicated Progress Notes Only</li> <li>Include Progress Notes with at least one Unplanned Service Only</li> </ul>	
	<u>∭</u> Clear <u>☐</u> Lo <u>a</u> d <u>☐</u> Save <u>⊖B</u> atch <u></u> <u>→</u> Lo <u>a</u> d <u></u>	Exit

### **PROGRESS NOTES REPORT**

Progress Notes Report Pag SAN DIEGO COUNTY MENTAL HEALTH										
				No	n-Final Approved Progress Notes Report by Cre	ated ID				
			c	Created	By ID: 46 MACDOUGALL, DEBOR.	AH (00037)				
444 C.1 444										
				I	Progress Note Dates: 01/01/2018 through 04/01/	2018				
					FA Status Selection: N Pending Progress Not	es				
					Assignment Unit Selection: 9900 TRAINING U	INIT				
				Assi	gnment SubUnit Selection: 9901 TRAINING S Drinting a racord for each Staff Signature	UBUNIT				
Report	: AZ2478RA				Finning a record for each star signature				Date : 0	4/23/2018
Staff	: MALDONADO, JANE (	00663)							Time : 1	7:47
	# Clim North	PN	PN		Sin ID. St. C. Sinna have Name	Prim	Sig	Crtd		<b>6</b>
Case	# Chent Name	Start Date/11me	Type	FA	Sig ID Statt Signature Name	Signer	Comp	By ID Created By Name	ĸ	Count
10002112	26 TEST, CLIENT	03/27/2018 13:00	G	Ν		46	Ν	46 MACDOUGALL, DEBORAH (00037)	N	
		03/27/2018 13:00	G	Ν		46	Ν	46 MACDOUGALL, DEBORAH (00037)	N	
	2 TEST, FRED X	03/27/2018 13:00	G	N		46	Ν	46 MACDOUGALL, DEBORAH (00037)	N	
		03/27/2018 13:00	G	N		46	N	46 MACDOUGALL, DEBORAH (00037)	N	
1000211	26 TEST, CLIENT	03/27/2018 13:00	G	N	46 MACDOUGALL, DEBORAH (00037	) 46	N	46 MACDOUGALL, DEBORAH (00037)	N	
1000211	2 TEST, FRED X	03/27/2018 13:00	07	N	46 MACDOUGALL, DEBORAH (00037) 46 MACDOUGALL DEBORAH (00037)	) 40	N	46 MACDOUGALL, DEBORAH (00037) 46 MACDOUGALL, DEBORAH (00037)		
1000211	Created By ID: 46	MACDOUGALL, DEB	ORAH (	00037)	W MACDOCOALL, DEBORAIT (1985)	/ 10		Wincboronie, Disbonnii (0001)		7
	-									
	Client Plan	Туре		=/A	V R Date 🔻	Thru		Primary Signer		7
	CP CYE Outpt /	PERT Informational Note			01/11/2018	01/11/20	18	MACDOLIGALL, DEBORAH (0	0037)	-
	No Global Dia	Tedicideed Deserves Mult			01/11/2010	04/44/20			•	
	No Client Plan e	Individual Progress Note			01/11/2018	01/11/20	18	HANSEN, STEPHANIE (0003)	)	
	CP CYF Outpt /	PERT Informational Note			01/11/2018	01/11/20	18	MACDOUGALL, DEBORAH (0	0037)	

Under the 'R' column, a 'Y' means that the note was replicated

### PROGRESS NOTES REPORT

A Progress Notes Report (Administrative Access)	_ 🗆 🗙
Selections1 Selections2 Print Columns Sort/Subtotal/Title	
Clients All Progress Note Start Dates 01/01/2018 thru 04/01/2018 Progress Note Types All Staff Signature All Signature Complete All Final Approval Status N - Pending Progress Notes Include Progress Notes with Addendum(s) Only These settings	
<ul> <li>Include Voided Progress Notes Only</li> <li>Include Replicated Progress Notes Only</li> <li>Include Progress Notes with at least one Unplanned Service Only</li> <li>Show only non-final approved notes that were replicated.</li> </ul>	
<u>∭Cl</u> ear <mark>⊯</mark> Save ⊗ <u>B</u> atch ∰Print	Exit

### PROGRESS NOTES REPORT



A non-final approved, replicated note indicates a correction has yet to be made.

# MIS-18 NON-FINAL APPROVED PROGRESS NOTES WITH SERVICES

County of San Diego Behavioral Health Service Non-Final Approved Progress Notes with Services For Service Date from 7/1/20/16 / 4/24/2018									COUNTY OF		AGENCY												
Client Name	Case Number Form Date	Form Type	Created ID	Created By	Credentials	Form Number	Service Code	Service	Service Date	Service Price	Balan ce	Bille d Flag	Current Paysource	Unit ID	Sub Unit	SubUnit Description	LEID	Legal Entity	Server ID	Server Name	Medi-Cal Service	Medi-Cal Claimed	Medi-Cal Paid

This report is currently distributed monthly to the CORs and has more detail than the Progress Note Report.

## PROGRESS NOTES LISTING VIEWS

### **Default View**

Client Plan Type	F/A V	Date 🔻	Thru
CP AOA Outpt / FSP Cl Individual Progress Note	<b>~</b>	04/19/2018	04/19/2018
CP AOA Outpt / FSP Cl Individual Progress Note		02/08/2018	02/08/2018
CP AOA Outpt / FSP Cl Individual Progress Note		01/25/2018	01/25/2018
CP AOA Outpt / FSP Cl Individual Progress Note		12/05/2017	12/05/2017
CP AOA Outpt / FSP Cl Individual Progress Note		11/14/2017	11/14/2017
CP AOA Outpt / FSP Cl Individual Progress Note	2	11/14/2017	11/14/2017
CP AOA Outpt / FSP Cl Never-Billable Progress Note	<b>~</b>	11/09/2017	11/09/2017
CP AOA Outpt / FSP Cl Individual Progress Note	<b></b>	11/09/2017	11/09/2017
CP AOA Outpt / FSP Cl Individual Progress Note		11/09/2017	11/09/2017
CP Client Plan 10/28/2 Individual Progress Note		10/12/2017	10/12/2017
CP Client Plan 10/28/2 Individual Progress Note	<b></b>	07/20/2017	07/20/2017
CP Client Plan 10/28/2 Individual Progress Note		04/27/2017	04/27/2017

# PROGRESS NOTES LISTING VIEWS TO SEE VOIDED NOTES



## **PROGRESS NOTES LISTING VIEWS TO SEE VOIDED NOTES**

Client Plan Type	F/A V	Date 🔻	Thru
CP AOA Outpt / FSP Cl Individual Progress Note	<b></b>	04/19/2018	04/19/2018
CP AOA Outpt / FSP Cl Individual Progress Note		02/08/2018	02/08/2018
CP AOA Outpt / FSP Cl Individual Progress Note		01/25/2018	01/25/2018
CP AOA Outpt / FSP Cl Individual Progress Note		12/05/2017	12/05/2017
CP AOA Outpt / FSP Cl Individual Progress Note		11/14/2017	11/14/2017
CR AOA Outpt / ESR Cl Individual Brogram Nata		11/14/2017	11/14/2017
CP AOA Outpt / FSP Cl Individual Progress Note		11/09/2017	11/09/2017
CP AOA Outpt / FSP Cl Never-Billable Progress Note		11/09/2017	11/09/2017
CP AOA Outpt / FSP Cl Individual Progress Note		11/09/2017	11/09/2017
CP AOA Outpt / FSP Cl Individual Progress Note		11/09/2017	11/09/2017
CP Client Plan 10/28/2 Individual Progress Note		10/12/2017	10/12/2017
CP Client Plan 10/28/2 Individual Progress Note		07/20/2017	07/20/2017
CP Client Plan 10/28/2 Individual Progress Note		04/27/2017	04/27/2017

### PROGRESS NOTES LISTING VIEWS TO SEE REPLICATED NOTES

Right click on the column headers then select Field Chooser.

Client Plan	Туре	F/A	V	Date 💌	Thru
CP AOA Outpt / FSP Cl	Individi			04/19/2018	04/19/2018
CP AOA Outpt / FSP Cl	Individi <u>G</u> roup Mode			02/08/2018	02/08/2018
CP AOA Outpt / FSP Cl	Individual Progress Note	<b></b>		01/25/2018	01/25/2018
CP AOA Outpt / FSP Cl	Individual Progress Note			12/05/2017	12/05/2017
CP AOA Outpt / FSP Cl	Individual Progress Note			11/14/2017	11/14/2017
CP AOA Outpt / FSP Cl	Individual Progress Note			11/14/2017	11/14/2017
CP AOA Outpt / FSP Cl	Individual Progress Note		~	11/09/2017	11/09/2017
CP AOA Outpt / FSP Cl	Never-Billable Progress Note			11/09/2017	11/09/2017
CP AOA Outpt / FSP Cl	Individual Progress Note			11/09/2017	11/09/2017
CP AOA Outpt / FSP Cl	Individual Progress Note			11/09/2017	11/09/2017
CP Client Plan 10/28/2	Individual Progress Note			10/12/2017	10/12/2017
CP Client Plan 10/28/2	Individual Progress Note			07/20/2017	07/20/2017
CP Client Plan 10/28/2	Individual Progress Note	<b>~</b>		04/27/2017	04/27/2017

### PROGRESS NOTES LISTING VIEWS TO SEE REPLICATED NOTES

Click on 'R' and drag to the column header.

a search Progress Notes				L.	
Client Plan	Туре	R		·	Thru
Field Chooser 🛛 🗶	Individual Progress Note		1	04/19/2018	04/19/2018
R	Individual Progress Note			02/08/2018	02/08/2018
Revision	Individual Progress Note			01/25/2018	01/25/2018
Void Comments	Individual Progress Note			12/05/2017	12/05/2017
	Individual Progress Note			11/14/2017	11/14/2017
	Individual Progress Note			11/14/2017	11/14/2017
	Individual Progress Note		<b>_</b>	11/09/2017	11/09/2017
	Never-Billable Progress Note			11/09/2017	11/09/2017
	Individual Progress Note			11/09/2017	11/09/2017
	Individual Progress Note			11/09/2017	11/09/2017
CP Client Plan 10/28/2	Individual Progress Note			10/12/2017	10/12/2017
CP Client Plan 10/28/2	Individual Progress Note			07/20/2017	07/20/2017
CP Client Plan 10/28/2	Individual Progress Note	<b>~</b>		04/27/2017	04/27/2017

### PROGRESS NOTES LISTING VIEWS TO SEE REPLICATED NOTES

ient Plan Type	F/A V	R Date 💌	Thru
CP AOA Outpt / FSP Individual Progress Note	2	04/19/2018	04/19/2018
CP AOA Outpt / FSP Individual Progress Note	<b>S</b>	02/08/2018	02/08/2018
CP AOA Outpt / FSP Individual Progress Note		01/25/2018	01/25/2018
CP AOA Outpt / FSP Individual Progress Note		12/05/2017	12/05/2017
CP AOA Outpt / FSP Individual Progress Note	<b>S</b>	11/14/2017	11/14/2017
CP NON Outpt / FCP Individual Program Note		11/11/2017	11/11/2017
CP AOA Outpt / FSP Individual Progress Note		11/09/2017	11/09/2017
CP AOA Outpt / FSP Never-Billable Progress Note	<b>S</b>	11/09/2017	11/09/2017
CP AOA Outpt / FSP Individual Progress Note	<b>S</b>	11/09/2017	11/09/2017
CP AOA Outpt / FSP Individual Progress Note		11/09/2017	11/09/2017
CF Client Fian 10/20/ Individual Progress Note		10/12/2017	10/12/2017
CP Client Plan 10/28/ Individual Progress Note		07/20/2017	07/20/2017
CP Client Plan 10/28/ Individual Progress Note		04/27/2017	04/27/2017

### DISPLAY AUDIT EVENTS

To see details about the history and actions on a note, *right click* on the progress note and click on Display Audit Events.

Client Plan	Туре	F/A V	R Date	-	Thru			
CP AOA Outpt / FSP	Individual Progress Note		04/19	9/2018	04/19/2018			
CP AOA Outpt / FSP	Individual Progress Note		02/08	3/2018	02/08/2018			
CP AOA Outpt / FSP	Individual Progress Note		01/25	5/2018	01/25/2018			
CP AOA Outpt / FSP	Individual Progress Note		12/05	5/2017	12/05/2017			
CP AOA Outpt / FSP	Individual Progress Note		11/14	<del>1</del> /2017	11/14/2017			
CP AOA Outpt / FSP	Individual Progress Note		11/14	ł/2017	11/14/2017			
CP AOA Outpt / FSP	Individual Progress Note	<u> </u>	11/00	/2017	11/09/2017			
CP AOA Outpt / FSP	Never-Billable Progress Note	<b>v</b>		Progress Note <u>M</u> a	intenance			
CP AOA Outpt / FSP	Individual Progress Note			Delete				
CP AOA Outpt / FSP	Individual Progress Note			Void				
CP Client Plan 10/28/	Individual Progress Note		$\sim$	<u>v</u> oid				
CP Client Plan 10/28/	Individual Progress Note		$\mathbf{x}$	Void and <u>Replicat</u>	e			
CP Client Plan 10/28/	Individual Progress Note		9	Display Voided Narrative				
			۵	Print Progress Note				
				Display <u>A</u> udit Events				

### **DISPLAY AUDIT EVENTS**

	Client P	lan	Туре			F/A	۷	R	Date	<b>T</b>	Thru				
	CP A	AOA Outpt / FSP	Individual Progr	ess Note		<b>_</b>			04/19/	2018	04/19/2018	3			
	CP /	AOA Outpt / FSP	Individual Progr	ess Note		<b>_</b>			02/08/	2018	02/08/2018	3			
	CP /	AOA Outpt / FSP	Individual Progr	ess Note		<b>_</b>			01/25/	2018	01/25/2018	3			
	CP A	AOA Outpt / FSP	Individual Progr	ess Note		<b>_</b>			12/05/	2017	12/05/2017	7			
	CP /	AOA Outpt / FSP	Individual Progr	ess Note		<b>~</b>			11/14/	2017	11/14/2017	7			
	CP /	AOA Outpt / FSP	Individual Progr	ess Note		<b>~</b>			11/14/	2017	11/14/2017	7			
	CP /	AOA Outpt / FSP	Individual Progr	ess Note			~		11/09/	2017	11/09/2017	Date	Of	Ser	vice
	CP /	AOA Outpt / FSP	Never-Billable P	rogress Note					11/09/	2017	11/09/201	7			
	CP /	AOA Outpt / FSP	Individual Progr	ess Note		<b>~</b>			11/09/	2017	11/09/2017	7			
	CP /	AOA Outpt / FSP	Individual Progr	ess Note		<b>~</b>			11/09/	2017	11/09/2017	7			
	CP (	Client Plan 10/28/	. Individual Progr	ess Note		<b></b>			10/12/	2017	10/12/2017	7			
	CP (	Client Plan 10/28/	. Individual Progr	ess Note		<b></b>			07/20/	2017	07/20/2017	7			
	CP (	Client Plan 10/28/	. Individual Progr	ess Note		$\mathbf{}$		- 1	04/27/	2017	04/27/2017	7			
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		Audit Events					Α	udit Ev	ents		_				
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Date note v created Date note was final	vas	Event Progress Note Progress Note Progress Note Progress Note Progress Note Progress Note Progress Note Progress Note Progress Note	Action Add Electronic Sign Print Display Display Electronic Sign Edit Electronic Sign	Date 11/15/2017 11/15/2017 11/15/2017 11/28/2017 12/6/2017 12/6/2017 12/6/2017 12/6/2017 12/6/2017	Time 04:00 P 04:30 P 04:31 P 02:45 P 01:08 P 01:08 P 01:08 P 01:09 P	M M M M M M M	EV Pri Pri Pri Pri Pri Pri Pri	vent ogress 1 ogress 1 ogress 1 ogress 1 ogress 1 ogress 1 ogress 1 ogress 1	Note Note Note Note Note Note Note	Action Add Display Display Print Display Display Electronic Sign Final Approved Display	Date       4/2/2018       4/17/2018       4/20/2018       4/20/2018       4/20/2018       4/20/2018       4/20/2018       4/20/2018       4/20/2018       4/20/2018       4/20/2018       4/20/2018       4/20/2018       4/20/2018       4/20/2018	Time 03:45 PM 0 03:42 PM 10:54 AM 10:54 AM 11:12 AM 11:14 AM 11:14 AM 11:14 AM 11:14 AM	ptur	n Rej	olicated
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### MIS-20 F/A PROGRESS NOTES OVER 14 DAYS FROM SERVICE DATE

Take note of these new columns to assist with corrections and completing the Progress Note Correction Form.



# RESOURCES ON OPTUM WEBSITE

OPTUM® San Diego Search													ister   <u>Site Map</u> Search
Home	County St	taff & Providers	Acces	ss & Crisis	Line	Consumers	& Famili	ies (	Community	Resour	ces	About Us	
Home > County Staff & Providers	> Organizational Pro	wider Documents											
Organization	Organizational Provider Public Documents												
This page is utilized by C	This page is utilized by Organizational Provider Staff to obtain forms, manuals and reports for the electronic health record, Cerner Community Behavioral Health.												
SUDPOH SUDURM	Beneficiary	Communications	Forms	Manuals	ОРОН	References	UCRM	UTTM	Training	PWB	BHS F	Reports	
Progress Notes v3 Video	Progress Notes v3 Video Tutorials <u>available online</u> .												
Name											¢	Date	¢
Group Progress Note Corrections for Adminstrative Staff (pdf)									2018-02-16				
Group Progress Note Corrections for Clinical Staff (pdf)									2018-02-16				
Progress Note Correct	Progress Note Corrections for Administrative Staff Revised 11/7/17 (pdf)									2017-11-08			
Progress Note Correct	ons for Clinica	Staff - Revised 11	/7/17 (pdf)	)								2017-11-08	
Progress Notes Resou	rce Packet PN	v3 (pdf)										2018-02-21	

# RESOURCES

OPTUM <sup>®</sup> San Diego	Logoff   <u>Welcome</u>   <u>N</u>	lanage Users   Site Map Search								
Home County Staff & Providers Access & Crisis Line Consumers & Families Community Re	esources About Us S	Secure Documents								
Home_ > Secure Documents_ > CCBH (formerly Anasazi) Secure Documents										
CCBH (formerly Anasazi) Secure Documents										
Communications Forms Manuals Quick Reference User Mtgs										
Name ¢	Description	Date 🔶								
925 Individual Form Fill.doc	Progress Notes	2015-10-09								
AIMS Explanation.doc	Clinical	2015-11-02								
AIMS Formfill.doc	Clinical	2015-11-02								
AOB 2015.pdf	Financial	2017-01-04								
Add Insurance .pdf	Financial	2017-01-04								
Assignment Form.doc	Assignments	2015-10-09								
BEHAVIORAL HEALTH ASSESSMENT - CHILDREN.doc	Assessments	2015-10-09								
BEHAVIORAL HEALTH ASSESSMENT - CHILDREN Instructions.doc	Assessments	2016-07-07								
BHS-025 Form B Final 05-06-2014-form fill.doc	Client Information	2016-07-07								
BHS-025 Form A Final 05-06-2014-form fill.doc	Client Information	2016-07-07								
BHS-025 Instructions for completing Forms A-B updated 05-06-2014.doc	Client Information	2015-10-09								
Behavioral Health Assessment - Explanation.doc	Assessments	2015-10-09								
Behavioral Health Assessment Consolidated - Reset CAS.doc	Assessments	2016-07-07								
CCBH Progress Note Correction Request Form (xlsx)		2017-12-26								
CCBH Void Replace Service Form (xlsm)	Financial	2018-03-19								

# PROGRESS NOTE CORRECTION FORM

**CCBH Progress Note Correction Request Form** 

Fax form to the Optum Support Desk

Fax number: 619-641-6729

For further assistance with this form contact the Optum Support Desk at 800-834-3792

1. 6	ieneral Info	ormation									
Unit/SubUnit Numbers and							Telephone Number				
Staff ID and Name							Fax Number				
Dat	e Submitte	d									
2. Correction Description											
	Void, V & R, Delete	Server ID	Case Number	Service Date MM/DD/YY	Progress Note Individual Group Informational	Original Service Code	Type of Error	Billing Status Unclaimed Paid, Void w/ Batch # Denied w/ Batch #	Batch Number OR Form Number (for Duplicates)	Other	Ticket Number
1		•									
2											