

PROGRESS NOTE CORRECTIONS FOR ADMIN AND CLINICAL STAFF

5/16/18

PROGRESS NOTE CORRECTIONS MANUALS

PROGRESS NOTE CORRECTIONS FOR ADMINISTRATIVE STAFF



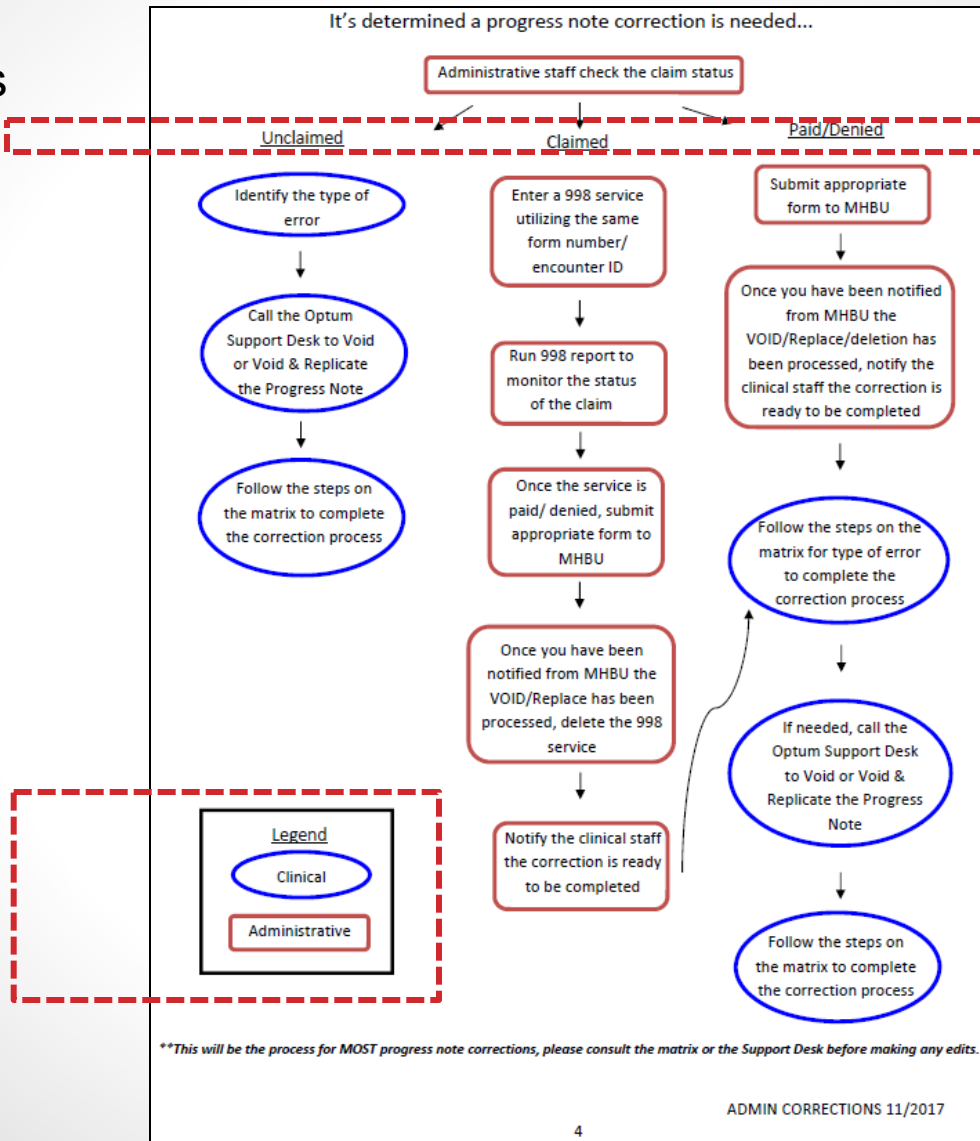
PROGRESS NOTE CORRECTIONS FOR CLINICAL STAFF



USING THE FLOW CHART IN THE MANUALS

The claim status can be found in Display Client Services.

Legend for the two roles during the correction process.



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.

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.

**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
Wrong client chart/Wrong date of encounter
Wrong client chart/Wrong date of encounter
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 (Lockouts, No-Show, DAS)

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

Billing Status			
UNCLAIMED	CLAIMED	PAID	DENIED
Y			
	Y		
		Y	
			Y
Y			
	Y		
		Y	
			Y
Y			
	Y		
		Y	
			Y
Y			
Y			
	Y	Y	Y
Y			
	Y		
		Y	
			Y

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

PROG

do not use this in

Appendix

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.

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.

BASIC CORRECTION STEPS

CHECK BILLING STATUS	Admin Staff										Progress Note Users										Support Desk				
	ENTER 998 SERVICE	RUN 998 REPORT TO MONITOR CLAIM STATUS UNTL PAID OR DENIED	SEND VOID SERVICE REQUEST TO MMBU (IF PAID)	SEND DISALLOWANCE & DELETE FORM TO MMBU (IF DENIED)	SEND REPLACEMENT SERVICE REQUEST TO MMBU	HEAR BACK FROM MMBU 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 IS READY 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				5			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			
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	
											1										3	2			
2							3		1	4	5						7						6		
CONTACT QI MATTERS @ QIMatters.HHSA@sdcounty.ca.gov																									
2							3		1	4	5				7	8							6		
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

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. →

USING THE APPENDICES

PROGRESS NOTE CORRECTIONS FOR ADMINISTRATIVE STAFF



PROGRESS NOTE CORRECTIONS FOR CLINICAL STAFF



EXAMPLE FOR (PAID) TIME DATA ENTRY ERROR

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 note.....	8
Wrong or insufficient information in the narrative.....	8
Wrong billing indicator which affects billing.....	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

EXAMPLE FOR (PAID) TIME DATA ENTRY ERROR

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

EXAMPLE FOR (PAID) TIME DATA ENTRY ERROR

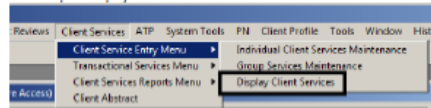
Administrative Appendix #1

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
- ✓ Wrong or insufficient information in the client narrative- when the encounter is not claimed/ claimed/ paid/ denied
- ✓ Wrong billing indicator which affects billing- when the encounter is not claimed
- ✓ Wrong billing indicator which affects does NOT billing- when the encounter is not claimed/ claimed/ paid/ 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-

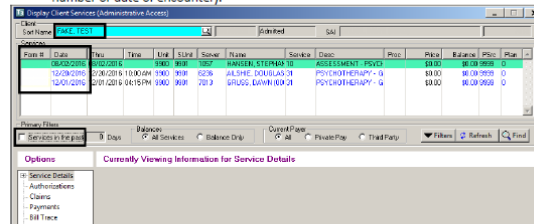
1. Open "Display Client Services."



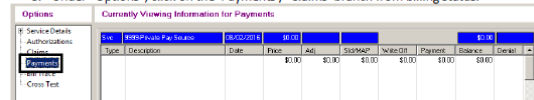
1

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).



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



The encounter has not been claimed yet:



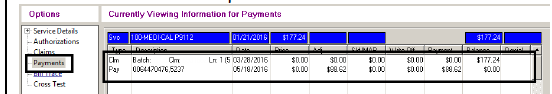
The encounter has been claimed and is pending payment or denial:



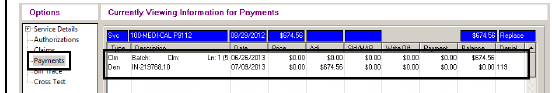
2

Administrative Appendix #1

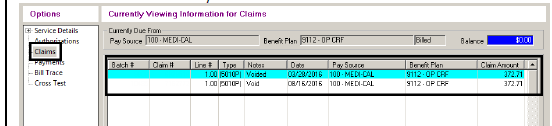
The encounter has been claimed and paid:



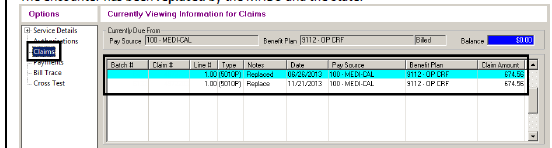
The encounter has been claimed and denied:



The encounter has been voided by the MHBU and the State:



The encounter has been replaced by the MHBU and the State:



4. Inform the clinical staff of the status of the encounter.

3

EXAMPLE FOR (PAID) TIME DATA ENTRY ERROR

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 informational.....	9
Wrong or insufficient information in the client chart.....	9
Wrong billing indicator which affects billing.....	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

EXAMPLE FOR (PAID) TIME DATA ENTRY ERROR

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

- 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.

EXAMPLE FOR (PAID) TIME DATA ENTRY ERROR

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:

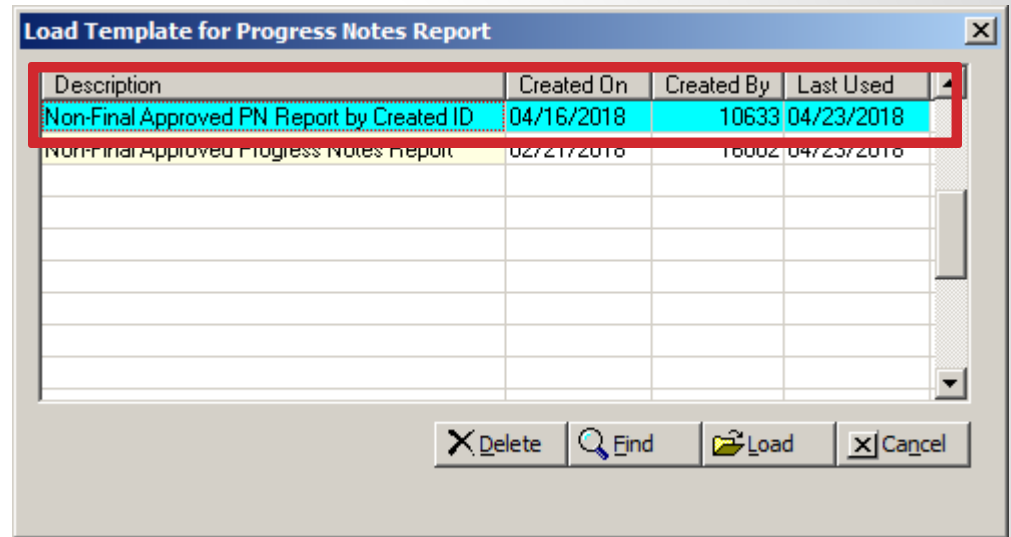
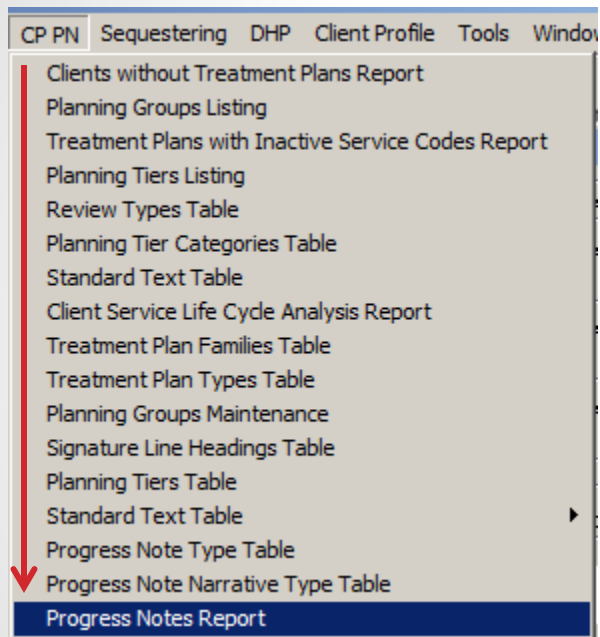
- ✓ Encounter did not occur- when the encounter is paid/or denied
- ✓ Wrong client chart- when the encounter is paid/or denied
- ✓ Wrong date of encounter- when the encounter is paid/or denied
- ✓ Duplicate progress note and encounter- when the encounter is paid/or denied
- ✓ Change encounter to never 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

1. 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.*

2. 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



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

PROGRESS NOTES REPORT

Progress Notes Report (Administrative Access)

Selections1 | Selections2 | Print Columns | Sqrt/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

Include Voiced Progress Notes Only

Include Replicated Progress Notes Only

Include Progress Notes with at least one Unplanned Service Only

These settings show *all* non-final approved notes

Clear Load Save Batch Print Exit

PROGRESS NOTES REPORT

Progress Notes Report
SAN DIEGO COUNTY MENTAL HEALTH

Page : 1

Non-Final Approved Progress Notes Report by Created ID

Created By ID: 46 MACDOUGALL, DEBORAH (00037)

*** Selections ***

Progress Note Dates: 01/01/2018 through 04/01/2018

FA Status Selection: N Pending Progress Notes

Assignment Unit Selection: 9900 TRAINING UNIT

Assignment SubUnit Selection: 9901 TRAINING SUBUNIT

Printing a record for each Staff Signature

Report : AZ2478RA

Date : 04/23/2018

Staff : MALDONADO, JANE (00663)

Time : 17:47

Case #	Client Name	PN Start Date/Time	PN Type	FA	Sig ID	Staff Signature Name	Prim Signer	Sig Comp	Crt'd By ID	Created By Name	R	Count
100021126	TEST, CLIENT	03/27/2018 13:00	G	N			46	N	46	MACDOUGALL, DEBORAH (00037)	N	
		03/27/2018 13:00	G	N			46	N	46	MACDOUGALL, DEBORAH (00037)	N	
2	TEST, FRED X	03/27/2018 13:00	G	N			46	N	46	MACDOUGALL, DEBORAH (00037)	N	
		03/27/2018 13:00	G	N			46	N	46	MACDOUGALL, DEBORAH (00037)	N	
100021126	TEST, CLIENT	03/27/2018 13:00	G	N	46	MACDOUGALL, DEBORAH (00037)	46	N	46	MACDOUGALL, DEBORAH (00037)	N	
2	TEST, FRED X	03/27/2018 13:00	G	N	46	MACDOUGALL, DEBORAH (00037)	46	N	46	MACDOUGALL, DEBORAH (00037)	N	
100021126	TEST, CLIENT	01/11/2018	O7	N	46	MACDOUGALL, DEBORAH (00037)	46	N	46	MACDOUGALL, DEBORAH (00037)	Y	7
Created By ID: 46		MACDOUGALL, DEBORAH (00037)										

Client Plan	Type	F/A	V	R	Date	Thru	Primary Signer
CP CYF Outpt / ...	PERT Informational Note	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		01/11/2018	01/11/2018	MACDOUGALL, DEBORAH (00037)
No Client Plan e...	Individual Progress Note				01/11/2018	01/11/2018	HANSEN, STEPHANIE (00037)
CP CYF Outpt / ...	PERT Informational Note			<input checked="" type="checkbox"/>	01/11/2018	01/11/2018	MACDOUGALL, DEBORAH (00037)

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

Include Voided Progress Notes Only

Include Replicated Progress Notes Only

Include Progress Notes with at least one Unplanned Service Only

These settings show *only* non-final approved notes that were replicated.

Clear Load Save Batch Print Exit

PROGRESS NOTES REPORT

Progress Notes Report
SAN DIEGO COUNTY MENTAL HEALTH

Page : 1

Non-Final Approved Progress Notes Report by Created ID

Created By ID: 46 MACDOUGALL, DEBORAH (00037)

*** Selections ***
 Progress Note Dates: 01/01/2018 through 04/01/2018
 FA Status Selection: N Pending Progress Notes
 Only Replicated Progress Notes
 Assignment Unit Selection: 9900 TRAINING UNIT
 Assignment SubUnit Selection: 9901 TRAINING SUBUNIT
 Printing a record for each Staff Signature

Report : AZ2478RA
 Staff : MALDONADO, JANE (00663) Date : 04/23/2018
Time : 17:48

Case #	Client Name	PN Start Date/Time	PN Type	FA	Sig ID	Staff Signature Name	Prim Signer	Sig Comp	Crt'd By ID	Created By Name	R	Count
100021126	TEST, CLIENT	01/11/2018	07	N	46	MACDOUGALL, DEBORAH (00037)	46	N	46	MACDOUGALL, DEBORAH (00037)	Y	1
Created By ID:		46	MACDOUGALL, DEBORAH (00037)									

Client Plan	Type	F/A	V	R	Date	Thru	Primary Signer
CP CYF Outpt / ...	PERT Informational Note	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		01/11/2018	01/11/2018	MACDOUGALL, DEBORAH (00037)
No Client Plan e...	Individual Progress Note				01/11/2018	01/11/2018	HANSEN, STEPHANIE (00037)
CP CYF Outpt / ...	PERT Informational Note			<input checked="" type="checkbox"/>	01/11/2018	01/11/2018	MACDOUGALL, DEBORAH (00037)

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

MIS-18 NON-FINAL APPROVED PROGRESS NOTES WITH SERVICES

OPTUM™		County of San Diego Behavioral Health Service Non-Final Approved Progress Notes with Services For Service Date from 7/1/2017 to 4/24/2018															COUNTY OF SAN DIEGO HHSAA HEALTH AND HUMAN SERVICES AGENCY							
Client Name	Case Number	Form Date	Form Type	Created ID	Created By	Credentials	Form Number	Service Code	Service	Service Date	Service Price	Balance	Billed Flag	Current Payscale	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	<input checked="" type="checkbox"/>		04/19/2018	04/19/2018
CP AOA Outpt / FSP Cl...	Individual Progress Note	<input checked="" type="checkbox"/>		02/08/2018	02/08/2018
CP AOA Outpt / FSP Cl...	Individual Progress Note	<input checked="" type="checkbox"/>		01/25/2018	01/25/2018
CP AOA Outpt / FSP Cl...	Individual Progress Note	<input checked="" type="checkbox"/>		12/05/2017	12/05/2017
CP AOA Outpt / FSP Cl...	Individual Progress Note	<input checked="" type="checkbox"/>		11/14/2017	11/14/2017
CP AOA Outpt / FSP Cl...	Individual Progress Note	<input checked="" type="checkbox"/>		11/14/2017	11/14/2017
CP AOA Outpt / FSP Cl...	Never-Billable Progress Note	<input checked="" type="checkbox"/>		11/09/2017	11/09/2017
CP AOA Outpt / FSP Cl...	Individual Progress Note	<input checked="" type="checkbox"/>		11/09/2017	11/09/2017
CP AOA Outpt / FSP Cl...	Individual Progress Note	<input checked="" type="checkbox"/>		11/09/2017	11/09/2017
CP Client Plan 10/28/2...	Individual Progress Note	<input checked="" type="checkbox"/>		10/12/2017	10/12/2017
CP Client Plan 10/28/2...	Individual Progress Note	<input checked="" type="checkbox"/>		07/20/2017	07/20/2017
CP Client Plan 10/28/2...	Individual Progress Note	<input checked="" type="checkbox"/>		04/27/2017	04/27/2017

PROGRESS NOTES LISTING VIEWS TO SEE VOIDED NOTES

The image displays a software interface for managing progress notes. At the top, a header bar contains the text "Progress Notes" and a search field labeled "Search Progress Notes". Below this, a navigation bar includes fields for "Client Plan", "Type", "F/A", "V", "Date", "Thru", "Primary Signer", and "Intervention".

A dropdown menu is open in the top right corner, showing three options: "New Progress Note", "Filters" (highlighted with a checkmark), and "Refresh Pane Content". A red arrow points from the dropdown menu to the "Filters" option.

The "Progress Notes Pane Filters" dialog box is open, showing a "Filters" tab. It includes a "Refresh" button, a "Save and Close" button (highlighted with a red circle), and a "Close Panel" button. Below the buttons, a message states: "Changes to the following filters will update the display of the Progress Notes Pane."

The "General Filters" section includes the following options:

- Date Range: 4/23/2017 thru 04/23/2018
- Client Plan Type: [Empty field]
- Progress Note Type: [Empty field]
- Category of Treatment: [Empty field]
- Intervention: [Empty field]
- Include Final Approved and Pending Progress Notes: [Checked]
- Include Voided Progress Notes: [Checked]
- Include Preferred Progress Notes only: [Unchecked]

At the bottom of the dialog box, it shows "Logged on as MALDONADO, JANE (00663)" and "Environment: Live".

PROGRESS NOTES LISTING VIEWS TO SEE VOIDED NOTES

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

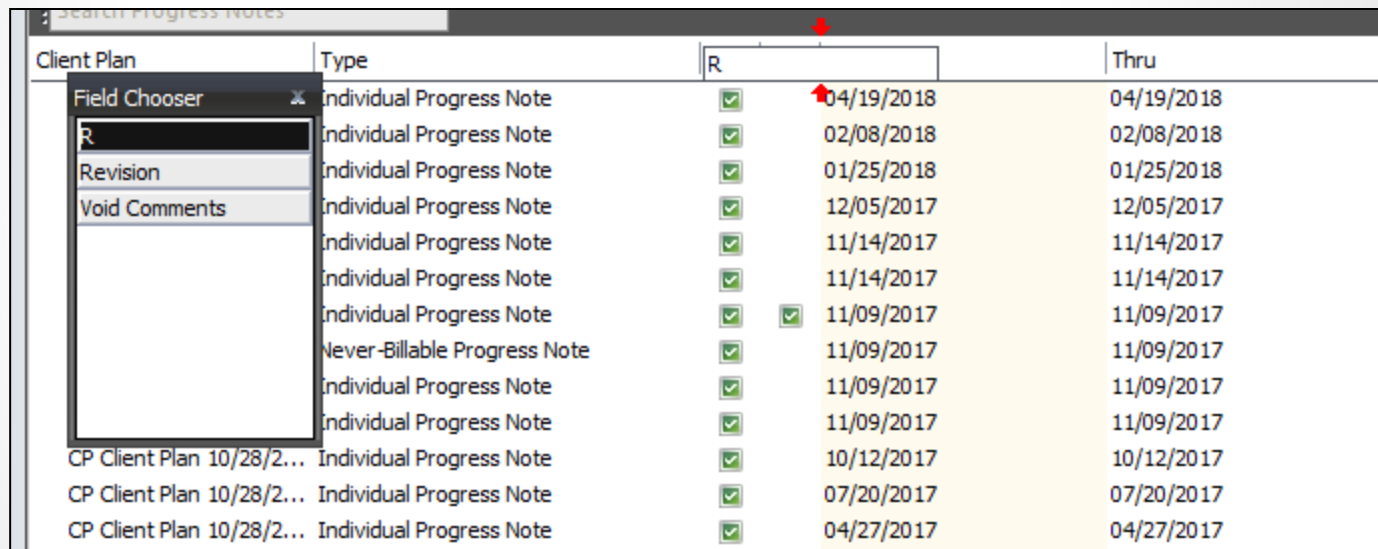
PROGRESS NOTES LISTING VIEWS TO SEE REPLICATED NOTES

Right click on the column headers then select Field Chooser.

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

PROGRESS NOTES LISTING VIEWS TO SEE REPLICATED NOTES

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



The screenshot shows a table with columns: Client Plan, Type, R, and Thru. A 'Field Chooser' dialog box is open over the table, with 'R' selected. A red arrow points to the 'R' column header in the table.

Client Plan	Type	R	Thru
	Individual Progress Note	<input checked="" type="checkbox"/>	04/19/2018
	Individual Progress Note	<input checked="" type="checkbox"/>	02/08/2018
	Individual Progress Note	<input checked="" type="checkbox"/>	01/25/2018
	Individual Progress Note	<input checked="" type="checkbox"/>	12/05/2017
	Individual Progress Note	<input checked="" type="checkbox"/>	11/14/2017
	Individual Progress Note	<input checked="" type="checkbox"/>	11/14/2017
	Individual Progress Note	<input checked="" type="checkbox"/>	11/09/2017
	Never-Billable Progress Note	<input checked="" type="checkbox"/>	11/09/2017
	Individual Progress Note	<input checked="" type="checkbox"/>	11/09/2017
	Individual Progress Note	<input checked="" type="checkbox"/>	11/09/2017
CP Client Plan 10/28/2...	Individual Progress Note	<input checked="" type="checkbox"/>	10/12/2017
CP Client Plan 10/28/2...	Individual Progress Note	<input checked="" type="checkbox"/>	07/20/2017
CP Client Plan 10/28/2...	Individual Progress Note	<input checked="" type="checkbox"/>	04/27/2017

PROGRESS NOTES LISTING VIEWS TO SEE REPLICATED NOTES

Client Plan	Type	F/A	V	R	Date	Thru
CP AOA Outpt / FSP ...	Individual Progress Note	<input checked="" type="checkbox"/>			04/19/2018	04/19/2018
CP AOA Outpt / FSP ...	Individual Progress Note	<input checked="" type="checkbox"/>			02/08/2018	02/08/2018
CP AOA Outpt / FSP ...	Individual Progress Note	<input checked="" type="checkbox"/>			01/25/2018	01/25/2018
CP AOA Outpt / FSP ...	Individual Progress Note	<input checked="" type="checkbox"/>			12/05/2017	12/05/2017
CP AOA Outpt / FSP ...	Individual Progress Note	<input checked="" type="checkbox"/>			11/14/2017	11/14/2017
CP AOA Outpt / FSP ...	Individual Progress Note	<input checked="" type="checkbox"/>			11/14/2017	11/14/2017
CP AOA Outpt / FSP ...	Individual Progress Note	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		11/09/2017	11/09/2017
CP AOA Outpt / FSP ...	Never-Billable Progress Note	<input checked="" type="checkbox"/>			11/09/2017	11/09/2017
CP AOA Outpt / FSP ...	Individual Progress Note	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	11/09/2017	11/09/2017
CP AOA Outpt / FSP ...	Individual Progress Note	<input checked="" type="checkbox"/>			11/09/2017	11/09/2017
CP Client Plan 10/28/...	Individual Progress Note	<input checked="" type="checkbox"/>			10/12/2017	10/12/2017
CP Client Plan 10/28/...	Individual Progress Note	<input checked="" type="checkbox"/>			07/20/2017	07/20/2017
CP Client Plan 10/28/...	Individual Progress Note	<input checked="" type="checkbox"/>			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	Type	F/A	V	R	Date	Thru
CP AOA Outpt / FSP ...	Individual Progress Note	<input checked="" type="checkbox"/>			04/19/2018	04/19/2018
CP AOA Outpt / FSP ...	Individual Progress Note	<input checked="" type="checkbox"/>			02/08/2018	02/08/2018
CP AOA Outpt / FSP ...	Individual Progress Note	<input checked="" type="checkbox"/>			01/25/2018	01/25/2018
CP AOA Outpt / FSP ...	Individual Progress Note	<input checked="" type="checkbox"/>			12/05/2017	12/05/2017
CP AOA Outpt / FSP ...	Individual Progress Note	<input checked="" type="checkbox"/>			11/14/2017	11/14/2017
CP AOA Outpt / FSP ...	Individual Progress Note	<input checked="" type="checkbox"/>			11/14/2017	11/14/2017
CP AOA Outpt / FSP ...	Individual Progress Note	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		11/09/2017	11/09/2017
CP AOA Outpt / FSP ...	Never-Billable Progress Note	<input checked="" type="checkbox"/>				
CP AOA Outpt / FSP ...	Individual Progress Note	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		
CP AOA Outpt / FSP ...	Individual Progress Note	<input checked="" type="checkbox"/>				
CP Client Plan 10/28/...	Individual Progress Note	<input checked="" type="checkbox"/>				
CP Client Plan 10/28/...	Individual Progress Note	<input checked="" type="checkbox"/>				
CP Client Plan 10/28/...	Individual Progress Note	<input checked="" type="checkbox"/>				

- Progress Note Maintenance
- Delete
- Void
- Void and Replicate
- Display Voided Narrative
- Print Progress Note
- Display Audit Events

DISPLAY AUDIT EVENTS

Client Plan	Type	F/A	V	R	Date	Thru
CP AOA Outpt / FSP ...	Individual Progress Note	<input checked="" type="checkbox"/>			04/19/2018	04/19/2018
CP AOA Outpt / FSP ...	Individual Progress Note	<input checked="" type="checkbox"/>			02/08/2018	02/08/2018
CP AOA Outpt / FSP ...	Individual Progress Note	<input checked="" type="checkbox"/>			01/25/2018	01/25/2018
CP AOA Outpt / FSP ...	Individual Progress Note	<input checked="" type="checkbox"/>			12/05/2017	12/05/2017
CP AOA Outpt / FSP ...	Individual Progress Note	<input checked="" type="checkbox"/>			11/14/2017	11/14/2017
CP AOA Outpt / FSP ...	Individual Progress Note	<input checked="" type="checkbox"/>			11/14/2017	11/14/2017
CP AOA Outpt / FSP ...	Individual Progress Note	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		11/09/2017	11/09/2017
CP AOA Outpt / FSP ...	Never-Billable Progress Note	<input checked="" type="checkbox"/>			11/09/2017	11/09/2017
CP AOA Outpt / FSP ...	Individual Progress Note	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	11/09/2017	11/09/2017
CP AOA Outpt / FSP ...	Individual Progress Note	<input checked="" type="checkbox"/>			11/09/2017	11/09/2017
CP Client Plan 10/28/...	Individual Progress Note	<input checked="" type="checkbox"/>			10/12/2017	10/12/2017
CP Client Plan 10/28/...	Individual Progress Note	<input checked="" type="checkbox"/>			07/20/2017	07/20/2017
CP Client Plan 10/28/...	Individual Progress Note	<input checked="" type="checkbox"/>			04/27/2017	04/27/2017

Date of Service

Audit Events			
Event	Action	Date	Time
Progress Note	Add	11/15/2017	04:00 PM
Progress Note	Electronic Sign...	11/15/2017	04:30 PM
Progress Note	Print	11/15/2017	04:31 PM
Progress Note	Display	11/28/2017	02:45 PM
Progress Note	Display	12/6/2017	01:08 PM
Progress Note	Electronic Sign...	12/6/2017	01:08 PM
Progress Note	Edit	12/6/2017	01:08 PM
Progress Note	Electronic Sign...	12/6/2017	01:09 PM
Progress Note	Final Approved	12/6/2017	01:09 PM
Progress Note	Display	12/6/2017	01:09 PM
Progress Note	Print	12/6/2017	01:09 PM
Progress Note	Display	12/6/2017	02:34 PM
Progress Note	Display	1/25/2018	07:53 AM
Progress Note	Display	4/2/2018	03:45 PM
Progress Note	Void	4/2/2018	03:45 PM

Audit Events			
Event	Action	Date	Time
Progress Note	Add	4/2/2018	03:45 PM
Progress Note	Display	4/17/2018	03:42 PM
Progress Note	Display	4/20/2018	10:54 AM
Progress Note	Print	4/20/2018	10:54 AM
Progress Note	Display	4/20/2018	11:12 AM
Progress Note	Display	4/20/2018	11:14 AM
Progress Note	Electronic Sign...	4/20/2018	11:14 AM
Progress Note	Final Approved	4/20/2018	11:14 AM
Progress Note	Display	4/20/2018	11:14 AM
Progress Note	Print	4/20/2018	11:14 AM

Optum Replicated

Optum opened note
Optum voided


Date note was created


Date note was final approved

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.

										County of San Diego Behavioral Health Service Final Approved Progress Notes over 14 Days from Service Date For Service Date from 7/1/2017 to 4/23/2018									
Client Name	Case Number	Form Type	Form Date	Form Sign Date	FA Staff ID	FA Staff	FA Credential	FA Date	FA Time	Form Number	Replicated	Service Code	Service	Service Date	Unit of Service	Minutes	Service Price	Balance	Billed Flag

										 COUNTY OF SAN DIEGO HHS HEALTH AND HUMAN SERVICES AGENCY			
Curr PaySrc	Unit ID	SubUnit ID	SubUnit	LE ID	Legal Entity	Server ID	Server Name	Server Credential	Medi-Cal	Medi-Cal Claimed	State Payment	CLAIM #	BATCH #

RESOURCES ON OPTUM WEBSITE



[Login](#) | [Register](#) | [Site Map](#)

Search

[Home](#)

[County Staff & Providers](#)

[Access & Crisis Line](#)

[Consumers & Families](#)

[Community Resources](#)

[About Us](#)

[Home](#) > [County Staff & Providers](#) > [Organizational Provider Documents](#)

Organizational Provider Public Documents

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](#)

[OPOH](#)

[References](#)

[UCRM](#)

[UTTM](#)

[Training](#)

[PWB](#)

[BHS Reports](#)

Progress Notes v3 Video Tutorials [available online](#).

Name	Date
Group Progress Note Corrections for Administrative Staff (pdf)	2018-02-16
Group Progress Note Corrections for Clinical Staff (pdf)	2018-02-16
Progress Note Corrections for Administrative Staff Revised 11/7/17 (pdf)	2017-11-08
Progress Note Corrections for Clinical Staff - Revised 11/7/17 (pdf)	2017-11-08
Progress Notes Resource Packet PNv3 (pdf)	2018-02-21

RESOURCES



[Logoff](#) | [Welcome](#) | [Manage Users](#) | [Site Map](#)

Search

[Home](#) | [County Staff & Providers](#) | [Access & Crisis Line](#) | [Consumers & Families](#) | [Community Resources](#) | [About Us](#) | [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

