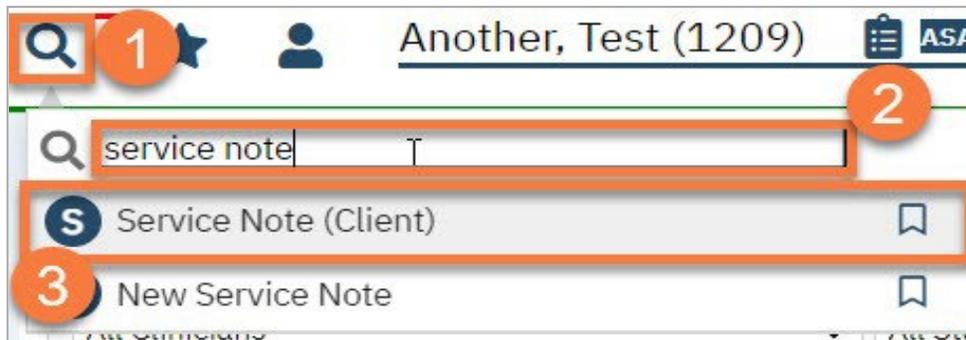


How To Write A Progress Note For Unscheduled Services

1. Click the search icon.
2. Type in “Services/Notes” in the search bar.
3. Click on “Services/Notes (Client)” in the search results.





How To Write A Progress Note For Unscheduled Services

4. This opens the Service Note. Complete the service details.
 - a. Select your program from the dropdown menu. This will determine which procedure codes you can select.
 - b. Select the procedure code from the dropdown menu.
 - c. Select the location and mode of service.
 - d. Enter the date of the service.
 - e. Enter the time(s) of the service. Face to face time is required, as this is used for billing. We recommend completing the travel and documentation as well, though these are not required for billing.

The screenshot shows a 'Service' form with the following fields and annotations:

- Status:** Show (dropdown)
- Program:** Outpatient MH Adult (dropdown, annotated with 'a')
- Procedure:** Targeted Case Management (dropdown, annotated with 'b') with a 'Modifier...' button next to it.
- Location:** Office (dropdown, annotated with 'c')
- Clinician:** Clinician, Robert
- Mode Of Delivery:** Face-to-face (dropdown)
- Cancel Reason:** (dropdown)
- Evidence Based Practices:** (dropdown)
- Start Date:** 01/26/2023 (calendar icon, annotated with 'd')
- Start Time:** 3:15 PM (annotated with 'e')
- Travel Time:** (input field) Minutes
- :** (input field) Minutes
- Documentation Time:** 10 Minutes
- Face to Face Time:** 30 Minutes
- Attending:** (dropdown)
- Referring:** (dropdown)



How To Write A Progress Note For Unscheduled Services

- Click on the Note tab. Complete the progress note section. This note type may look different depending on the procedure code you have chosen. Most will include 3 fields: the Note field, where you will enter the main part of your note, the Care Plan field, which will pull from the most recent note in you program and where you will make updates to any plan of care, and the Problem List section, where you can add problems directly from the note.

The screenshot shows a software interface with several tabs: Service, Note (highlighted with a red circle and the number 5), Billing Diagnosis, Warnings, and Disposition. Below the tabs is a 'General' section. The 'Problem Details' section includes a dropdown menu, a search bar for 'Code' and 'Description', and date pickers for 'Start Date' (01/25/2023) and 'End Date'. A 'Program' dropdown is set to 'Outpatient MH Adult-09/01'. Below this is a 'Problem List' table with columns for SNOMED Description, SNOMED CT Code, ICD 10 Code, Start Date, End Date, and Program. One entry is visible: Schizoaffective disorder, mixed ... with SNOMED CT Code 270901009, ICD 10 Code F25.0, Start Date 01/25/2023, and Program Outpatient MH Adult. Below the table are 'Insert' and 'Clear' buttons. The 'Problems addressed during this session' section has a 'Refresh' button. The 'Note' section contains a text area with the instruction: 'Describe current service(s), how the service addressed the beneficiary's behavioral health need (e.g., symptom, condition, diagnosis, and/or risk factors)'. The text area contains the following text: Function: na, Intervention: na, Response: na, Plan: na.



How To Write A Progress Note For Unscheduled Services

- The Billing Diagnosis tab will show you which diagnoses will be pulled onto the billing. You should generally ignore this tab for ongoing services. However, if you need to change the billing order, for example you want this note to focus on the secondary diagnosis, you can re-order the diagnoses to match your service without changing the overarching diagnosis form.

Service	Note	Billing Diagnosis	Warnings	Disposition
Billing Diagnosis				
		1 F25.0 - Schizoaffective disorder, Bipolar type		
Re-Order Diagnosis Refresh Diagnosis				

How To Write A Progress Note For Unscheduled Services

7. When you are complete, click Sign.

