

# Individual Progress Notes User Guide



## City and County of San Francisco

## **Introduction:**

This document guides users through the “Individual” progress notes pathway in Avatar.

For direction on writing group progress notes, go to “Group Progress Notes User Guide v2013-12-23.pdf”

Usually, after completing a one-on-one session with a client, the clinician will then write an individual note about the session. The form used for this purpose is “Progress Notes (Group And Individual)”.

The progress notes form has 2 sections, “Group” and “Individual”.

When writing about the Individual note, the “Group” section of the form is disregarded or ignored.

## Entering Individual Notes:

1. Go to “Progress Notes (Group and Individual)”.  
Begin at **Individual Progress Notes** section.

2. **IMPORTANT!!!!:**  
Be sure to skip the top 4 fields displayed on the upper-right side of form.  
This “forbidden zone” becomes activated only when doing group progress notes.  
Please see Group Progress Notes user guide for instruction.

3. At “**Select Client**”, enter client name.

3. At **Select Episode**,  
Choose client’s corresponding episode

4. At **Progress Note For**,  
select “New Service”.

5. Select **Note Type**.

5a. Interns only:  
Select Note Type = “Cosign”.  
Then, select supervisor name from  
“User To Send Co-Sign To-Do Item To”

6. Type in **Notes Field**

Scroll down on page to see the following:

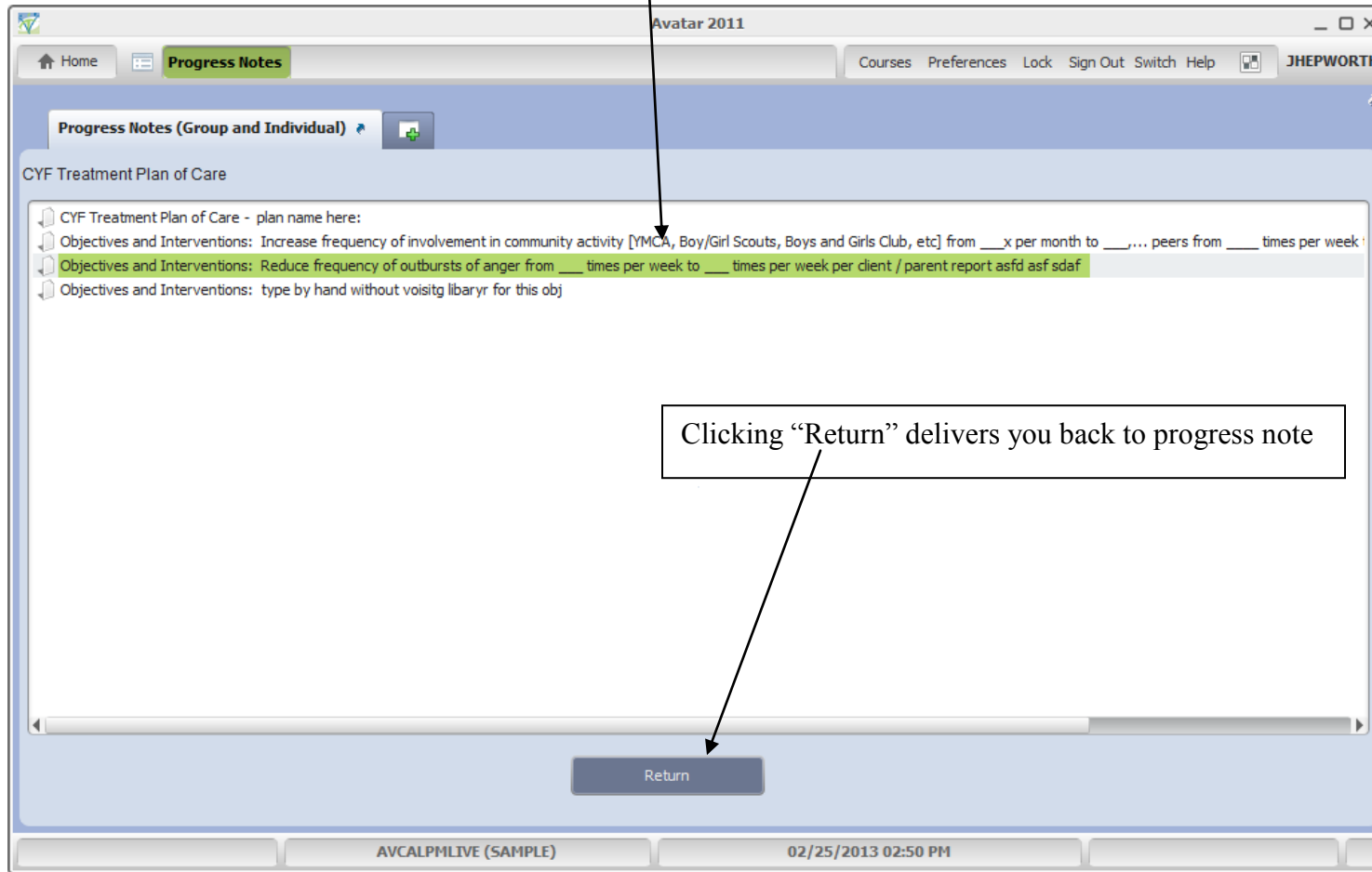
The screenshot shows a web-based form for entering progress notes. The form is titled "Progress Notes (Group and Individual)" and has two main sections: "Individual Progress Notes" and "Group Default Notes". The "Individual Progress Notes" section contains several fields and buttons:

- Date Of Service:** A date picker showing "02/25/2013".
- Service Program:** A dropdown menu showing "Westside Outpatient Clinic (89052)".
- Service Charge Code:** A text input field containing "INDIVIDUAL PSYCHOTHERAPY 45-74 MINS (90806)".
- Location:** A dropdown menu showing "Office".
- Practitioner Face to Face Time (in minutes):** A text input field containing "53".
- Practitioner Doc and Travel Time (in minutes):** A text input field containing "19".
- Practitioner:** A text input field containing "HOM,KELLEE (000015)".
- Select T.P. Version:** A dropdown menu showing "CYF Treatment Plan of Care".
- Select T.P. Item Note Addresses:** A button.
- Clear 'Note Addresses Which Treatment Plan Problem':** A button.

Numbered callouts provide instructions for each field:

- 7.** Select **Date of Service** (Field becomes disabled If **Practitioner** is not selected )
- 8.** Select **Service Program** (Do not select "EPISODE")
- 9.** Enter **Service Charge Code**. Please see Jan 2013 CPT code changes.
- 10.** If client is  $\leq 18$  yrs, then select appropriate CYF treatment plan and paste into box on right. If client is adult, then the "Select T.P. Version" will not work. Go back to "Notes Field" above and hand-type reference to relevant part of Tx Plan.
- 11.** Enter **Location** : "Office" if contractor site. "CMHC" if civil service site
- 12.** Enter Practitioner Face to Face Time (in minutes). Enter Practitioner Doc and Travel Time (in minutes). Note: Avatar will not stop you from typing up to "a million minutes" by mistake.

Below, an item from the CYF Treatment Plan is selected and linked to the progress note.



Below, selected objective from Children's Treatment Plan is linked to progress note.

The screenshot shows the Avatar 2011 software interface. The main window title is "Avatar 2011". The top navigation bar includes "Home", "Progress Notes", "Courses", "Preferences", "Lock", "Sign Out", "Switch", "Help", and the user name "JHEPWORTH". The left sidebar has "Progress Notes (Group and Individual)" and "Individual Progress Notes" sections. The main content area is a form for creating a progress note. The form includes fields for "Date Of Service" (02/25/2013), "Service Program" (Westside Outpatient Clinic (89052)), "Service Charge Code" (INDIVIDUAL PSYCHOTHERAPY 20-44 MINS (90804)), "Location" (Office), "Practitioner Face to Face Time (m minutes)" (39), "Practitioner Doc and Travel Time (m minutes)" (17), and "Practitioner" (HOM, KELLEE (000015)). A "Note Addresses Which Treatment Plan Problem" field is highlighted with a blue box and contains the text: "Objectives and Interventions-> Reduce frequency of outbursts of anger from \_\_\_ times per week to \_\_\_ times per week per client / parent report asfd asf sdaf". An arrow points from the text above to this field. Below the form are buttons for "Select T.P. Version" (CYF Treatment Plan of Care), "Select T.P. Item Note Addresses", and "Clear 'Note Addresses Which Treatment Plan Problem' Text."

Below, if there is no Children's Treatment Plan to link (or if using a plan for adults) – type reference to plan in **Notes Field**.

Avatar 2011

Home Progress Notes Courses Preferences Lock Sign Out Switch Help JHEPWORTH

Progress Notes (Group and Individual)

- Individual Progress Notes
- Group Default Notes

Submit

Type note in this box. If treatment plan is not linked to progress note, type "note address specific part of treatment plan such as objective on \_\_\_\_\_, etc."

**Date Of Service**  
02/25/2013 T Y

**Location**  
Office

**Service Program**  
Westside Outpatient Clinic (89052)

**Practitioner Face to Face Time (m inutes)** 48

**Practitioner Doc and Travel Time (m inutes)** 24

**Service Charge Code**  
INDIVIDUAL PSYCHOTHERAPY 45-74 MINS (90806)

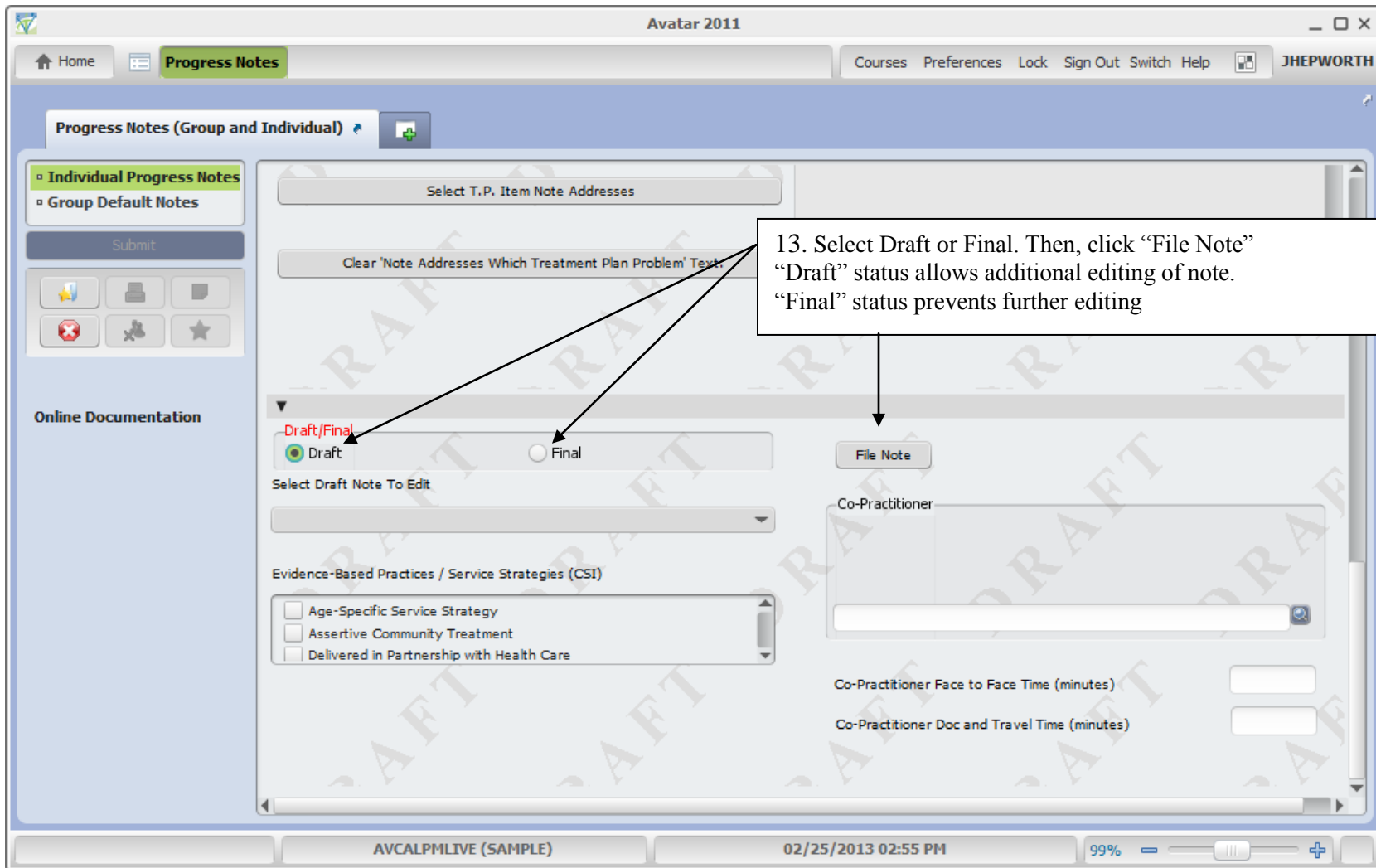
**Practitioner**  
HOM,KELLEE (000015)

Note Addresses Which Treatment Plan Problem

Select T.P. Version

AVCALPMLIVE (SAMPLE) 02/25/2013 02:54 PM 99%

In this example, user selects “draft” and then click’s “File Note” with intent of returning to finalize.  
User can then close Avatar and return at later time to edit draft note.





## Retrieving Draft Notes:

If note has been saved as draft, retrieve by returning to Progress Notes (Group and Individual).

Avatar 2011

Home Progress Notes Courses Preferences Lock Sign Out Switch Help JHEPWORTH

Progress Notes (Group and Individual)

Individual Progress Notes  
Group Default Notes

Submit

1. Enter client name.

2. Select episode

Group Name or Number

Note Date

Select Note To Edit

Note Addresses Which Existing Service/Appointment

Note Type

User To Send Co-Sign To Do Item To

Online Documentation

Progress Note Entry

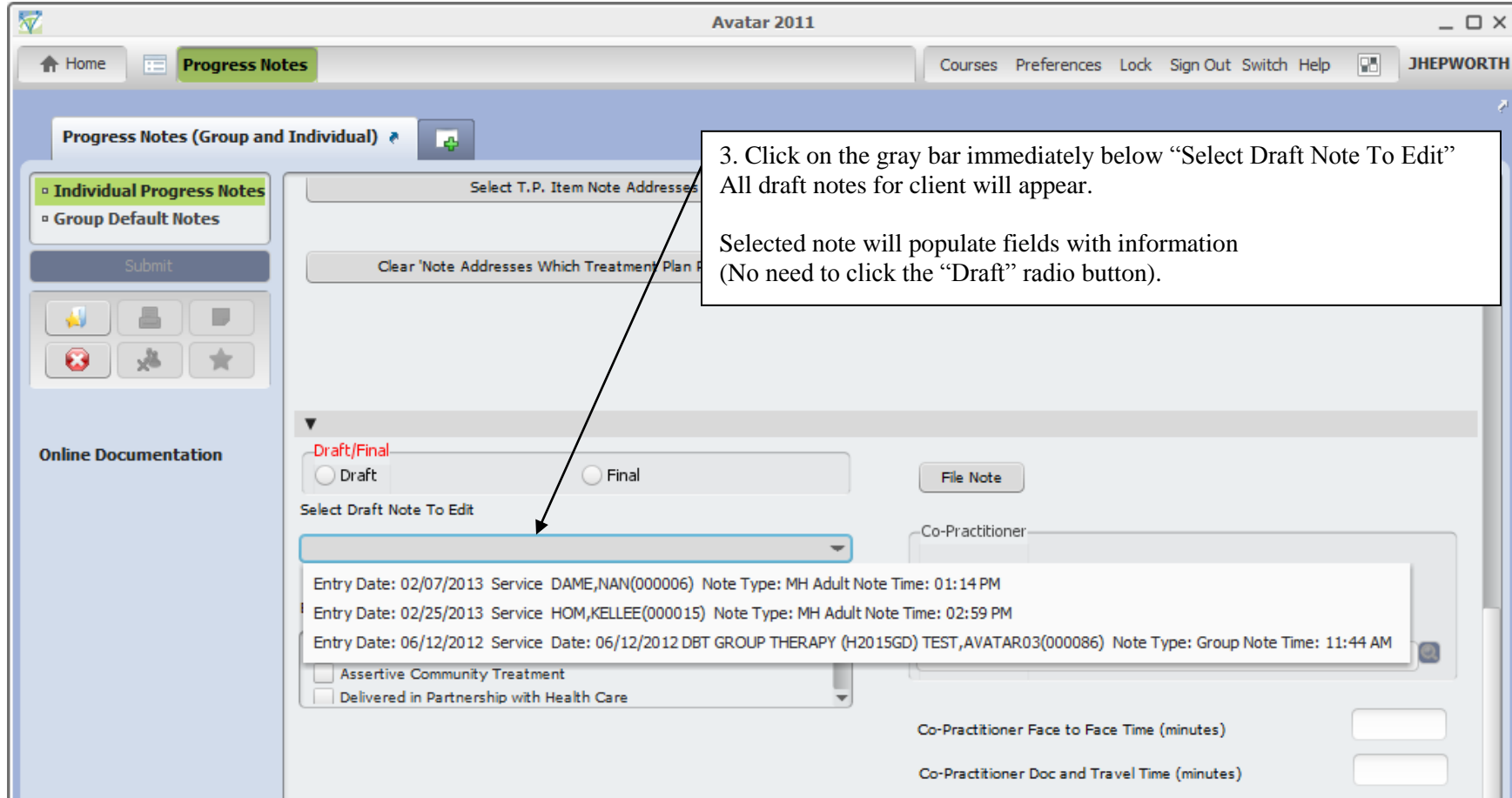
Progress Note For

Existing Service Existing Appointment  
Independent Note New Service

File Note

Notes Field

[ADP Regulation for documenting progress towards treatment goals](#)



Avatar 2011

Home Progress Notes Courses Preferences Lock Sign Out Switch Help JHEPWORTH

Progress Notes (Group and Individual)

Individual Progress Notes  
Group Default Notes

Submit

Online Documentation

Select T.P. Item Note Addresses

Select Draft Note To Edit

Draft/Final  
 Draft  Final

File Note

Co-Practitioner

Entry Date: 02/07/2013 Service DAME,NAN(000006) Note Type: MH Adult Note Time: 01:14 PM  
Entry Date: 02/25/2013 Service HOM,KELLEE(000015) Note Type: MH Adult Note Time: 02:59 PM  
Entry Date: 06/12/2012 Service Date: 06/12/2012 DBT GROUP THERAPY (H2015GD) TEST,AVATAR03(000086) Note Type: Group Note Time: 11:44 AM

Assertive Community Treatment  
 Delivered in Partnership with Health Care

Co-Practitioner Face to Face Time (minutes)

Co-Practitioner Doc and Travel Time (minutes)

3. Click on the gray bar immediately below “Select Draft Note To Edit”  
All draft notes for client will appear.  
Selected note will populate fields with information  
(No need to click the “Draft” radio button).

Below is selected note.

4. After edits are complete, select “Final” and click “File Note”.

“Append Progress Note” function allows addition of comment to a finalized note by author. Except – interns are not allowed to append finalized notes that have been approved by supervisor.