

SANTA CRUZ COUNTY AVATAR INFORMATION NOTICE

TOPIC: Append Documents Has Replaced Append Progress Notes

Avatar Form(s), Process and/or Users Affected

Date 12/28/18

Avatar Form(s) **Append Documents**

Problem Process Procedure Change The Append Progress Notes form has been disabled. Instead, if you want to add an additional information to a finalized progress note, use the form Append Documents.

Users Affected Any user who uses the SC General Purpose Progress Note or the SC Group Progress Note. The Append Documents form does not work with the SC Med Progress Note.

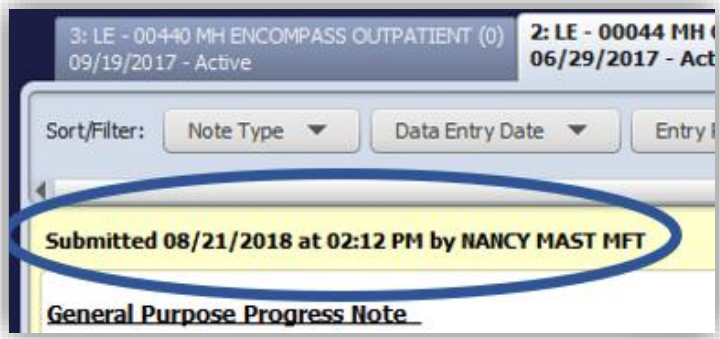
Summary/Introduction

The Append Progress Note form was used to add an appendix or short note to the end of a progress note, after the note has been finalized, filed and, if applicable, cosigned.

It has been replaced by Avatar form Append Documents, which functions similarly, but allows additions to other documents such as a Treatment Plan or a Crisis Assessment.

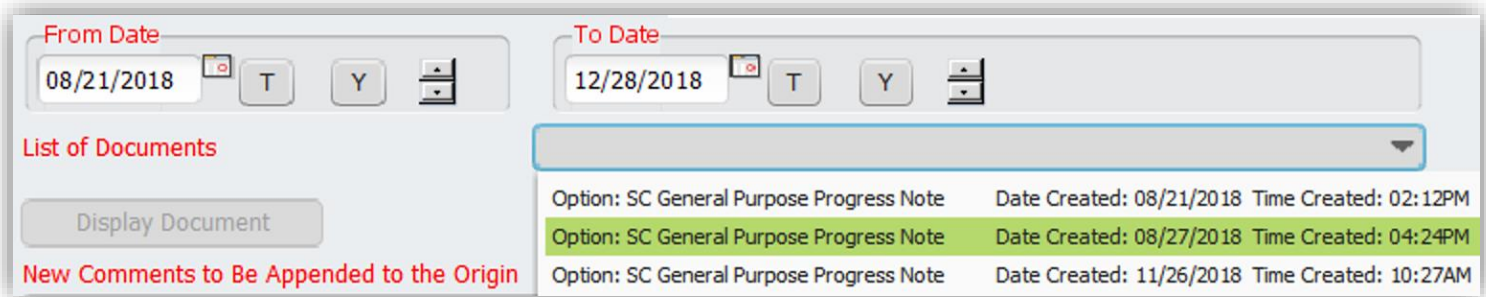
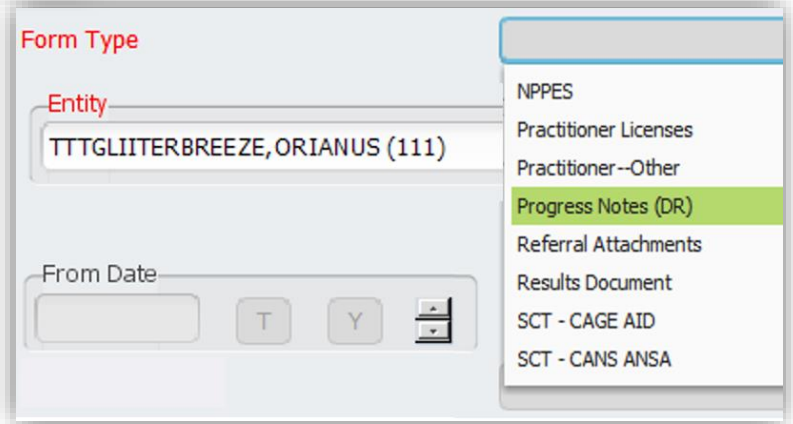
The form also looks a little bit different and has some different fields as described in the Details section of this document.

Detailed Description of How to Use the Append Documents form



1. **Before You Start:** Find the note you want to append in the client's chart. Note the "Submit" date and time on the note.

2. Open the **Append Documents Form**.
3. In the **Form Type** field, select *Progress Notes (DR)*.
4. In the **Entity** field, enter the client name or number.
5. In the **From Date** field, enter the start date of the timeframe you want to use to search for your note.
6. In the **To Date** field, enter the end date of the timeframe you want to use to search for your note.
7. You will next see a *pre-display* of the client's notes within your selected timeframe. **Select the note you want to append.**



IMPORTANT: If you have routed a progress note to a supervisor and are waiting for a co-signature, the progress note will not appear in the List of Notes. Ask your supervisor to "Reject" the note, which will put it back in your My To Do's in Draft form. You can then make your changes and submit the note again, without having to "append" the note.

- In the **New Comments to Be Appended to the Original Document** section, add your comments. You may want to add a notation about which section of the note your comments belong to because your addendum will be at the very end of the note.

The screenshot shows a software interface for document management. At the top, there are two date selection fields: "From Date" set to 08/21/2018 and "To Date" set to 11/26/2018. Below these are "List of Documents" and a "Display Document" button. A dropdown menu shows "Option: SC General Purpose Progress Note" and "Date Created: 08/27/20...". The main section is titled "New Comments to Be Appended to the Original Document" and contains a text area with the text: "ADD TO FOLLOW UP: Requested that client bring homework to next meeting."

- Click **Submit**.

Once you have submitted the form, your changes will show at the end of the note when viewed in the chart.

The screenshot shows the "SC General Purpose Progress Note" view. At the top, there are three note entries: "3: LE - 00440 MH ENCOMPASS OUTPATIENT (0) 09/19/2017 - Active", "2: LE - 00044 MH COUNTY OUTPATIENT 06/29/2017 - Active", and "1: CLIENT REC 06/29/2017 - Active". Below these are "Sort/Filter" buttons for "Note Type", "Data Entry Date", "Entry Person", and "Data Entry Time". The main content area shows "Draft/Final: Final" and a section titled "ADDITIONAL DOCUMENT NOTE - 12/28/2018 at 12:00 PM by Nancy Mast" containing the text "ADD TO FOLLOW UP: Requested that client bring homework to next meeting." Below this is a "Document Routing" section with "Status: Final" and "Approvers:".

For More Information Contact

The QI help desk at askqi@santacruzcounty.us

Resources

More information about this issue will be posted on the Santa Cruz Avatar webpage shortly.

<http://www.santacruzhealth.org/hsahome/hsadivisions/behavioralhealth/avatarresources.aspx>

The easy way to get to the web page is to type Avatar into the Search Forms blank when you are in Avatar. Click on Avatar Resources and this will launch the web page.

