

## MHTC Progress Note Entry Tip Sheet

This Tip Sheet will walk users through the MHTC Progress Note Entry Form. This Tip Sheet may change as our trainings and systems are updated. Please visit our website <https://dhs.saccounty.gov/BHS/Avatar/Pages/Avatar.aspx> for the most updated version. If any additional help is needed you can contact us at 916-876-5806 or at [Avatar@saccounty.net](mailto:Avatar@saccounty.net).

The MHTC Progress Note Entry form documents the direct and indirect interaction with the client. MHTC progress notes should be completed on the same day a service was provided. For information on the documentation requirements please contact [QMInformation@saccounty.net](mailto:QMInformation@saccounty.net).

**MHTC PROGRESS NOTE ENTRY** Submit Discard Add to Favorites

**Individual Client Progress Notes**

- Progress Note
- Clinical Information
- Group Information
- Injection Follow up
- ECT Follow up
- Seclusion/Restraint Debriefing
- Code Blue Additional Items
- Physician Notification
- Post Fall/Injury Assessment
- AWOL Outcome

▼ Progress Note

**Select Client \*** 1

TESTAMARK,JULIEN (688974000) 🔍

**Select Episode \*** 2

Episode # 2 Admit : 05/21/2001 Discharge : 05/22/2001 Program : SacCo-MHTC-Adult-CS-Stockton x ▼

**Select Draft Note To Edit** 3

Select x ▼

**Progress Note For \***

Existing Service     
  Existing Appointment     
  Independent Note     
  New Service 4

**Primary Staff**

TEN,TRAINER (020086) 🔍

**Note Type \***

Standard (Co-Sig Required) x ▼

**Incident Date \***

05/22/2001 📅 T Y ⬆️ ⬆️ ⬆️

**Incident Time**

09:00 AM Current Time H M AM/PM ⬆️ ⬆️ ⬆️

**MHTC Incident Location**

Inpatient- A Unit x ▼

**End Date**

📅 T Y ⬆️ ⬆️ ⬆️

**End Time**

Current Time H M AM/PM ⬆️ ⬆️ ⬆️

1. **Select Client:** Open the MHTC Progress Note Entry form for the client you are working on. If you select your client prior to opening the form the client's name will populate.
2. **Select Episode:** Select your Episode from the drop down.
3. **Select Draft Note to Edit:** Select the note you have in draft status from the drop down. If you do not have any notes in Draft there will be nothing in the drop down.
4. **Progress Note For:** MHTC Progress Note For is where you select the type of progress note you are entering. MHTC will always select **Independent Note**.

MHTC PROGRESS NOTE ENTRY

Submit Discard Add to Favorites

Individual Client Progress Notes

- Progress Note
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- Injection Follow up
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- Code Blue Additional Items
- Physician Notification
- Post Fall/Injury Assessment
- AWOL Outcome

▼ Progress Note

Select Client \* TESTAMARK, JULIEN (688974000) [5]

Note Type \* Standard (Co-Sig Required) [5]

Incident Date \* 05/22/2001 [6]

Incident Time 09:00 AM [7]

MHTC Incident Location Inpatient- A Unit [8]

Primary Staff TEN, TRAINER (020086) [9]

Select Episode \* Episode # 2 Admit : 05/21/2001 Discharge : 05/22/2001 Program : SacCo-MHTC-Adult-CS-Stockton

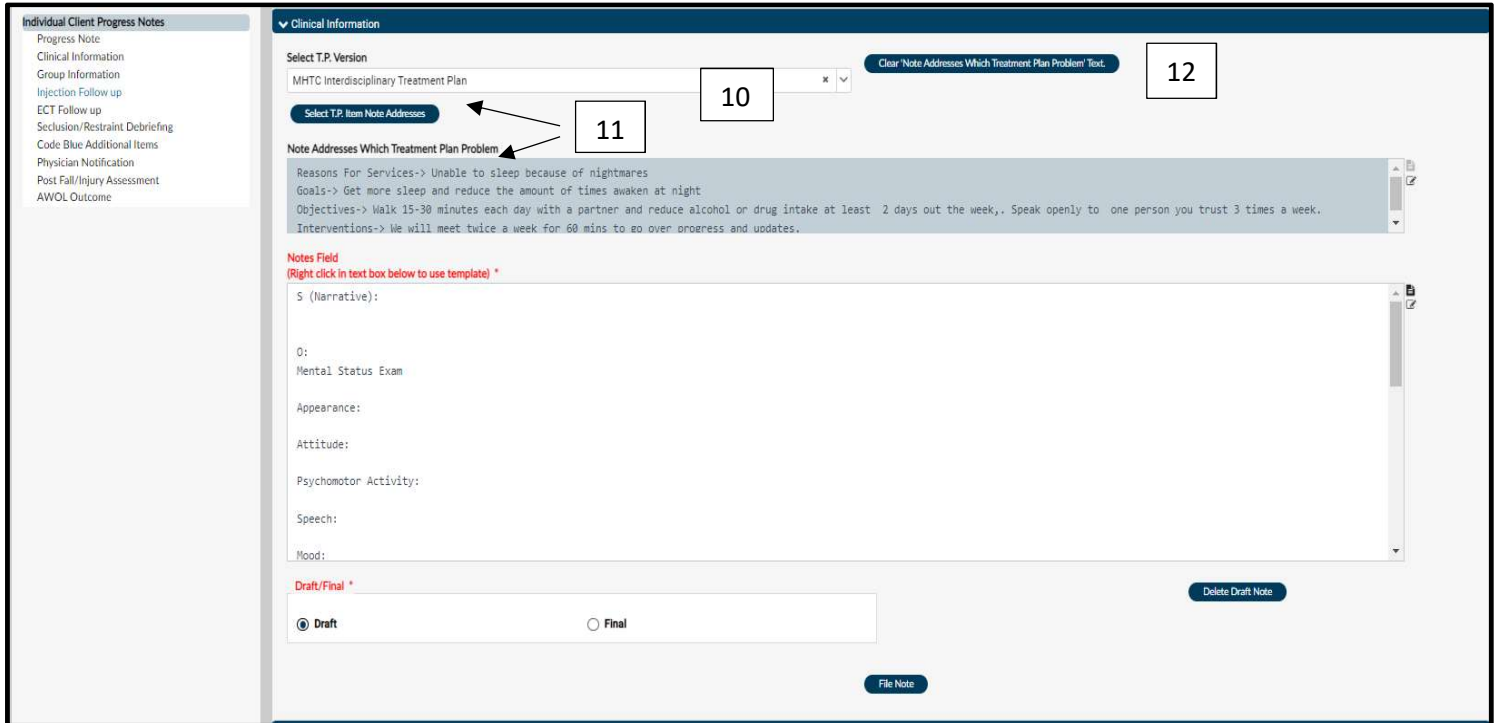
Select Draft Note To Edit Select

Progress Note For \*  Existing Service  Existing Appointment  Independent Note  New Service


End Date

End Time

5. **Note Type:** Enter Note Type by selecting from the drop down.
  - a. Note: Other fields will open depending on the Note Type selected.
6. **Incident Date:** Enter the incident Start Date and End Date.
7. **Incident Time:** Enter the incident Start and End Time.
8. **MHTC Incident Location:** Select where the incident occurred.
9. **Primary staff:** Will default to your name.

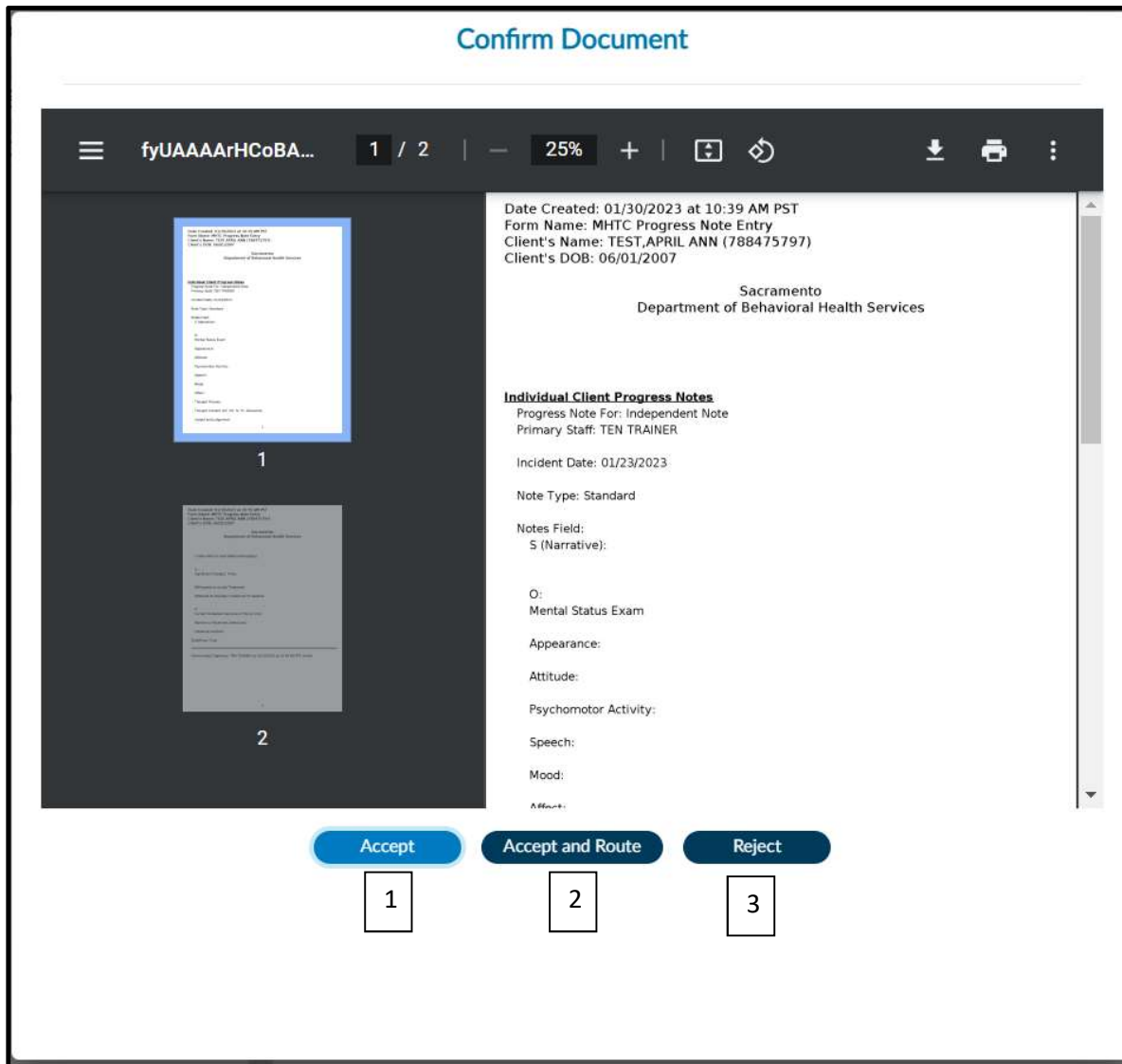


10. **Select T.P Version:** To link a Treatment Plan to the MHTC Progress Note use the T.P. drop down to select the Plan.
11. **Select T.P Item Note Addresses:** Click the Select T.P. Item Note Addresses button, an outline of your most current treatment plan will populate. If there is no outline, that is because there is no treatment plan for that episode. Click on the section of the treatment plan that this progress note is addressing. Click Return at the bottom of the page to get back to the progress note.
12. **Clear Note Addresses which treatment plan problem text:** To clear the Treatment plan selected click on the clear T.P. Item Text button.

- 13. **Note Field:** The Notes Field is where you enter your documentation.
- 14. **System Templates:** There are templates available for certain note types. To access the templates, click on the template icon  to the right of text field, select System Templates, and click on the MHTC Template available.
- 15. **Delete Draft Note:** To delete a draft MHTC Progress note, select the Delete Draft Note button within the progress note form. Progress notes in Final status cannot be deleted but can be voided. There are representatives from MHTC with the permissions to void progress notes. If a finalized progress note needs to be voided, contact your Supervisor.
- 16. **Draft/Final:** The Workflow Control is where you are able to select how you would like to save your work. You will have to save your work in either Draft or Final Status. Draft status means you are still working on the note and will need to come back to it. Final status means you have completed the note.
- 17. **File Note:** To file your note, select file note button. Notice the submit button is grayed out. Everything below the draft/final option is based on the Note Type selected.

## Document Routing Accept or Accept and Route

After the MHTC Progress Notes is finalized by select the final and file button you should see a Confirm Document pop-up. This will allow you to accept and route your progress note to the appropriate approver to accept or reject the Progress Note to make updates.



1. **Accept:** Accept allows the user to accept and file the Progress note without Supervisor approval.
2. **Accept and Route:** Allows users to route the finalized Progress Note to your Supervisor or appropriate Approver.

- Reject:** Allows users to place the Progress Note back into draft status to make updates.

Route Document to

---

Supervisor

Search here

Add

Team

Search here

Add

Add Approver

Admitting Practitioner

Attending Practitioner

Caseload Practitioners

4
FOUR TRAINER (010562)

Add

Approver	Final Approver	Title	Name
<input checked="" type="checkbox"/>		Staff	FOUR TRAINER (010562)

5

Submit

Cancel

- Add Approver:** Add Approver's name to the bottom search field under the Add Approver section. Leave Admitting, Attending and Caseload boxes blank so you can search for anyone's name.
- Submit:** Allows the user to submit their final Progress Note Entry form to the selected Approver.

### Opening a Draft Note from a blank MHTC Progress Note Entry Form

From the myDay view open the Progress Note Entry form. You can highlight your client prior to open it specifically for that client or enter in the client's information once the form has been opened. Select the appropriate episode on the Episode drop-down. Click on the Select Draft Note To Edit drop-down. Select the draft note you want to edit.

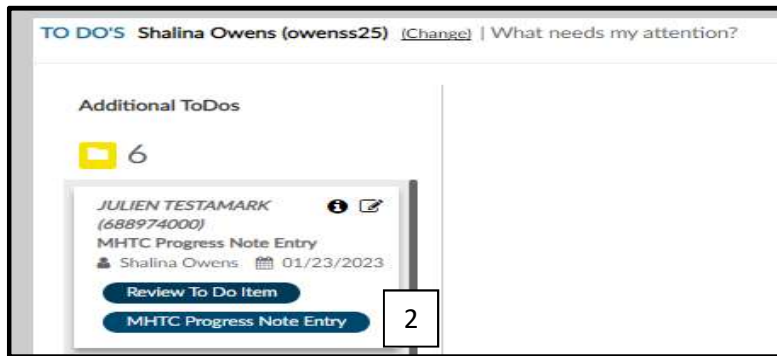
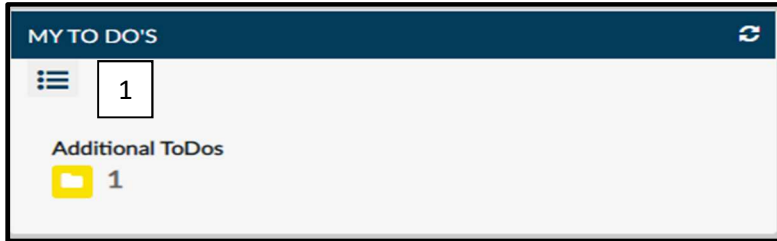
The screenshot shows a web form titled "Progress Note" with the following fields:

- Select Client \***: A search box containing "TESTAMARK, JULIEN (688974000)" with a magnifying glass icon.
- Note Type \***: A dropdown menu showing "Standard (Co-Sig Required)".
- Incident Date \***: A date field showing "05/21/2001" with a calendar icon and "T" and "Y" buttons.
- Select Episode \***: A dropdown menu showing "Episode #: 05/21/2001 Discharge: 05/22/2001 Program: SacCo-MH".
- Select Draft Note To Edit**: A dropdown menu showing "Entry Date: 01/23/2023 Service TEN, TRAINER(020086) Note Type: Standard". This dropdown is circled in black.
- Incident Time**: A time field showing "10:00 AM" with a "Current Time" button and "H", "M", "AM/PM" dropdowns.

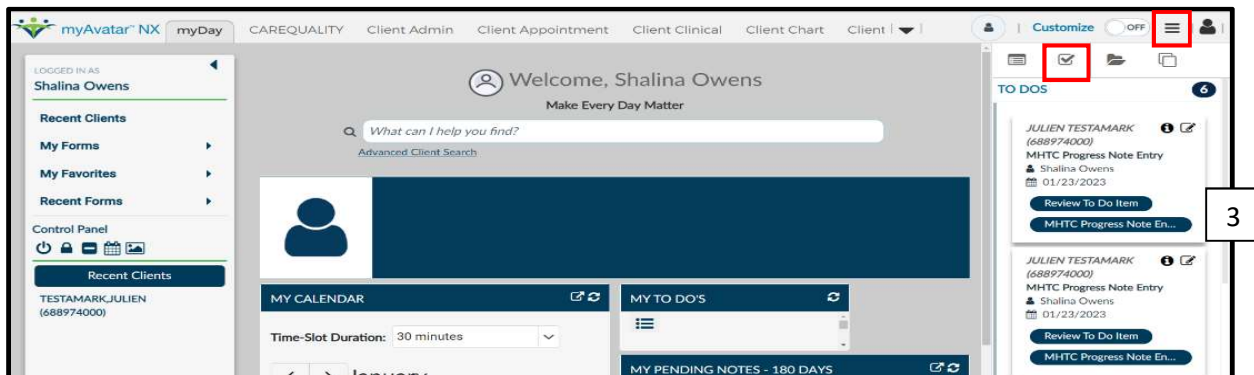


## Accessing a Draft Progress Note

There are several ways to access a draft MHTC Progress Note's.



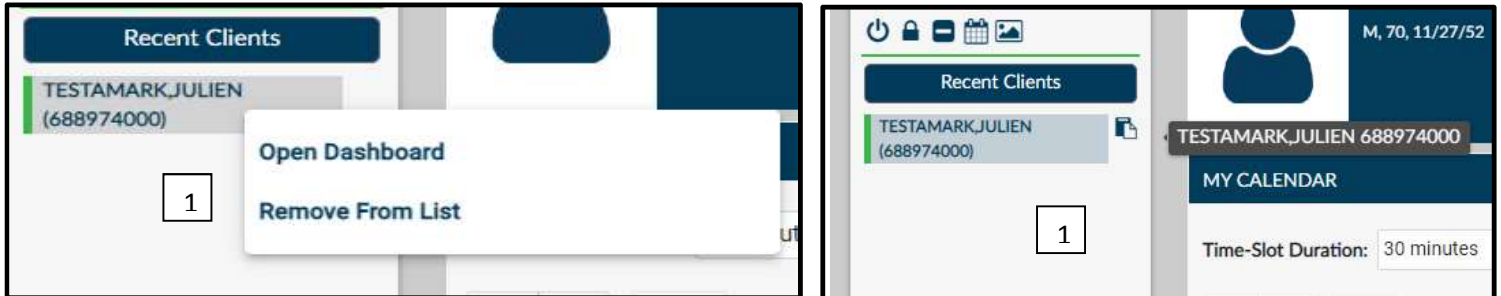
1. **My To Do's widget:** The My To Do's widget is located on your myDay view console. Select the Additional ToDo's folder to open the To Do's List. Avatar NX will list all items in review or draft status.
2. **Additional ToDos's:** To open the draft note, find your clients name then click on the MHTC Progress Note Entry button.



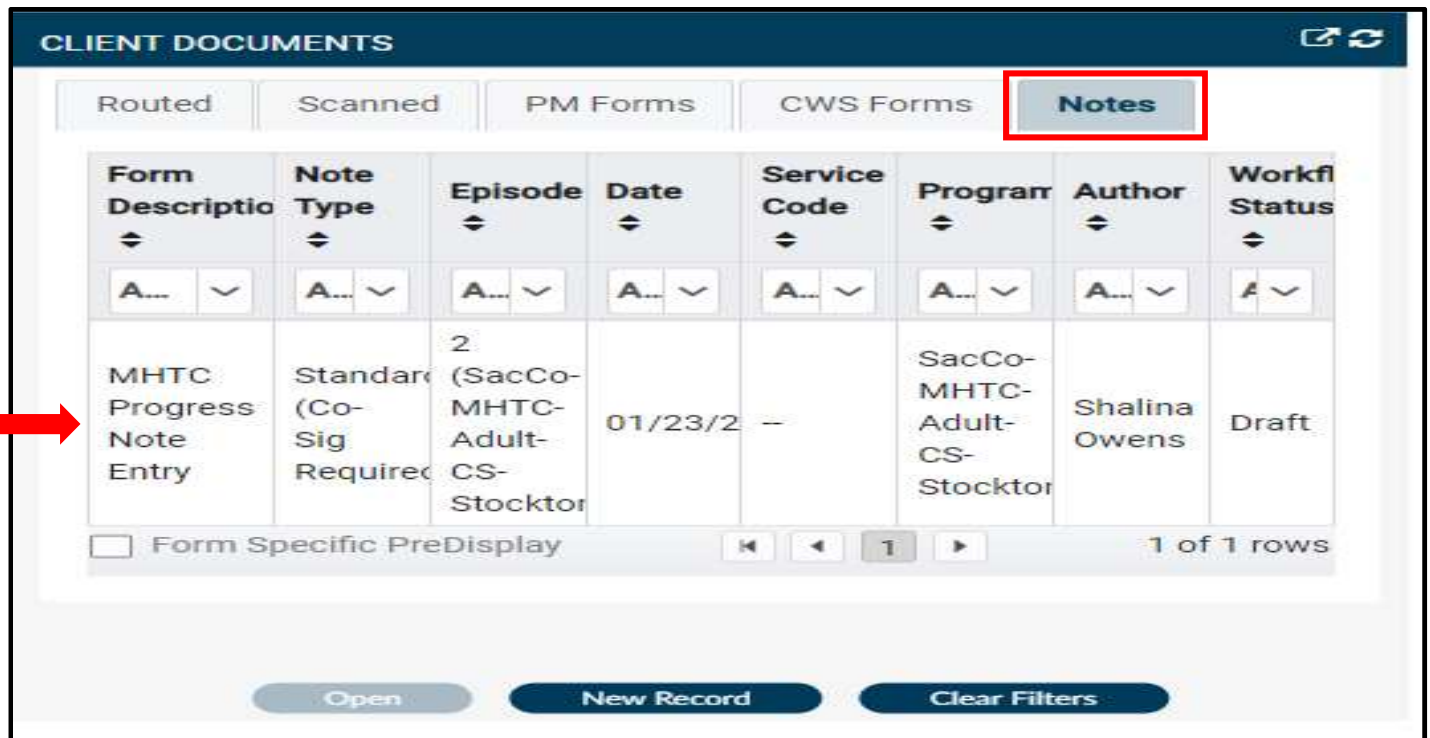
3. **My Activities/ ToDo's:** To open your To Do list, click on My Activity, then select the ToDos tab with the check mark. Selecting the form name will take you back to the draft item.

## Opening a Draft Note from the Client’s Dashboard and Client’s Chart

The Client Dashboard and Client’s Chart allows user to review Progress notes, Assessments and any other documentation.



1. **Right Click or hover over client’s name:** Right clicking on the clients name allows users to open the Dashboard or remove the client from your Recent Clients list. Hovering over the clients name allows you to select the two pieces of paper to the right of the client’s name. Once selected the dashboard will open.



2. **Note Tab:** Select the Note tab to the far right. Find your progress note and click on the name. The Progress note will open the Console Widget Viewer.

LOGGED IN AS  
**Shalina Owens**

What can I help you find?  
Advanced Client Search

Recent Clients

My Forms

My Favorites

Recent Forms

Control Panel

Recent Clients

TESTAMARK JULIEN (688974000)

CODA (Co Occurring Disorders Assessment)  
Columbia SRA Since Last Visit  
Columbia Suicide Risk Assessment  
Core Assessment  
Crisis Screening and Assessment  
Crisis Triage  
Health and Review of Systems  
Health and Review of Systems Section 2  
Housing Plan  
Initial Psychiatric Assessment  
LOCUS  
Medication Service Plan  
MHTC Interdisciplinary Treatment Plan  
MHTC IPA  
MHTC Progress Note Entry  
MHTC Property Inventory  
MHTC TB Questionnaire  
Progress Note Entry  
Progress Note Entry (Crisis Services)  
PSC 35  
Psychiatric Mental Status Exam  
Strength Assessment  
SUD Assessment  
Vitals Entry  
Vocational Assessment

TESTAMARK JULIEN (688974000)  
Preferred Name: M, 70, 11/27/52  
Ep: 2 : SacCo-MHTC-Adult-CS-S...  
Admission Date: 05/21/2001  
Attn. Pract: -  
Ht: -, Wt: -  
Location: X, X, XX  
Phone #: 000-0000  
DX P: 304.80 Poly substance dep...  
Allergies (0)

CLIENT DOCUMENTS

Routed Scanned PM Forms CWS Forms **Notes**

Form Description	Note Type	Episode	Date	Service Code	Program	Author	Workfl Status
MHTC Progress Note Entry	Standard (Co-Sig Required)	2 (SacCo-MHTC-Adult-CS-Stockton)	01/23/20	--	SacCo-MHTC-Adult-CS-Stockton	Shalina Owens	Draft
MHTC Progress Note Entry	Standard (Co-Sig Required)	2 (SacCo-MHTC-Adult-CS-Stockton)	01/23/20	--	SacCo-MHTC-Adult-CS-Stockton	Shalina Owens	Draft

Form Specific PreDisplay 2 of 2 rows

Open New Record Clear Filters

CONSOLE WIDGET VIEWER

MHTC Progress Note Entry

Individual Client Progress Notes  
Progress Note For: Independent Note

Primary Staff: TRAINER TEN

Incident Date: 05/21/2001

Select T.P. Version: MHTC Interdisciplinary Treatment Plan

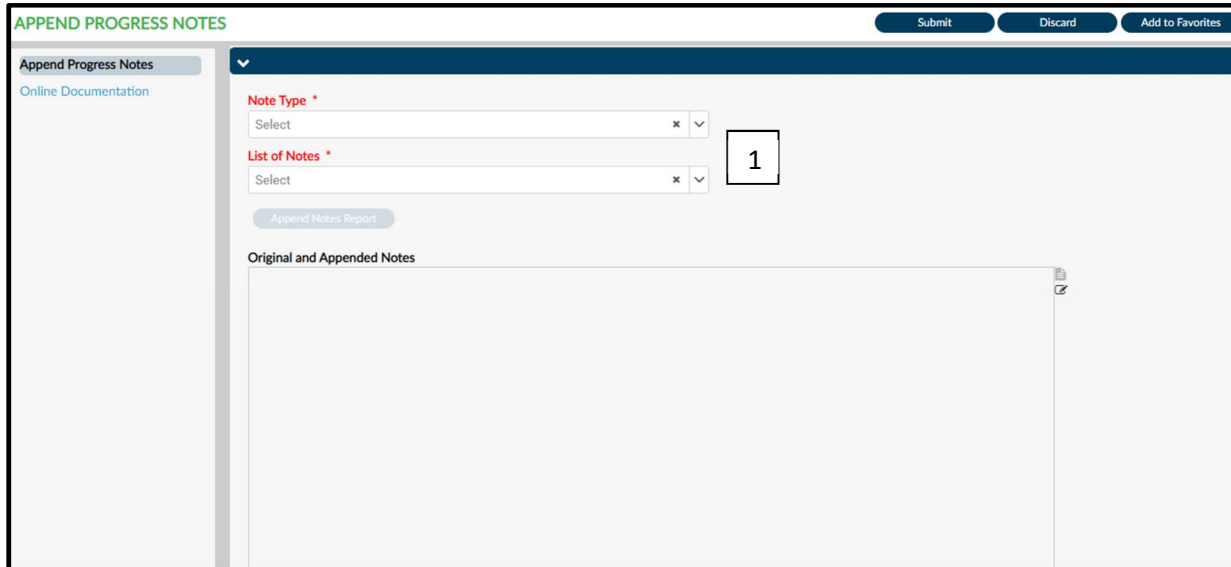
Note Addresses Which Treatment Plan Problem:  
Reasons For Services-> Unable to sleep because of nightmares  
Goals-> Get more sleep and reduce the amount of times awoken at night  
Objectives-> Walk 15-30 minutes each day with a partner and reduce alcohol or drug intake at least 2 days out the week, Speak openly to one person you trust 3 times a week.  
Interventions-> We will meet twice a week for 60 mins to go over progress and updates.

Open Record Close All Print

3. **Client Chart:** Select the Clients Chart Console. Select the Note tab and the Progress Note you are looking for. Once selected it will open in the Console Widget viewer.

## Appending Progress Notes

Once a note has been finalized you cannot edit the note, however in certain circumstances you can append a progress note. You cannot change the content of the original note, you can only add additional information. In order to append a progress note it has to be within 45 days of the note and you are only able to append a note if you do not require a co-signature for progress notes. You can access Append Progress Note by opening the Append Progress Note form.



1. **Note Type:** Locate the note you wish to append. You will locate the note by choosing the note type and then find your note in the list of Notes drop-down. Click on the note that needs to be appended.

**Note Type \***  
 Standard (Co-Sig Required) x v

**List of Notes \*** 2

Select x v

1 - Date of note (original): 01/12/2023 Time of note (last updated): 01:43 PM  
 Written by: Shalina Owens

2. The original content of the note will populate below. This cannot be edited. Below the original note there will be a section for you to add new comments. Add your comments and click Submit to save.

APPEND PROGRESS NOTES

Append Progress Notes  
 Online Documentation

Language in which service was provided: English  
 Was Interpreter Used?: No

**Document Routing**  
 Status: Final  
 Approver: SIX TRAINER-Staff (Accepted)

**New Comments to Be Appended to the Original Note \***  
 Add comments here

3

3. By submitting the new comments allows you to add to the original progress note.

## Reports

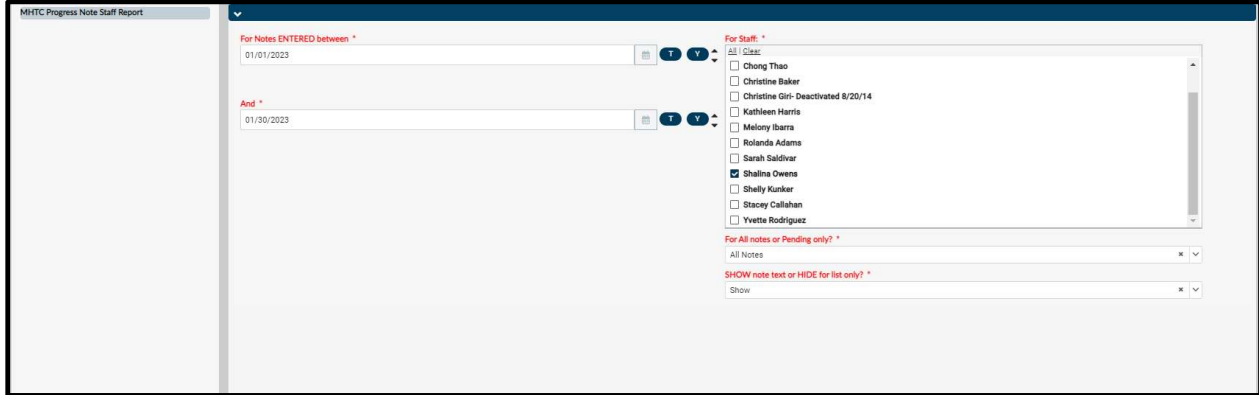
There are many reports users can run that will give you information on previously entered progress notes.

**Report Inventory** is a report you can run to find out which report the user has access to. The report with an X, you have access to and the blank sections you will not have access to.

Sacramento County DBHS		Report Inventory										
Report	Description	Update	Provider MHPM	Provider MHCWS	Provider SUP TPM	Provider SUP TCWS	Provider Special	County Access	MHTC	UR	County	
274 Staff Roster Report											X	
AB1299 Presumptive Transfer Report	QM Report based on the SR 2.0 changes that went live 3/1.	5/27/21		X					X		X	
Access Assigned Clinician Report	Obsolete	9/30/20						X				
Active Authorization Report	All authorizations to a program between a date range, regardless of assignment. **NOTE~ Most programs are no longer "authorized", contact your Monitor with questions	9/30/20	X					X	X		X	
Active Client Current SUD Assessments	Report to see current open clients and when the last SUD Assessment has been completed in a program.	9/30/20			X	X						
Active Client Eligibility Comparison	Compares program active clients with the Monthly MEDS file by SSN and flags cases where the Avatar CIN for medi-cal does not match the MEDS CIN and shows Eligibility Status, primary aid code and special aid codes 1 and 2	9/30/20					X		X		X	
Active Client FIF Status	For the program selected, shows currently open clients with the most recent FIF form scanned using the origination date. Clients with no FIF or with the most recent over a year old highlighted.	9/30/20	X								X	
Active Client Final Assessments	For the Program selected, returns all active clients and the dates of all finalized non psychiatric assessments in their episode. Includes HQ, MSE, Core, Plan, LOCUS, CODA, Vocational, ANSA, CANS	9/30/20		X		X						
Active Client Initial Assessments	Similar to the Active Client Final, but for admissions in a date range and showing the FIRST of each assessment type and time to each	9/30/20		X		X					X	
Active Client Next Appointment	For the program selected, reports all clients with their next scheduled appointment	9/30/20					X					
Active Client Plan and Core Status	For currently open episodes at a program, shows the admit date, the start date, the current plan date and the current Core Assessment date	9/30/20		X								
Active Client PSC35 Report			X	X								

## MHTC Progress Note Staff Report

This report shows the Progress Note for one or more staff from your agency, it flags notes missing co-signatures and in pending draft status.



The screenshot shows a web interface for generating a report. It includes filters for 'For Notes ENTERED between' with dates 01/01/2023 and 01/30/2023. A 'For Staff' list includes names like Chong Thao, Christine Baker, and Shalina Owens (checked). There are also dropdowns for 'For All notes or Pending only?' and 'SHOW note text or HIDE for list only?'.

Name ~ ID (Episode)	Note Entered	Incident Date	Days	Bus*	Service	Note Type	Duration	Status	Missing Co-Sig
TEN,TRAINER ~ 020086									
TEST,ENTRY ~ 758277000 (14) vjbhkijnjl	1/12/2023	1/12/2023	0	0		Standard (Co-Sig Required)		Final	
TEST,ENTRY ~ 758277000 (14) 11111	1/23/2023	1/23/2023	0	0		Standard (Co-Sig Required)		Draft	
TEST,ENTRY ~ 758277000 (14) 22222	1/23/2023	1/22/2023	1	1		Standard (Co-Sig Required)		Draft	
TESTAMARK,JULIEN ~ 688974000 (2)	1/23/2023					Standard (Co-Sig Required)		Draft	
TESTAMARK,JULIEN ~ 688974000 (2)	1/30/2023	5/21/2001	7,924	5,657		Standard (Co-Sig Required)		Draft	

S (Narrative):

O:  
Mental Status Exam

Appearance:

Attitude:

Psychomotor Activity:

Speech:

Mood:

Affect:

Thought Process:

Thought Content (AH, VH, SI, HI, Delusions):

Insight and Judgement:

Criteria Met for Hold (Medical Necessity):

Progress Note Staff Report Page 1 of 2 Printed 1/30/2023 at 4:42:32PM

## MHTC Client Note Report

This report shows the details of Progress Notes for a client within the defined date range.

**Client \***  
 TEST, APRIL ANN (788475797) For Notes with Incident Dates Between \*

**Episode \***  
 Episode # 5 Admit: 01/23/2023 Discharge: NONE Program: SacCo-MHTC-Inpt-Stockton And \*

01/23/2023 01/30/2023

This report shows the details of progress notes for a client within the defined date range.



**Sacramento County DBHS**

**MHTC Client Note Report**

**Showing Notes Between 1/23/2023 and 1/30/2023**

**Patient:** TEST, APRIL ( 788475797)  
**Episode:** 5 ~ SacCo-MHTC-Inpt-Stockton

**Admit Date:** 1/23/2023  
**Discharge Date:**

**Note Type:** MHTC AWOL Note (Co-Sig Required) **Entry Date:** 1/23/2023  
**Date and Time:** 1/23/2023 09:00 AM **Entry Time:** 11:57 AM  
**Location:** Large Courtyard **Keyed By:** Elena Juarez  
**Primary Staff:** TRAINER,ELEVEN

**Progress Note:**

How did patient leave the facility: Walked

Missing time notified:

Missing Persons Number:

Names, numbers and instructions to others notified:

**Physician Notified:**

006684	BARNHORST,AMY	<b>Date/Time:</b> 1/23/2023	11:55 AM
<b>AWOL:</b>		<b>End Date/Time:</b> 1/23/2023	09:07 AM

**Final Outcome:**

Patient Returned	Found in main hallway
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**Note Type:** MHTC Code Blue **Entry Date:** 1/23/2023  
**Date and Time:** 1/23/2023 11:43 AM **Entry Time:** 11:51 AM  
**Location:** Cafeteria **Keyed By:** Elena Juarez  
**Primary Staff:** TRAINER,ELEVEN

**Progress Note:**

Time Announced Overhead: 1000

911 Called: Y/N Y

EMS Arrival Time:

EMS Departure Time: