# Progress Notes

*Summary:*

Progress notes are one of the three types of notes in PIMSY. Progress Notes/Therapy Notes are useful for documenting outpatient therapy, enhanced service (case management for example), nonbillables, etc.

*Buttons:*

**Take Payments** – take a payment from the client directly from the Note.

**Open Last Note** – open the last note on this client.

**Note Report** – prints the note for release.

**Leaf Icon** – In PIMSY, there are green leaf and red-brown leaf icons. Green leaf and green tree icons are related to money items, invoices etc.

 Brown leaf icons are always report related, usually printable reports. If the button has a brown leaf and text it will pull up a printable report for whatever subject you are on in the system. If the button has a brown leaf only, then you will have options as to which report you want to generate. There may be multiple standard options here or there could be multiple custom reports just for the specific client as well.

**Docs** – this button allows the clinician to attach documents to a specific note rather than the overall chart.

**View Client** – view the client's chart.

**Font Size** – increase or decrease the font size in the free-text area.

**ABC** – spell check for the free-text area.

*Fields:*

**Service Date** – the date this service was provided.

**Duration** – the duration of the session.

**Location Code** – where the service was performed.

**Billing Code** – the service that was performed or the code that fits the information being documented.

**Face to Face** – check this if the visit was face-to-face with the client.

**Collateral Note** – indicates that the session took place with collateral contacts rather than the client.

**Released for Review** – releases the note for review when dual-signoff has been indicated in the User's file.

**Released** – the note is released, locked, and invoiced.

**Note Type** – see the dropdown for note types.

**Division** – if applicable.

**Allow Unconditional Release** – an administrative field that bypasses system note rules in order to allow release of the note.

**Auto Populated Fields** – the fields in this area will auto populate when header information is saved.

**Inpatient** – check here if the client is an inpatient in your facility.

**Admitted** – the date the client was admitted as an inpatient.

**Discharged** - the date the client was discharged as an inpatient.

*Tabs:*

**Brief Mental Status Exam** (comes with PIMSY) - set up by the system administrator prior to doing your notes. There is one pre-loaded in the PIMSY system or it can be changed to better serve your practice's needs.

**Goal** – all active goals previously created in the treatment plan are available in this tab to be brought into the note body.

**Add. Services** – is where you add any additional services provided and PQRS codes as needed.

**Addendums** – in order to add or change a note after it has been released, an addendum must be performed. *You cannot modify a note directly once it has been released.*

**Team** – this area is used for team notes or when multiple clinicians are needed for signoff.

**Reference** – information only tab that reflects what insurance is attached to the note as well as note release info.

**Misc Q & A Tracking** – optional Q&A area that is set up by the company Administrator.

*Instructions:*

**CREATING A NEW NOTE**

To begin a progress note for a client, go to the appointment in the **SAL/Calendar** and open it. Click on the **Note** button. A box will pop up where you select the type of note you need. Select **New Therapy / Progress Note.** Click **OK**.

This will open the **Note** box which will have the date, time, duration, and billing code already pre-populated. The **Location** code and **Division** will auto-populate if previously set on the client's chart. This demographic info that is attached to the note is referred to as the **Headers.** Once the **Headers** are selected or pre-populated for the note click **Save.** From this point in the note documentation process, before the note is released, the staff performing the note can save their work, exit, and finish at a later time.

The **Note** section is where you type the actual note. This can be free text or right-click and select Templates in order to access a list of pre-defined Templates that are set-up by the company administrators within the Pick List. The **Note Type** drop-down list contains note outlines to aid in documenting appropriately.

The bottom portion of the **Note** dialogue box includes seven tabs. In the **Goal** tab, the previously established needs and goals that were input into the **Treatment Plan** are shown here. To bring a goal into the note, select the appropriate row from the **Goal** tab. If you double-click on the entire row it will bring in the entire goal. If you just want one part from the goal list, double-click on that one cell.

Once the note is complete, click the **Released** box *(Release = Sign Off).* **Releasing** the note *locks* the note from any further changes *(for audit purposes)*. Prior to **Release,** the note can be **Saved** and edited as many times as needed. ***Once the note is released, the note is locked, and requires an Addendum*** *(see above)****, to be changed.***

*Use Case:*

Dr. Holbrook at ABC Therapeutics has just seen a client and needs to write a note for the visit. He goes to the My Sal Calendar and opens up the appointment for which he needs to write the note. Dr. Holbrook completes much of the relevant information but doesn't have time right now to complete the note. He saves the note for now so he can go back later to finish and release the note for billing.