Edit Service Information

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Edit Service Information

In this lesson you will learn the steps to edit service information when an erroneous entry occurs in a progress note.

You will learn to find the progress note that needs correction, and you will also learn that you can only edit progress notes that are in an open status.

After selecting the appropriate progress note entry, you will make the necessary changes.

Lesson Objectives

- Learn to locate the client, episode, and date range of the service to be edited

- Select and edit the service

LESSON SCENARIO

Maria Mancini is an administrator at a BHRS clinic. She finds making corrections to progress note entries in Avatar is easy. The Select Service(s) to Edit feature allows her to quickly locate a range of progress notes and zero in on the exact note she wants to correct.

UNDERSTANDING EDIT SERVICE INFORMATION

With Edit Service Information, you can correct service information that appears in a progress note. You can change the service code, date of service, duration, practitioner, and location.

IMPORTANT

If the service is connected to the wrong client or the wrong episode, contact MIS to make the correction. You can only edit service information if the charge is in an open status. If MIS closed the item for accounting purposes, contact MIS to make the correction.

IMPORTANT

Contract providers do not use Edit Service Information; they should contact MIS directly for all progress note corrections.

WHO CAN PERFORM THIS FUNCTION?

Administrators perform the Edit Service Information function.

MENU PATH

Avatar PM→Services→Ancillary/Ambulatory Services→Edit Service Information

EDIT SERVICES INFORMATION TAB PAGE 1S

You use this tab to choose the client, episode, and date range for the progress note you want to edit. When you click the Select Services to Edit button, the Select Service(s) to Edit screen opens (shown following this illustration) listing all services for the specified date range. When you choose the service to edit, the service detail fills in the bottom half of the following window where you can make changes. You can also make changes on page 2 of this tab.

This is where you select the service(s) to edit. You can only edit services in an open status. If the service is not open, contact MIS.

EDIT SERVICES INFORMATION TAB PAGE 2

Use this tab if you need to edit co-practitioner information.

FIELD	DESCRIPTION
A) Evidence-Based Practices/Services Strategies (CSI)	BHRS does not use this field.

Exercise 1: Edit a Client's Service Information

In this exercise you will correct a service code error a clinician discovered after submitting a progress note in final.

Before You Begin: *Select a client who has an existing progress note.*

1. Choose Avatar PM→Services→Ancillary/Ambulatory Services→Edit Service Information from the Menu Frame.

2. Follow these steps to begin editing the client's service information:

A Enter all or part of the client's name and click the Process Search button.

B If necessary, choose the client from this dropdown list or click OK if the client's name appears in a message box.
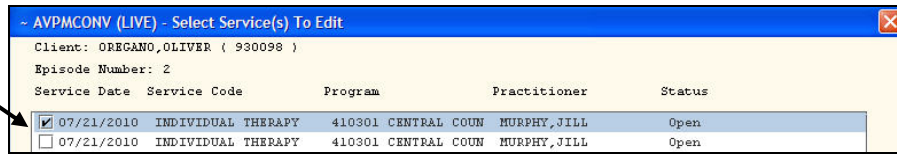
C Choose the client's episode from this drop-down list.

D Enter the service start and end dates here.

E Click this button to display a list of progress notes within the specified date range.

The Select Service(s) to Edit window opens.

3. Place a checkmark in the checkbox for the service you want to edit.

The bottom half of the Edit Service Information window populates with the information from the service you selected.

4. Follow these steps to change the service code:

A Type the service code shown here.

B When the message appears indicating the new code, click OK
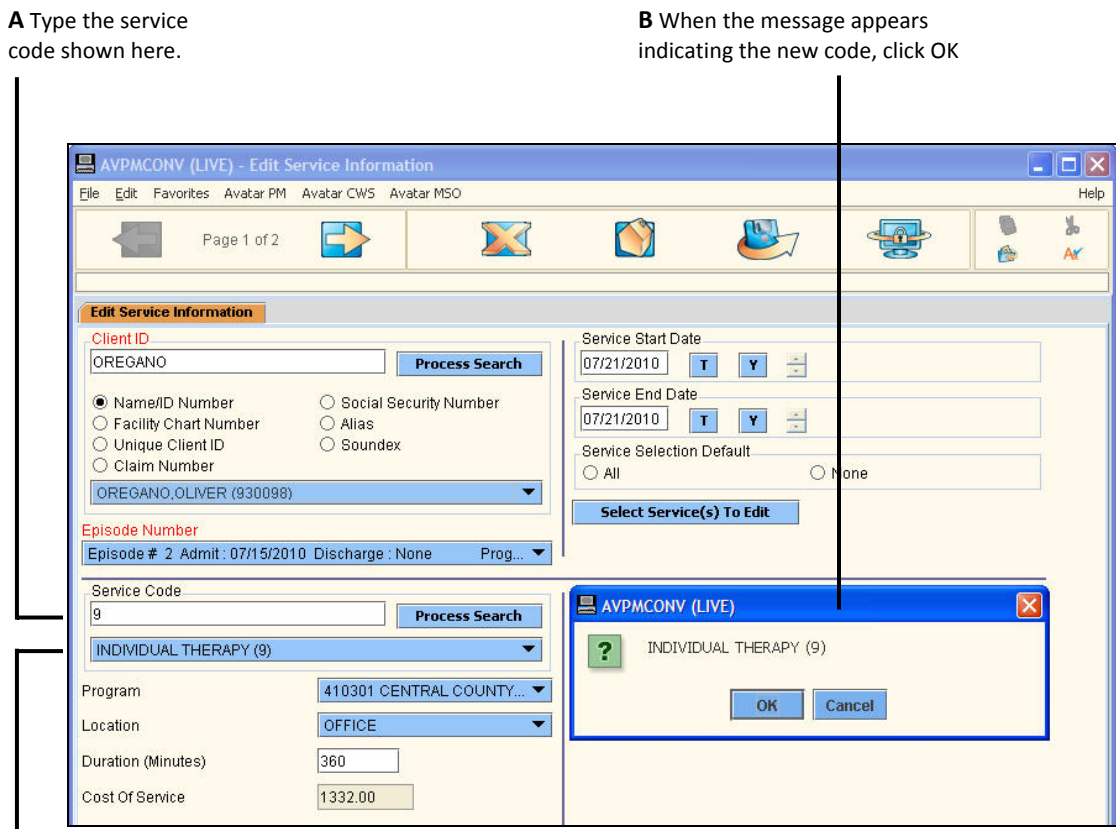
C The new service appears here.

5. Click the Submit icon on the Option toolbar to save the change.

CONCEPT REVIEW

1. You can only edit service information if the charge is in an open status.

   a. True

   b. False

2. Clicking the Select Service(s) to Edit button allows you to select all of a client's services available for editing or you can select a specific date range of services for editing.

   a. True

   b. False

3. If an error is connected to the wrong client or wrong episode, you must _____ to make the correction.

   a. use Avatar's Edit Service Information feature

   b. contact MIS

   c. ask your Unit Chief

APPENDIX—CONCEPT REVIEW ANSWERS

1. a
2. a
3. b