



Edit Service Information

Table of Contents

LESSON SCENARIO	2
UNDERSTANDING EDIT SERVICE INFORMATION	3
WHO CAN PERFORM THIS FUNCTION?	3
MENU PATH	3
Edit Services Information Tab Page 1s	4
Edit Services Information Tab Page 2	5
CONCEPT REVIEW	8
APPENDIX—CONCEPT REVIEW ANSWERS	9



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.

The screenshot displays the Avatar software interface. The main window is titled "AVPMCONV (LIVE) - Edit Service Information". It features a menu bar with "File", "Edit", "Favorites", "Avatar PM", and "Avatar CWS". Below the menu bar is a toolbar with navigation icons. The main content area is divided into several sections:

- Edit Service Information:** Contains a "Client ID" field with the value "OREGANO" and a "Process Search" button. Below this are radio buttons for "Name/ID Number" (selected), "Facility Chart Number", "Unique Client ID", "Claim Number", "Social Security Number", "Alias", and "Soundex". A dropdown menu shows "OREGANO, OLIVER (930028)".
- Service Dates:** "Service Start Date" is set to 02/01/2010 and "Service End Date" is set to 02/27/2010. Both have "T" and "Y" buttons.
- Service Selection Default:** Radio buttons for "All" and "None".
- Buttons:** A "Select Service(s) To Edit" button is highlighted with a black arrow.
- Episode Number:** "Episode # 1" with "Admit: 02/19/2010" and "Discharge: None".

A secondary window titled "AVPMCONV (LIVE) - Select Service(s) To Edit" is open, showing a table of services. A black arrow points from the "Select Service(s) To Edit" button in the main window to the table in this dialog box.

Service Date	Service Code	Program	Practitioner	Status	
<input type="checkbox"/>	02/19/2010	INDIVIDUAL THERAPY	410101 NORTH COUNTY	MURPHY, JILL	Open
<input checked="" type="checkbox"/>	02/21/2010	INDIVIDUAL THERAPY	410101 NORTH COUNTY	MURPHY, JILL	Open
<input type="checkbox"/>	02/26/2010	ADMINISTRATIVE NOTE	410101 NORTH COUNTY	MURPHY, JILL	Open

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.

Service Date	Service Code	Program	Practitioner	Status
<input checked="" type="checkbox"/> 07/19/2010	INDIVIDUAL THERAPY	410301 CENTRAL COUN	BECHER,MATT	Open
<input type="checkbox"/> 07/19/2010	GROUP THERAPY	416800 EAST BAYSHOR	SEVERSON,HOLLY	Open
<input type="checkbox"/> 07/19/2010	GROUP THERAPY	410101 NORTH COUNTY	BECHER,MATT	Open
<input type="checkbox"/> 07/19/2010	GROUP THERAPY	417003 COASTSIDE YO	FRID,DINA	Open
<input type="checkbox"/> 07/20/2010	INDIVIDUAL THERAPY	410301 CENTRAL COUN	BECHER,MATT	Open
<input type="checkbox"/> 07/20/2010	GROUP THERAPY	410103 NORTH COUNTY	BECHER,MATT	Open
<input type="checkbox"/> 07/20/2010	GROUP THERAPY	410101 NORTH COUNTY	TRAINING4,TRAIN	Open
<input type="checkbox"/> 07/20/2010	GROUP THERAPY	410303 CENTRAL/SOUT	MONTALVO,LILIAN	Open
<input type="checkbox"/> 07/27/2010	GROUP THERAPY	419000 SERRAMONTE T	BULL,INGALL	Open
<input type="checkbox"/> 07/29/2010	MEDICATION SUPPORT	410301 CENTRAL COUN	BELCASTRO,KRISTAL	Open
<input type="checkbox"/> 07/30/2010	INDIVIDUAL THERAPY	410301 CENTRAL COUN	TRAINING4,TRAIN	Open
<input type="checkbox"/> 07/30/2010	INDIVIDUAL THERAPY	410301 CENTRAL COUN	BECHER,MATT	Open
<input type="checkbox"/> 07/30/2010	INDIVIDUAL THERAPY	410301 CENTRAL COUN	BECHER,MATT	Open
<input type="checkbox"/> 07/30/2010	ASSESSMENT	410301 CENTRAL COUN	TRAINING9,TRAIN	Open
<input type="checkbox"/> 07/30/2010	GROUP THERAPY	410301 CENTRAL COUN	BECHER,MATT	Open
<input type="checkbox"/> 08/02/2010	INDIVIDUAL THERAPY	410301 CENTRAL COUN	BECHER,MATT	Open
<input type="checkbox"/> 08/04/2010	INDIVIDUAL THERAPY	410301 CENTRAL COUN	BECHER,MATT	Open

EDIT SERVICES INFORMATION TAB PAGE 2

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

The screenshot displays the 'Edit Service Information' tab in the AVPMCONV (LIVE) application. The interface includes a menu bar (File, Edit, Favorites, Avatar PM, Avatar CWS, Avatar MSO, Help) and a toolbar with navigation icons. The main content area is divided into several sections:

- Co-Practitioner:** A text input field with a 'Process Search' button, radio buttons for 'Name/ID Number' (selected) and 'Unique Practitioner ID', and a dropdown menu.
- Co-Practitioner Duration (Minutes):** A text input field.
- Second Co Staff Member:** A text input field with a 'Process Search' button, radio buttons for 'Name/ID Number' (selected) and 'Unique Practitioner ID', and a dropdown menu.
- Second Co Staff Duration (Minutes):** A text input field.
- Medical Diagnosis 1:** A text input field with a 'Process Search' button and a dropdown menu.
- Medical Diagnosis 2:** A text input field with a 'Process Search' button and a dropdown menu.
- Emergency Indicator:** Radio buttons for 'Yes' and 'No'.
- Evidence-Based Practices / Service Strategies (CSI):** A list of checkboxes:
 - Age-Specific Service Strategy
 - Assertive Community Treatment
 - Delivered in Partnership with Health Care
 - Delivered in Partnership with Law Enforcement

A red letter 'A' is located to the right of the CSI field, with a vertical line extending upwards from it.

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.

The screenshot shows the 'AVPMCONV (LIVE) - Edit Service Information' window. The 'Client ID' field contains 'OREGANO' and has a 'Process Search' button next to it. Below this are radio buttons for search criteria: Name/ID Number (selected), Social Security Number, Facility Chart Number, Alias, Unique Client ID, and Claim Number. A dropdown menu shows 'OREGANO, OLIVER (930098)'. The 'Episode Number' field shows 'Episode # 2 Admit : 07/15/2010 Discharge : None Prog...'. The 'Service Code' field contains '7' and has a 'Process Search' button. A dropdown menu shows 'REHABILITATION SERVICES (7)'. The 'Program' field shows '410301 CENTRAL COUNTY...'. The 'Location' field shows 'OFFICE'. The 'Duration (Minutes)' field contains '60'. The 'Cost Of Service' field contains '222.00'. On the right side, there are date fields for 'Service Start Date' and 'Service End Date', both set to '07/21/2010'. Below these are radio buttons for 'Service Selection Default': All (selected) and None. A 'Select Service(s) To Edit' button is highlighted with a box. Below this is a 'Practitioner' field with a 'Process Search' button and a dropdown menu showing 'MURPHY, JILL (000011)'. There are also radio buttons for search criteria: Name/ID Number (selected) and Unique Practitioner ID. A 'Modifiers' field is also present.

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

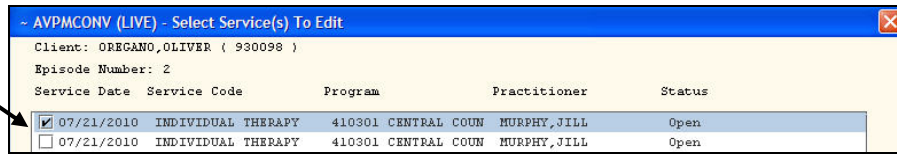
C Choose the client's episode from this dropdown list.

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.

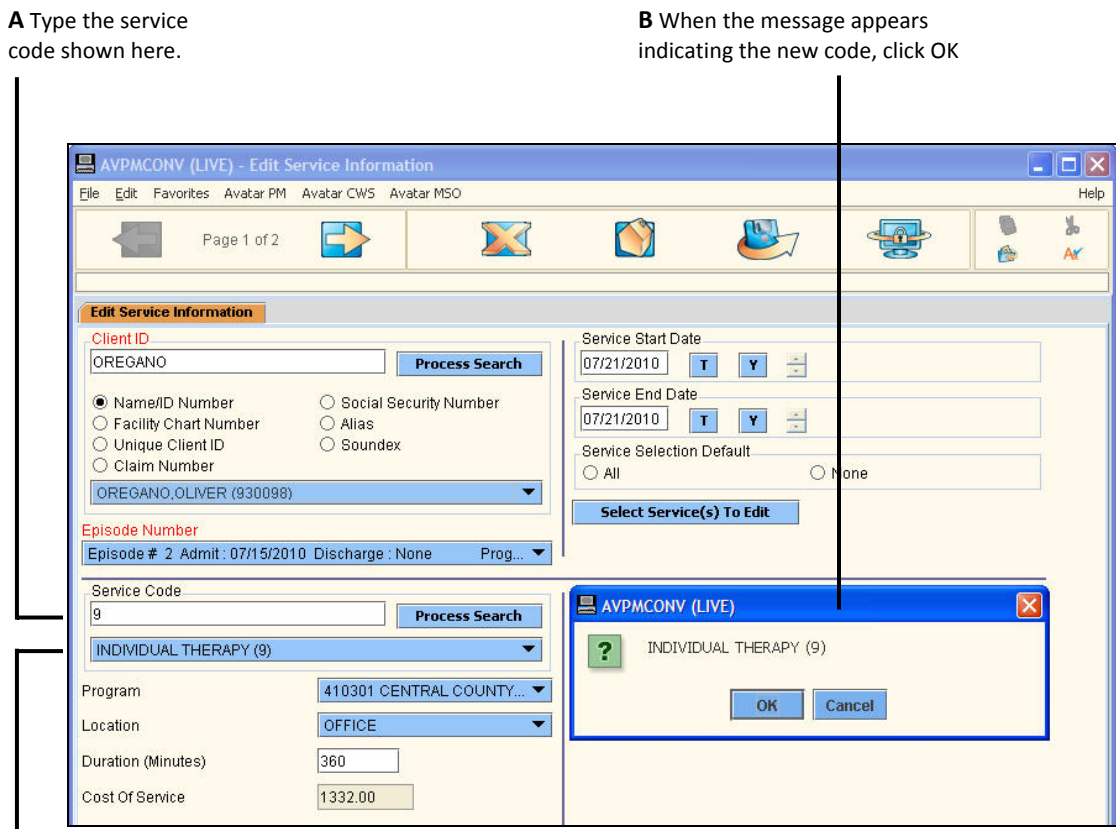
The Select Service(s) to Edit window opens.

- 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.

- Follow these steps to change the service code:
 - Type the service code shown here.
 - When the message appears indicating the new code, click OK



C The new service appears here.

- 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