



Monterey County Behavioral Health Policy and Procedure

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| Policy Number | 492 |
| Policy Title | Clinical Progress Note Co-Signatures/Group Co-Practitioner Signatures |
| References | None |
| Form | None |
| Effective | September 25, 2014 |

Policy

It is the policy of Monterey County Behavioral Health (MCBH) to ensure that all progress note co-signatures and group service co-practitioner signatures are obtained in a timely manner and are in compliance with the MCBH 72 business hour progress note completion standard.

Mental Health Aides, Behavioral Health Aides, Interns/Trainees who are still enrolled in a graduate program/pre-degree and new employees must obtain a supervisor co-signature for all clinical progress notes (unless the supervisor has specifically notified you that a co-signature is no longer required).

Supervisors can also require any employee at any time to obtain supervisor or services manager co-signatures as a supervision tool. The supervisor will also inform the employee once co-signatures are no longer required.

For group services, co-facilitator signatures should also be obtained within 72 business hours of the service. Communication and coordination between the author and the supervisor and/or co-practitioner is necessary to ensure that clinical progress notes are finalized in a timely manner.

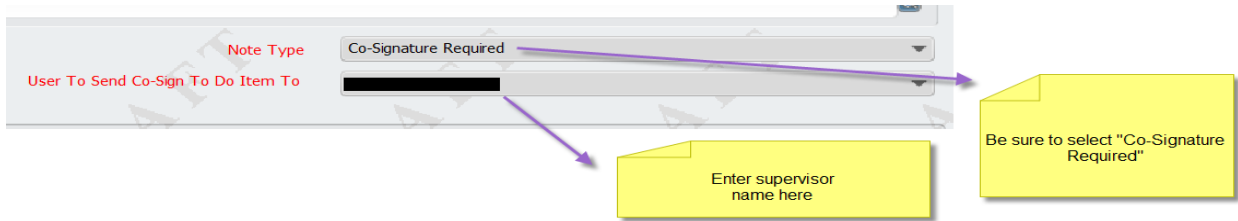
Please note: Co-signatures from supervisors as well as group co-facilitators should still be obtained within 72 business hours of the time of service.

Procedure

Notes requiring co-signatures from a supervisor

1. For practitioners who require co-signatures for progress notes, the author will complete the progress note, select "Co-Signature Required" and then save the progress note in "draft" status. This will create an automatic "To Do" item in Avatar for the supervisor/co-signer. See below:

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The author must also email or call the supervisor to inform them that a “To Do” item is awaiting their review.

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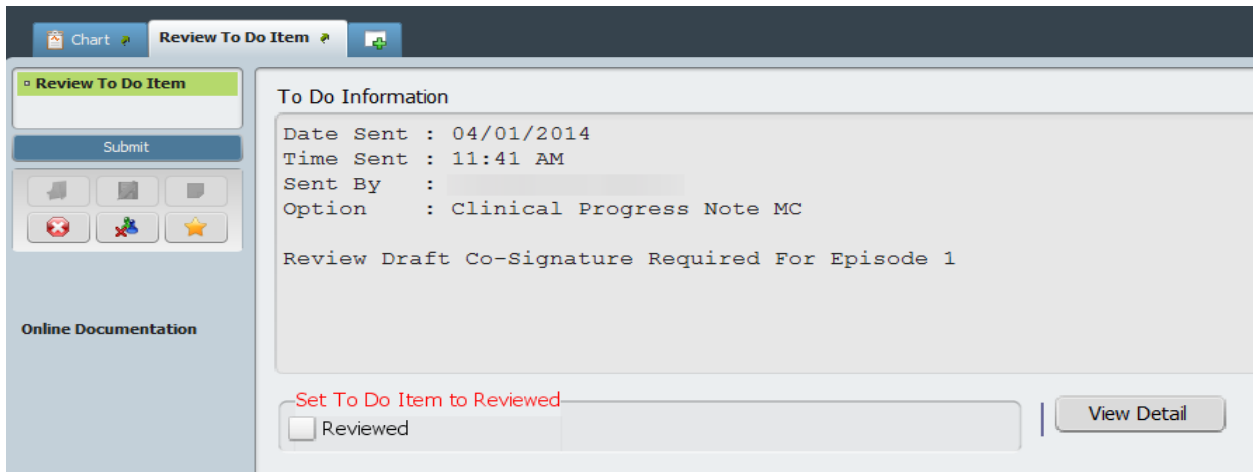
- The supervisor will review the progress note (see below) and will contact the author via email or telephone to clarify that the progress note is ready to be finalized or will provide feedback/corrections to be made before the note is finalized by the author.

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The author will then make any applicable changes and will finalize the progress note (making sure that “Co-Signature Required” is still selected so that the supervisor can complete a final review of the note).

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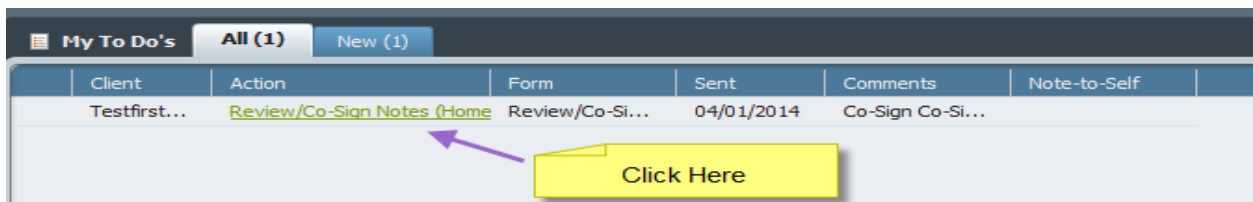
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- The supervisor will then receive another automatic “To Do” item in Avatar. The supervisor will click “Review/Co-Sign Notes”. See below:

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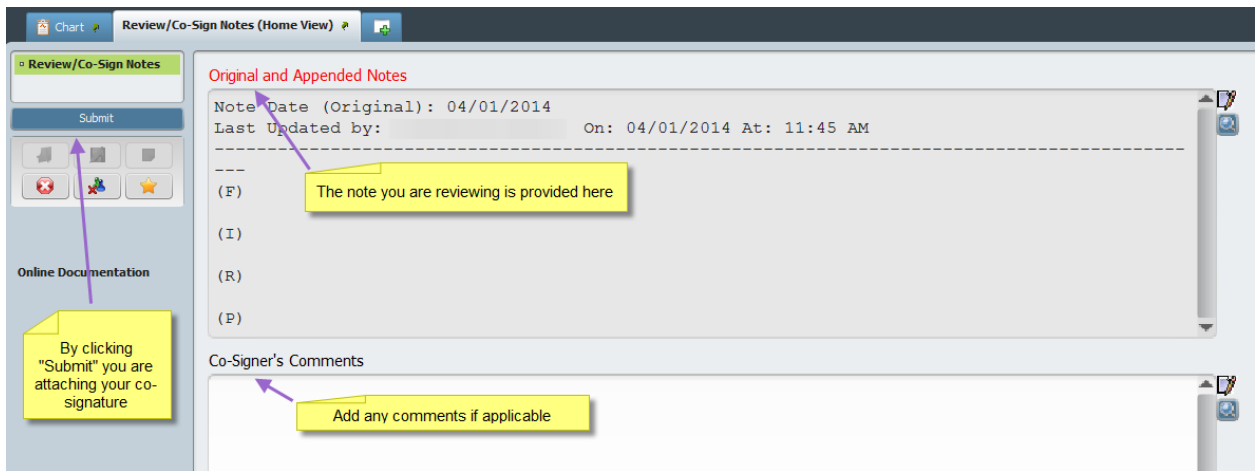


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- After clicking “Review/Co-Sign Notes” the following box will open and the supervisor can review the actual note, add comments if necessary and then will click “Submit” to provide their co-signature. See below:



Group co-practitioners

- The facilitator will complete the group services note in Avatar (making sure to select that a co-signature is required) and will finalize the note. See below:



- The co-facilitator will receive a “to do” in Avatar and will review the note to ensure that the information is accurate, add any additional information/clarification if necessary, and then will select “submit” to provide their co-signature.

PLEASE NOTE: County providers cannot bill for services under a contract provider’s episode. Conversely, contract providers cannot bill under county provider episodes.

88 **Additional information about progress notes**

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90 If a progress note has been finalized and additional information needs to be
91 added the author should select the form "Append Progress Notes" in Avatar
92 which will allow the author to provide additional details to be added to the original
93 note. The appended section of the progress note is not visible when viewing
94 progress notes through the chart overview widget. You must use a crystal report,
95 such as report 311, to view the progress notes with the appended section. **All**
96 **notes (not just group notes or co-signature required notes) can have**
97 **information added if necessary.**