# Steps to write client progress notes and session bills

# in My Clients Plus for TCM

# General things to know:

Progress notes are separate from Client sessions (bills for claims)

The provider can create a progress note without creating a bill and can create a bill without creating a progress note.

TCM providers create a bill one time a month to cover the month’s services.

Client enrollment packet and assessments will be scanned by office staff and uploaded in the Client Set Up. This is also where all client demographics and insurance information is kept. This information is entered into the system by intake and office staff.

If you want to view all the documents in a client’s record go to the menu and click on Progress and Session Notes. Locate the client in the drop down box. Click on choose session date. This will show all documents in the client’s electronic record.

You may view the entire chart of notes at any time by opening up a note and clicking on print. Select your date range and the notes will be available in a scroll down fashion.

MCP will only attach the first note created on a day to the billing session. You can go to the client’s document library (as described above) to see the other notes.

All billable services must be documented within 48 hours of the service and signed and locked.

We recommend you plan to write you note within 24 hours of the session and save the second day for difficulties such as a disruption in access to internet service or when the My Client’s Plus website is down and unavailable.

Mc+ uses Pacific Time (and Military time) so keep this in mind when you see the time stamp. Click here for a [time conversion chart.](https://www.transformationsllc.net/library/electronic-medical-records-system/military-time-and-time-zones/)

# How to create a TCM note:

1. Click on “**Progress and Session Notes**”.
2. Select the name of the client from the drop down box.
3. In the far right drop down box select “**Create a New Note**” or you may copy a previous note. Every note previously entered is listed in this drop down box. You may create a copy from a previous note; the system will warn you to modify the information to accurately reflect the new information.
4. Select the note type such as the TCM Monitoring report or the TCM Contact note
5. Chose the session date by clicking on the date on the calendar. You will need to open the calendar and click on the date again to verify and open up a note.
6. Complete the note, **preview, save**, **sign and lock**
7. Click **Exit** and return to the menu.

# Review your work. Do this to verify accuracy and check to correct errors. To view all notes do the following:

1. Open up any note.
2. Click on the red “Print” button.
3. Enter the date range into the calendar and click on “**Print**” on the pop up calendar screen.
4. Scroll through the client’s chart to read the progress notes. You must have pop-ups enabled on your browser to use this feature. Instructions on how to enable pop-ups is provided in the Transformations website library.

# How to correct errors on a note:

1. Open up the note.
2. Click on “Add Note Addendum” found on the bottom left hand corner of the note.
3. Select Note Addendum to add any information missing from the note.
4. Select Note Correction to correct or change the information. You can use this to change minutes or any incorrect information on the form. If you discover you wrote the note in the wrong client chart or wrote the note twice you can indicate this here.
5. Click on **save** and type in your name to electronically add your signature.

# Steps to create a session bill:

1. Go to the menu and click on Client Sessions
2. See the calendar and click on the date you saw the client.
3. Click on “Add New Session”
4. Verify session date and select the client from the drop down box
5. Select the following to add (or verify if already populated): billing code, diagnosis, location, modifier, units and authorization number.
6. If this is your first time adding a billing session to this client file, you will need to click on the “Long Form” icon in the bottom left corner. This is where you add your modifier, units and authorization number.
7. Click the red “Save” button at the bottom of the form.

# Check the session bill for accuracy

You should see the calendar again with the date of the session marked. Under the magenta bar is the session and note you just entered.

1. If you click on the manila folder icon you will see the client session bill. Edit it if needed.
2. If you click on the red x you will delete the client session bill.
3. On the right you will see one of three different icons: a lock and pencil, a brown clipboard with a note on it, or a brown clipboard without a note on it. Any is fine for TCM services.
4. If you have a lock and pencil icon, click on it and you may view a note you wrote the same day as this session bill. You will need to click “print” to view all of the notes for this billable session.
5. If you don’t see the lock but instead see a brown clipboard icon with a white paper note on it, this means you attached a note but did not sign and lock it. Click on the clipboard icon, review the note and click on “sign and lock”. And again to view all the notes associated with this session bill, click on “print” and scroll through your notes.
6. If you see a brown clipboard icon with no note on it, this means you did not write a note on the same day you created the bill. This is not a problem. Click on the brown clipboard icon; Click “print” to review your notes or you may select the top right drop down box that says “create new note”. This drop down box lists all of the notes entered for this client.

# How to submit your Client Session (bills) and Progress Notes

1. Click on the yellow “To Do List” in the menu at the bottom of the page in MC+
2. Click on the red + Add Task
3. in “Task Description” write : **Client name- the date of service- and your name**
4. in “Due Date” use today’s date
5. in “Notes “write your note requesting the review or whatever you want to say.
6. on the right side bar use the drop down box to “Assign Task To”: Assign it to your direct supervisor. This will send the task to the correct person. (Notice, during the training process you may be asked to send your notices to someone else.)
7. Next select the drop down box “Associated with Client” and use the drop down box to find your client’s name.
8. Then click on “Create This Task”. This will send your message.
9. Your notes and client session bill will be reviewed. If there is a problem the supervisor will send you a task assignment on your To Do List requesting a correction.
10. Remember that the client’s CAFAS assessment and treatment plan must be up to date to process billing.