# Steps to write client progress notes and session bills

# in My Clients Plus

# 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.

A bill without a progress note is likely a problem.

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.

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/)

# Steps to create a session bill and progress note.

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. If you are using add-on codes click on “Add Add-On Code” at the bottom of the form. Repeat the previous steps. Add-On codes are used for the second and third hour of therapy (99354 and 99355) and for the Interactive Complexity code (90785). Please remember that 99355 is a 15 to 30 minute code and will require the editing of the time, charges and units if you use 2 units of the code.

# Once you are finished entering the Client Session (bills) you will do the following to create a note:

1. Click on “Add Progress Note”. (Do not click save at this time. If you click on “Save” you will not be taken directly to a progress note. You will have to go back into Client Session to write the note. It just creates more steps for you. For instructions pick up below on # 8.
2. Verify the name of the client
3. Next you will select “Create a New Note” or copy a previous note
4. Select the note type such as a BHP 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
8. 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.

* If you click on the manila folder icon you will see the client session bill. Edit it if needed.
* If you click on the red x you will delete the client session bill.
* If you see a lock and pencil icon click on it and you will see the note you wrote and attached to this client session bill.
* If you don’t see the lock but instead see a 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 icon, review the note and click on “sign and lock”.
* If you see a brown clipboard icon with no note on it, this means you did not write and attach a note to this client session bill. Click on the brown clipboard icon; write a note, preview, save, sign and lock. Go back to # 2 for more instructions.

# Steps to enter a non-billable note

1. On the main menu click on “progress and session notes”
2. Choose your client name
3. Select Create a New Note or copy a note
4. If you create a copy from a previous note, the system will warn you to modify the information to accurately reflect the new information.
5. Click on session date. You must select the date on the calendar to open up a note.
6. Complete the note, preview, save, sign and lock.
7. Warning. This method does not create a Client session bill. Use this method for documenting unbillable services.

# Review your work. Do this to verify accuracy and check to correct errors. To view all notes (with and without Client Session bills) 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.

# How to correct errors

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.

# 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 immediate supervisor. This will send the task to the correct person. If you are a licensed BHP provider, send the task to Sameera Jackson. (Notice, during the training process send the notice to Teresa Lloyd. She will tell you when to start sending your notices to your supervisor or Sameera Jackson).
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 note 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 your CAFAS assessment and treatment plan must be up to date to process billing.