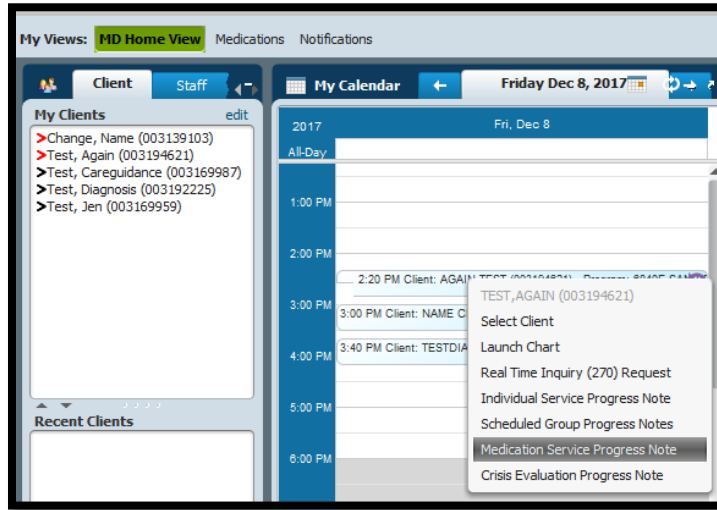


## Instructions for Medication Service Progress Note

1. Open the [**Medication Service Progress Note**] form by right clicking on the appointment in the My Calendar widget on the MD Home View.



2. The **Client, Episode, and Appointment** will auto-populate with information from the selected appointment.

The screenshot shows the 'Medication Service Progress Note' form. The 'CLIENT' section is populated with 'CODES,PROCEDURE (3001686)'. The 'PROGRESS NOTE BASIS' section has a dropdown menu set to 'Existing Appointment'. The 'APPOINTMENT' section is populated with '06/02/2015 (09:50 AM-09:55 AM)', 'Status: Unscheduled', 'Service: ASSESSMENT-PSYCH DIAG INT', and '6840F SAN FERNANDO I...'. A 'Submit' button is visible at the bottom left.

3. Enter the **Face-to-Face** and **Other Time** for the session with the client. Be sure to tab out of the field for the Total Duration to auto-calculate correctly.

The screenshot shows the 'PRACTITIONER(S) / TIME' section of the form. The 'Practitioner' dropdown is set to 'HALLMAN, JENNIFER (047990)'. The 'Face-To-Face' field is set to 25, the 'Other Time' field is set to 10, and the 'Total Duration (minutes)' field is set to 35.

## Instructions for Medication Service Progress Note

4. Enter the “Service Information”. The **Date of Service, Location of Service, Program of Service and Service Code** will automatically populate. Verify that the Service Code is correct. If the Location of Service is other than “Office” or “Home,” enter the service address.
  - a. Hint: In the Service Code field, type in “E+M” to pull up all the medication support evaluation and management codes if you do not know the exact service code.
  - b. Remember: If the client did not show and the note is simply to document that the client did not show, use the “00000” service code.

The screenshot shows a form titled "SERVICE INFORMATION" with the following fields and values:

- Date Of Service:** 06/02/2015
- Program of Service:** 6840F SAN FERNANDO MH
- Location of Service:** Office
- Service Code:** E+M ESTABLCLT LOW/MOD (99212)

Below the "SERVICE INFORMATION" section is the "SERVICE ADDRESS" section with the following fields:

- Facility Name:** (empty)
- Street:** (empty)
- City:** (empty)
- State:** CA
- 9-digit zip code REQUIRED:** (empty)
- Enter -9998 if ZIP+4 is unknown:** (empty)

5. Select whether or not the **Columbia Suicide Screening Questions** were asked during the session. If the screening was completed, select the responses to the screening questions.

The screenshot shows a form titled "COLUMBIA SUICIDE SCREENER" with the following sections and questions:

- Suicide Screening Questions:** Screening Completed (selected), Screening Not Completed
- Since last visit (or past 30 days if never previously asked):**
  - Have you wished you were dead or wished you could go to sleep and not wake up? (Yes selected)
  - Have you actually had any thoughts of killing yourself? (No selected)
  - Have you been thinking about how you might kill yourself? (No selected)
  - Have you had these thoughts and had some intention of acting on them? (No selected)
  - Have you started to work out or worked out the details of how to kill yourself and do you intend to carry out this plan? (No selected)
- Since last visit (or lifetime if never previously asked):**
  - Have you done anything, started to do anything, or prepared to do anything to end your life? (No selected)

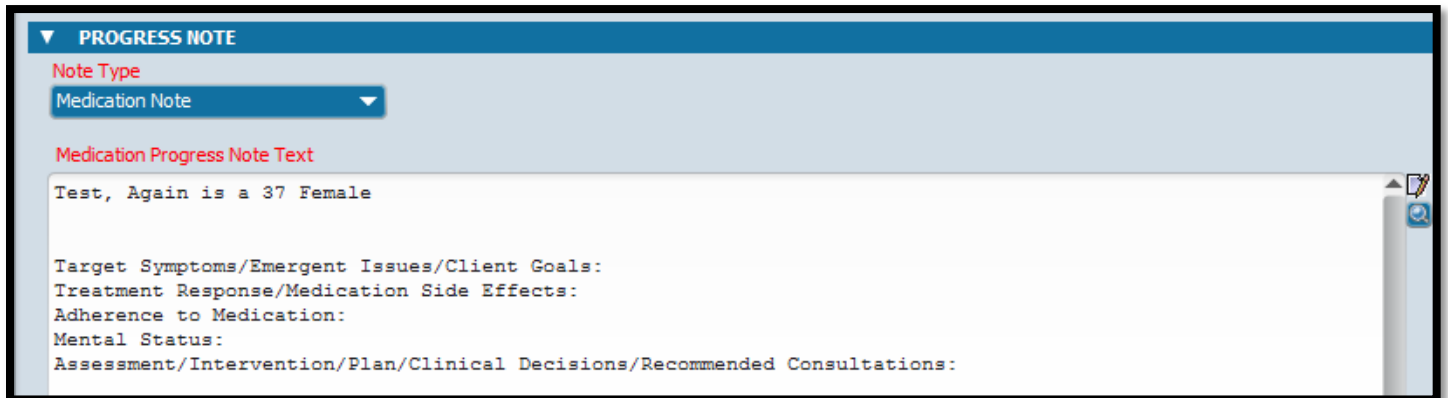
## Instructions for Medication Service Progress Note

6. Enter if there were any **Special Circumstances** and the **Language** the service was provided in.
  - a. Hint: In the Language field, type in the first letter of the language to quickly go to that language instead of having to scroll through all the languages.

7. Identify if **All known current medications were documented in OrderConnect** and whether **Medications were Prescribed**. If medications were prescribed, enter the "Medications Prescribed"
  - a. Hint: Right Click in the field to pull in medications entered into OrderConnect: **Widget Templates-CWS**, Template on Demand, Complete List of Current Medications
  - b. Note: You may edit this once you pull them in (e.g. add a medication that has not yet been entered into OrderConnect).

## Instructions for Medication Service Progress Note

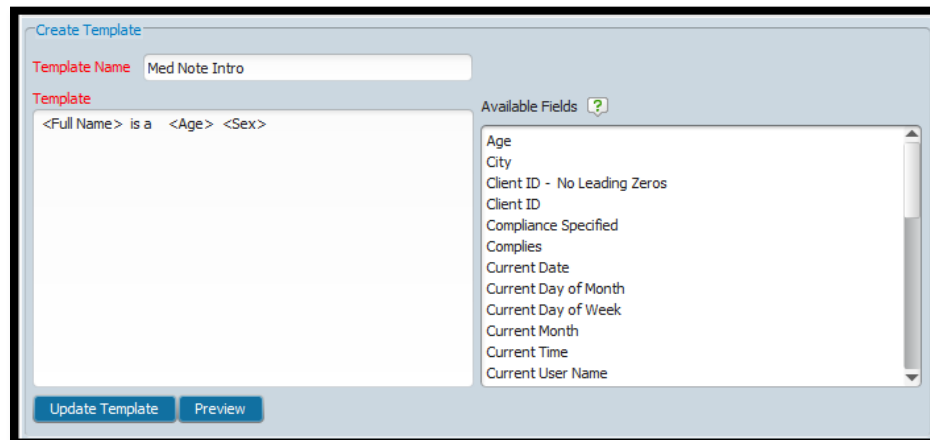
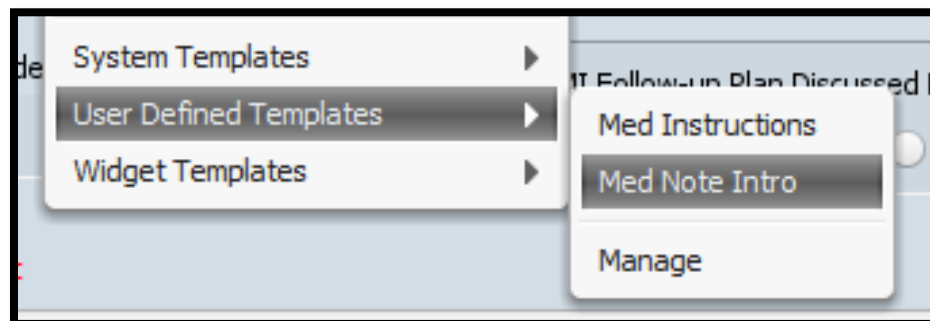
8. Select the **Note Type** (Medication Note) and enter the text of the note.



The screenshot shows a software interface for creating a 'PROGRESS NOTE'. At the top, there is a blue header with a dropdown menu for 'Note Type' set to 'Medication Note'. Below this is a text area titled 'Medication Progress Note Text' containing the text: 'Test, Again is a 37 Female'. Underneath the text area are several labels for structured data entry: 'Target Symptoms/Emergent Issues/Client Goals:', 'Treatment Response/Medication Side Effects:', 'Adherence to Medication:', 'Mental Status:', and 'Assessment/Intervention/Plan/Clinical Decisions/Recommended Consultations:'.

Hint: Right click in the field to bring in---

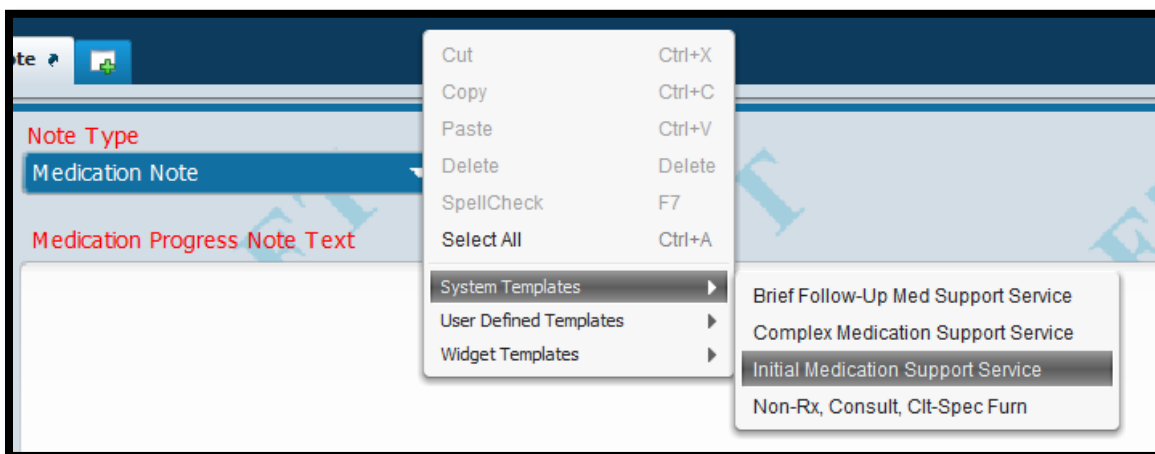
- i. **User Defined Templates:** your own templates of text to pull into the note



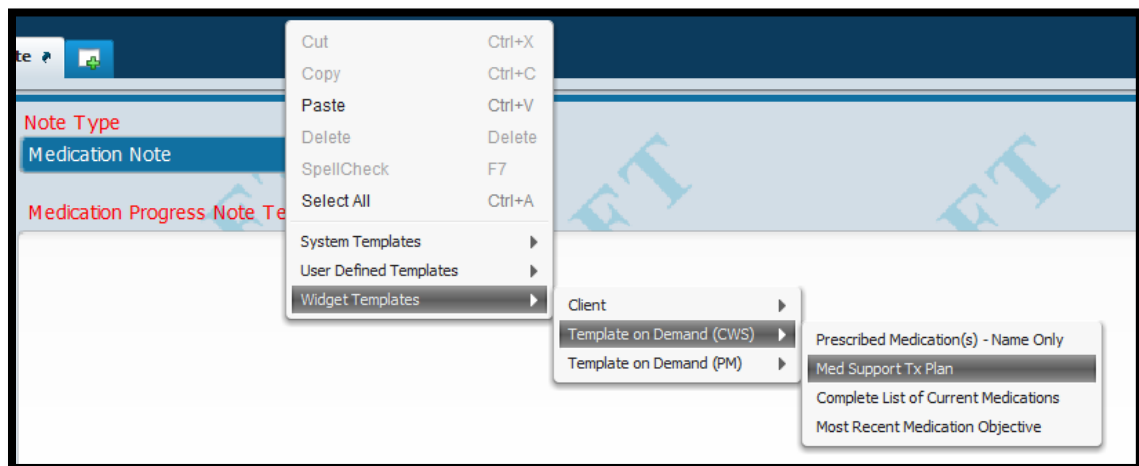
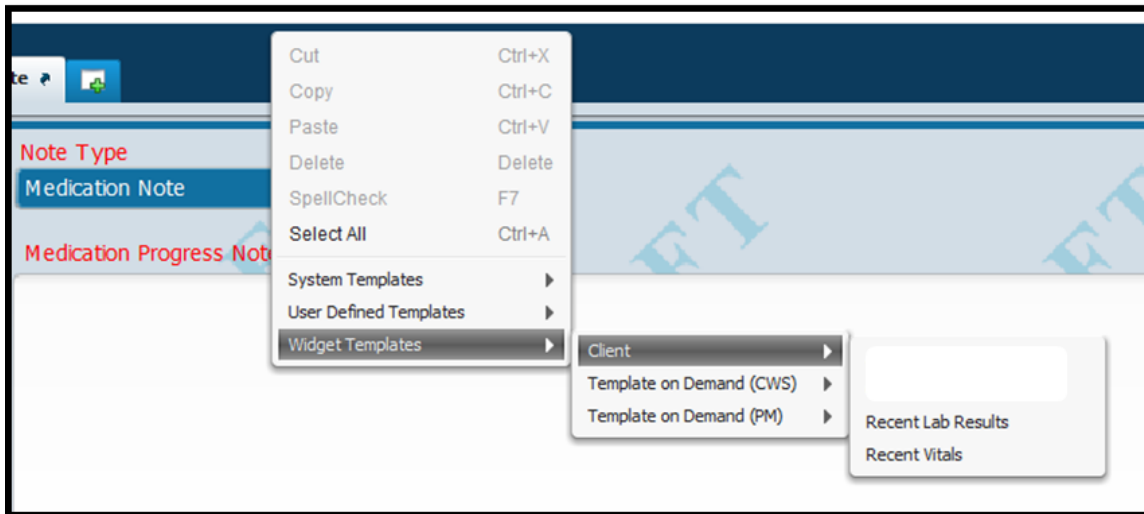
The screenshot shows a 'Create Template' dialog box. It has a 'Template Name' field containing 'Med Note Intro'. Below this is a 'Template' text area with the content: '<Full Name> is a <Age> <Sex>'. To the right of the text area is a list of 'Available Fields' including: Age, City, Client ID - No Leading Zeros, Client ID, Compliance Specified, Complies, Current Date, Current Day of Month, Current Day of Week, Current Month, Current Time, and Current User Name. At the bottom of the dialog are two buttons: 'Update Template' and 'Preview'.

## Instructions for Medication Service Progress Note

- ii. **System Templates** include headings for an initial medication support and brief follow-up services



- iii. **Widget Templates** include Recent Vitals, Recent Lab Results, Active Diagnosis, and most recent Med Support Tx Plan



## Instructions for Medication Service Progress Note

### 9. Enter any **Clinical Instructions Given to the Client**

- a. **Reminder:** The instructions written here will show in myHealthPointe. The client may access myHealthPointe and view lab results, medications, upcoming appointments and a summary of your session. The instructions written in this field will populate on the summary of the session
- b. **Hint:** Create a **User Defined Template** for instructions that are typically given to the client

