

PIMSY

Cheat Sheets

Progress Notes (Therapy)

- Go to your SAL Calendar.
- Double click on the appointment. This will bring up the "Edit SAL" dialogue box.
- On the left side, about a 2/3 thirds down you will see a button that says NOTE, single click on it. A dialogue box will open to ask "What type of note?" Select NEW THERAPY/PROGRESS NOTE. Then select OK.
- A much larger window will open title NOTE. Update the top section of the note.
 - Check to make sure that the date and time are correct - fix if needed.
 - Select LOCATION of service (e.g. 11- office) - Click the arrow on the right side of the box to see your options.
 - Select appropriate BILLING CODE. There are several options here that are based upon your client's insurance. There will be certain codes for IAs, crisis, and regular treatment. You should only see the ones that would be relevant to your client. If you're not sure what's appropriate or what you need isn't listed, ask your supervisor or the billing department.
 - Select the NOTE TYPE. Again, click on the arrow on the right to expose your options. Choose "Progress Note - Narrative"
 - Enter DIVISION. COP - Child Outpatient, AOP - Adult Outpatient.
 - Double check that this information on the top is correct.
 - **Click SAVE. This allows auto-save to start, allows you to auto-populate your goals, etc.**
 - In the narrative box you will see the following: Participants, Focus of Treatment, Provider's Narrative and Planning and Recommendations.
 - Focus of Treatment: This will be the focus of your session, when you have your ITP in PIMSY, you can double click on the goals to bring them up into the note - place your cursor where you want the text to populate, then click to the far left of the goal to bring the entire goal into this section. I find it helpful to do this section first to ensure it populates in the correct location.
 - Participants: who was there
 - Narrative—self-explanatory (what happened)



- Planning/Recommendations—self-explanatory (homework, next session)
- After completing this section move to the tab below titled, ADD ITEM/BRIEF MENTAL STATUS EXAM, click to open that tab. (Note: Once this tab is open, some people like to click the box on the far right with arrows pointing in diagonal directions to expand this tab to full screen.) In this tab you will find several questions that will need to be answered for each note; progress, risk assessment, stages of change, and treatment modality. You can highlight your choices there. They will then populate on the right side when you save the note. Risk assessment requires a numerical value. If you give a rating over 1, please give a written explanation.
- IF THERE IS ACTIVE SI/HI FOR THIS CLIENT TODAY - you MUST complete the questions about SI/HI (next questions on this list/tab)
- MSE—is found below this and will only need to be completed if you feel it is warranted. You may want to fill this out if there is a substantial change in your client. Again, this will populate on the right side when you save. This rest of this section is not required. (Note: If you expanded the tab to full screen, click SAVE and EXIT when complete.)
- We've completed the note—now what do we do. We want to release the note. You can first Right click in any text box and then select "Spell Check" to spellcheck the note/text box (though there is also an automatic spellcheck at release.)
- At the top of the note you will see several boxes: Released for review, reviewed, released. It is here where the note will be released either to billing or to a supervisor to be reviewed. Once you release the note you will no longer be able to edit the note and any additional information will need to be added through an addendum.
- You've clicked the release button, now go to the upper left corner and click save to release the note. You will then see a dialogue box asking you, "Are you sure you want to do this?" If you click yes—it's off to billing.
- After saving the note just move over to the right and click the button that says exit you will be returned to EDIT SAL, click close and then you are on your calendar again. HOORAY!

- **NOTE:** If something is not filled out like location or a billing code it won't let you release the note and you will see a dialogue box identifying the problem. Go back make the necessary corrections and release the note.

- **Note:** Right to the left is a font size button, you can increase the size of your font



How do I write a note for a no show or a cancelation? You will follow the same procedures but . . .

- If your client did not show up and you are going to write a note for the client you will want to choose "Client No Show" as the billing code. Uncheck the check box labeled "Face to Face" and check the check box labeled "Collateral Note"
- Choose the "Cancellation Note" under note type and complete the note.
- It is not necessary to complete the "ADD ITEMS" section for a cancellation note.
- The release process is still the same.
- Note: If you need to do a No Show/Cancellation Note for an Intake, you will need a Diagnosis Code in order to release the note. Please use: Z02.9 Encounters for Administrative Examinations, Unspecified.

How do I write a collateral note?

- From your calendar, click "New Note." (Upper left)
- Choose "Progress Note" for Note type and click okay.
- Fill in the top section of the note with client name, date, time, division, location. Billing code will be "Nonbillable Case Management." Uncheck "Face to Face" and check "Collateral." Note type will be "Collateral Note."
- Complete note.
- It is not necessary to complete the "ADD ITEMS" section for a collateral note.
- The release process is the same.

Last Updated 1/22/19, seb