

Create an Individual Progress Note

To create a progress note for a client you must first perform a client search (if the client is not already displayed).

Enter the client's last name and click Search or click Display All to find a client.

The screenshot shows the 'File > Progress Notes' window. The 'Select by:' section has 'Client' selected. The 'Search by:' dropdown is set to 'Last Name'. The 'Begins with or matches:' field contains 'Doe'. A red circle with the number '1' points to the 'Search' button. A red circle with the number '2' points to the search results table. A red circle with the number '3' points to the 'Session Date' column in the main table below.

Name	SSN	Client Reference #
Doe, Jane	123456789	

Note Selection	Session Date	Code	Description	File/Sign Status	Print/File Selection
<input checked="" type="checkbox"/>	06/01/2018	1072	Gambling Outpatient Group	--	<input type="checkbox"/>
<input type="checkbox"/>	05/14/2018	1752	Mental Health Individual Counseling/Therapy	--	<input type="checkbox"/>
<input type="checkbox"/>	02/20/2018	1425	Group -IOP	Filed	<input type="checkbox"/>
<input type="checkbox"/>	02/13/2018	205	Narrative/Non-DUI Evaluation	--	<input type="checkbox"/>

The screenshot shows the 'File > Progress Notes' window. The 'Select by:' section has 'Client' selected. The 'Search by:' dropdown is set to 'Last Name'. The 'Begins with or matches:' field is empty. A red circle with the number '1' points to the 'Display All' button. A red circle with the number '2' points to the search results table. A red circle with the number '3' points to the 'Session Date' column in the main table below.

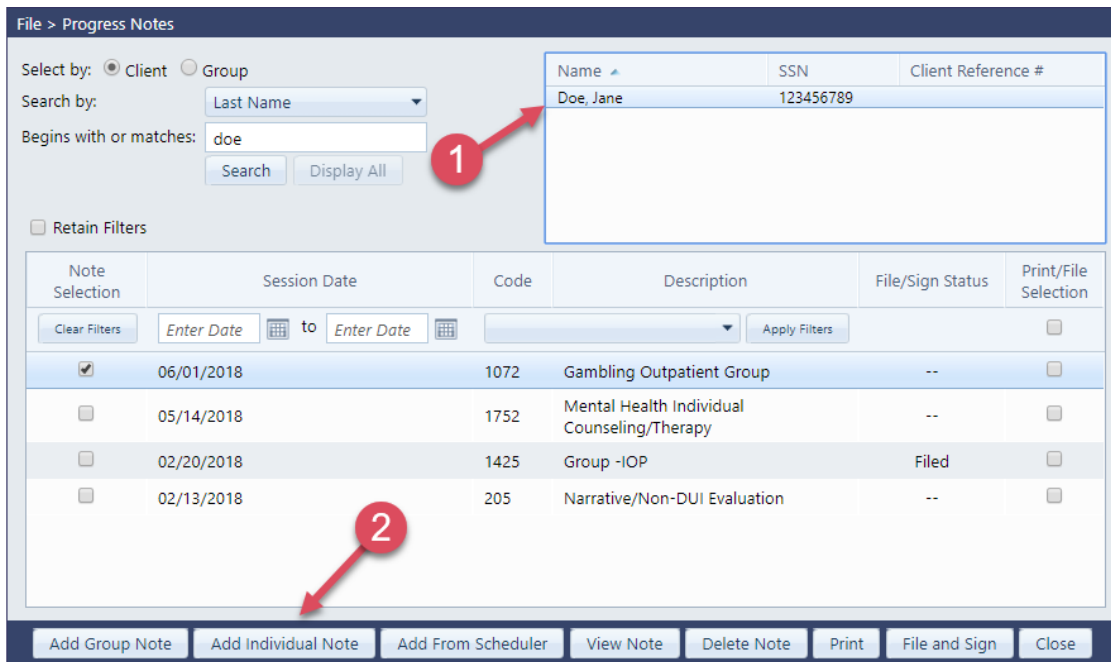
Name	SSN	Client Reference #
Appleseed, Johnny	849445464	2342343223
Doe, Jane	123456789	
Green, Sarah	898786525	
Griffith, Laurie	080219870	
Hale, Tammy	221231966	
Haley, Kendall	347929430	
Hatter, Charles	060419520	

Note Selection	Session Date	Code	Description	File/Sign Status	Print/File Selection
<input checked="" type="checkbox"/>	06/01/2018	1072	Gambling Outpatient Group	--	<input type="checkbox"/>
<input type="checkbox"/>	05/14/2018	1752	Mental Health Individual Counseling/Therapy	--	<input type="checkbox"/>
<input type="checkbox"/>	02/20/2018	1425	Group -IOP	Filed	<input type="checkbox"/>
<input type="checkbox"/>	02/13/2018	205	Narrative/Non-DUI Evaluation	--	<input type="checkbox"/>

You may also search by SSN or Client Reference Number (Client Ref. #) by clicking on the dropdown arrow to select SSN or Client Reference #.



Select the client for whom you wish to add a progress note and click “Add Individual Note”. A new screen will appear.



1. Select the Co-Facilitator (optional),
2. Type of Session, Date, Time of Session
3. Select the Diagnosis Icon to copy the client's diagnosis to the note and View Tx Plans paste treatment plan to your note
4. Enter your note in provided dialog box
5. Use the [Statement] button to add or create reusable statements
6. When done click the [Save] button

File > Progress Notes > Add Note



Note Info

Client: Doe, Jane **2** Level of Care: - Level I - Outpatient treatment: (RL - SA) Nic **1**

Clinician: Ron Alai Co-Facilitator:

Session Type: 105 - DUI Evaluation Sort by Description

Session Date: 06/11/2018 Time: Start: 9:00 AM to End: 10:00 AM Duration: 1:00

Diagnosis: F14.20 Cocaine use disorder, Severe **3**  

Note:

individual note goes here. **4**

5 **6**

Statements Save Cancel