The Progress Notes Audit functionality has been enhanced to include options to capture notes that do not meet a given character or time criteria. This can be set up on a group level and the following screenshots demonstrate this setup.

![Staff Master](image1.png)

This staff belongs to the group “Review 1”

![Group Window](image2.png)

Add the RBHA, Program, Facility, or Service Type criteria to the group. The applicable service type must be chosen both in the group setup as well as the matrix (following window). Then on the Note Audits tab, click Add Matrix.
To capture the information on the Additional tab across the entire agency, enter Yes in the drop down for RBHA, Program, Facility, and Service Type. Then on the Additional tab, enter the minimum session length in minutes as well as the minimum characters. When these criteria are not met for the service type previously chosen, the progress note will become part of the review process.

If the Progress Note does not meet the minimum requirements, the assigned Progress Note Reviewer receives “Notes under review” on their Staff Home. This review process is compatible only on the Core Progress Notes.
On the “Exclude Clients From Lookup” window the text on the left side was incorrect. The path for the Staff Master (circled in red below) was updated.
A flag was created to filter the available Service Types on the Progress Note to match those on the Treatment Plan. The flag name is “ProgNoteSvcTypeFiltering” and there are three options:

- 0 = off, or no filtering.
- 1 = filter the service type list on the Progress Note based on the service types in the Treatment Plan plus the exempt service types from the maintenance window.
- 2 = Check the Service Type when signing the note and if not present on the Treatment Plan, prevent the note from being signed.

The Core Progress Note was updated to require the services to match the Treatment Plan. Based on the flag setting, staff is able to save the note, but not sign it if the service for which the note is being written is not on the Treatment Plan. This enhancement is primarily for situations where a mandate exists to only bill for services that appear on the Treatment Plan and documented via the Progress Note.

![Flag Maintenance Window displaying the flag “ProgNoteSvcTypeFiltering”](image)
An update was made to the “ProgNoteShowAuthTab” flag to control the user’s ability to edit the Authorization tab on the Progress Note. This flag controls the display of the Authorization button and tab on the Progress Note and works in conjunction with the staff based “ClientMasterPreventEdit” flag. The numbers on the flag control the following:

1 = Edit Master
2 = Add Client Guarantor
3 = Add Client Billing Status
4 = Edit Client Billing Status
5 = Edit Claims
6 = Add Authorization
7 = Edit Authorization
8 = Add Disclosure
9 = Edit Disclosure

Flag Maintenance Window displaying the flag “ClientMasterPreventEdit”
An update was made to the NARBHA Assessment to include closure and non-closure options in the EOC Status dropdown. This will affect NARBHA agencies only.

Also on the NARBHA Assessment; for clients under the age of 18, a default value will be set in the “Gender Identity” and “Sexual Orientation” drop downs. The default value will be 98- Not applicable due to age. This is based on two flags: “PopChildGenderOnStatDemog” and “PopChildSexOrientationOnStatDemog”.
An update was made to the “Copy Last” process on the Progress Note. Previously when the note was setup with a super bill, this did not function properly. With this update, the Copy Last functions properly on super bill notes.

An update was made to the Staff Dictionary so that words can be added and saved correctly. Previously an error periodically appeared. The Staff Dictionary is accessed by clicking on Spell > Dictionaries.

Double click to open Dictionary maintenance.
Med Note changes:

The following Med Note information is currently only available for Beta testing and will not be installed on your agency unless you are a testing participant. This patch will be available to all agencies when testing has been finalized.

A change was made to the Med Note Template Maintenance so that when a change is made, the med Note template, the changes can now be tested by scheduling a new patient and opening a new med note. Previously this was not possible.

An update was made to the Med Note adding a Signature Button on the Button Bar at the bottom so the Dr can sign the note after saving. This is the preferred method of signing the Med Note. Previously the only signature method was via the staff home unsigned tab.

*** Please note that not all Patch updates/additions will apply to all agencies ***