

Forms & Notes FAQs

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I can no longer see my notes; they were there last week but not this week?

Check the date range filter that includes the date of services of the notes (there is a default range).

If there's nothing in the Diagnosis box at the bottom of a form, but I've filled out the Billing box, what should I do?

Follow the steps below:

1. Click Save.
2. Open Main Menu.
3. Click on DSM-V
4. Add a diagnosis.

Started Forms and Draft Notes in my Reminders List keep getting longer, and many of them aren't needed. What should I do?

Click the client's name to open the form/note, then click **Remove Form**.

I filled out a Form/Note on the wrong client. How can I fix this?

Ask your supervisor to transfer the form or note from the wrong client to the correct one.

A client is no longer in our care - How do I discharge them?

Click on Transfer Forms-Discharge Forms, and fill out the discharge form.

Why is nothing showing up for Chart/Progress Notes, but my client has an active Treatment Plan?

The client is in the wrong program.

My Chart/Progress Notes are too long, and I don't chart on half the items. What should I do?

Use the program and intervention dropdowns to narrow down what appears.

What are Care Logs and how do they differ from Checklists?

Care Logs are often referred to as activities of daily living or daily living activities (DLA). This is how Residential Agencies track certain behaviors of their clients. Agencies may refer to their Care Log as a Point Sheet. Ultimately, the goal is to record expected behaviors and data without writing notes. The Agency builds the criteria scoring or logging of this data.

Care Logs and Checklists are closely related, however, each is used for capturing different types of data. Care Logs are used for instances to record expected behaviors or daily activities for a single client. Care Logs have more reporting and statistics than Checklists (e.g. how many prompts did the client need to wake up?). Checklists are used for quickly recording information about multiple clients at once, and replaces paper hourly rounds and bed checks.
