

Quick Reference: Scheduled Appointments & Progress Notes

Three ways to add client interaction session information to TREAT:

- There are several ways of adding client interaction sessions to TREAT, this document shows the various options. Continue to use the methods that you prefer at your agency.
 1. Scheduled Appointment - single
 2. Progress Note - single
 3. Start with Scheduled Appointment & link a Progress Note – both together

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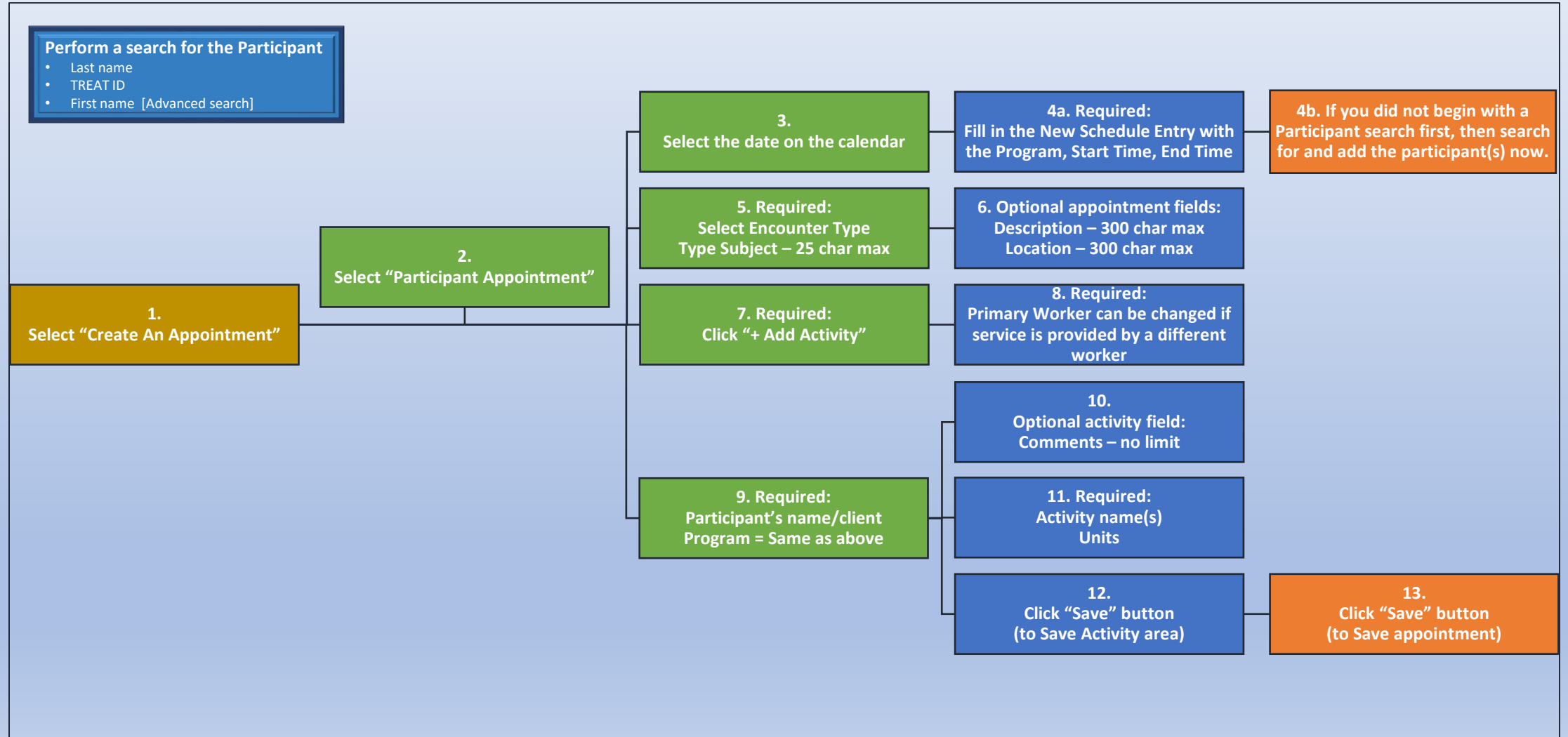
Agency Support & Partnership

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Create A Scheduled Appointment



FAQ

Scheduled Appointments

- Every support interaction/session with a participant, client, community member needs to be entered into TREAT.
 - **At least one Service Activity Item must be added**
- A Scheduled Appointment can be edited and does not get locked
- A Scheduled Appointment can have any date, including future dates
- Scheduled Appointments are visible from the 'Participant Schedule' and from the Primary Worker's Schedule
- Encounters menu displays a simple log or summary of Appointments regardless of status, Enrollments & Discharges; there are only three reasons to go to Encounters
 - i) to view all summary items, i.e., Scheduled Appointments
 - ii) to modify the 'Enrollment' Primary worker - edit
 - iii) to Close/Discharge the select Visit Type: 'Enrollment' Encounter and edit to close program
- Encounters menu does not display a summary of Progress Notes

Errors that may prevent Creating a Scheduled Appointment successfully

Why can't I save my New Scheduled Entry?

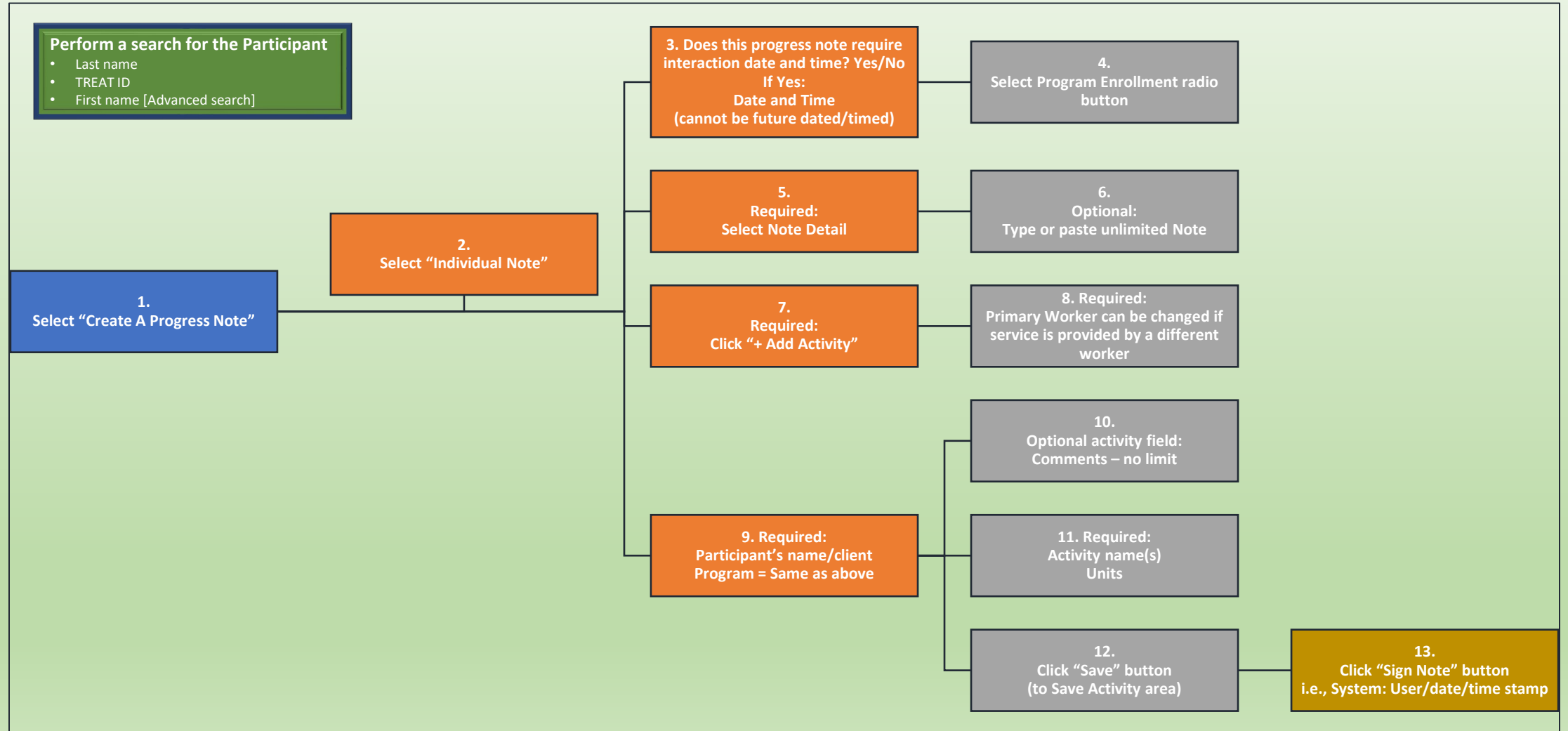
- **Program Enrollment required:**

Type	Question	Description	Source
Error	Visit Type	The program selected is not an active program for First/Last Name . Active programs available are: PROGRAM SHORTNAME . . .	Encounter

- **Encounter Type needs to be selected:**

Type	Question	Description	Source
Error	Encounter Type	The Encounter Type cannot be empty; Select One	Encounter

Create A Progress Note

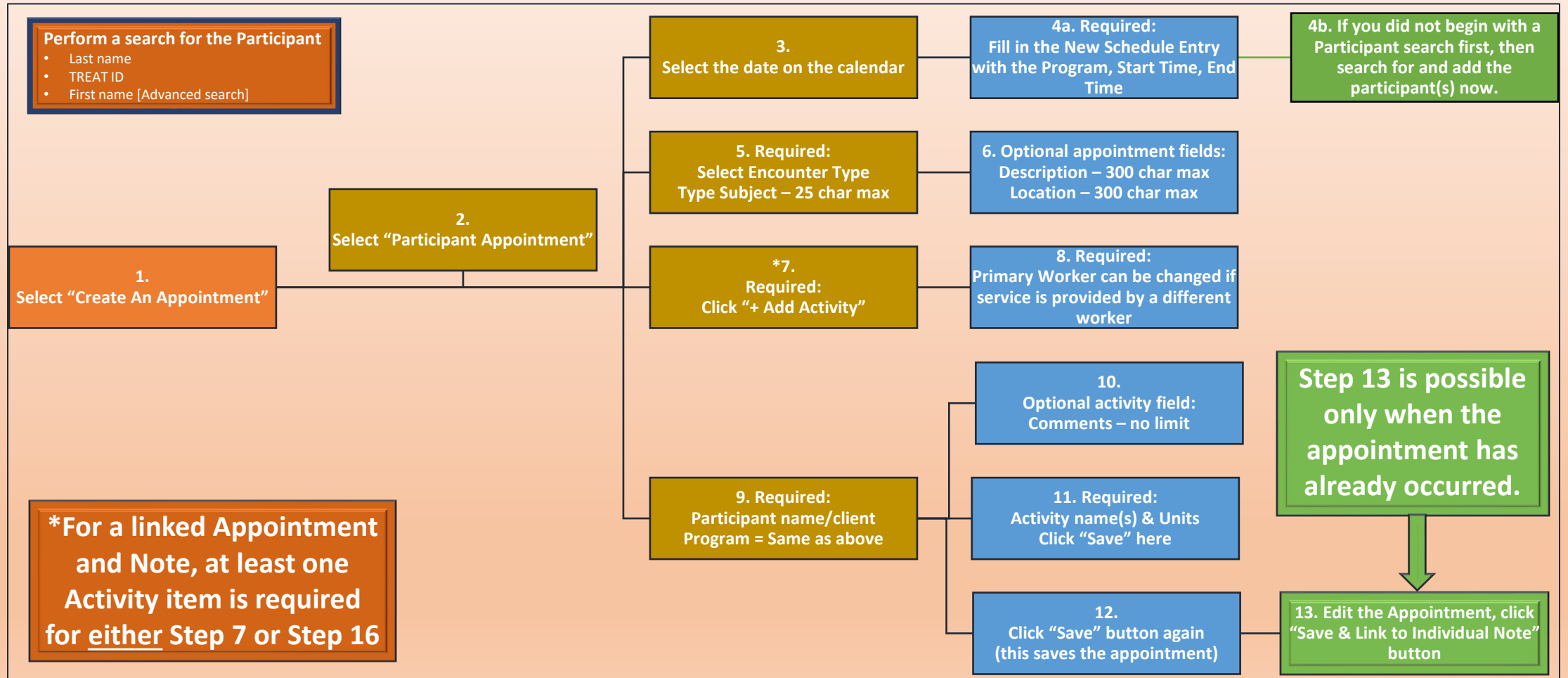


FAQ

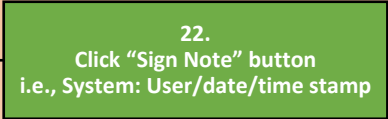
Individual Progress Notes

- Every support interaction/session with a participant, client, community member needs to be entered into TREAT.
 - **At least one Service Activity Item must be added**
- Does this progress note require interaction date and time?
 - You can select No to this question if the service was just delivered a few minutes ago
 - Yes, if the service was delivered on a previous date
- A Progress Note cannot be:
 - in the future
 - dated before program admission (Enrollment) date
 - edited after 72 hours (this includes the Move and Delete features)
 - linked to an Appointment which is in the future – more about this on the next slide
- A list of all Progress Notes is visible from the Participant's Progress Notes menu
 - on the Progress Notes screen, click the plus (+) positioned to the left of any one of the Progress Notes. During the 72 hour Edit window, this how you can either Delete or Move the Note

Create a Scheduled Appointment and Link a Progress Note - Part One - Appointment



DO NOT SELECT ENCOUNTER



Progress Note: Expand Context Detail Information

- *Identify the Progress Note that **is Linked**, vs. the Progress Note that **is not Linked**:*
 - *Navigate to the full list of Progress Notes – i.e., click “Progress Notes” on the left sidebar menu*
 - *On the Progress Notes screen, click the plus (+) positioned to the left of any one of the Progress Notes*
 - *Next step, click the plus (+) positioned to the left of “Expand context detail information”*

Linked:

- Based on **what we can see here**, we know that this Progress Note **is** linked to a Scheduled Appointment. It is automatically populated with the Appointment Start/End Date – usually the same, Status, Visit Type and Encounter Type.

Program	Encounter#	Start Date	End Date	Status	Visit Type	Enc Type	Close Reason
STEC-SUP	0000002474	06-Dec-2024	06-Dec-2024	Attended	Visit	Office	--

Not Linked:

- Based on **what we can see here**, we know that this Progress Note **is NOT** linked to a Scheduled Appointment. It is a stand-alone Note associated back to original Admission Start Date in the past (no End Date) and the Visit Type = Enrollment.

Program	Encounter#	Start Date	End Date	Status	Visit Type	Enc Type	Close Reason
STEC-SUP	0000001145	05-Oct-2022	--	Admitted	Enrollment	--	--

Closing FAQs

Linked Scheduled Appointments to Progress Notes

1. **If a Scheduled Appointment is **linked** to a Progress Note do they both need to have Service Activity Items?**
 - Not necessarily. Service items on either one or the other is the minimum requirement and would be sufficient.
2. **Is it incorrect if they both have Service Activity Items?**
 - No not incorrect; both can have Service Activity Items. However you should try not to add the same items on both the Scheduled Appointment and the **linked** Progress Note.
3. **Is it possible to first, Create a Progress Note and then **link** a Scheduled Appointment to it?**
 - No.
4. **What if I need to add more details to the **linked** Progress Note, but it's already locked?**
 - Go back to the original Appointment, click Edit, then click Save & **Link** to Individual Note. This allows you to add another **Linked** Progress Note to the same original Appointment.
5. **What if I click on the Program Enrollment radio button by accident?**
 - Click "Show discharged/other encounters" then select the correct Appointment for **linking**

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