

# Synthesis Provider Note Entry

(Revised: 2/20/2020)

## PROCESS STEPS

- 1) Entering the Note
- 2) Linking Note to a Service Line and Signing the Note
- 3) Supervisory Approval
- 4) Printing Notes (OPTIONAL)

### STEP 1: Entering the Note

Select "Provider Notes" from the Table of Content (TOC) area

Enrollee List Search: Last Name [v] [Search]

*\* Names appearing in italics are not currently enrolled.*

Select	Last Name	First Name	DOB	Program
	Anderson	Helga	11/11/1997	Wraparound
	Cleveland	Joe	2/22/2000	Wraparound
	Feinstein	Jim	2/2/1988	Wraparound
	Pulliam	Candace	5/15/2001	Wraparound
	Wegher	Janet	5/5/1975	Wraparound
	Zipple	Eva	1/1/1990	Wraparound

Provider Notes Reports Logoff

Sign Notes Add Note Link to SAR Print Notes Print POC Print Crisis Plan

Search for a Provider Note

Start Date: [ ] End Date: [ ] [Search]

Select the Youth's Name. To look up the youth's name - type part of the last name in the Search box and click "Search." Click on the envelope to open that record.

Click on **Add Note**.

The screen below will appear. It lists all of the Service Authorizations for that youth for the past 3 months. Select which Service Line this Note relates to, and press "Select." (If no Service Line yet exists, simply press "Select Without SAR." You will link this note to a SAR Line later in the process.)

Select a SAR Line						
		Select		Select Without SAR		Cancel
Select	Service Month	Service Recipient	Physician	Provider	Units Auth'd	Units Entered
<input checked="" type="radio"/>	December-2009	Annie Anderson	Peter Pan	Better Conc	4	
<input type="radio"/>	November-2009	Annie Anderson	MANUELA EVANS	Better Conc	9	

## Data Entry Screen for Provider Notes:

<b>Date of Contact:</b> (mm/dd/yyyy)	<input type="text"/>	<b>Note Type:</b> Multiple Types Permitted	<div> Crisis Stabilization  Crisis Supervision  Collateral Contact  Enrollee Contact  Meetings  No Show  Recordkeeping  Travel </div>
<b>Recipient:</b>	Helga Anderson		
<b>Contact Start Time:</b> (hh:mm am/pm)	<input type="text"/>	<div> Community  Court  Detention  Facility  Home  No Show  Phone  School </div>	
<b>Contact End Time:</b> (hh:mm am/pm)	<input type="text"/>		
<b>Contact Location:</b>	<input type="text"/>		
<b>Contact Time</b>	0 hrs		
<b>Travel Time</b>	<input type="text" value="0.0"/>		
<b>Documentation Time</b>	<input type="text" value="0.0"/>		
<b>Total Hours</b>	0.0 hrs		
<div> * Enter numbers and decimal points; no text.  ** Use the minutes to hours conversion below.  1-6 m = 0.1 h      31-36 m = 0.6 h  7-12 m = 0.2 h      37-42 m = 0.7 h  13-18 m = 0.3 h      43-48 m = 0.8 h  19-24 m = 0.4 h      49-54 m = 0.9 h  25-30 m = 0.5 h      55-60 m = 1.0 h </div>			
<div> PROVIDER NOTE TEXT </div>			

**Date of Contact:** The date the contact occurred.

**Recipient:** Generally, this will be the youth. However, it may be a family member OTHER THAN the identified enrollee if that is what was authorized on the SAR.

**Contact Start and End Times:** These are required fields. The start time and end time is reflective of the start time and end time of the **face-to face contact** being made. The time must reference a.m. or p.m. If you are documenting a No-Show or a phone contact, you must leave both fields blank. For phone contacts it is advisable to indicate the time of the phone contact within the text of the note.

**Contact Location:** Select the location where the contact occurred. “Facility” references locations such as a group home, residential center, shelter care.

**Note/Service Type:** Select what type of contact was made (Enrollee, Collateral, Travel, etc.). You can select multiple types for one note.

- **Enrollee Contact:** ANY type of contact with the identified enrollee alone or with collaterals.
- **Collateral Contact:** ANY type of contact with COLLATERALS ONLY. Collaterals may be family members, caregivers, other team members, the care coordinator, school personnel, etc. If the enrollee was a part of the contact, use the “Enrollee Contact” code. Coincidental collateral contacts where a planned contact with the enrollee resulted in a “No Show” should be documented as a “No Show”
- **Meetings:** Used to document the monthly Child and Family Team meetings and/or Plan of Care meetings or other meetings in which the provider’s attendance is requested, i.e., IEP meetings, staffings. The service recipient and/or identified enrollee must be present.
- **No Show:** Use this code when no covered service was provided, i.e. - the youth/service recipient was not available when the provider arrived at the place of contact.
- **Other:** Use this code if service time you are documenting cannot be identified as any other service type.

**DO NOT** use the following Note/Service Type Codes:

1. Consulting Psychologist/Psychiatrist
2. Crisis Supervision
3. Crisis Stabilization
4. Recordkeeping
5. Release of Information
6. Travel

**Service Hour Reporting:**

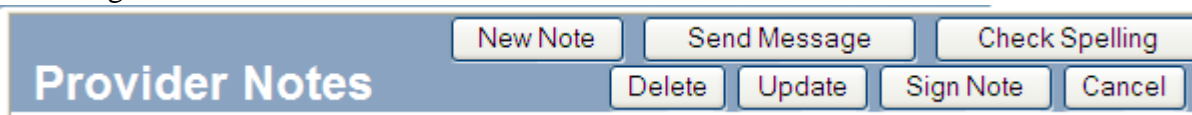
**Contact Time:** This will auto-calculate based on the Start and End Times entered.

**Travel Time:** Apply only to some service codes.

**Documentation Time:** Apply only to some service codes.

**Provider Note Text:** Activity/conversation engaged in, service recipients' mood/any significant behaviors or verbalizations/reactions, plans for future interventions/contacts.

After you're done entering the note, click on Insert. The blue bar area at the top changes to the following:



You can use the Spell Check feature at any time during data entry. However, **Spell Check DOES NOT SAVE YOUR ENTRY. You must always click “Update” to save your note. If you insert your note first and then do a Spell Check – you must click “Update” to save any changes.**

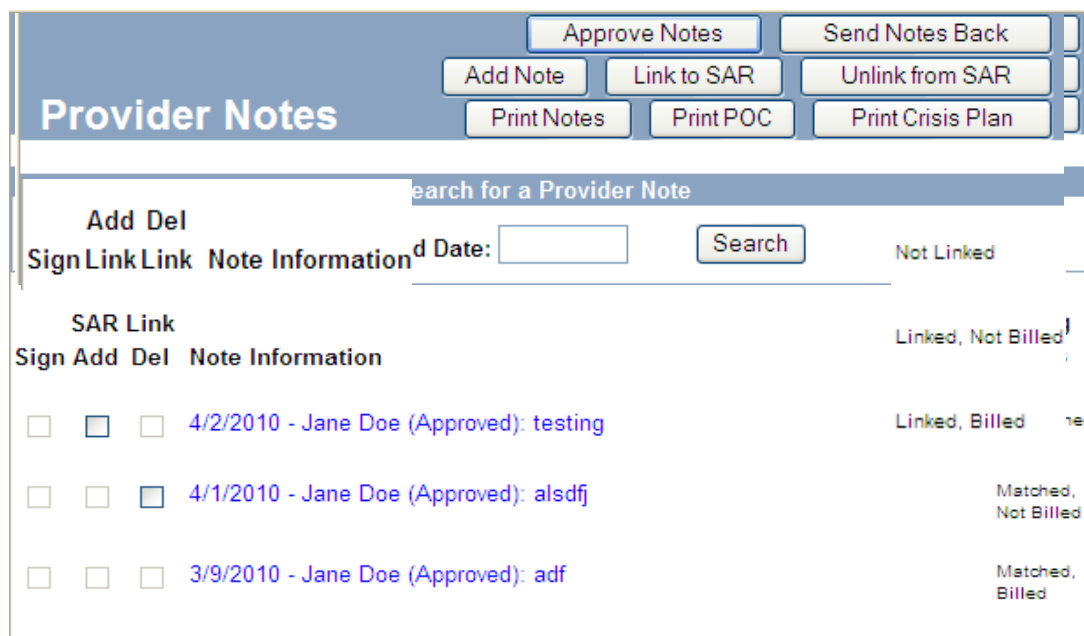
You can make any edits or corrections to the note. Simply make your changes and click “Update”.

**STEP 2: Linking the Note to a Service Line and Signing Notes**

Both of these functions can be done from the main screen.

**LINKING NOTES**

If the Service Line did not exist when you entered the Note (which would occur if the Care Coordinator had not entered a Service Authorization for the enrollee for the month), you'll need to go back to any Notes that you did not link to a Service Line at the time you entered the Note. You do this from the main Provider Notes screen.



A Billing Status will appear next to each note:

- Not Linked: The note is not linked to a SAR and thus can't be billed;
- Linked, Not Billed: The Note is linked to a SAR but has not yet been billed.
- Linked, Billed: The Note has been linked to a SAR and billed for. No changes can be made.

Then just select which SAR line the Notes relate to and click “Select”. Those notes are now linked to the Service Authorization so your agency can bill for them.

Select a SAR Line						
<div>Select    Select Without SAR    Cancel</div>						
Select	Service Month	Service Recipient	Physician	Provider	Units Auth'd	Units Entered
<input checked="" type="radio"/>	December-2009	Annie Anderson	Peter Pan	Better Conc	4	
<input type="radio"/>	November-2009	Annie Anderson	MANUELA EVANS	Better Conc	9	

**SIGNING NOTES**

Notes must be signed. After you sign a note – it is no longer editable by you. (NOTE: Supervisors will later Send Back or Approve each note; if a note is sent back, the note will become editable again.) Notes can be signed individually, or in a batch for an enrollee.

To sign an individual note, simply click the “Sign Note” button on the Provider Note screen.

Signing a batch of notes for an enrollee is done from the initial display screen shown after you select a specific person’s name.

Sign Notes    Add Note    Link to SAR    Unlink from SAR

Print Notes    Print POC    Print Crisis Plan

Provider Notes

Search for a Provider Note

Start Date:     End Date:     Search

Add	Del	Sign	Link	Link	Note Information	Billing Status
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			6/1/2010 - Jane Doe (Draft): I picked up Helga from her home today and we went to ...	Linked, Not Billed

Select which notes you want to sign by putting checkmarks in the Sign column, and then press “Sign Notes.”

**For the Worker – this is the final step in the process unless your Supervisor send back your note. If you have Notes sent back by your supervisor, you will receive a login message informing you of that note, which will contain a link to the note(s) that need to be edited. You will be able to edit those notes, and will need to re-sign them when done.**

Rejected note – press “Click to View” to see which notes were rejected

Good Morning GEORGE BENZ

You have Progress Notes Message(s) - [Click to View](#)

After “Click to View,” a list of any rejected notes will appear. Click on youth name to link to note.

PROGRESS NOTES MESSAGES

Back

**Aggie Hale:**  
A Progress Note for [Theresa Anderson](#) was rejected by Aggie Hale.

If you are a Supervisor, you will be responsible for approving all of the workers’ notes. You can do this by individual enrollee (as described above for the workers), or you can do a group of supervisees and all of their notes for a specific time frame.

### **STEP 3: Supervisory Approval**

To approve notes for multiple workers/enrollee/dates at one time:

Select the tab “Note Approvals.”

The screen that follows will allow you to approve or send back groups of notes for groups of staff. Simply enter the date range you want to approve, select the provider(s) that you want to approve notes for, select which types of notes you want to approve, and click “Approve.” (You can also Send Back batches of notes this way. If you Send Back note(s), the note becomes editable by the worker again, and a login message is sent to that worker to update the note.). After you approve the notes, they are no longer editable, and are ready for billing.

The screenshot shows a web form titled "Approve Notes by Worker". At the top right are two buttons: "Approve" and "Send Back". Below the title is a section "Select a date range to approve or send back." with two input fields: "Starting Date:" and "Ending Date:". To the right of these fields is a section "Approve:" with two radio button options: "Signed Notes only" and "Draft & Signed Notes". Below this is a blue header bar that says "Select Workers' Notes to Approve or Send Back". Underneath this bar is a list of four workers, each with a checkbox and their name followed by a bracketed alias: ☐ Jane Doe [crisis], ☐ MANUELA EVANS [mevans], ☐ Peter Pan [ppan], and ☐ Mary Poppins [mpoppins].

**NOTE: Synthesis serves as the medical record for our youth, which is why you cannot edit or delete a note after it has been signed. However – there are times when the NON-TEXT portions of a note can be updated.** This would occur if a note was dated wrong, if the wrong service type or location.

### **STEP 4: Printing Notes (OPTIONAL)**

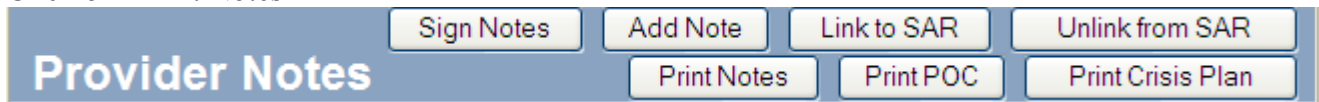
To print Provider Notes, first click on Provider Notes in the Table of Contents (TOC) area.

Then, select the enrollee name you wish to print notes for:

The screenshot shows a web page titled "Enrollee List". On the left is a vertical navigation menu with four items: "Provider Notes" (highlighted with a blue background), "Reports", and "Logoff". An arrow points from the text "Select Provider Notes" to the "Provider Notes" menu item. The main content area has a search bar with the text "Search: LastName" and a "Search" button. Below the search bar is a note: "\* Names appearing in italics are not currently enrolled." Below this is a table with five columns: "Select", "Last Name", "First Name", "DOB", and "Program". The table contains six rows of data, each starting with a folder icon in the "Select" column. To the right of the table, a bracketed text box contains the following instructions: "Select the enrollee Name. To look up a youth name - type part of the last name in the Search box and click 'Search.' Click on the envelope icon to open that name." The envelope icon is the folder icon in the "Select" column of the table.

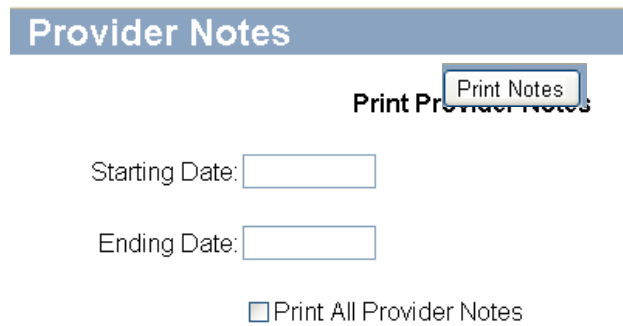
Select	Last Name	First Name	DOB	Program
	Anderson	Helga	11/11/1997	Wraparound
	Cleveland	Joe	2/22/2000	Wraparound
	Feinstein	Jim	2/2/1988	Wraparound
	Pulliam	Candace	5/15/2001	Wraparound
	Wegher	Janet	5/5/1975	Wraparound
	Zipple	Eva	1/1/1990	Wraparound

Click on “Print Notes”



A horizontal toolbar with a blue header bar on the left containing the text "Provider Notes" in white. To the right of the header bar are six buttons: "Sign Notes", "Add Note", "Link to SAR", "Unlink from SAR", "Print Notes", and "Print POC". The "Print Notes" button is highlighted with a blue border.

The following screen appears. Enter the date range you wish to print, and click “Print Notes.”



A screen titled "Provider Notes" in a blue header bar. Below the header bar, the text "Print Provider Notes" is displayed. To the right of this text is a button labeled "Print Notes" which is highlighted with a blue border. Below the "Print Provider Notes" text are two input fields: "Starting Date:" followed by a text box, and "Ending Date:" followed by a text box. At the bottom of the screen is a checkbox labeled "Print All Provider Notes".

# Printing Plans of Care (POCs) and Crisis Plans

The most current APPROVED POC and Crisis Plan can be printed from the initial display screen shown after you select a name. You can sign your notes from this screen, or print POCs and/or Crisis Plans.

Sign Notes

Add Note

Link to SAR

Unlink from SAR

Print Notes

Print POC

Print Crisis Plan

Provider Notes

Search for a Provider Note

Start Date:

End Date:

Search

Add	Del	Sign	Link	Link	Note Information	Billing Status
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			6/1/2010 - Jane Doe (Draft): I picked up Helga from her home today and we went to ...	Linked, Not Billed

Simply choose “Print POC” or “Print Crisis Plan,” and a screen similar to the one displayed below will appear:

Simply click the Printer icon to send the document to your printer.

Save a Copy

Search

Select

121%

Search Web

Adobe Reader 7.1

Wraparound Milwaukee

PLAN OF CARE

CONFIDENTIAL INFORMATION: Per Wis. Admin. Code 92.03, disclosure of this information without client/guardian consent or statutory authorization is prohibited by law.

Youth: Anderson, Ola

Enrolled: 4/3/04

POC Status: Completed

DOB: 1/1/91

POC Date: 12/19/06

POC Number: 16

Youth Address

1234 Any Street

Milwaukee, WI 53201

Family/Guardian Address(es):

Aggie Hale

4753 S. 22nd Place

Milwaukee, WI 53225

2nd Family Member(i.e. mom, etc.)

Street Address

City, State Zip