How to Review Unlocked Notes

If a note has been unlocked by a supervisor or CCS QA staff, the provider will receive an email notification that a note has been unlocked. In order to see why a note has been unlocked, the provider will need to review this in the module.

Step 1: Sign into the module database and go to the module inbox messages (screenshot below).

Step 2: In the module inbox, the provider will receive a detailed message outlining which note was unlocked, who unlocked the note (please connect with the individual who unlocked the note if further clarification is needed) and what needs to be fixed.

A progress note has been unlocked.

Sarah ServiceFacilitator	10/15/2020

A progress note for client Starbucks, Sally (Client No: 922126) on 10/15/2020 08:00 AM in the CCS module was unlocked by **Sydney Kamp** for the following corrections:

Unlocked – Please review type of contact (currently mailing).

Click the requested correct to view the note.

Step 3: The provider will click the **unlocking comment** (bold, blue lettering) and the module will take the provider directly to the note (there will be another pop-up when the provider goes to the note with the same info. as the module inbox message). The provider can then make the requested changes and resign the note.

How to Request a Note to be Unlocked

If a provider notices something needs to be changed about a signed note (i.e. date/time of service, service length, adding/taking away travel, service type, etc.), the provider will need to request an unlock. The only piece of a note that cannot change is the narrative (clarifying information or additional content can only be added through an addendum). ***An unlock is not needed to add an addendum.***

Step 1: Sign into the module database, search the client and select the note that needs to be unlocked.

Step 2: The provider will need to state *why* the note needs to be unlocked. Put the unlock request in the box that states: *please indicate which fields require correcting* (screenshot below). It is best to be very specific in the request. Please see some examples below.

- Date of service needs to be updated to 9/20/20.
- Service time needs to be updated to 60 minutes rather than 45 minutes.

Step 3: Once a request has been put into the text box, the provider will click *unlock* at the bottom of the screen and this will prompt the supervisor or CCS QA staff to review the comment and unlock the note.

How Supervisors Unlock a Note after a Request

A provider/staff member may ask for an unlock request and this request will likely go directly to their supervisor. The supervisor will receive an email notification that a provider/staff member requested a note to be unlocked. The supervisor will need to review the unlock request in the CCS module to unlock the note.

Step 1: Sign into the module database and go to the module inbox messages (screenshot below).

Comprehensive Community Services Inbox: (2)

Desktop   Navigation ▸   Reports   Module ▸   SiteMap   LogOff

Step 2: Click on the message to review the unlock request. Below is an example of an unlock request message in module.

A progress note has been requested to be unlocked by Sarah ServiceFacilitator.

Sarah ServiceFacilitator	**10/15/2020**
Sarah ServiceFacilitator has requested a progress note for client Starbucks, Sally (Client No: 922126) on 10/15/2020 08:00 AM in the CCS module to be unlocked for corrections. **Reason for Unlock: I need to change the date to 10/14/20.** Click the link above to view the note.	

Step 3: The supervisor will click the **unlocking comment** (bold, blue lettering) and the module will take them directly to the note. The supervisor will be *required* to write an unlock comment, which is a statement that clarifies what needs to be changed about the progress note. It is best to provide clear directions on what needs to be updated/changed about the note as this statement is what the provider/staff member will see when reviewing the unlocked note.

Please indicate which fields require correcting *

Unlocked per request to update date of service to 10/14/20.

Step 4: Once the unlock comment is put in the text box, the supervisor will click *unlock* at the bottom of the screen and the provider will be notified that a note has been unlocked in the module. The provider needs to follow the directions of "how to review unlocked notes" to read the unlock comments in the module.

How to Request a VOID

If a provider enters a progress note into the incorrect client chart, they will need to request a VOID. Reminder, VOIDs will only be done if a note is in the wrong client chart. If a note was entered incorrectly, such as a duplicate note or the wrong date/time, please use the unlock function to fix the information or use the addendum function to make any clarifications to the narrative or note.

When a note has been entered into the incorrect chart, please connect with QA Specialists, Erin Rodell and Sydney Kamp via email.

Step 1: Email Erin and Sydney: rodell.erin@danecounty.gov and kamp.sydney@danecounty.gov

Step 2: Please provide as much information as possible as it will help identify the correct note to send for the VOID request.

- Client Name and Number
- Date/Time of Progress Note
- Reason for VOID

Step 3: VOID requests will be completed at the end of the week.
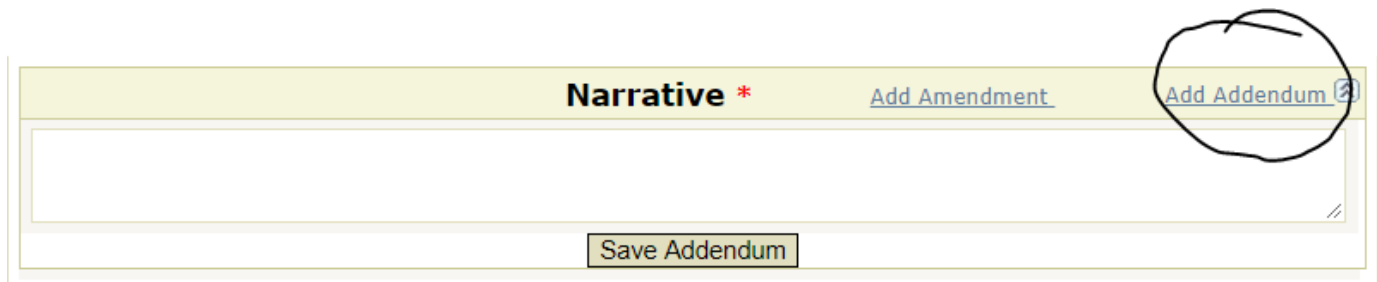
How to Add an Addendum

If a note requires clarifying information after it has been signed, this would be done through an addendum. Once a note is signed, the provider cannot change the narrative. ***An unlock is not needed to add an addendum.***

Step 1: Sign into the module database.

Step 2: Go to the note in the client's chart.

- **Reminder**: An addendum can be added when a note is signed or unsigned, but only the original signer of the note can add an addendum. Again, an unlock is not needed to add an addendum.

Step 3: Scroll down to the narrative section and click the hyperlink that states, "Add Addendum". From there, the provider can add additional clarifying information to the note.