# Progress Note Work Flow v5

**CREDIBLE**



Clinic Manager

**Start**

Select Add Service & then the Web Form button from one of the following:
a. Service Tab
b. Client Nav Bar
c. Employee Nav Bar
OR
Select Begin Service button from a scheduled appointment

Need to check client info? — No → Select applicable form category button(s) → Document progress note:
1) Complete all required questions with a red asterisk
2) Use spell check when available

Yes ↓

Select Intake Nav Bar in form

↓

Check client information and copy or change any necessary information

Documenting to Tx plan? — Yes → Use applicable documentation field in the tx plan form category — No → Select complete button at the end of each form category to save data

Progress note fully completed? — Yes → Select final complete button — No → Access the incomplete service/form from the Incomplete button on the Service tab or on the Service List screen off the employee nav bar

Data correct on Sign & Submit screen? — Yes → Require supervising provider? — No → Enter password and sign and submit service form → **End**

No ↓

Correct: Location, Diagnosis, Recipient, Billing Group, Start & End Time

↓

All fields corrected? — No (loops back to Correct) — Yes → (back to Require supervising provider?)

Require supervising provider? — Yes → Select supervising clinician from the Supervising Physician field on the Sign & Submit screen and select Override w/ Supervising "Yes" radio button → Enter password and sign and submit service form