1. Click the search icon.
2. Type in "Services/Notes" in the search bar.
3. Click on "Services/Notes (Client)" in the search results.

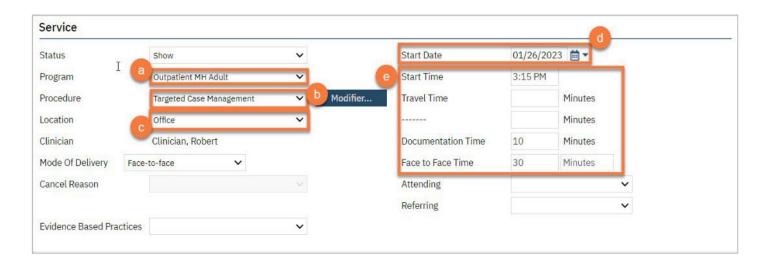4. This opens the Service Note. Complete the service details.
    a. Select your program from the dropdown menu. This will determine which procedure codes you can select.
    b. Select the procedure code from the dropdown menu.
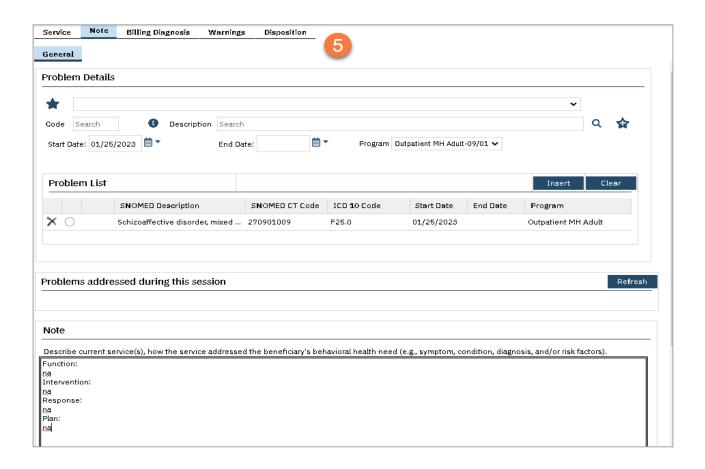   c. Select the location and mode of service.
    d. Enter the date of the service.
    e. Enter the time(s) of the service. Face to face time is required, as this is used for billing. We recommend completing the travel and documentation as well, though these are not required for billing.

5. Click on the Note tab. Complete the progress note section. This note type may look different depending on the procedure code you have chosen. Most will include 3 fields: the Note field, where you will enter the main part of your note, the Care Plan field, which will pull from the most recent note in you program and where you will make updates to any plan of care, and the Problem List section, where you can add problems directly from the note.

6. The Billing Diagnosis tab will show you which diagnoses will be pulled onto the billing. You should generally ignore this tab for ongoing services. However, if you need to change the billing order, for example you want this note to focus on the secondary diagnosis, you can re-order the diagnoses to match your service without changing the overarching diagnosis form.

7. When you are complete, click Sign.