

How to Enter an Individual Service Ticket

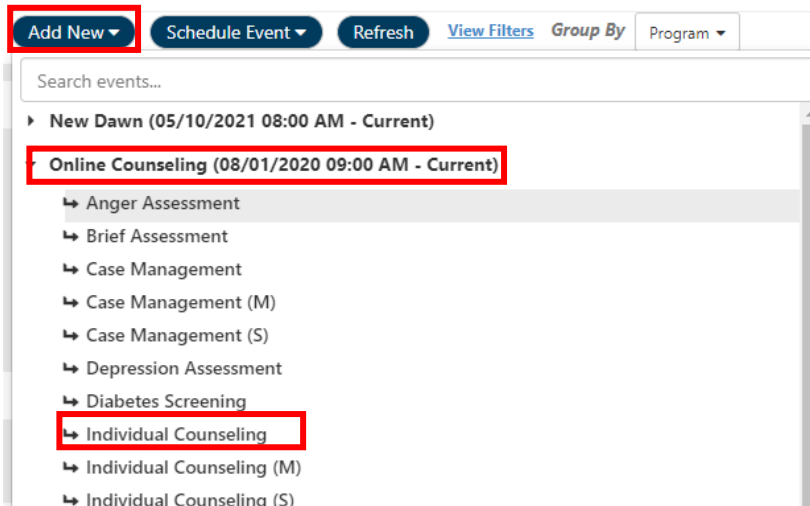
This guide will focus on entering an Individual Progress note; however, these steps can be followed to enter any individual services. Many of the required fields for each service entry will be similar.

- If you are reaching out to a client to make contact or schedule a session, please use the Case Management note instead of an Individual Progress note.

[Video Guidance Part 1](#) [Video Guidance Part 2](#) [Video Guidance Part 3](#) [Routing Services](#)

Breadcrumbs: Client > Case Management > Service Management > Service Entry

- Click Add New.
- Select the program you wish to enter the service under.
- Select the service you wish to enter.



Goals and Diagnoses on File

All current diagnoses and goals entered for client will be listed in this section. If a diagnosis or goal is ended, it will no longer appear on the list.

Goals and Diagnoses on File													
Current Goals													
Status	Date	Target Date	Status	Goal Library Description	Goal Statement								
Refresh													
Current Diagnosis													
Axis	Date	Priority	Priority Description	Diagnosis	DSMIV	ICD9	ICD10 Code	ICD10 Term	DSM5 Term	GAF Score	SNOMED Code	SNOMED Term	WA CGAS Score
1	09/17/2021	1	Primary	PTSD (post-traumatic stress disorder); ICD9: 309.81; ICD10: F43.10; SNOMED: 47505003; DSM4 Term: Posttraumatic stress disorder; DSM5 Term: Posttraumatic stress disorder	309.81	309.81	F43.10	Post-traumatic stress disorder, unspecified	Posttraumatic stress disorder		47505003	Posttraumatic stress disorder	
1	06/17/2021	1	Primary	Depression; ICD9: 311; ICD10: F32.9; SNOMED: 35489007; DSM4 Term: Depressive disorder NOS; DSM5 Term: Unspecified depressive disorder	311	311	F32.9	Major depressive disorder, single episode, unspecified	Unspecified depressive disorder		35489007	Depressive disorder	

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No-Show Information

- **Do Not Bill:** Check this box if the treatment plan was billed on paper or should not be billed through myEvolv
- **No Show:** Check this box if the service was scheduled and client did not show for appointment
- **Attempt to Contact:** Complete this field if No Show is Checked
- **Reason For:** Complete this field if No Show is Checked

Diagnoses on File

▲ No-Show Information

No-Show Information Do Not Bill No Show

Attempt to Contact Reason For

Encounter Information

- **Client:** This field will automatically fill and cannot be changed
- **Event:** This field will automatically fill and cannot be changed
- **Language Other Than English:** Check this box as necessary
- **Client Involved:** Uncheck this box as needed
- **Schedule Services:** Future Individual services can be scheduled by completing the required fields in this section.
 - **Staff Responsible:** This field will automatically fill, however, can be changed
 - **Program Responsible:** This field will automatically fill, however, can be changed
 - **Activity:** Use magnifying glass to make selection
 - **Scheduled Date/Time:** Enter Date of scheduled service
 - **Time:** Enter time of scheduled service
 - **Duration:** Enter estimated duration
 - Other non-required fields can also be completed

No-Show Information

▲ Encounter Information

Client Event*

Language Other Than English Client Involved

Schedule Services

Staff Responsible*	Program Responsible*	Activity*	Facility Responsible	Scheduled Date/Time*	Duration*	Location	Diagnosis Treated	Due Date to Complete Task	Actions
+ Hutchinson, Kathle	Online Counseling			Time: [calendar icon]	HH:MM				Actions

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Completed Information

- **Is Telehealth:** Check this box if the service is provided via Telehealth
- **Service Facility:** Use magnifying glass to make selection
- **Actual Date/Time:** Use Calendar/Clock Icons to complete fields
- **Duration:** Enter total time spent with client
- End Date/Time (System Generated): These fields will automatically calculate after saving
- **Completed By:** This field will automatically populate. Use binoculars to edit if necessary
- **Location:** Use magnifying glass to make selection

The screenshot shows the 'Completed Information' form. A sidebar on the left has 'Completed Information' highlighted. The main form has several fields highlighted with red boxes: 'Is Telehealth' (checkbox), 'Service Facility*' (text input with search icon), 'Actual Date/Time*' (calendar and clock icons), 'Duration (hh:mm)*' (text input with 'HHMM' placeholder), 'End Date/Time (System Generated)' (calendar icon), 'Completed By*' (dropdown showing 'Hutchinson, Kathleen Marie'), and 'Location*' (text input with search icon).

Diagnosis Treated

Use magnifying glass to select client diagnosis on file treated during session with client.

The screenshot shows the 'Diagnosis Treated' form. A sidebar on the left has 'Diagnosis Treated' highlighted. The main form has two text input fields highlighted with red boxes: 'Diagnosis Treated' and 'Second Diagnosis Treated', both with search icons.

Service Related Encounter Information

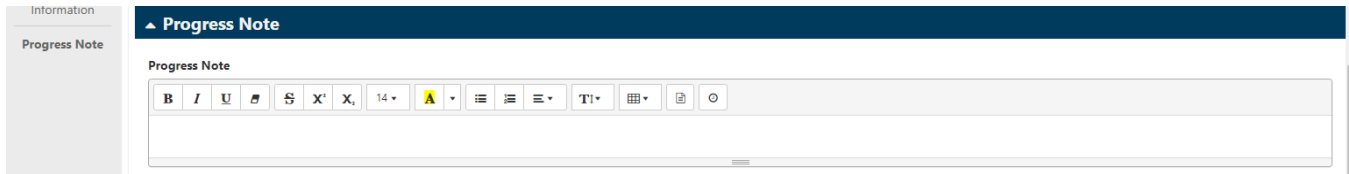
- **Program Providing Service:** This field should automatically fill. If not, use magnifying glass to make appropriate selection.

The screenshot shows the 'Service Related Encounter Information' form. A sidebar on the left has 'Service Related Encounter Information' highlighted. The main form has a text input field highlighted with a red box: 'Program Providing Service*', which contains the text 'Online Counseling' and has a search icon.

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Progress Note

Enter the progress note narrative for session. Be sure to use correct note format as trained by supervisor.



The screenshot shows a web-based form for entering a progress note. On the left is a vertical sidebar with the text 'Information' and 'Progress Note'. The main area has a dark blue header with a white triangle icon and the text 'Progress Note'. Below the header is a text area with a rich text editor toolbar. The toolbar includes icons for bold (B), italic (I), underline (U), strikethrough (ABC), undo (↶), redo (↷), font color (A), background color (■), bulleted list (≡), numbered list (≡), indent (≡), text color (T), link (🔗), unlink (🔗), and a refresh/clear icon (🔄). The text area below the toolbar is currently empty.