SANTA CRUZ COUNTY LATE NOTE GUIDANCE

Reducing Documentation Errors

Accurate and timely documentation are important components of good clinical care. One way to reduce late notes is to reduce documentation errors that require corrections.

- Errors in documentation should not happen frequently; programs must address ongoing staff mistakes in documentation.
- If supervisors have concerns about staff documentation accuracy, notes should be reviewed before they are finalized, or at least within the timeliness window to allow for rejection and correction.

Correcting errors

Type of Error	Correction Method
Service Code	QI can correct on the back end without reverting to draft, via askQI request
Narrative	Use Avatar form "Append Document" instead of reverting to draft. See Avatar Clinicians Manual for instructions Avatar Corrections Quick Guide 2024.pdf.
Reverted Note	Late note reason should state: *"Note originally finalized on [date], reverted to draft on [date] for correction."*

Refer to QI guidance for acceptable terminology: Progress Note Guidance UPDATE MHP & DMC_FINAL_5_26_2024.pdf

Handling Late Notes

If a note is late, the delay should be explained within the progress note.

- Personal provider information should **not** be included in the note
- Late notes should not be a frequent occurrence.

Acceptable Reasons	Required Note Statement
Unexpected absence (illness)	*"Late entry due to unexpected absence of clinician."*
Technical difficulties (computer issues for 1–2 days)	*"Late entry due to technical difficulties."*

Other Reasons for Late Notes

These are not acceptable reasons for late notes: High workloads, staff schedules, or other workflow issues. These do not justify late documentation and should be addressed at the program level.

State oversight has defined "business day" as any day a provider is open and provides services. Holidays when the programs are closed are not counted as a "business day".

Important Compliance Considerations

- Under **CalAIM,** disallowances occur for fraud, waste, abuse.

- Individual late notes are not disallowed, but frequent late notes not addressed by a program may result in disallowance due to potential fraud.

- DHCS is reviewing for note timeliness.

** QI Tip: 📝 To avoid late notes, complete documentation early!