

How do I complete a note if all or any of the Measures (including Clinical History form) are not showing up in the Uninitialed Documents tab?

In order to safely complete a note and not accidentally pull incomplete measures in form the Client Portal, you will want to view which Clinical Questionnaire or Measures will pull into the note and “Ignore” the ones that are NOT in the Uninitialed Documents tab.

New Therapy Progress Note WITHOUT Measures Details

Patient: Example Client (CLIEXA)
Patient ID: CLIEXA
Patient DOB: 10/1/1977

Primary code:
Add-on code 1:
Add-on code 2:
POS code:

Modifier 1:
Modifier 2:
Modifier 3:
Modifier 4:

Prior Document Data

Data will be pulled in from these documents:

- [CLIEXA_20210923_Free Form \(No Meds & Allergies tab\).pdf](#) (Jennifer Holdredge, Dr. / MA PsyD, LMFT)
- [CLIEXA_20210923_Adult Intake Note \(with assigned measures\).pdf](#) (Jennifer Holdredge, Dr. / MA PsyD, LMFT)

[More Details and Options](#)

Included Measures

The new document will include these measures for review:

- Suicide Ideation Subscale

[More Details](#)

Participants

- Jennifer Holdredge, Dr. / MA PsyD, LMFT (Owner)

[Select Supervisor](#)

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Clinical Questionnaires

These are the outstanding Clinical Questionnaires assigned to the patient that will be initialed when this document is started.

If you do not want to initial them at this time you can "ignore" them.

Name	Date	Status	Action
CLIEXA_20211115_MFT Clinical History Form.pdf	11/15/2021	Submitted	Ignore

[Close](#)

The patient has the following outstanding clinical questionnaires:

- [CLIEXA_20211115_MFT Clinical History Form.pdf](#)

Notice These will be initialed before this new document is started, and they may contain data that will be pulled in.

[More Details and Options](#)

Modifier 1:
Modifier 2:
Modifier 3:
Modifier 4:

- ✓ Remember, prior to completing a Mobile Note for a new intake (or a returning client) who has Measures to complete, be sure to look in the Uninitialed Documents tab (under Documents) BEFORE you begin any Mobile Note.

- ✓ Once the client completes & submits the Measures, they will show up in the Uninitialed Documents tab.

- ✓ If the Measures (including the Clinical History form) are not submitted by the client, then opening a Mobile Note will pull empty or partially completed Measures from the Client Portal and they will be blank. The Measure(s) will have to be resent to the Client Portal if this happens.

- ✓ If you see all Measures in the Uninitialed Documents tab, then you can safely complete your Mobile Note.

- ✓ If any or all Measures are missing from the Uninitialed Documents tab, then you can do a regular Mobile Note Progress Note instead of the Mobile Note Intake Note, but you WILL need to follow the workaround to avoid pulling in any incomplete Measures. **SEE ATTACHMENT for more information regarding the workaround.**

- ✓ Next session, once Measures are completed and show up in the Uninitialed Documents, then you can complete the Mobile Note Intake Note.