# Care Management Organization
# Progress Notes Overview

This overview consists of all progress notes and their accompanying definitions, available to Care Management Organizations (CMO).

## CMO Notation Types:

Below is a list of the progress note types and documentation or functional purpose:

| Progress Notation Type | Definition/Purpose |
|---|---|
| Billable - FF/Home Visit | *This notation type documents activity that is billable, supporting information for Medicaid claims.*<br><br>• Utilized for face-to-face (FF) meetings, visit at home, or anywhere in the community/ program/ Individualized Education Program (IEP), if youth is present.<br>• Utilized for FF visits, <u>not</u> Child Family Team (CFT) meetings or Joint Care Review (JCR) meetings. Billable CFT Update or CFT Update should be used to document a CFT or JCR. |
| Billable - On-Call | *This notation type documents Interactions between the on-call care manager and the youth, family, team member, etc.* |
| Billable C/F Team Update | *This notation type documents the review of and, agreement with the plan when documented and submitted by the OOH provider. It also documents when a CFT meeting (outside of the JCR meeting) is <u>not</u> completed for youth in OOH treatment.*<br><br>• Utilized when a CFT meeting occurs to update the Individual Service Plan (ISP).<br>• Utilized to document clinical rationale supporting OOH Treatment or TJCR using the four key elements\* outside of a CFT.<br><br>*If the Team discusses a Functional Behavior Assessment (FBA) request, then include the FBA template information.*<br><br>• Utilized when <u>the Care Manager is present</u> at an Out-of-Home (OOH) Treatment Meeting or Transition Joint Care Review (TJCR) meeting. (Use Child/Family Team Update when Care Manager is not present or is attending via phone.) |

\*The four key elements are documented in "Instructions for Completing the CFT Meeting Summary and Initial Referral for OOH Treatment Note". The key elements are Consent, Clinical Necessity, Youth and Family Vision and Projected Treatment Plan.

| Billable CC | *This notation type documents communication (reciprocated email, phone call, or text) with* **family** *or* **caregiver** *to monitor, assess, refer, develop treatment plan.* |
|---|---|
| C/F Team Annual Review | *This notation type is entered once a year based on admission date and must be committed less than or equal to 60 calendar days prior to the Annual Review plan submission.*<br><br>• Replaces the CFT Meeting note types when an annual review is conducted.  The Care Manager must be present for the CFT/OOH Treatment Team Meeting. |
| Child/Family Team Update | *This notation type documents agreement when a JCR or TJCR is reviewed and submitted for youth in OOH treatment.*<br><br>• Utilized to document clinical rationale supporting OOH Treatment or TJCR using the four key elements* outside of a CFT.<br><br>• Utilized when <u>the Care Manager is not present</u> at an Out-of-Home (OOH) Treatment Meeting or Transition Joint Care Review (TJCR) meeting. (Use Billable C/F Team Update when Care Manager is present.) |
| CMO Outreach Efforts | *This notation type documents when CMO performs these actions.*<br><br>• Leaves a voice mail for **ANY** member of the team.<br>• Shows up to a face-to-face Child Family Team meeting, and no one is there.<br>• Sends email that is not answered.<br>• Sends a text that is not reciprocated. |
| Collateral Contacts | *This notation type documents communication (voicemail, email or text) with a* **non-family** *member of CFT.* |
| Continued Need for OOH Treatment | *This notation type has functionality to maintain a youth referral on YouthLink.  Use this required note type every 45 days or the referral will come off YouthLink.  Do not backdate this note type.* |
| Critical Incident Report | *This notation type is used when there is a critical incident.* |
| Family Choice | *This notation type documents that a certain timeline was not or will not be met (due to Family Choice in meeting date, cancelling visits, etc.) Examples include the family choosing not to, or is unable to:*<br><br>• Meet for the initial FF within 72 hours of referral.<br><br>• Meet for the CFT within the 75-90 day timeframe, or for the second home visit during the month, etc. |

*The four key elements are documented in "Instructions for Completing the CFT Meeting Summary and Initial Referral for OOH Treatment Note".  The key elements are Consent, Clinical Necessity, Youth and Family Vision and Projected Treatment Plan.

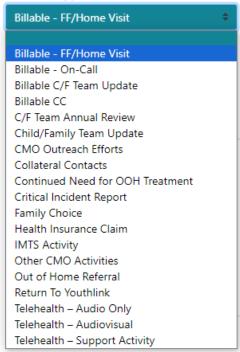| Health Insurance Claim | *This notation type is for documenting actions related to the 3560 application and/or Medicaid activities.*<br><br>• Gathering documentation outside of an initial CFT.<br><br>• Discussion regarding Medicaid.<br><br>• Assisting with details about the Medicaid/3560 application process. |
|---|---|
| IMTS Activity | *This notation type is to document Intensive Mobile Treatment Service (IMTS) activities.* |
| Other CMO Activities | *This notation type documents any activity that is not described in other types, such as:*<br><br>• Administrative tasks that are not captured elsewhere.<br>• When the CFT needs to request a Functional Behavior Assessment (FBA) outside a CFT meeting.<br>• When a youth is transferring to another county CMO in order to inform PerformCare of agreement between CMOs.<br>• Researching resources for family.<br>• Preparing transfer summary. |
| Out of Home Referral | *This notation type documents both the clinical rationale for Out of Home, and to verify that all required documents have been uploaded and are ready for review after the OOH Referral has been submitted.* |
| Return To YouthLink | *This notation type returns a youth referral to active status on YouthLink when it is less than 90 days old. Do not backdate this note.* |
| Telehealth - Audiovisual | *This notation type documents a typical face-to-face service is delivered by means of <u>both</u> video and audio technology. This note indicates that a provider interacted with the youth and/or family during service session through visual and auditory communication.*<br><br><u>Examples</u>: Technology platforms may include videoconferencing applications such as (but not limited to) Skype and Zoom. |
| Telehealth - Audio Only | *This notation type documents a typical face-to-face service is delivered by means of audio communication only. This note indicates that a provider interacted with the youth and/or family during service session through auditory communication only.*<br><br><u>Example</u>: Telephonic contact |
| Telehealth - Support Activity | *This notation type documents collateral or other service support activities outside of the actual telehealth service delivery itself.*<br><br><u>Examples</u>: Text messaging, failed phone call attempts, etc. |

**CMO Notation Sub Types**

CMO progress notes include the availability of a Notation Sub Type drop down menu. When a progress note type listed above is selected, the Notation Sub Type field beneath it will populate with the four sub types reflective of the stages of wraparound care within which the documented activity fits. The Care Manager may select the Notation Sub Type that best delineates the stage of wraparound related to the activity.
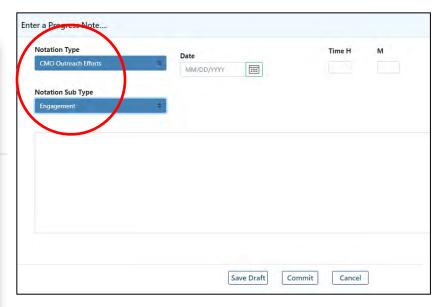
The sub type is recommended but is not required to commit the progress note. If no selection is made, the field will remain blank.

**Four Phases of Wraparound:**

- *Engagement/Team Prep* – the wraparound facilitator builds rapport with family – the engagement phase should last 30-45 days.
- *Plan Development* – family identifies natural supports (family, friends, neighbors, including professionals) and creates a team, a family vision, and an initial plan of care – the planning phase can last up to 90 days.
- *Implementation* – team implements the initial plan of care – team meets frequently to revisit and update the plan and celebrate successes – longest phase.
- *Transition* – when priority goals have been achieved, family members begin to facilitate their own team meetings – the family can navigate systems and advocate for themselves effectively.
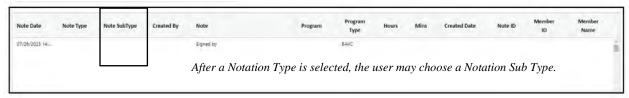
**Notation Type**

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The Notation Sub Type will appear in the Progress Notes



| Note Date | Note Type | Note SubType | Created By | Note | Program | Program Type | Hours | Mins | Created Date | Note ID | Member ID | Member Name |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 07/26/2023 14:... | | | | Signed by | | BAIIC | | | | | | |

*After a Notation Type is selected, the user may choose a Notation Sub Type.*

## Instructions on Use of Telehealth Progress Notes:

Providers should continue to utilize their existing progress notation types to enter necessary documentation.  If the service provided is typically a billable face-to-face service and is provided instead via Telehealth, a second progress note is necessary to verify the method of service delivery.  This information helps CSOC obtain important service delivery information and supports the current provider service delivery method.  Non face-to-face contacts routinely conducted by telephone and other relevant activities should be documented within existing progress note types is in line with standard practice.

Example:  A CMO is documenting the outcome of a recent Child Family Team (CFT) meeting, which occurred via audio and video Telehealth:

1) The CFT would document the outcome of their CFT meeting within their CFT progress note as they do in current practice.  The elements of this progress Notation Type would not change.
2) The Care Manager would enter a second progress note "Telehealth - Audiovisual" advising that the CFT meeting took place on xx-xx-xxxx via Zoom and to refer to CFT progress note dated xx-xx-xxxx for service details.  Entry of duration is not required, and no Notation Sub Types are available for telehealth progress note types.

### References

The Wraparound Process User's Guide, updated 2019
https://nwi.pdx.edu/pdf/Wraparound_Family_Guide09-2010.pdf

### Summary

Please note that existing training materials that refer to these areas will be reviewed and updated.  If you have any questions, please contact PerformCare at 1-877-652-7624.

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**PerformCare Customer Service**

**www.performcarenj.org/ServiceDesk/**

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