

## Care Management Organization Progress Notes Overview

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

### Available Note Types:

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

Progress Notation Type	Definition/Purpose
Billable - FF/Home Visit	<p>This note type documents:</p> <ul style="list-style-type: none"> <li>• Face to face (FF) meetings, visit at home, or anywhere in the community/ program/ Individualized Education Program (IEP), if youth is present.</li> </ul> <p><b>Do not use this note</b> for Child Family Team (CFT) or Joint Care Review (JCR) meetings.</p>
Billable - On-Call	<p>This note type documents:</p> <ul style="list-style-type: none"> <li>• Interactions between the on-call care manager and the youth, family, team member, etc.</li> </ul>
Billable C/F Team Update	<p>This note type documents:</p> <ul style="list-style-type: none"> <li>• When a CFT meeting occurs to update the Individual Service Plan (ISP).</li> </ul> <p><i>If the Team discusses a Functional Behavioral Assessment (FBA) request then include the FBA template information.</i></p> <ul style="list-style-type: none"> <li>• Care Manager’s presence at an Out-of-Home (OOH) Treatment Meeting or Transition Joint Care Review (TJCR) meeting and to document agreement with the plan when reviewed and submitted by the OOH provider</li> <li>• When a CFT is <u>not</u> completed for OOH youth</li> </ul>
Billable CC	<p>This note type documents:</p> <ul style="list-style-type: none"> <li>• Communication with <b>FAMILY</b> or <b>CAREGIVER</b> to monitor, assess, refer, develop treatment plan</li> <li>• Reciprocated email, phone call, or text with FAMILY or CAREGIVER</li> </ul>
C/F Team Annual Review	<p><i>This note type must be committed less than or equal to 60 calendar days prior to Annual Review plan submission.</i></p> <p>This note type documents:</p> <ul style="list-style-type: none"> <li>• Annual Review (performed once a year based on admission date)</li> </ul>

Progress Notation Type	Definition/Purpose
	Annual Review progress note replaces the CFT Meeting notes types when an Annual review is conducted. The Care Manager must be present for the CFT/OOH Treatment Team Meeting.
Child/Family Team Update	<p>This note type documents:</p> <ul style="list-style-type: none"> <li>• Agreement when a JCR is reviewed and submitted for youth in OOH treatment when the Care Manager was <u>not</u> present or participated in the meeting by phone</li> <li>• The clinical rationale supporting OOH Treatment using the four key elements outside of a CFT*</li> </ul>
CMO Outreach Efforts	<p>This note type documents:</p> <ul style="list-style-type: none"> <li>• Leaving a voice mail for <b>ANY</b> member of the team</li> <li>• Showing up to a face to face Child Family Team meeting and no one is there</li> <li>• Sending email that is not answered</li> <li>• Sending a text that is not reciprocated</li> </ul>
Collateral Contacts	<p>This note type documents:</p> <ul style="list-style-type: none"> <li>• Communication with a <b>NON-FAMILY</b> member of CFT</li> <li>• Received voicemail, email or text from NON-FAMILY member of CFT</li> </ul>
Continued Need for OOH Treatment	This note 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	<p>This note type documents:</p> <ul style="list-style-type: none"> <li>• When there is a critical incident</li> </ul>
Family Choice	<p>This note type documents:</p> <ul style="list-style-type: none"> <li>• A certain timeline was not or will not be met (due to Family Choice in meeting date, cancelling visits, etc.)</li> </ul> <p>Examples include the family choosing not to, or not being unable to:</p> <ul style="list-style-type: none"> <li>• Meet for the initial FF within 72 hours of referral</li> <li>• Meet for the CFT within the 75-90 day timeframe, or for the second home visit during the month, etc.</li> </ul>

\*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.

Progress Notation Type	Definition/Purpose
Health Insurance Claim	<p>This note type documents:</p> <ul style="list-style-type: none"> <li>• Actions related to Medicaid activities</li> <li>• Gathering documentation outside of an initial CFT</li> <li>• Discussion regarding Medicaid</li> <li>• Assisting with Medicaid/3560 application process</li> </ul>
Other CMO Activities	<p>This note type documents:</p> <ul style="list-style-type: none"> <li>• Administrative tasks that are not captured elsewhere</li> <li>• When the CFT needs to request an Functional Behavioral Assessment (FBA) outside a CFT meeting</li> <li>• When a youth is transferring to another county CMO in order to inform PerformCare of agreement between CMOs</li> <li>• Researching resources for family</li> <li>• Preparing transfer summary</li> </ul>
Out of Home Referral	<p>Use this note type to verify that all required documents have been uploaded and are ready for review after the OOH referral has been submitted.</p>
Return To YouthLink	<p>Use this note type to return a youth referral to YouthLink. This note type can return a referral to YouthLink only if the referral is not older than 90 days. Do not backdate this note.</p>
Telehealth - Audiovisual	<p>Use this progress note type if 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.</p> <p><u>Examples:</u> Technology platforms may include videoconferencing applications such as (but not limited to) Skype and Zoom</p>
Telehealth - Audio Only	<p>Use this progress note type if 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.</p> <p><u>Example:</u> Telephonic contact</p>
Telehealth - Support Activity	<p>Use this progress note type to document collateral or other service support activity outside of the actual telehealth service delivery itself.</p> <p><u>Examples:</u> Text messaging, failed phone call attempts, etc.</p>

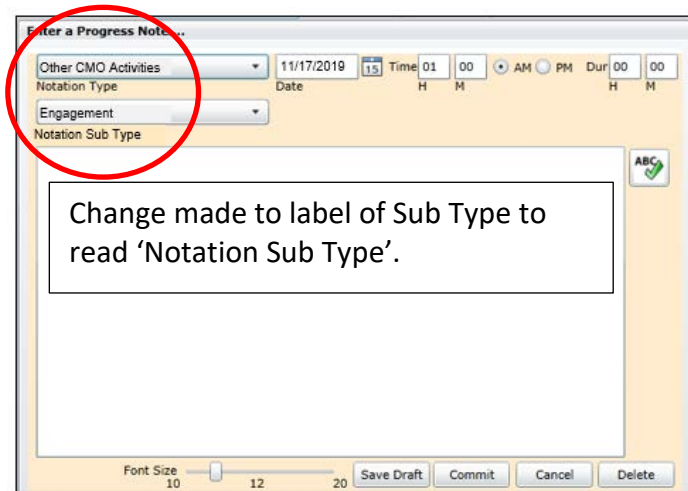
## CMO Progress Notes - Notation Sub Types

CMO Progress Notes will 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



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

The Notation Sub Type will appear in the Progress Notes grid.

**Progress Notes**

Show All Draft Progress Notes  
 Show My Draft Progress Notes  
 Show Committed and Signed Progress Notes

Truncate Notes

Note Date	Note Type	Note SubType	Created By	Note
2019/11/15 11:53:00	Collateral Contacts	Engagement		Signed by [redacted] Within Dept UCM on 11/15, This is a note with a Sub Type

## Instructions on Use of Telehealth Progress Notes:

Providers should continue to utilize their existing progress note 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 is necessary to help CSOC obtain important service delivery information and support 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 in line with standard practice.

Example: A CMO is documenting the outcome of a recent Child Family Team (CFT) meeting, which occurred via Video Audio 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 note 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 note subtypes 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](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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