

GENERAL PROGRESS NOTE

COMPLETED BY:

1. Staff delivering services within scope of practice. Co-signature must be completed within reasonable time.

COMPLIANCE REQUIREMENTS:

1. A Progress Note must be completed after every service contact with the client.
2. Content of each progress note must support the service claimed.
3. The General Progress Note Template shall be used for all individual and family services, and all prompts must be addressed.
 - a. **Intervention** prompt is to document a narrative describing how the intervention provided addressed the beneficiary's behavioral health need(s) (e.g., symptom, condition, diagnosis, and/or risk factors). If using template with a support person/family member, this section shall be used to document the intervention and how it is addressing the needs of the beneficiary.
 - b. **Client Response** prompt is to document the beneficiary's response to the intervention. If using for a service with a support person/family member, documentation shall indicate the response or participation of the support person/family member.
 - c. **Next Steps** is used to document planned action steps by the provider or beneficiary, collaboration with the beneficiary, and/or collaboration with other provider(s).
 - d. **Update to Problem List** shall document any updates or changes to the beneficiary Problem List, if applicable.
4. Data must be entered into the Electronic Health Record (EHR).
5. Every progress note within the EHR must be completed and final approved within 3 business days (date of service is day 1).
 - a. Progress notes signed by a provider needing co-signature are considered "on time" when the provider signs the note within 3 business days and the co-signer signs with a reasonable time.
 - b. Notes will no longer be disallowed for being final approved late but may be marked out of compliance.

DOCUMENTATION STANDARDS:

1. Service entry shall be completed as a part of the progress noting process.
2. Completion and final approval of the progress note by the staff is a certification the documented service was provided personally, and the service was provided to a beneficiary meeting access criterion, or during assessment to determine if the beneficiary meets criteria.
3. When it is not completed and final approved, the note is at risk for deletion by another server.
4. Paper forms are only to be completed when the EHR is not accessible and/or when staff have not yet been trained in the EHR.
5. Progress notes are not viewed as complete until they are final approved.