March 2006

Progress Note:

During recent audits, the auditors gave feedback concerning the (S) portion on our progress notes. The comments were as followed:

- The (S) section repeats itself verbatim and does not show any change or progress in the
 consumer's presentation over several months to a year. It does not contain the current
 presentation of the consumer. We suggest that you include a brief description of your
 consumer's current presentation or situation along with the template of identifying
 information.
- 2) The (S) section reports that the consumer is doing well over several months or throughout the entire assessment period. This reflects a lack of medical necessity. Although consumers may not be struggling every week and you want to give the current presentation, we suggest that you include a description that covers why you are assessing or treating this consumer.
- 3) The (S) section is too vague and does not give a clinical snapshot of the consumer including current impairment(s). Please remember that auditors may read only one note, and that note will need to have enough information as a stand-alone note.
- 4) The (S) section needs to reflect what the provider is going to focus on. The interventions should address the issues worked on in the session.
- 5) For Case Management Notes, the (S) section needs to reflect the clinical purpose of this service to justify medical necessity. Describing symptoms (i.e., depression) and giving a short intervention (i.e., consulted with social worker) does not explain the purpose of Case Management and is at risk for lacking medical and service necessity.

Client Service Plan (CSP)

Here are just a few reminders:

- 1) Make sure your CSP includes impairment, and not symptoms only. A CSP without impairments could be seen as lacking medical necessity.
- 2) Avoid use of vague language in the objective section that is not measurable (i.e., 'poor boundaries', 'aggressive', 'low self-esteem', 'lack of trust', etc...).
- 3) Milestones need to be incremental and related to the listed impairment. One milestone generally does not cover an entire year.
- 4) If the consumer is 16 years or older, make sure you include a transitional goal and objective in your CSP.