CPS-P/Y
Annual Conference 2019

Individual vs Group Documentation: Is There a Difference?

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Agenda

01 Objectives
02 Basic Documentation Principles
03 Overview of Progress Notes
04 What are Your Challenges?
05 Individual vs Group Notes
06 Examples of Documentation
07 Practice: Write a Group Note
08 Questions & Answers

Chapter

01 Training Objectives

- Identify required elements of progress notes
- Describe similarities and differences between types of progress notes
- Express & review challenges to writing good notes
- Gain proficiency in writing progress notes
The basics of good documentation and why it’s important

Medical / Health Record Documentation:

- Provides official **evidence** of your supportive services
- A **legal** record of care and support
- **Record** of service delivery
- Primary **communication** between providers
- Fosters **quality** service delivery
- Supports **continuity of care**
- **Reduces** risks and errors
- Records **benefits vs risks** of treatment/care
- **Tool** for engagement
Tips for a Successful Progress Note:

- Review the parent / youth’s goals and action plans prior to meeting (or have copies to review together)
- Be thorough yet concise
- Written soon after interaction with parent / youth to ensure accuracy
- Can be understood by and appropriate for any reader (coworker, family, youth, auditor)

You Decide: Clear or Not?

Goal: “I would like to improve my social skills and gain more knowledge of different places offered in the community in order to avoid isolating from others, for the next year.”

Objective
“Four times per month, John will attend a group activity to help develop his socialization skills.”
You Decide: Clear or Not?

**Goal:** “I intend to continue working as a stocker at Kroger’s for the next year.”

**Objective:** Critical Skill: “Requesting Feedback”: “90% of the time per month, John will ask his supervisor for specific and honest critique of his job performance when he feels unsure as to how he is doing.”

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Subjective vs Objective Language

**Subjective:**
- Often biased
- Feelings-laden
- Pre-judging
- Influenced by personal opinion / views
- Assumptions

**Objective:**
- Unbiased / factual
- Without feeling
- No judgement
- Lacks personal opinion / views
- Just the facts
Subjective vs Objective Language

Subjective:
• Inappropriate
• Appropriate
• Unmotivated
• Too much / not enough
• ?
• ?

Objective:
• Awake / Asleep
• Made no comment
• Stated . . .
• Numbers / percentages
• ?
• ?

Progress Notes: What’s Required?
Top 11 Reasons Progress Notes Do Not Support Billing

1. Content did not support units billed
2. Content did not match service definition
3. Content did not support code billed
4. Progress note was missing
5. Code was missing/different than code billed
6. Staff credential missing
7. Staff credential not supported by documentation
8. Signature missing
9. Date of entry missing
10. Content not unique to the individual
11. Intervention outside of provider’s scope of practice

Common Errors in Progress Notes

“Wordy” notes that document a conversation but fail to capture interventions, response, or progress

“I arrived at the peer’s home and she immediately began telling me about a situation with her boyfriend who said, “you can get out because I’m not putting up with you anymore” and then she told him, “you can’t put me out because this is my house” and then I told her that she was right and she . . .”
Common Errors in Progress Notes

Using vague, non-descriptive, or subjective words in notes

- “I met with Jerald today and he is doing much better, making good progress toward his goals because he is working on his coping skills and getting much better at dealing with life.”
- “Jean’s goal is to improve her functioning and increase her communication skills. We tried to work on communication skills today but she was resistant to my help.”

Common Errors in Progress Notes

Documenting diversionary or nonbillable activities

“I linked John to the pharmacy and to Kroger’s today because he needed groceries and his medication. I linked him to a restaurant on the way home. He said he was very appreciative of my linking him to these services.”
Minimum Requirements: Quantitative (Basics)

- Date of contact / service
- Code of service provided
- Time in/out and units
- Location of service
- Content of Note* (next slide)
- Signature w/printed name and credential
- Date you wrote/signed note

Minimum Requirements: Qualitative

- Goal / objective being addressed
- Interventions provided
- Additional needs / changes
- Response to your intervention
- Progress made
- Plan for next time
Example Noting Format

**Behavior / goal / objective being addressed** – Why are you doing what you’re doing?

**Interventions provided** – What you did – Did it fit within the definition of a service you bill?

**Response to your intervention** – How did it go?

**Progress made / Plan** – specifically, behaviorally, clearly, what progress was made? What will you do next time you meet?

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**Behavior / goal / objective being addressed:**

- Describe current situation
- Identify goal or objective addressed
- Basically, why are you there?
**Example Noting Format**

**Interventions provided –**
- What, specifically, did you do?
- How did you do it?
- Was it planned or did you respond to current situation?
- Share lived experience?
- Link or connect to a resource?
- Is what you did consistent with overall plan?

**Example Noting Format**

**Reaction / Response:**
- How did it go?
- Reactions?
- Supporting quotes?
Example Noting Format

Progress made:
- Did they move toward a goal?
- No progress? Why?
- Is goal/objective still relevant?
- Is person still motivated to achieve goal?
- Does person have support for goals?

Chapter 04
Challenges

What are your challenges?
Challenges are part of life for us all . . .

Does your documentation accurately capture the setbacks, challenges, changes in direction, and triumphs of those you help?

Internal Challenges to Completing Documentation

- Skill(s)?
- Support(s)?
- Knowledge / Training?
- Knowing when, where, how to document
- Confidence?
External Challenges to Completing Documentation

- Time?
- Distractions?
- Technology? (paper vs electronic)
- Noting format used?
- Support for protecting PHI?

What might you do to address those barriers?

What SKILLS might you need to write plan-focused notes?
- Describing what you did
- Determining impact of your intervention
- Capturing (in writing) how the peer responded
- Planning for future contact/work/interventions
- ?

What SUPPORTS might you need to write plan-focused notes?
- Peer’s recovery plan?
- Group co-leader/other staff/youth/parent support?
- Good examples?
- Proofreader?
- ?
Remember to Ask for Help / Collaborate!

Chapter 05
Individual vs Group
Single-Contact / Service Notes

- All basic quantitative elements (Name, date, code, units, etc.)
- Goal / objective(s) to be addressed
- Current needs / challenges?
- List / identify intervention(s) provided
- Response to your intervention(s)
- Document specific progress made (or not)
- Plans / changes for next meeting time

Group-Contact / Service Notes

- All basic quantitative elements (Name, date, code, units, etc.)
- Individual’s goals / objectives addressed
- List / Identify interventions provided to the group
- Describe Individual’s response to interventions
- Was progress made toward objectives or goals?
Example: Vague Note

Name: John Smith  Peer Support-Individual (H0038U5U7)  Date: 5/31/19
Time In/Out: 9:15 am - 9:45 am  (2 Units)

**B:** John was dressed appropriately for the weather, was well-groomed, no noticeable odor, was oriented x 3, a positive mood, and expressed no major problems today. Denied any homicidal/suicidal ideations, denied A/V hallucinations, stated he was taking his medications as prescribed.

**I:** Met with John at his home and he told me he is doing much better and he is going to Peer Supports Group every day. He had a great week and really enjoyed this past Memorial Day weekend. Reminded John of importance of using good coping skills and we need to work on making more friends. I encouraged him to keep up the good work and I will be back next week.
Example: Vague Note

Name: John Smith  Peer Support Individual (H0038U5U7) Service
Date: 5/31/19  Time In/Out: 9:15 am - 9:45 am (2 Units)

R: John responded appropriately and was receptive to the information discussed during the session. He stated, “I like your visits and hope I can always have you as my CPS.”

P: I will continue visit the peer later to assist with meeting his goals and objectives and continue helping him work on using his coping skills and reminding him of his goals.

Name: Ima Peerperson, CPS-Y  Date Entry: 5/31/19

Example: Clear, Goal-focused Note

Name: John Smith  Peer Support Individual (H0038U5U7)
Date: 5/31/19  Time In/Out: 9:15 am - 9:45 am (2 Units)

B: I met John at his apartment today. He is very excited about his recent participation in the neighborhood Memorial Day barbecue. He said that he had met many of his neighbors for the first time, and has hope that he has made a new friend in the process. He stated he wore the new clothes he purchased last week for this event.

I: CPS-Y congratulated John on his recent progress toward his goals and objectives of making a new friend by getting out into his community, meeting people, and using his skills of “Introducing himself” and “Starting a Conversation.” CPS-Y reminded John that he is making progress toward overcoming his barrier of the fear of rejection and that his continuing to take some emotional risks can be scary but offer great rewards.
Example: Clear, Goal-focused Note

Name: John Smith Peer Support Individual (H0038U5U7)
Service Date: 5/31/19 Time In/Out: 9:15 am - 9:45 am (2 Units)

R: John accepted my feedback and encouragement stating that he realizes it isn’t easy but that stretching himself and taking risks will help him become an active part of his neighborhood as he intends to continue living where he is for the next couple years at least.

P: We brainstormed that, as John feels confident in introducing himself to strangers and starting conversations with them, that “Ending Conversations” may be a skill to talk about next. We will roleplay starting and ending a conversation at our next meeting to assess and continue encouraging John in his new skill use and re-enforce his commitment to building friendships with his neighbors.

Name: Ima Peerperson, CPS-Y Date Entry: 5/31/19

Chapter
07
Practice

Let’s Write a Note
Meet Inez:

- Attending Peer Support Group five days/week with 10 other peers.
- **Goal 1:** “I intend to become a CPS by 7-1-2020
  - **Objective 1:** Inez will lead two groups per week in PS program, choosing topics with group leader, and get topics approved three days prior.
  - **Intervention 1:** CPS will assist Inez with choosing group topics and developing her presentations, as needed, and provide coaching and feedback.
  - **Objective 2:** Inez will research requirements, classes, and costs and create a plan/calendar for completion.
  - **Intervention 2:** CPS will remind, encourage, and review calendar/progress toward completion of required tasks.
ERROR: ioerror
OFFENDING COMMAND: image
STACK: