

# The Write Stuff: Intake Notes, Progress Notes, and Group Notes

October 21, 2016



# Agenda

- Session I: Intake Notes and Progress Notes
  - Review intake notes
  - Progress notes
  - Progress note practice activities
- Session II: Progress Notes and Group Notes
  - Additional practice with progress notes
  - Progress note challenge!
  - Group progress notes

# Intake Note

- Intake sets the stage for all future documentation.
- Almost everything you need to write in an intake note is already completed in eCOMPAS during the assessment.
- Include information to make it all flow together as a narrative.

**Gen Info**

**Family**

**History**

**Goals**

**FRC Services**

**Assessment**

# Intake Notes: What goes in?

- Gen Tab:
- Where they heard about the FRC
  - Initial reason for coming in
- History Tab:
  - Parent: history of mental illness and/or substance abuse
  - Youth: MH diagnosis, History of Sub. Ab, number of times youth...(Psych ER, arrest, suspension, etc.)



# Intake Notes: What goes in?

- Goals:

- Strengths
- Needs
- Goal, action plans, and date of anticipated completion



- Assessment:

- FES score and notable outcomes (positive and room for growth)

# Progress Notes

- Provides an opportunity for family/youth and advocate to evaluate how things are going on a frequent and regular basis.
- Documents the continued medical necessity of the services being provided.
- Summarizes the period of time reviewed.
- Can be considered a “mini” plan review.

# Tips for a Successful Progress Note

- Review the parent/youth's goals & action plans before the meeting or have copies for you to review together
- 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, and auditor)



# SOAPD



- **S**trengths observed
- **O**bjective account of the interaction
- **A**ssessment of the situation/individual
- **P**lan (progress toward specific goal)
- **D**ata or new information gathered



What questions can we ask  
to get the information we  
need to write a Progress  
Note?



# Asking the Right Questions

## 1. Ron

### ■ Goal:

Within the next month, Ron will improve his study skills by spending 60 minutes studying outside of class each week, as evidenced by self-report to Youth Advocate.

### ■ Action Plans:

- 1) Ron will stay after school with his social studies teacher for 30 minutes every Tuesday for the next month, in order to build study time into his school day and to create accountability with a supportive teacher.
- 2) For the next month, Ron will attend weekly Youth Group for 90 minutes, in order to learn effective coping skills for test anxiety.

# SOAPD Possible Questions

## Strengths observed

- Review strengths you identified during the intake. Are you noticing any of that during your meeting?
- In the meeting with your parent/youth are you observing any new strengths?
- "I'm listening to what you are saying and it's clear that you are/have \_\_\_\_\_ (strength observed). It seems to be helping you in achieving \_\_\_\_\_(goal or action plan)."

# SOAPD Possible Questions

Objective account of the interaction

- Are there specific emotions being expressed, if so, how do you know that it's happening (smiling, crying, raised voice, etc.)? Why is this important?
- What does the youth/parent say that is particularly useful to quote in their note?

# SOAPD Possible Questions

## **A**ssessment of the situation/individual

- “How have the classes/groups (or other action plans) been going for you?”
- “Any successes or challenges?”
- “Is there anything that the FRC or you can do to help resolve these barriers/challenges?”
- “Do you think that your action plans are helping you to achieve your goal(s)?”
- “Is there a reason why you didn’t attend your last group/class?”
- “Is this goal still important to you?”
- “Are there any changes that we need to make to your goals or action plans?”

# SOAPD Possible Questions

**P**lan (progress toward specific goal)

- “What have you done since our last session?”
- “What do you find helpful about your class/group?” OR “What have you gained so far by participating in the class/group?”
- “Is there anything happening that is helping you make progress on your goals or action plans?”

# SOAPD Possible Questions

Data or new information gathered

- “Are there any major things that have happened since the last time that we met?”
  - Does this impact their goals and action plans?
  - How does this impact their goals and action plans?
  - Does this mean that the goals and action plans may need to change?
- Last time we met, you were struggling with \_\_\_\_\_ or were not finding \_\_\_\_\_ helpful. Has anything changed?
- Did you complete \_\_\_\_\_ since the last time that we met?

# Ingrid

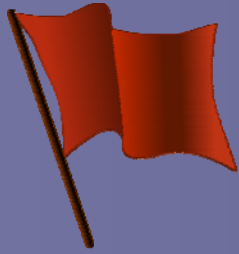
## **Goal:**

In the next 2 months, Ingrid will apply learned coping strategies to demonstrate appropriate behavior (e.g., speaking calmly; refraining from physical outbursts/aggression) with her son at least 3 times per week, as evidenced by self-report to Family Advocate.

## **Action Plans:**

- 1) Ingrid will attend weekly, 90-minute anger management group for the next 8 weeks in order to learn conflict resolution and positive coping strategies to manage stressful situations which arise with her son.
- 2) For the next 2 months, Ingrid will attend weekly, 60-minute Parent Support Group in order to receive support and feedback from other parents of children with special needs.

Progress Note Elements	Fully	Partially	Absent	Notes
Includes clear link to goals and action plans.				
Describes progress made and/or lack of progress in achieving action plans and/or goals.				
Includes a summary/discussion of meeting, recent services and interventions provided since the last note.				
Identification of any necessary changes to the goals/action plans.				
Documentation of any significant life events (successes and/or barriers).				
Addresses any outstanding issues from previous progress note.				
Strengths observed.				
Date of service, time spent, and location				
Progress Note is signed and dated				



# Red Flags



- Notes that do not mention:
  - Goals
  - Action Plans
  - Successes
  - Barriers
- Notes that do not indicate:
  - Progress
  - If no progress – the reasons for lack of progress
  - Plan to encourage progress
- Notes that are almost identical to previous note(s)

# Some Requirements to Consider

- For each encounter, a progress note must be completed.
- The duration of the encounter must be documented.
- Communications with outside providers/resources/referral should also be documented.



# How to fix an Incomplete Note

- First, use your progress note grid to identify areas that are missing.
- Review the note for appropriate language.
- If someone (youth, parent, co-worker, or auditor) read this, would they understand what the family member is doing with your FRC?



# example

- Debra's Goal: Improve communication with her son by increasing the number of positive conversations over the next two months. Debra will use a journal to log their conversations to track her efforts.
  - Action Step 1: Debra will participate in the parenting class to learn about age and stage, self-care, and communication. The class meets for 12 weeks, once a week.
  - Action Step 2: Debra will attend the parent support group for the next three months to find support and understanding.

# Incomplete Note Example

- FA met with Debra at the FRC office. She said she wasn't doing so good. She complained about her landlord not fixing her hot water heater so we talked about ways to get her to take action. She is also very stressed out because she got a letter saying that her daughter's SSI was going to be reduced because she recently got food stamps. FA will look into the SSI issue for her and get back to her.

# Revised Note w/ Required Elements

FA met with Debra at the FRC office for 30 minutes. Initially Debra spoke about issues with her housing situation; FA was able to provide related resources. Debra continued to use her log book to review conversations with her son. She hasn't missed a parenting class, yet. Based on her journal, she reported having two additional positive conversations with her son each week since she started services at the FRC. There was one conversation during the week where her son completely shut down. Debra was able to role play this during the meeting with FA. Debra identified two strategies through her parenting class that can help her have more conversations with her son. Debra reported finding her meetings with FA to be "helpful" and that she has "learned a lot". Debra will continue to use her journal, attend parenting classes, and meet weekly with FA to review progress and role play challenging conversations.

# Lunch Break!



# Chase

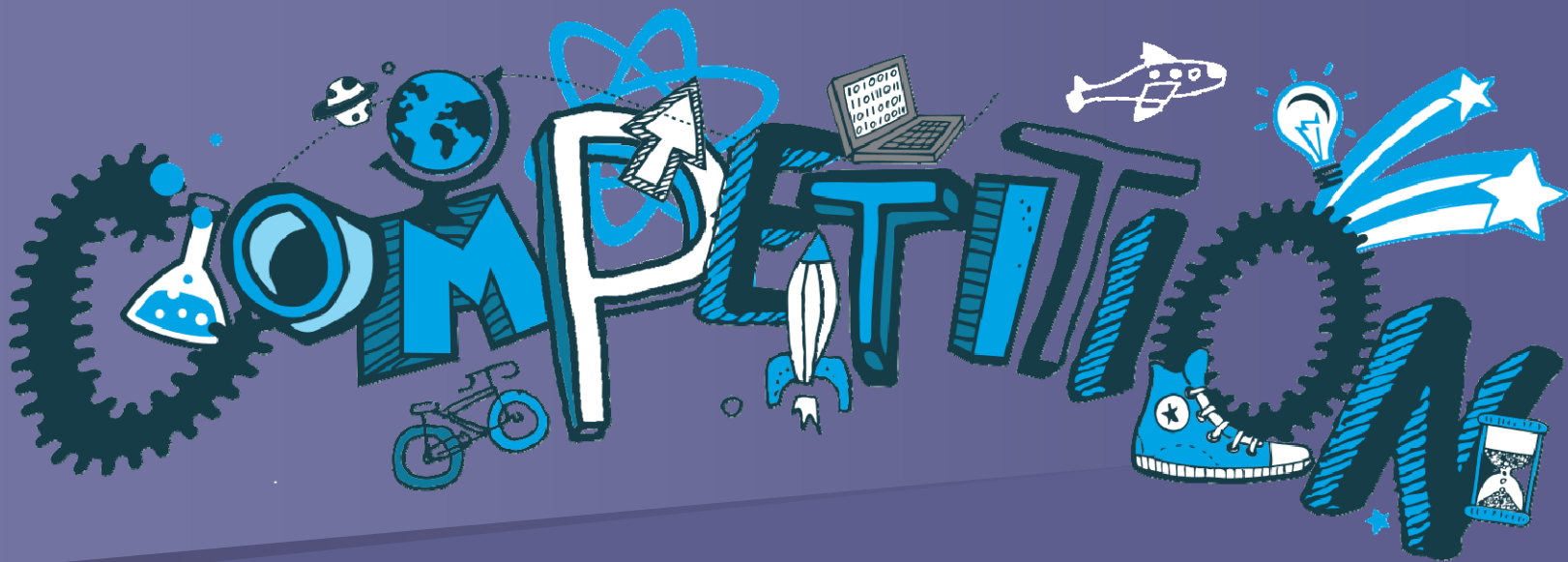
## **Goal:**

In 3 months, Chase will increase the likelihood of successfully returning to college, as evidenced by completing a comprehensive action plan for dealing with stressors and seeking supports in the university environment.

## **Action Plans:**

- 1) Chase will attend weekly 90-minute Youth Group for the next 3 months, in order to improve his stress management skills and to build competency in managing his symptoms.
- 2) For the next 3 months, Chase will meet weekly with Youth Advocate for 45 minutes, in order to receive assistance with locating supported education resources, gain support and encouragement around pursuing his goals, and create his action plan.

# Progress Note Challenge!



# Group Notes



# Group Notes

- Group notes are used to document participation in a group or class.
- Each participant will have a unique note.
- Group Notes include:

Standardized Description of the Class or  
Group

+

Individualized description related to  
participant's goal

# Set Up for Success

- Have an agreed upon set of descriptions for each class and group.
- Facilitators should bring goals and actions plans for each parent/youth expected to participate in either the class or the group.
- Group/Class Progress Note Cheat Sheet
  - If co-facilitating the group/class, one of the facilitators should be assigned to complete the cheat sheet.

# Group/Class Tracking Sheet

- ☐ Active participation: Spoke without being asked to and/or participated in activities
- ☐ Shared: Meaningfully shared something personal
- ☐ Paid attention: Was engaged but not actively participating
- ☐ Inattentive: Was not engaged or was preoccupied
- ☐ Responded to direct questions: Only spoke when asked by a fellow participant or facilitator/teacher
- ☐ Supported others: Provided emotional support to another participant
- ☐ Withdrawn: Emotional version of inattentive
- ☐ Learned something new: This is something you want to write in the notes section
- ☐ Shared new coping skills: This is something you want to write in the notes section

# Writing During a Class/Group?

**Won't the youth/parents be uncomfortable with me writing during the group/class?**

**Maybe....**

- It is important that you inform the group or class before it starts that you will be doing this.
- Head off concerns by explaining:
  - What you write remains confidential
  - It is helpful for the group (as a facilitator you can connect ideas, bring the conversation back to an important topic, etc.)
  - You want to make sure that meaningful progress is being recorded for their Advocate
  - This will not be used to share with child welfare agencies (or other mandating authorities) – it is for your internal documentation (and billing)
  - Their Advocate will see the comments

Any other concerns you think may come up when writing during a group/class?



# How do I write a Group Progress Note?

Part 1: Standardized description of your group or class. Date, length of class/group, location, if childcare was provided, any snacks provided, and if metro cards were given.

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Part 2: Relevant information related to the participants goals or action plans. 2 maybe 3 sentences.

## Standardized Part of a Support Group Note

Parent/youth attended the [name of group/service] on [date of group]. The group's topic was [subservice/what is generally covered in the group]. The group was offered at [location] for [duration of group]. Snacks were/were not provided. Childcare was/wasn't provided. Participants received a metro card.

## Standardized Part of a Class Note

parent/youth attended the [name of course] on [date of class]. This was [class number and title of class]. Class number \_\_\_\_ covers [FRC standardized description of class material] The group was offered at [location] for [duration of group]. Snacks were/were not provided. Childcare was/wasn't provided. Participants received a metro card.

# Types of Standardized Descriptions

Examples: NAMI Support Groups  
and Basics

# Linking Goals and Action Plans

Add a simplified version of the youth/parent's relevant goal(s).

Best option: direct quote a statement made by parent/youth related to their goal.

When you don't have a quote, describe a topic discussed that was relevant to their situation and if the youth/parent actively participated, paid attention, shared something personal, or supported others.



# Send Us Your Standard Group and Class Descriptions!

We would like to help you all come up with standard language around your classes and groups that can be regularly used when writing a group note.

Please email Diana with your standard descriptions of classes.

We will put together a cheat sheet for you.

If there is more than one description for a class, we will include all and let your FRC decide the best description to use.

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