

Residential or Withdrawal Management – Daily Progress Note

REQUIRED FORM:

If the Residential or Withdrawal Management program has opted to use a daily progress note, this form is a required document.

WHEN:

The daily progress note shall be completed every day a service is provided. Multiple daily notes may be written each day.

The LPHA or counselor shall type or legibly print their name and sign and date the Daily Progress Note within 7 days of the date of service.

This form is to summarize the client's participation in services in the program on a daily basis.

This form must be completed within the following guidelines:

- Residential and Withdrawal Management programs shall document each client's progress on a daily basis and complete the form within the following seven (7) days.

NOTE: Case Management and/or physician consultation services are never captured on the Daily Progress Note. An individual progress note (Form 601) must be completed for every case management and/or physician consultation service that is provided/claimed.

COMPLETED BY:

The LPHA or the SUD counselor who provided the majority of services for that day, or the primary counselor if they provided any services to the client that day, should complete the note.

REQUIRED ELEMENTS:

Progress Notes shall be legible.

1. **Client Name:** Enter the client's full name
2. **Client ID:** Enter the SanWITS Unique Client Number
3. **Date:** Enter the date the service(s) were provided
4. **Shift time:** If the daily note covers the entire day, write "All day" or "12am-12am" or write the timeframe of when all services were provided for that day "8am-10pm". If there will be multiple daily notes documented that day, write the time of each shift (e.g., 8am-4pm; 4pm-12am).
5. Service topic or purpose of service
6. Language of Service (if other than English)
7. Translator Utilized (if applicable)
8. Start time of service
9. End time of service
10. Total service duration
11. Service contact type using the table (contact type) at the top of the form
12. Service type using the selections indicated in the table (Service Type) at the top of the form

13. EBP utilized using the selections indicated in the table (EBP Utilized) at the top of the form.
Note: If EBPs were utilized, they must be detailed in the narrative of the note.

Narrative must include a summary of the clinical services provided to the client during the day:

- 1) Provider support & interventions:** Enter support and/or treatment intervention services delivered to the client.
 - Support/treatment intervention services to compliment the client's treatment goals/objectives as listed on his/her Treatment Plan.
 - If applicable, specify which of the two recommended Evidenced Based Practices were used: Motivational Interviewing (MI), or Relapse Prevention (RP) and specific details how the EBP interventions were utilized. If other, identify the type of EBP and describe how it was utilized.
 - Interventions to address client level of participation/stage of change.
 - If applicable, describe attempts to refer or link the client to additional resources, unless this was provided in a case management service (Reminder: case management services are documented on an individual progress note).

- 2) Description of client's specific progress on treatment plan: problems, goals, action steps, objectives, and/or referrals:** Enter information regarding client's progress.
 - Client's progress on treatment plan problems, goals and action steps.

- 3) Client's ongoing plan, including any new issues:** Enter client's plan in treatment and any new issues that arise in treatment.

- 4) If any service(s) are provided in the community, identify the location(s) and how confidentiality was maintained:** Enter where the service(s) were provided and explain how confidentiality was maintained during provision of service(s).

Signature:

- **Counselor/LPHA Printed Name, Title:** Type or legibly print the counselor or LPHA name and title.
- **Signature, Credentials:** Complete signature and credentials by hand.
- **Date of Completion:** Complete date the progress note is signed by hand. The note must be documented and signed within seven (7) days from date of service(s).