

Elements of Good Note Writing

1. When a consumer comes into your office for a session or if you are in the field, you want to assess how his/her dress/hygiene is.

Example

Client dressed/not dressed appropriately for the weather. Client's presented with good/poor hygiene.

2. You want to pay attention to client's mannerisms and behavior during the session.

Example

Client's was experiencing severe/moderate/mild depression/anxiety.

Then you want to give a concise description on the behavior.

Did they have a flat affect?

Were they constantly standing and sitting?

Was their speech erratic?

Were they having trouble staying on topic, jumping from one subject to the next?

Did they seem to have been on a substance?

3. Ask the client if there any needs they want to address. Include any wellness needs. Check their Problems and Goals on their TX Plan to see what wellness goals they have.

Example

Client reports that he/she needs housing/food/clothing/income (SSDI/SSI/employment)

4. Report what CM did for client.

Example

CM **advocated** for client by calling local food pantries to inquire on operation times and any documentation needed. CM linked client to the DHS to apply for food stamps.

CM **linked** client to food pantry/DHS. Name food pantry

CM **referred** client to food pantry.

CM Billable Words: advocate, link, and refer

5. Then at the end of the note you want to document when the next appointment is.

Example of Case Management Note:

Client was dressed appropriately for the weather. Client presented with good hygiene. Client was experiencing severe depression and anxiety. Client could not concentrate on the objective of the session. Client's speech was very erratic, jumping from one subject to another. Client reports a need for SSDI/food. CM **referred** client to DHS to apply for food stamps. CM **linked** client to the Social Security Office to apply for SSDI/SSI. CM **advocated** for client by speaking on the client's behalf on the application process. Client's next session is scheduled on 11/15/2018 @ 1:00 pm.

WELLNESS

8 Dimensions of Wellness:

1. **Emotional**- Coping effectively with life and creating satisfying relationships.
2. **Financial**- Satisfaction with current and future situations.
3. **Social**- Developing a sense of connection, belonging, and a well-developed support system.
4. **Spiritual**- Expanding our sense of purpose and meaning in life.
5. **Occupational**- Personal satisfaction and enrichment from one's work.
6. **Physical**- Recognizing the need for physical activity, diet, sleep, and nutrition.

7. **Intellectual**- Recognizing creative abilities and finding ways to expand knowledge and skills.
8. **Environmental**- Good health by occupying pleasant, stimulating well-being.

Wellness Billable Words: Educate, provide feedback, and/or promote good physical health through the coordination of exercise support activities.

Example of Wellness Note:

Client was dressed appropriately for the weather. Client presented with good hygiene. Client was experiencing severe depression and anxiety. Client could not concentrate on the objective of the session. Client's speech was very erratic, jumping from one subject to another. CM inquired how the client has been incorporating on what the client was doing to add more exercise and better nutrition to their diet. Client stated that he/her does not have the resources to join a gym or the money to buy better food. Client reports a need for SSDI/food. CM **educated** client on the application process/how to obtain emergency food stamps. CM **promoted good physical health through the coordination of exercise** by **educating** client on local gyms that that have low income accommodations. CM **educated** client on ways to exercise at home. CM **educated** and **provided feedback** on the application process online/at the office for SSDI/SSI. Client's next session is scheduled on 11/15/2018 @ 1:00 pm.

REHAB

- An ability acquired by systematic effort to do something well. Skills may be physical, intellectual, emotional or social (behavioral)
- It can be observed, taught and measured
- It's not a state of being: "having good self-esteem"
- Should increase success and satisfaction with the individuals roles and environments
- Requires knowing the role and environmental demand of the individual

EXAMPLES OF SKILLS DEVELOPMENT

- Communication
- Organizational
- Social
- Employment
- Money Management
- Memory
- Conflict Resolution
- Attention Span
- Relationships
- Planning
- Prioritization
- Relaxation
- Relapse Prevention
- Self-Motivation
- Problem Solving
- Assertiveness
- Coping
- Self- Care
- Leadership
- Teamwork
- Housekeeping
- Menu Planning
- Food Storage
- Meal Preparation

REHAB BILLABLE WORDS: teach, taught, learn, educate and practice

Example of a Rehab Note:

Client was dressed appropriately for the weather. Client presented with good hygiene. Client was experiencing severe depression and anxiety. Client could not concentrate on the objective of the session. Client's speech was very erratic, jumping from one subject to another. CM **taught** client how to budget their food stamps. Client will **learn** to plan 3 meals per week and **practice** buying the appropriate food that helps promote good nutrition and staying within their budget. Client's next session is scheduled on 11/15/2018 @ 1:00 pm.

Any time you speak on the client's behalf using the client personal information make sure you have a Release of Confidential Information signed with the appropriate boxes checked.