

- MEMORANDUM -

DATE: May 2, 2023

TO: ACBH Specialty Mental Health Service (SMHS) Providers

FROM: Torfeh Rejali, Quality Assurance Administrator *Torfeh Rejali*
Brion Phipps, Clinical Review Specialist Supervisor *Brion Phipps*

SUBJECT: **Updates to SMHS Progress Note Templates in Clinician's Gateway**

The purpose of this memo is to inform SMHS programs regarding updated Progress Note templates that will be launched in Clinician's Gateway on **May 22, 2023**.

Background

With the implementation of Cal-AIM Documentation Redesign by Department of Health Care Services (DHCS), the State made significant changes to the Medi-Cal documentation requirements. To align with these new requirements, ACBH continues to make changes to existing clinical templates within CG.

New Clinician's Progress Note CalAIM Template

The standard mental health clinician Progress Note template has been updated to conform to CalAIM Medi-Cal standards per [DHCS BHIN 22-019](#) and now includes the following two narrative sections:

1. A narrative describing the service, including how the service addressed the beneficiary's behavioral health need (e.g., symptom, condition, diagnosis, and/or risk factors).
2. Next steps including, but not limited to, planned action steps by the provider or by the beneficiary, collaboration with the beneficiary, collaboration with other provider(s) and any update to the problem list as appropriate.

A late entry checkbox has been added to indicate when a note is completed after the required due date (3 business days or 24 hours for crisis).

The template also includes a narrative section for group services, when a co-staff is present, to document their involvement in the group session. First, use the *Add Additional Clinicians* function in the *Billing Time* section at the top of the note to include group co-staff in the billing. When the group co-staff narrative field is completed, then the co-staff does not need to document group services elsewhere. For all other activities, this section should be left blank.

New Targeted Case Management (TCM) Care Plan Progress Note

In conversation with ACBH providers, it was determined that a standalone TCM Care Plan Progress Note should be created to enable providers to retrieve and update their TCM Care Plans more easily. This template was specifically created for documenting targeted case management (TCM) services that result in an initial or





updated TCM plan. Both the TCM service and resulting plan should be documented on this note template. The note includes the sections in the standard progress note template above, as well as an additional section for the TCM plan. Users would document the TCM service in the two standard progress note narrative sections, then complete the TCM Care Plan section at the end of the template based on the information from the session. TCM care plans need to be in narrative format and completed upon the onset of TCM services. **TCM care plans should be updated whenever clinically necessary, at least annually.**¹

For activities that do not result in an initial TCM plan or update, including TCM services, the standard Clinician's Progress Note template should be used.

Training

The ACBH Quality Assurance (QA) team is facilitating a training/Demo of these new notes. The Demo will be recorded and posted on the [QA Training](#) page. To attend in person, please register using the link below.

New Mental Health Progress Note Templates

Tuesday May 9th, 2023

10:00-11:00 AM

Registration Link: <https://attendee.gotowebinar.com/register/5091953128197327193>

Action Required

Please plan to attend this training and/or listen to the recorded session prior to implementation of these notes on 5/22/23.

If you have any questions and/or comments, please contact QATA@acgov.org.

¹ [Per CA State Plan Amendment, Supplement 1 to Attachment 3.1-A., pages 8-17](#)

NOTE: The CA State Plan Amendment, referenced on page 8 of DHCS BHIN-019, requires that "Monitoring and update of the Client Plan is conducted on an annual basis or at a shorter interval as appropriate".

