



SANTA CRUZ COUNTY AVATAR INFORMATION NOTICE

TOPIC: NEW TEXT TEMPLATES FOR TCM CARE PLANNING AND PROBLEM LIST UPDATE/REVIEW

Policies, Processes and/or Staff Affected

Date	1/29/2024
Change/Update	Updates to Text Templates in Avatar Progress Notes
To	Staff who write progress notes in Avatar, and their supervisors. EXCLUDES medical staff.



Summary/Introduction

Two new Avatar Text Templates have been added for use with the SC General Purpose Progress Note to document the following:

- **Problem List Review and Updates**
- **MHP – TCM Care Plan Goal Statement**

About Text Templates

Progress Note Text Templates are blocks of pre-written text you can add to a progress note, and then edit as needed. Text Templates serve as a guide to describing services. See [How to Add Text Templates](#) at the end of this document for more information on how these work.

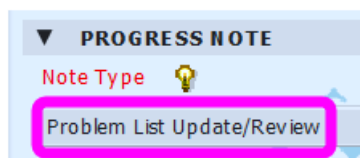
NEW Problem List, Review, Add or Remove Template

Use this template when reviewing and updating the problem list to ensure that required items are documented in your progress note.

Template Text: Writer met with [client and/or client's caregiver/support person] to review, add, or remove problems from the problem list that are current and relevant to the client's behavioral health treatment. Problem(s) identified that need to be (added, resolved or changed to inactive) are [list problems (within scope of practice)] by [provider (name and credential if different than writer), client and/or client's caregiver/support person] on this date, [date identified on problem list].

Once you add the template, you may edit as needed.

When you use this template, select the Progress Note Type Problem List Update/Review.



About Documenting Problem List Updates

Problem List updates need to be documented with specific information including:

- Statement of problem
- Who identified the problem? (e.g. provider, client, family)
- Which program?
- Status?
- Was the problem added, resolved, or changed to reflect new information?

NEW MHP – TCM Care Plan Goal Statement Template

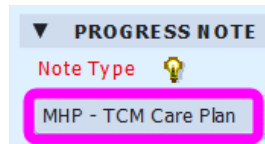
Use this to document your TCM Care Plan in a progress note.

Template Text: Client is receiving mental health treatment in hopes of achieving their goal to [add goal]. Writer will continue to support [client and/or client's caregiver/support person] through case management services to address their needs and goals identified in the assessment until [add what it will look like when the goal(s) are met].

Writer met with [client and/or client's caregiver/support person] to provide case management related to [add identified need]. Writer supported [client and/or client's caregiver/support person] by [add service activities/specific interventions]. Upon achievement of the service goals, writer will provide care coordination and/or discharge planning to assist client in sustaining their gains. [Client and/or client's caregiver/support person] agrees with this plan.

Once you add the template, you may edit as needed.

- When you use this template, select the Progress Note Type MHP – TCM Care Plan Goal Statement.
- Add a new TCM Care Plan note, each time you add, remove, or update a TCM goal.
- For more information about writing Targeted Case Management progress notes, see this document on [TCM Care Planning](#) on the [County CalAIM webpage](#).



About Targeted Case Management (TCM) Care Plan Notes

- Targeted Case Management starts with assessing the need for linkage to other services, and planning for how these needs will be addressed.
- A TCM Care Plan is a special type of progress note that documents added TCM goals and activities, along with participation of the client in developing said goals.
- Each TCM Care Planning note should include the problem being addressed. This problem should be in the problem list.

Resources

- More information about Targeted Case Management (TCM) and Problem List Review: [SCC BH QI Fee for Service FAQ Version 3 MHP \(10.13.2023\)](#)
- For General information about CalAIM: See the [County BH Avatar CalAIM Page](#)

For More Information Contact

The QI help desk at askqi@santacruzcounty.us

How to Add Text Templates

- 1) Open a progress note form and begin your note.
- 2) When you get to the text portion of the note (“Narrative Description of Services”), right click into text field to open the progress note menu and then select System Templates.
- 3) Click the template you want to add to your note.

