NM FIT Documentation Guidelines for Contact Notes
(Progress Notes, Service Notes, etc)

The general rules and specific content requirements listed below include Medicaid documentation requirements and are based largely on Virginia’s Part C documentation guidelines. Each contact log must have the following information:

- Child’s first and last name (It is acceptable to have the child’s first and last name on each page of contact notes rather than on each note itself (the name must appear on both sides of the paper if both sides are used for contact notes).

- Type of service provided (special instruction, physical therapy, service coordination, etc.)

- Type of contact (phone, home visit, e-mail, etc.)

- Date of service or contact.

- If the contact described in the note occurred prior to the date of the note, then the date of the contact should be contained in the body of the note (e.g., “4/5/06 - On 4/4/06 service coordinator participated in Joe’s IFSP meeting.”).

- Provider signature (with first and last name) and title or credentials of provider. The signature of the provider must be handwritten or electronic; no stamps allowed. (If multiple entries are made on each page, each entry must be initialed by service provider in addition to a full signature on each page.)

- For contact notes documenting a service session with the child and family, also include the following:
  - To whom the service was delivered
  - Who was present
  - Time in and time out (time session began and ended)
  - Location/setting (e.g., home, day care, etc.) in which the service was provided

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Information from the family/caregiver about what has happened since the last visit. The contact note should make clear that the information is from the family by using phrases like “as reported by family member,” or “Caregiver reports....”

Specific interventions and methods used during the session, referencing all outcomes that were the focus of the intervention

How the child, caregiver and others who were present participated in the session

Progress made as related to IFSP outcomes

Suggestions for follow-up during daily routines, including the following:
- Support and instruction provided for the family
- Any adjustments that are needed to intervention strategies and activities

Other Guidelines

Write legibly

Document all contacts made and all activities completed with or on behalf of the child and family. This includes, but is not limited to, phone calls (including “no answer” or a “voice message left”) face - to - face contacts, and written correspondence. If someone is looking at a child’s record and a contact or activity is not written down, then the reviewer must assume that the contact or activity did not occur.

Use contact notes to provide essential information that is not contained in meeting record forms such as the IFSP.

Document the reasons for cancellation (whether cancelled by the provider or the family) any time a contact was scheduled and did not occur. The more specificity provided, the more helpful the contact note is for individuals monitoring and/or using contact notes for billing.
- Provide complete and accurate information about the contact or activity, ensuring that a third party could read the contact note and understand what occurred.

- Use objective statements. State only the facts.

- Use language understood by all team members, including the family. Avoid jargon and abbreviations or explain them in the note.

- Complete contact notes in a timely manner. Part C providers are required to comply with their own agency's rules regarding timelines for completion of contact notes. If their agency has no such rules, then the contact note must be completed no more than 72 hours from the time of the contact. Ideally, the contact note should be done immediately following the contact to ensure optimal recall of what occurred and so that the note is available for other team members who may need the information for their service provision to the family.

**How to make corrections to Notes**

- Correct errors on handwritten contact notes by:
  - drawing a single line through the incorrect information
  - provide the date of the correction and the initials of the reviser, then add the correct information.

- Correct errors in electronic documentation by using strike-through. Provide the date and initials of the reviser. White-out, or any other means of correction other than that described here, may never be used to change the contact note.

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