



HURON BEHAVIORAL HEALTH
PROCEDURE

Procedure #: **CSM.2.04**
Issue Date: 05/26/04
Rev. Date: 05/25/26
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Title: Progress Note Documentation Procedure

Prepared By: Clinical Director

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Purpose:

To define the process and protocols for documenting clinical progress notes.

Scope:

This procedure applies to all employees (including full-time and part-time employees), contract clinical providers, volunteers, students, and/or interns of Huron Behavioral Health (HBH) and all consumers served.

Information:

1. The on-going delivery of services is to be documented in the consumer's case record using the progress note form in the Electronic Medical Record (EMR) system.
2. Progress notes may be generated by either clinical staff or clerical staff. Clinical staff progress notes typically record the consumer's progress toward the stated goals, objectives, and team assignments as identified through the person-centered planning process in their Individual Plan of Service (IPOS).
3. Progress notes are also used to document activities prior to the development of the IPOS, such as documenting initial activities from the time of the first contact, intake assessment, first scheduled appointment, etc. Clerical staff will generate progress notes which capture the activities in which state reporting parameters require the record-keeping of such activities. Clerical staff may also complete a progress note for missed appointments, cancellations, etc.
4. Progress notes may be billable or non-billable, but any contact that is made with/for a consumer in relation to authorized services (as defined in the IPOS and in compliance with the Michigan Medicaid Provider Manual), must be documented on a progress note and coded (for billing purposes) as a contact.

Procedure:

1. Contacts are to be provided in accordance with the frequency, amount, and duration defined in the individual's IPOS and documented promptly (typically within 24 business hours) of the service (see also ["Person-Centered Planning Policy" QI.1.05](#) and ["Person-Centered Planning and Individual Plan of Service \(IPOS\) Procedure" QI.2.18](#)).
2. Employees will document the consumer's progress (or lack of progress) on the progress note form in the EMR system each time a service is provided. Effective March 2026, employees may also utilize the "Blueprint Note-taking system" as part of their efforts to provide excellent consumer care. This allows the worker to be more fully present during the session. When choosing to use the Blueprint Note-taker system, the worker must first obtain written consent from the consumer using the ["Informed Consent for Utilizing Blueprint Automated Notetaker Form" \(90-792\)](#).
3. Staff will document the following information (as applicable) on the progress note:
 - Consumer name, case number, service codes, place of service, location, etc.
 - Goals and progress toward defined goals (as defined in the IPOS)
 - Mental status and/or Observations
 - Medication compliance (if applicable)
 - Behavioral concerns
 - Presenting issues
 - Interventions
 - Other issues as pertinent/applicable

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4. Concurrent documentation is encouraged, but in all cases, progress notes should be completed within twenty-four (24) hours of the contact.
5. Staff should also document (in the case record) consumer cancellations and/or no-shows, as well as staff cancellations.

Definitions/Acronyms:

CLS – Community Living Supports

COA – Council on Accreditation

EMR – Electronic Medical Record

HBH – Huron Behavioral Health

IPOS – Individual Plan of Service

Forms:

Progress Note Form (in EMR)

[90-792 Informed Consent for Utilizing Blueprint Automated Notetaker Form](#)**Records:**Progress notes are retained in the consumer's case record in accordance with the ["HBH Record Storage and Retention Policy" \(QI.1.23\)](#).**Reference(s) and/or Legal Authority**

COA standards

[QI.1.05 Person-Centered Planning Policy](#)[QI.1.23 HBH Record Storage and Retention Policy](#)[QI.2.18 Person-Centered Planning Process and Individual Plan of Service \(IPOS\) Procedure](#)**Change History:**

Change Letter	Date of Change(s)	Changes
None		Old procedure brought into new Controlled Documentation format with minimal content changes.
A	09/11/07	Revised to include the new regional Progress Note Form (90-1008), removed all references to old HBH progress note forms (90-208 & 30-001), added "EMR" to "Acronym" and "Records" sections, revised bullets in #3 to comply with items on new Progress Note form, revised some wording to clarify without changing content, removed #7 (Record keeping) as it was redundant with "Records" section of Policy, added hyperlinks
B	02/21/13	Reviewed and revised to comply with 8 th edition COA standards – removed COA chapter-specific (G9) reference, combined numbers 2 & 3, changed "appropriate" to "responsible" in # 2 and added "within 24 business hours", added "Business" to #6, reworded #8 which referred to the paper form process and changed to reflect new EMR system, removed EMR note in "Records" section as it was moved to #8, in "Acronym" section removed "AAM", "DD", "MI", & "QI" and added "PCP".
C	10/14/15	Bulletized "Information" section and moved #1 from "Procedure" section to 3 rd bullet, removed progress note form # (90-1008) and added "in EMR" (3 places), removed #8 which stated "Effective 1001/07, all progress notes are to be documented in EMR", corrected numbering errors, made numerous other grammatical corrections/changes without changing sentence content.
D	07/25/17	In 3 rd bullet in "Information" section changed "There are two types of billable contacts, direct and support" to "There are two types of progress notes, direct and support (support progress notes are not billable)", made several additional minor wording/grammatical changes/corrections throughout document without changing sentence content.
E	04/03/19	In "Scope" section changed "contractual providers" to "contractual clinical provides", changed "PCP" to "IPOS" throughout document (4 places), in "Acronyms" section added "IPOS", made several minor wording/grammatical changes/corrections throughout document without changing sentence content.
F	07/30/19	In "Information" section second bullet added first sentence and added "Clinical staff" & "typically", added third bullet.
G	05/22/21	In "Information" section removed "There are two (2) types of progress notes, direct and support (support progress notes are not billable). In a "direct contact", the worker must meet face-to-face with the consumer. "Support contacts" may include telephone contact(s) with consumer, agencies, or other persons regarding the consumer's status or treatment without the consumer present." and added "Progress notes may be billable or non-billable, but any", made several minor wording/grammatical changes/corrections throughout document without changing sentence content.
H	04/16/23	In "Procedure" section #3 first bullet changed "address" to "location", in "Acronyms" section removed "PCP", made several minor wording/grammatical changes/corrections throughout procedure without changing sentence content.
I	12/27/24	In "Information" section added #4, in "Acronyms" section added "CLS", in "References" section added CSM.2.12,

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		made several minor wording/grammatical changes/corrections throughout procedure without changing sentence content.
J	11/17/25	In "Information" section removed #4 ("Additionally, staff at Community Links generate progress notes for the services they provide, which includes skill-building, Community Living Supports (CLS), and/or supported employment activities (see also "Supported Employment and Skill Building Progress Note Procedure" CSM.2.12), in "References" section removed CSM.2.12.
K	05/25/26	In "Information" section #3 added "Clerical staff may also complete a progress note for missed appointments, cancellations, etc.", in "Procedure" section added "Effective March 2026, employees may also utilize the "Blueprint Note-taking system" as part of their efforts to provide excellent consumer care. This allows the worker to be more fully present during the session. When choosing to use the Blueprint Note-taker system, the worker must first obtain written consent from the consumer using the "Informed Consent for Utilizing Blueprint Automated Notetaker Form" (90-792).", in "Forms" section added 90-792, made several minor wording/grammatical changes/corrections throughout procedure without changing sentence content.