

## **Documentation and Workload Credit**

### Rationale for Separate Documentation

Since the inception of the SAFE Program in Oklahoma City in 1999, the following procedures have been used to capture workload and document care provided to veterans' family members/friends.

Clinicians do not document the family member's visit in the veteran chart. Clinicians may choose to include "refer to the SAFE Program/family education" as part of the veteran's treatment plan, but all documentation of family participation in SAFE is done separately. In this way, the veteran does not have access to information about the family member, thereby allowing families to share freely about their experience without fear of consequence.

### Creation of a Clinic

The MAS department can create a clinic to be used specifically for the SAFE Program. It is important that the clinic be created as a "non-billable" clinic, but one that generates workload credit. This task should be done during the planning stages of family programming and definitely before the first class.

### Creation of a Collateral Chart

1. At the family member (collateral)'s first visit, collect the following information (typically by asking him/her to complete a short form):
  - a. Collateral's first and last name
  - b. Collateral's full social security number
  - c. Collateral's date of birth
  - d. Collateral's mailing address
  - e. Veteran's first and last name
  - f. The last four numbers of the veteran's social security number
2. After the session, provide this information to the MAS clerk, who then creates the collateral chart.

### Completing the Encounter and Progress Notes

1. Create the appointment in the designated clinic and completes the check-out / encounter (in the same process as used with veteran appointments). For SAFE, the following information can be used:
  - a. CPT code = 90887
  - b. Diagnosis = V65.0 ("healthy person accompanying sick")

2. Write a progress note for each collateral visit. General information describing the session content and a brief summary of the collateral's situation can be described.
3. Include the following disclaimer at the end of every SAFE Progress note:

*All non-veteran participants are reminded that they are not eligible for individual mental healthcare at this VA Medical Center. They are instructed to report to their local emergency room or the Oklahoma Department of Mental Health and Substance Abuse Crisis Center if feeling like they are a danger to themselves or others. Any treatment that they receive therein will be at their own expense.*

4. You may choose to use/adapt this progress note template:

TITLE: Family Education

DATE OF NOTE: FEB 11, 2007

AUTHOR: SHERMAN, MICHELLE D

URGENCY:

ENTRY DATE: FEB 11, 2007

EXP COSIGNER:

STATUS: COMPLETED

Patient seen for 90-minute education class.

Family Educational Workshop

Family member attended a workshop today as part of the:

SAFE Program - Support and Family Education: Mental Health Facts for Families

The topic of today's workshop was: What causes mental illness?

Family member's level of participation in session: Active

Date of the next family education program workshop: Mar 10, 2007

Other comments: Mary attended the SAFE Program for the first time today. She shared that her husband, Tom, has bipolar disorder, and she's eager to learn more about how to support him. She heard about the SAFE Program through the Day Treatment Program. Today's session involved a discussion of the causes of mental illness, the biopsychosocial model and the vulnerability-stress model. Several relevant handouts were provided.

Participants had the opportunity to ask Dr. Faruque questions about medications. A small candle was provided to each person as a small gift.

All non-veteran participants are reminded that they are not eligible for individual mental health care at this VA Medical Center. They are instructed to report to their local emergency room or the Oklahoma Department of Mental Health and Substance Abuse Crisis Center if they feel like they are a danger to themselves or others. Any treatment that they receive therein will be at their own expense.

Veteran's Name: Tom Jones

Veteran's last 4: XXXX