

Documenting Unexpected Needs

Treatment planning is an essential part of helping individuals succeed at meeting their goals. A carefully developed treatment plan that specifies goals and objectives helps both the provider and the individual track their progress and determine whether goals are being met as planned. However, there are points throughout treatment that unexpected concerns arise, which may include crises, and the provider must deviate from the plan.

Imagine that you are scheduled to meet with Saliah, a woman you have been working with on the goal of gaining greater financial stability. You intend to discuss budgeting when you meet next, but when she walks in, Saliah is teary eyed, explaining that her boyfriend recently told her that he wants to end the relationship because he met someone else. This is an unexpected concern that must be addressed. As the provider, you recognize the need to process this situation with Saliah. However, your supervisor has told the team repeatedly that all interactions and interventions should align with the treatment plan. So what do you write in the documentation?

When Unexpected Needs Arise



Progress notes for unexpected concerns that arise are written like any other progress note **except** they require some additional information, because the activities may not be aligned with the treatment plan.

In order for the reader to understand the purpose of the intervention, it is important that the note provide context as to the reason and nature of these deviations from the plan. Some things that are helpful to mention include the following:

- The original purpose of your meeting with the individual
- Information about the unexpected situation and its impact on the individual and treatment
- What the provider did in response to the situation (*the intervention*)
- How the individual responded to the provider's intervention
- Referrals and next steps (within your scope of practice)

Important to note:

If unexpected needs appear to be routine rather than occasional, this may indicate that the treatment plan needs to be reviewed and possibly amended. For example, a client who continually is “in crisis” because of disagreements with family and friends may need to have an additional goal focused on conflict management, boundaries, or healthy relationships. While there is no rule about how many times a concern has to be raised before the treatment plan should be amended, providers should pay special attention to the frequency of any issue or concern which may signal the need to revise the treatment plan.

Practice: Jo



Jo is a 45-year-old woman who has been working with you for the past year. Jo's primary goal is to refrain from drug and alcohol use. You and Jo have been having discussions about avoiding people, places, and situations where the temptation to use might be overwhelming. Jo has been making steady but slow progress, and your plan for your next session is to talk about triggers for her drug use. When Jo walks into your office, she is crying because she just learned that a close family member has been diagnosed with cancer.

- 1 Write a statement about what you had hoped to talk about with Jo today.

- 2 Write a statement about the unexpected situation, and its impact on Jo and treatment. (*Feel free to use your creativity and professional experience to imagine how Jo might be affected.*)

- 3 What did you, the provider, do in response to the situation?

- 4 Describe how Jo responded to your intervention and support.

- 5 Finally, write up your next steps, including any care coordination needs.

Practice: Ahmad



As part of your work with Ahmad, age 14, to strengthen his social skills and develop a network of friends, you have been starting to talk with him and his parents about his hygiene. You had intended to use his next appointment to watch funny videos together as a safe way to introduce some uncomfortable issues, but when Ahmad’s mother brings him in, she explains quietly that the family is being evicted from their apartment and she doesn’t know what they will do.

How would you reflect this unexpected situation in your progress note?

- 1 Write a statement about what you had hoped to talk about with Ahmad today.

- 2 Write a statement about the unexpected situation, and its impact on Ahmad, his family, and treatment. (*Feel free to use your creativity and professional experience to imagine how they might be affected.*)

- 3 What did you, the provider, do in response to the situation?

- 4 Describe how Ahmad and his mother responded to your intervention and support.

- 5 Finally, write up your next steps, including any care coordination needs.

Look at Your Own Work



Step 1 Think about a recent situation where things did not go as planned due to something unexpected. Review the note to see if your progress note included the key elements.

Step 2 Copy the note here and revise it to include all the important components.

Step 3 Share your revised note with a supervisor or colleague. Ask this person to review your note and provide you with feedback about how you explained why you needed to veer off course, what you accomplished during the intervention, and next steps.

Remember



- ➔ Be clear about the purpose of the session
- ➔ Provide a rationale for any change in plan
- ➔ Detail the interventions used during the session
- ➔ If there is a concern that continues to resurface, this may signal a need to review or revise the treatment plan

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Answer Key



Jo (possible solution)

- 1 Jo arrived for her scheduled session, during which Counselor had planned to discuss triggers related to her drug use.*
- 2 When Jo arrived, she was sobbing and explained that she just found out that a family member has been diagnosed with cancer. Jo was unable to focus on the planned activity and the session shifted focus. Jo shared that she feels helpless and doesn't know what she will do if she loses her family member.*
- 3 Counselor assisted Jo in processing her feelings and explored how this news may impact her current progress. We also discussed safe ways to manage her sadness and anger, including self-care (long walks) and spending time with friends and family., Counselor and Jo wrote these ideas on a card for Jo to have as a reminder. Therapist made sure Jo had phone number for on-call clinician.*
- 4 By the end of the session, Jo was crying less and said she would stay with her sister for the next few days for additional support.*
- 5 Next appointment is scheduled in one week; Jo was encouraged to call for an emergency session if necessary. Counselor will check in with Jo via text message during the week.*

Ahmad (possible solution)

- 1 Today, Therapist had planned to talk with Ahmad about hygiene.*
- 2 However, upon arrival, Ahmad's mother told this therapist that they are being evicted. Both Ahmad and his mother looked very distressed and tired. Ahmad also sounded tense when he spoke. Given these concerns, therapist devoted session to understanding the immediate needs of the family.*
- 3 Therapist asked why the family is being evicted, and about other immediate and long-term housing options. Therapist also spoke with mother and Ahmad about how stressful housing emergencies can be and asked how they are doing. Therapist, with mother's permission, contacted a housing advocacy organization and spoke together with a housing advocate about their options. Therapist also suggested Ahmad's mother contact support staff at his school to let them know what is going on, and to make sure he can stay in his school when he moves.*
- 4 Ahmad's mother said she found it helpful to brainstorm options with someone else, but says she still feels very stressed. She is very worried it will affect Ahmad.*
- 5 Therapist was told Ahmad has a medical appointment next week so will not be able to come in for two weeks. Mom was encouraged to contact the school and the housing agency for more assistance and information. Therapist also gave mother information about Family and Youth Peer Support options.*