

## Caretool Minimum Required Data Fields – Options Counseling

- Person-Centered Assessment
- Service Enrollment
- Progress Notes
- Action Plan – Referrals included
- PCOC Exit Interview

\*Tip: If client demographics are complete in the Identification and demographics section, they will autofill into the assessment.

\*\* Person-Centered Assessment provider and Service Enrollment Provider must match. Assessment is required prior to Service Enrollment.

<b>Person-Centered Assessment Data</b>
Name (Last, First, Middle)
Address (Street, City, and Zip)
County
Phone Number
Language Used (spoken and written)
Interpreter Type
Date of Birth
Gender
Racial/Ethnic Identity (Q8 and 8a)
Primary Race/Ethnic Identity
Income Range
Lives With
Housing Type
Urban/Rural
Veteran Status
Disability Questions (Q16-Q24)

### Progress Notes:

- Describe each contact (encounter) with an Options Counseling (OC) client and each note should include the fields below.
- Should be clear and allow for adequate follow-up. Narration must include sufficient information to indicate client's needs/circumstances and steps taken to identify plans & resources to meet those needs.
- Progress notes related to Options Counseling should be connected using the Enrollment Element.
- All OC activity must be documented immediately following the encounter when possible but no later than the next business day from the encounter.

Encounter Date (enter date of contact/encounter)
<b>**Select Elements:</b>
Medicaid/NWD Activities (if Medicaid was discussed)
Method of Contact (home visit, email, telephone, etc.)
Schedule Follow-Up
Significant Event (hospital, fall, institutionalization)
***Units (0.25=15 minutes, 0.5=30 minutes, 1.0=1 hour)
**Enrollment – choose the appropriate enrollment from the dropdown

\*\*More than one element can be added to a progress note. Be sure to complete all fields for each element.

\*\*\*Enrollments need to be added to Caretool before units can be entered.

### Action Plan:

Action Plans need to include the following:

- Goal and associated need
- Task(s) and who's responsible
- Task timelines and completion dates
- Referrals – including need and taxonomy
- Referral outcomes and follow up questions
- Goal closure reason and date

\*Once complete, Action Plans need to be locked to complete disenrollment.