

**Date:** September 24, 2018

**To:** OSH Psychiatrists/PMHNPs; Community Providers

**From:** Alison Bort, PSRB Executive Director

**RE:** D**rafting a PSRB Progress Note Update**

*At every full hearing, the PSRB is required to make two findings: (i) Whether the patient/outpatient remains appropriate for PSRB jurisdiction; and (ii) Whether the patient/outpatient is adequately managed at their current placement.*

In order to make these findings, the Board reviews the entirety of the record and often takes testimony from the client’s providers. The Progress Note Update (‘PNU’) is a critical part of this process and is designed to supplement to record with the most updated information regarding a client’s appropriateness for jurisdiction and current placement. A finding of jurisdiction is made when a client is deemed to be suffering from a qualifying mental disorder which when active causes the client to pose a risk of substantial danger to others. A client is appropriately placed if he/she can be safely managed in their current situation. Below are the bare-bones requirements for a PNU, each will be discussed in turn*…*

**(1) Diagnosis (& medications);**

**(2) Opinion regarding dangerousness when client’s disorder is active;**

**(3) Opinion regarding client’s current placement;**

**(4) Any additional information the practitioner deems relevant to the client’s situation.**

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**Information Contained in a PSRB Progress Note Update:**

1. **Qualifying Diagnosis –**
* List the client’s current DSM-5 diagnosis which qualifies him/her for PSRB jurisdiction. Also list any differential diagnoses or rule outs. The Board is also interested in relevant secondary diagnoses such as personality disorders or other major impairments (including serious medical conditions) that may affect the client’s mental health.
* List any medications that the client is currently taking as well as whether the client is taking these voluntarily.
1. **Dangerousness When Active –**
* Provide your opinion regarding whether the client is dangerous when his or her qualifying mental illness is active (i.e. if left untreated would the client pose a risk of substantial danger to others?).
* It is also a good idea to list any significant recent incidents which speak to the client’s dangerousness or influence your opinion on this matter.
1. **Current Placement –**
* Provide your opinion regarding whether the client is appropriately placed where they are currently. Can they be safely managed at a lower level of care? Do they need additional restrictions to maintain safety? What is the next step for the client regarding placement?
1. **Additional Information/Misc. –**
* Include any additional information that is relevant to the Board’s decision making such as the client’s participation in treatment, recent incidents of positive behaviors, updates in the client’s support system, employment, interests, etc.

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| NOTE: A good PNU need not be lengthy – 1-2 pages is usually sufficient. ***Although sometimes historical information is directly relevant to the client’s hearing, it is usually not necessary to provide the full history of the client in a regular PNU***. The Board has the record in front of it and it is not necessary to copy/paste large sections of historical information from past documents.  |

**Timing/“Due Date” for PSRB PNUs:**

* The Board members have several thousands of pages to review for a given hearing date.
* The Board would like the PNU to be dated relatively close in time to the hearing (usually within 20-30 days of the hearing is fine).
* In order to ensure that the Board and all parties have sufficient time to review all of the documentation in preparation for a hearing, ***all documents for the record need to be submitted by the Wednesday prior to a Wednesday hearing***.
* This means the absolute deadline for a PNU to be submitted to the Board (through your PSRB liaison) is ***one week*** prior the client’s hearing.
* If events occur which require an updated or late PNU, please contact your PSRB liaison or Board staff directly to ensure that it makes it into the record.

Please be aware that the Board has many thousands of pages to review for a given hearing. This is differentiated from a situation where something that should be documented occurs in a client’s case less than one week prior to the hearing. The Board understands that those type situations are unavoidable and encourages practitioners to work with Board staff to ensure last minute info makes it into the record.

**Questions?**

*Please feel free to reach out to the PSRB hearings coordinator, Laura Moeller (**laura.moeller@oregon.gov**) or PSRB Executive Director, Alison Bort (**alison.bort@oregon.gov**). The PSRB liaison at OSH who coordinates the transfer of documents from OSH to the PSRB is Sandi Flowers (**sandra.flowers@state.or.us**).*