

Military OneSource Case Summary Note Guidance

Military OneSource regularly monitors **the quality of non-medical counseling services**. Our primary means for doing that is **by audits of the case activity forms** that you submit following each counseling session. Through such audits, we find that some providers are writing more than is needed but far more are writing less than what is needed. We are sending this communication to everyone in the Military OneSource network, to ask that you review and adopt the following guidelines when completing CAFs for your Military OneSource clients.

Military OneSource Case Summary Notes are meant to be brief and general, yet informative about what occurred during each session related to the participant's progress toward established goals. Please be sure to write legibly. If we cannot read it, we are forced to return it to you for re-submission.

The following 3 elements are both necessary AND sufficient for a comprehensive Case Summary Note:

- 1. What was the presentation of the participant OR what occurred during the session?**
- 2. What steps were taken by the provider toward established goals?**
- 3. What was the response of the participant (or couple/family).**

In most cases, one sentence to answer each question should suffice making a typical Session Note three sentences long.

Here are some examples:

- 1. Participant exhibited stress and discussed the pressures of his workplace and marriage. Practiced stress management exercises to be used in times of overwhelming stress. Participant was receptive and agreed to practice outside of sessions.*
- 2. Couple discussed challenges with communication that lead to arguments. Assisted couple with active listening tools for more effective communication. The couple struggled with application of concepts. Gave homework to practice at home.*
- 3. Participant vented through most of session about work related stressors and frustration with co-workers. Introduced anger management tools such as Think before you speak, taking Timeouts, Identifying solutions, and using 'I' statements. Participant agreed to try techniques at home and at work.*

Additional case summary details are required in the following situations:

High Risk Cases: If the participant is engaging in high risk behaviors (violence, abuse, self-harm, and impulsive or addictive behaviors that present risk to self or others), please document those behaviors and call Military OneSource to report or consult.

Safety Plan Developed: If a safety plan was developed, please document a summary of that safety plan.

Current (= within the past year) Abuse: Current Domestic Violence, Child Abuse/Neglect, Sexual Assault, or Sexual Abuse (of a minor) needs to be documented in the Case Summary Note and immediately reported to Military OneSource.

Risk and Functional Assessment indicating Severe Impairment: If the participant exhibits Severe Impairment of functioning in any of the Assessment factors (this is indicated by a '3'), please clarify what behaviors lead to that determination in the Case Summary Note.

Note: If 'Severe Impairment' is determined, it may indicate that the participant is Out-of-Scope for Military OneSource services.

Finally, please do NOT:

1. Copy and paste session notes from one session to another.
2. Write the same note for each session. Write a unique note for each session.
3. Be so general or brief that the quality of work is not reflected in your notes.

We greatly appreciate the expert counseling services that you provide for our service members and military families, and for all your efforts to partner with us in continual quality improvement of the Military OneSource program.

Thank you!

Military OneSource Provider Relations