

Preschool/School Supportive Health Services Program (SSHSP): Session Notes and Progress Notes

Session Notes (Medicaid requirement):

Service providers must maintain contemporaneous records. Session notes specifically document that the servicing provider delivered certain diagnostic and/or treatment services to a student on a particular date. Session notes must be completed by all qualified providers furnishing the services authorized in a student's IEP for each Medicaid service delivered and must include:

- Student's name
- Specific type of service provided
- Whether the service was provided individually or in a group (specify actual group size)
- The setting in which the service was rendered (school, clinic, other)
- Date and time the service was rendered (length of session – record session start time and end time)
- Brief description of the student's progress made by receiving the service during the session
- Name, title, signature and credentials of the servicing provider and signature/credentials of supervising clinician as appropriate

The duties of the provider are discussed in Social Services regulation at 18 NYCRR Section 504.3(a). Medicaid providers must prepare and maintain contemporaneous records that demonstrate the provider's right to receive payment under the Medicaid program. "Contemporaneous" records means documentation of the services that have been provided as close to the conclusion of the session as practicable. In addition to preparing contemporaneous records, providers in the Medicaid program are required to keep records necessary to disclose the nature and extent of all services furnished and all information regarding claims for payment submitted by, or on behalf of, the provider for a period of six years from the date the care, services or supplies were furnished or paid, whichever is later.

Progress Notes (IDEA requirement):

Progress notes are completed, at a minimum quarterly, by the service provider and must include:

- The present level of performance of the student,
- The progress that the student is making toward meeting projected outcomes of goals, and/or objectives of health related services as specified on the IEP.

Progress notes are required, under IDEA and Part 200 of the Commissioner's Regulations, for each reporting period. An annual review that contains progress notes by appropriate providers, qualifies as one progress note.