

Appendix D. CRS Epic Documentation: Tools/Template Example (Intake, Action Plan)

CRS INTAKE NOTES

Date:

Patient:

Intake type: {CRS Type:21449}

Who referred:

Puyallup Provider: {PLP Providers:21708}

Tacoma S. Provider: {TAS Providers:21287}

Intake notes: {CRS attempt notes:21539}

Child type: {CRS Kids Link type:21740}

Reason for visit: {Reason for CRS visit:21538}

Visit category: {Visit Category:21289}

Resources currently used: {CRS Resources Used:21537}

Interests and activities: {CRS Interests and Activities:21540}

Challenges: {Challenges:21290}

Social support: {Social Support:21291}

Referral to other Group Health resources: {CRS Referral to GH Resources:21292}

Length of visit: {CRS Length of Visit:21541}

Type of service provided: {CRS Service Type:21451}

Visit notes: {CRS Visit Notes:21543}

My goal is to: {CRS Action Plan Goal:21548}

I created the following action plan to help me reach my goal.

What I'm going to do	{CRS Action Step:21544}
The community resource I will use to help me	{CRS Resource:21545}
How often will I do it	***
When I will start	***
When *** will follow up with me	***

My confidence level (from 0 to 10) that I can complete this plan is: {CRS Confidence Level:21348}.

- Confidence level of 0 means: "There's no way I can complete this plan."
- Confidence level of 10 means: "There's nothing that will get in my way of completing this plan!"

What might make it hard for me	What can help me stick to my plan
Example: It's hard to stay away from my favorite foods during the holidays.	Example: When I'm invited to a holiday party, I'll bring healthy food that I enjoy.
***	***

Neighborhood Health Link is a website that helps you find free or low-cost community resources to improve y and learn to manage health conditions.

You can search for resources yourself at <https://www.neighborhoodhealthlink.org/>

Links to the programs we discussed today: {Link to Community Programs:21293}

Notes on my action plan: {CRS Action Plan Notes:21546}

CRS FOLLOW-UP VISIT NOTES

Date:

Patient:

Follow-up type: {CRS Type:21449}

Able to follow-up: {Ability to Follow Up:21295}

Follow-up notes: {CRS attempt notes:21539}

Child type: {CRS Kids Link type:21740}

Met goal? {Met Goal:21296}

Description of activity/resource used: {CRS Resources Used:21537}

Referral to other Group Health resource: {CRS Referral to GH Resources:21292}

How often used? {How Often Used:21298}

Challenges: {Challenges:21290}

Additional action planning: {Additional Action Planning:21297}

Notes: {CRS Visit Notes:21543}

Length of visit: {CRS Length of Visit:21541}