

CBHS SERVICE ENTRIES:

CBHS service entries fall into two broad categories:

1. **Therapy session** – includes individual, child, family, and couple therapy, shadowing, SUD counseling or consult, or EMDR session.
2. **Non-therapeutic service** – any other form of engagement or attempted engagement other than the categories included above.

ENGAGEMENT TYPE: Describes the nature or type of engagement you have with a client or 3rd party related to the client’s case. The engagement type indicates whether or not the engagement is considered a therapeutic service/session or non-therapeutic service.

ENGAGEMENT METHOD: Describes the specific method or “how” the therapist engaged with the client or 3rd party. For therapeutic engagement, the engagement method also indicates whether or not the session occurred as scheduled.

HOW TO DETERMINE ENGAGEMENT TYPE & METHOD: In order to determine the correct Engagement Type and Method, first ask yourself:

- **Is the engagement considered a therapy session?**
 - **YES: Continue to next question**
 - **NO: Continue to pages 3-4**
- **Did the client attend the therapy session?**
 - **YES: See below**
 - **NO: Continue to page 2**

YES
Client attended



Engagement Type	Engagement Method	Participated?
Child TA Individual TA Shadowing TA Couple TA Family TA SUD Counseling SUD Consult EMDR Session	Phone Video Session In Person at Office In Person in Classroom	YES

NO
Client did not attend



Why not?	Engagement Type	Engagement Method	Participated?
Client cancelled the session ahead of time (any amount of time) – client only!	Child TA Individual TA Shadowing TA Couple TA Family TA SUD Counseling SUD Consult EMDR Session	Cancelled <i>If the client called, emailed or texted to cancel, you can indicate this in the notes.</i>	NO
Client did not show up without advance notice		No Show <i>If you called the client to check in. You can indicate this in the notes.</i>	
Planned no session – therapist out, or for bi-weekly clients		No Session	
NOTE: Client re-scheduled ahead of time for another day that same week		<i>NO NEED TO ENTER THERAPY SESSION – if client called or emailed to re-schedule you can log as “Other (Non-Therapy)” if you’d like to have the record. Re-schedule becomes the therapy session.</i>	

Important! Therapists must enter at least one “Therapy session” type service entry every week, regardless of whether or not the client attended the session.

**NON
Therapeutic
Engagement**



Scenario	Engagement Type	Engagement Method	Participated?
Therapist reaches out to client to remind about upcoming therapy session	Other (Non-Therapy)	Phone Received message Received email Email conversation	YES
Therapist reaches out to client for other non-therapy related support			
Client reaches out to therapist to re-schedule their appointment (for same week)		Phone call, no message Left message Sent email Sent letter	NO
Client reaches out to therapist for other non-therapy related support			
Therapist conducts initial screening with client to determine interest in moving forward with therapy	Screening	Phone	YES

Therapist communicates with other provider, agency, school, etc. related to the client's case.	Collateral Contact	Phone Received message Received email Email conversation Phone call, no message Left message Sent email Sent letter	NO
Therapist communicates with parent of a child client	Parent Collateral	Phone Received message Received email Email conversation Phone call, no message Left message Sent email Sent letter	NO
Therapist communicates with client after case has been closed.	Post-Exit Engagement	Phone Received message Received email Email conversation	YES
		Phone call, no message Left message Sent email Sent letter	NO

ENGAGEMENT TYPE & ENGAGEMENT METHOD DEFINITIONS

ENGAGEMENT TYPE	DEFINITION
THERAPY SESSION	
Child TA	This refers to child therapy and play therapy sessions. This does not refer to shadowing sessions.
Couple TA	This refers to therapy sessions with a couple.
Family TA	This refers to therapy sessions with a family.
Individual TA	This refers to individual therapy sessions.
Shadowing TA	This refers to your shadowing sessions done at Compass Children’s Center.
SUD Counseling	Therapy session with a specific focus on substance use disorder.
SUD Consult	Initial consult focused on substance use disorder for the purpose of determining if ongoing SUD counseling is appropriate for the client.
Counselor of the Day	This refers to a session you did with your own client as Counselor of the Day. If you saw any person other than your own client as Counselor of the Day, please follow the normal COD documentation procedures.
Social Skills Group	<i>CCC only</i> – group social skills session involving multiple children at CCC.
<p>Important note! If the scheduled Therapy Appointment does not take place for any reason, you should still select one of the above as the Engagement Type and then select <u>Cancelled</u> or <u>No Show</u> or <u>No Session</u> as the Engagement Method – <u>see next section</u>.</p>	

NON-THERAPEUTIC ENGAGEMENT	
Screening	This refers to a conversation with the client to determine their interest and availability for therapy. This is not considered a therapy session and typically happens before an individual therapist is assigned to the client.
Collateral Contact	Refers to a conversation or exchange of information with another service provider, case manager etc. in support of the client’s case.
Parent Collateral	This refers to any type of communication you have with the parent of a child you are seeing for child therapy or shadowing. This is distinct from Family Therapy sessions which have their own Engagement Type – see Therapy Appointment – Family .
Other (Non-Therapy)	This refers to administrative and ad hoc communications with your client outside of therapy sessions and the other engagement types listed in this document. Some examples include phone calls and emails reminding a client of an appointment or scheduling an appointment. When recording a cancellation or “no show”, do not use this Engagement Type . Instead, use the <i>Therapy Appointment (Individual, Child, Couple, or Family)</i> Engagement Type and then indicate Cancelled or No Show as the Engagement Method .
EMDR Session	This refers to EMDR sessions. You should never use this engagement type unless you are trained or certified in EMDR and you did EMDR with the client during the session.
Post-Exit Engagement	Refers to any communication with the client AFTER they have exited the program.

ENGAGEMENT METHOD	DEFINITION
In-Person at office	Use when you provide therapy to a client in a therapy office onsite at one of the Compass sites.
In-Person in classroom	This is used for shadowing at CCC ONLY. It should not be used for any other purpose.
Phone	Use this code when you communicate with the client over the phone for therapy OR non-therapy purposes.
Video Session	Use this code when you provide therapy over video (e.g. Zoom).
No show	This is used to record when a client does not show up for their scheduled appointment and they do not inform the therapist before their appointment that they will not be attending.

Cancelled	This is used when a session is cancelled by the CLIENT. Please use the Progress Note box to indicate if the client cancelled or if the therapist cancelled and the reason, if known. For example: "Client cancelled session because she is not feeling well." If the client re-schedules for another time within the same week, you do NOT need to include a separate Service Entry with <i>Cancelled</i> as the Engagement Type . Instead, log the re-scheduled therapy session the same as you would if the client had attended during their regularly scheduled time.
No Session	Use when no session was scheduled. (E.g. Therapist has a planned vacation, you only see the client every other week, etc.) This may only be used when the skipped session is planned and should not be used for unplanned or one-off cancellations or no shows. Use instead <i>Cancelled</i> or <i>No Show</i> .
Left Message	Therapist left a voicemail/phone message for the client.
Received Message	Therapist received a voicemail/phone message from the client.
Sent Email	Therapist sent an email to the client.
Received Email	Therapist received an email from the client.
Email Conversation	Use this option to indicate back-and-forth email communication between the client and therapist within the same day (or several days if appropriate).
Sent Letter	Therapist sent a letter via post to the client.
Placed call, no message	Therapist attempted to contact the client by phone and did not leave a message.