

CHEAT SHEET: CLIENT TRACKING SHEET

Prenatal Clients

A Tracking Sheet must be completed for every billable service, at the time of transfer, and at the time of case closure. There should be a Progress Note to accompany each Tracking Sheet.

Complete the items in the **Prenatal box** during the pregnancy until the delivery

Complete the **Smoking Cessation box** for every face-to-face and virtual visit.

- For those that do not smoke cigarettes, but use other tobacco products, mark "0" for the question referring to the number of cigarettes currently smoked per day

The **Topics and Discussion box** is to be completed with billable Care Coordination services.

The **Enhanced Services box** can be billed for face-to-face and virtual visits.

- One session per code, per day may be billed
- The service limit for Health Education/Childbirth code is 7 and may be billed by RNs and those that have a Childbirth Certification
- The service limit for Parenting and Preventive Self Care is 32
- When billing Enhanced Services code, at least one topic under that code must be selected

Post Partum Clients

A Tracking Sheet must be completed for every billable service, at the time of transfer, and at the time of case closure. There should be a Progress Note to accompany each Tracking Sheet.

Complete the items in the **Post Partum box** after delivery

Complete the items in the **Cared By box**

- Check yes to the question about the infant being in the care of CPS if the infant is involved in an open CPS case or the infant has been removed from the home
- This box is to be completed with every contact, including face-to-face, virtual, and phone call.

Complete the **Smoking Cessation box** for every face-to-face and virtual visit.

- The Smoking Cessation box is not completed for infant clients, but it is important to assess the smoking habits of the infant caregiver. Mark the box See Progress Note when assessing the infant caregiver.
- For those that do not smoke cigarettes, but use other tobacco products, mark "0" for the question referring to the number of cigarettes currently smoked per day.

The **Topics and Discussion box** is to be completed with billable Care Coordination services.

The **Enhanced Services box** can be billed for face-to-face and virtual visits.

- One session per code, per day may be billed
- The service limit for Health Education/Childbirth code is 7 and may be billed by RNs and those that have a Childbirth Certification
- The service limit for Parenting and Preventive Self Care is 32

When billing Enhanced Services code, at least one topic under that code must be selected

The **Breastfeeding box** is to be completed during face-to-face and virtual visits, as well as when it is appropriate by phone.

- Complete this box throughout the case until "Never Breastfed" or "No, stopped on" option has been chosen
- Obtain the most accurate "Stopped on" date as possible for the date breastfeeding stopped
- Please note that exclusively breastfeeding only includes breastmilk (whether received by latching or pumping) and does not include any formula, cereal, baby food, or solid foods.

The **Safe Sleep Assessment box** should be completed for every face-to-face and virtual visit

- Please note that the last two questions addressing Safe Sleep education and the Period of Purple Crying education now have the option to select "Education was not provided at this visit"

Infant Clients

A Tracking Sheet must be completed for every billable service, at the time of transfer, and at the time of case closure. There should be a Progress Note to accompany each Tracking Sheet.

Complete the items in the **Infant box** for enrolled infant clients.

Complete the items in the **Cared By box**

- Check yes to the question about the infant being in the care of CPS if the infant is involved in an open CPS case or the infant has been removed from the home
- This box is to be completed with every contact, including face-to-face, virtual, and phone call.

The **Topics and Discussion box** is to be completed with billable Care Coordination services.

- Please note that if an ASQ assessment is completed, then "Developmental Progress" should be selected

The **Breastfeeding box** is to be completed during face-to-face and virtual visits, as well as when it is appropriate by phone.

- Complete this box throughout the case until "Never Breastfed" or "No, stopped on" option has been chosen
- Obtain the most accurate "Stopped on" date as possible for the date breastfeeding stopped
- Please note that exclusively breastfeeding only includes breastmilk (whether received by latching or pumping) and does not include any formula, cereal, baby food, or solid foods.

The **Safe Sleep Assessment box** should be completed for every face-to-face and virtual visit

- Please note that the last two questions addressing Safe Sleep education and the Period of Purple Crying education now have the option to select "Education was not provided at this visit"