

Role Based Template Example

Team Announcements and Notes:			
JOHN (HE/HIM) -any information programs need-		Role	Success/Progress, Challenges, Next Steps
		Counselor	John used a new coping skill on his own, increased stress levels bc balance end of school year and job, meeting next week to review relapse prevention plan
		Supported Employment	Maintained job for 5 months! Will reach out to john to schedule re: work stress and revisit disclosure conversation
		Supported Education	will reach out about end of school stress and bring organization tools
		Skills Trainer	working with supported education staff - joining appointment together. Will also work on transition planning
		Case Management	Transiton Planning: possible outside providers
		Peer Support	parents attended MFG last week, asked questions about substance use and psychosis.
		Nurse	Nurse is planning on following up for SFG about concerns and education
		Occupational Therapist	Has completed OT screen
		Med Provider	Has met provider, declining routine appointments right now
Intake:	5/23/2024		
Last Review	2/5/2025		
Next 90 Day Review:	5/6/2025		
Projected Transition Date:	5/23/2026		
Engagement Level:	Medium	navigating school/work - canceling a few appointments the last two weeks now	
Risk Level	Low	Last risk assessment on 4/25/2025 low	
JOHN (HE/HIM) -any information programs need-		Role	Success/Progress, Challenges, Next Steps
Intake:			
Last Review			
Next 90 Day Review:	3/30/1900		
Projected Transition Date:	12/30/1901		
Engagement Level:			
Risk Level			

Domain Based Template Example

Team Announcements and Notes:		<ul style="list-style-type: none"> • Workshop scheduled for 8/10 • Staff potluck 7/11 • • 			
JOHN (HE/HIM) -Other information program's need-		Domain Area - Goals	Team Member	Team Member	Success/Progress, Challenges, Next Steps
		Mental Health	Counseling	Peer Support	John used a new coping skill on his own, increased stress levels bc balance end of school year and job, meeting next week to review relapse prevention plan
		Employment	Supported Employment	Occupational Therapist	Maintained job for 5 months! Will reach out to john to schedule re: work stress and revisit disclosure conversation
		Medication	Med Provider		Declined
		Family/Natural Supports	Peer Support	Nurse	parents attended MFG last week, asked questions about substance use and psychosis. Nurse is planning on following up for SFG about concerns and education
		Education	Skills Trainer	Supported Education	will reach out about end of school stress and bring organization tools
		Social			No social goal at this time - joined club at school!
Intake:	5/23/2024	Transition Planning	Case Management	Occupational Therapist	scheduled to talk about transition and possible outside providers
Last Review	2/5/2025				
Next 90 Day Review:	5/6/2025				
Date:	5/23/2026				
Engagement Level	Medium	navigating school/work - canceling a few appointments the last two weeks now			
Risk Level	Low	Last risk assessment on 4/25/2025 low			
-Other information program's need-		Domain Area - Goals	Team Member	Team Member	Success/Progress, Challenges, Next Steps
Intake:	1/1/2025				
Last Review	2/25/2025				
Next 90 Day Review:	5/26/2025				
Projected Transition Date:	1/1/2027				
Engagement Level					
Risk Level					