



# Independent Study | in Idaho

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**PSYC 574**  
**Record Keeping and Case**  
**Management in**  
**Chemical Addictions**  
**Counseling**



**The University of Idaho in statewide cooperation with**  
**Boise State University — Idaho State University — Lewis-Clark State College**

# Course Guide

Independent  
Study | in Idaho

*Self-paced study. Anytime. Anywhere!*

**PSYCHOLOGY 574**  
**Record Keeping and Case Management**  
**in Chemical Addictions Counseling**  
University of Idaho  
3 Semester-Hour Credits

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1- PSYC 574  
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**Table of Contents**

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Welcome! ..... 1

Policies and Procedures..... 1

Course Description ..... 1

Course Materials ..... 1

Course Delivery..... 1

Course Introduction..... 2

Course Objectives ..... 2

Lessons ..... 2

Exams..... 2

Grading ..... 3

About the Course Developer ..... 3

Contacting Your Instructor ..... 3

  

Lesson 1: Basics of Documentation ..... 4  
     Written Assignment 25 points possible

Lesson 2: Intake Process ..... 5  
     Written Assignment 25 points possible

Lesson 3: ASAM Basics..... 24  
     Written Assignment 25 points possible

Lesson 4: Match Treatment (TX) Plan ..... 32  
     Written Assignment 25 points possible

Lesson 5: Treatment Plan Reviews/ Addendums ..... 36  
     Written Assignment 25 points possible

Lesson 6: Progress Note and Discharge..... 40  
     Written Assignment 25 points possible

  

**Midterm Exam Information: Covers Lessons 1–6..... 42**

  

Lesson 7: Substance Abuse Case Management ..... 43  
     Written Assignment 25 points possible

Lesson 8: Substance Abuse Case Management continued ..... 44  
     Written Assignment 25 points possible

Lesson 9: Case Management in the Community ..... 45  
     Written Assignment 25 points possible

Lesson 10: Case Management – Special Populations..... 46  
     Written Assignment 25 points possible

Lesson 11: Case Management Assessment..... 48  
     Written Assignment 25 points possible

Lesson 12: Case Management Plan ..... 49  
     Written Assignment 25 points possible

  

**Final Exam Information: Covers Lessons 7–12 ..... 51**

  

Lesson 13: Research Paper ..... 52  
     Written Assignment 50 points possible

## PSYC 574 Record-Keeping and Case Management in Chemical Addictions Counseling 3 Semester-Hour Credits: U of I

### **Welcome!**

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Whether you are a new or returning student, welcome to the Independent Study in Idaho (ISI) program. Below, you will find information pertinent to your course, including the course description, course materials, course objectives, as well as information about assignments, exams, and Grading. If you have any questions or concerns, please contact the ISI office for clarification before beginning your course.

### **Policies and Procedures**

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Refer to the ISI website at [www.uidaho.edu/isi](http://www.uidaho.edu/isi) and select *Students* for the most current policies and procedures, including information on setting up accounts, student confidentiality, exams, proctors, transcripts, course exchanges, refunds, academic integrity, library resources, and disability support and other services.

### **Course Description**

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Exploration and examination of the sequence of events and services that clients encounter as they begin and move through the treatment process in a typical addictions treatment setting, as outlined in the Twelve Core Functions and Global Criteria of the International Certification Reciprocity Consortium (ICRC); study of the Twelve Core Functions and the Addiction Counseling Competencies relevant to each area. Additional projects/assignments required for graduate credit. University of Idaho students: Joint-listed with PSYC 574

Prerequisite: PSYC 101

*12 graded assignments, 2 proctored exam  
Available online only.*

Students may submit as many assignments per week as desired; however, assignments and exams must be submitted consecutively. Grades and feedback on assignments may take up to three weeks after the date submitted.

ALL assignments and exams must be submitted to receive a final grade for the course.

### **Course Materials**

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#### **Required Course Materials**

- Treatment Improvement Protocol (TIP) 27 Comprehensive Case Management for Substance Abuse Treatment. This is a free online book. The easiest way to access it is to google TIP 27.  
<https://store.samhsa.gov/product/TIP-27-Comprehensive-Case-Management-for-Substance-Abuse-Treatment/SMA15-4215>
- The Addiction Treatment Planner 5<sup>rd</sup> edition. (6<sup>th</sup> edition ISBN: 9781119707851 after February 2021)  
Edited by Arthur E Jongsma ISB-13:978-1118414750 Wiley 2014

### **Course Delivery**

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All ISI courses are delivered through Canvas, an online management system that hosts the course lessons and assignments, and other items that are essential to the course. Upon registration, the student will receive a *Registration Confirmation Email* with information on how to access ISI courses online.

## **Course Introduction**

This course will consist of reading text and handouts as well as lectures. Assignments primarily consist of applying the material. Some assignments utilize case studies. You will often be asked to add your thoughts. Some of the material is straight forward, and there are specific answers for which I am looking. I think these will be obvious. Others, such as writing treatment plans, require you to think through the assignment using materials and adding your thoughts. As long as I see the effort and following the basic guidelines I provide, you'll do fine. I like to see creative approaches.

## **Course Objectives**

The goals of this class are:

1. Gain an understanding of the basics of record-keeping, including legal aspects and how record keeping can help you and your client
2. Experience record keeping from a client perspective as well as a counselor perspective
3. Understand record keeping requirements for the State of Idaho
4. Understand the basics of Case Management
5. Learn how to access community resources for case management.

Upon completing this course, I expect students to be prepared for entry-level employment in the field of addictions counseling and/or case management.

## **Lessons**

### **Overview**

Each lesson may include the following components:

reading assignments

lecture

written assignment, project, or activity

### **Study Hints:**

Keep a copy of every assignment submitted.

Complete all reading assignments.

Set a schedule allowing for course completion one month before your personal deadline. An *Assignment Submission Log* is provided for this purpose.

Web pages and URL links in the World Wide Web are continuously changing. Contact your instructor if you find a broken Web page or URL.

Refer to the **Course Rules** in Canvas for further details on assignment requirements and submission.

## **Exams**

You must wait for grades and comments on assignments before taking subsequent exams. For your instructor's exam guidelines, refer to the **Course Rules** in Canvas.

Refer to Grading for specific information on assignment/exam points and percentages.

Exams are applying knowledge to specific case studies or situations.

No time limits, No proctor is required.

## **Grading**

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The final course grade is based on the following:

A = 90% to 100%

B = 80% to 89%

C = 70% to 79%

D = 60% to 69%

F = 59% or less

<b>Item</b>	<b>Points</b>	<b>Title</b>	<b>Material</b>
Assignment 1	25	Basics of Documentation	Lecture
Assignment 2	25	Intake Process	Handouts; Lecture
Assignment 3	25	ASAM Basics	Handouts; Lecture
Assignment 4	25	Match Treatment Plans with ASAM	Handouts; Lecture, Introduction to <i>The Addiction Treatment Planner</i>
Assignment 5	25	Treatment Plan Reviews and addendums	Handouts; Lecture
Assignment 6	25	Progress Note and Discharge	Handouts; Lecture
Midterm	50		
Assignment 7	25	Substance Abuse Case Management	Chapter 1 TIP 27
Assignment 8	25	Substance Abuse Case Management continued	Chapter 2 TIP 27
Assignment 9	25	Case Management in the Community	Chapter 3 TIP 27
Assignment 10	25	Case Management – Special Populations	Chapter 5 TIP 27
Assignment 11	25	Case Management Assessment	Handout; Lecture
Assignment 12	25	Case Management Plan	Handout; Lecture
Final	50		
Research Paper	50		
<b>Total</b>	<b>450</b>		

The final course grade is issued after all assignments and exams have been graded.

Acts of academic dishonesty, including cheating or plagiarism, are considered a grave transgression and may result in a grade of F for the course.

## **About the Course Developer**

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I earned an M.Ed. in 1993 and a Ph.D. in 1999 in Counseling and Human Services from the University of Idaho with a minor in Psychology. I have been a licensed psychologist in the state of Idaho since 2001. I am the owner and supervisor of **Weeks and Vietri Counseling**, where we provide individual, group, couples, and family counseling. We provide mental health and addictions counseling, and we have been the treatment providers for Latah County Drug Court since the program started. I have worked as a social worker and hospice. I currently provide counseling, consulting, and instruction as a university psychology instructor.

## **Contacting Your Instructor**

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Instructor contact information is posted on your Canvas site under *Course Rules*.

# Lesson 1

## Basics of Documentation

### **Lesson Objectives**

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The course is arranged into two sections.

Part 1: Documentation

Part 2: Case Management

### **Reading Assignment**

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Watch the short introductory video lecture titled *Lecture 1.mp4*

### **Introductory Lecture**

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Paperwork is essential, although often not the favorite component of the job. If not documented, then later judgment may be that it did not happen. Paperwork serves as your memory and keeps you focused on the treatment goals, a record of what was discussed in the prior session, and the progress being made.

Forms that start the process:

- Intake form
- Release of information
- Upon meeting with a client:
- Clients determine the goals
- Review progress that is being made in the treatment
- Discharge plan to guide treatment

Requirements for forms:

- Must fill out forms in ink.
- Every line on a form must be filled in, so someone else can't fill in blanks later.
- If something is changed on a form, draw a line through the change, and then the counselor and the patient initial and date the change.
- If anything is added, add the information and then initial and date the additions.

### **Written Assignment - 25 Points Possible**

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Before beginning the first written assignment, refer to the *Course Rules* in Canvas for your instructor's assignment requirements.

**There is a short video attached for you to listen to, then answer the following questions.**

Why is paperwork important? 10 points

Why is it necessary to make sure every line is filled in on every form? 4 points

Why should forms be completed in ink rather than pencil? 3 points

What is the proper way to cross something out on a form if you make a mistake? 4 points

I gave a brief overview of the flow of paperwork, starting with intake. What are the other four categories of paperwork referred to? 4 points