Res/Day Hab Plan & Checklist

AWARDS INSTRUCTION SHEET

People with Developmental Disabilities (PWDD) service information can be entered into AWARDS via the Res Hab/ Day Hab Daily Plan, the Res Hab/ Day Hab Daily Checklist and Service Plan Linked progress notes. Reports are also available for the information entered using these tools. These tools are typically used by the "Residential Habilitation" and "Day Habilitation" program types but can be turned on for any program types within AWARDS. The plan and checklist labels that appear throughout the system display according to which program type is selected for the program in which work is being completed.

REQUIRED PERMISSIONS

Permissions required to enter or view DD services information are as follows:

- Chart Access – You must have chart access permission for the program associated with the consumer(s) for Res Hab/Day Hab service information is to be entered, updated, and/or viewed.
- Data Entry/Access – Res Hab/Day Hab service information is accessed from within the Services and Outcomes modules. In order to see these modules on your AWARDS Opening Menu page, you must have the "Display Chart Records Services Button," "Display Chart Records Outcomes Button," and "Display Any Chart Records Buttons" data entry/access permissions.

ABOUT THIS DOCUMENT

This document is intended to guide you through the process of entering and viewing Res Hab/Day Hab service information. Specific topics covered are:

- Entering/Updating a Res Hab/Day Hab Plan – Learn how to enter or update a plan. Page **1**
- Entering/Updating a Res Hab/Day Hab Plan Review – Learn to enter or update a plan review. Page **4**
- Viewing a Res Hab/Day Hab Plan Report – Learn how to view a Res Hab/Day Hab plan report. Page **7**
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ENTERING/UPDATING A RES HAB/DAY HAB PLAN

To enter or update a res hab/day hab plan, complete the following steps:

1. From the *AWARDS Home* screen, click **Charts** from the left-hand menu, and then **Services**. The *Consumer Services Menu* page is displayed.

2. Click the **Program** drop-down arrow and select the program associated with the consumer for whom the plan is to be entered or updated.

3. Click the **Database** drop-down arrow and select "Data Entry."

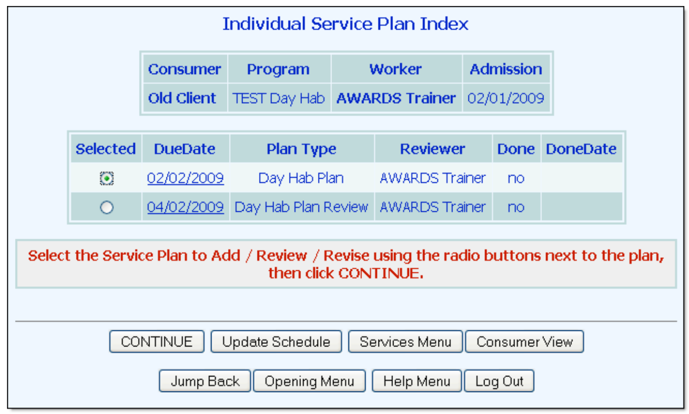
4. To limit record selection by consumer name, click the **A-Z** drop-down arrow and select the consumer's last name initial. An asterisk (*) in this field will include all consumers in the selection process.

5. If the plan to be worked on is for a former (discharged) consumer, click the **Roster Archives** check box.

6. Click **Service Plans**. The *Service Plan Consumer Selection* page is displayed.

7. Click the **Consumer** drop-down arrow and select the consumer for whom the plan is being entered or updated.

8. Click **PLAN INDEX**. The *Individual Service Plan Index* page is displayed. This page contains a list of any existing plans scheduled for the selected consumer. Some plans may have automatically been scheduled for the consumer at the time of admission.



   - If a service plan schedule record must be entered or updated, continue with step **9**.
   - If an existing plan is to be worked on and it is not necessary to enter or update a schedule record, continue with step **12**.

   If the client whose index is being viewed is also admitted in a Medicaid Services Coordination (MSC) program and has a completed MSC service plan, a link to that MSC service plan may also appear on this service plan index page. When the link is clicked, the MSC service plan will open in read-only mode.

9. Click **Update Schedule**. The *Plan Review Schedule* page is displayed.

10. To update an existing schedule record, make changes to the review schedule fields and options as necessary. To enter a new schedule record, configure the blank **NEXT** or **BACK FILL** review schedule fields and options.

    When updating this schedule, dates must be entered in chronological order from top to bottom. If it is necessary to insert a new date between two existing dates, use the BACK FILL line instead of NEXT.

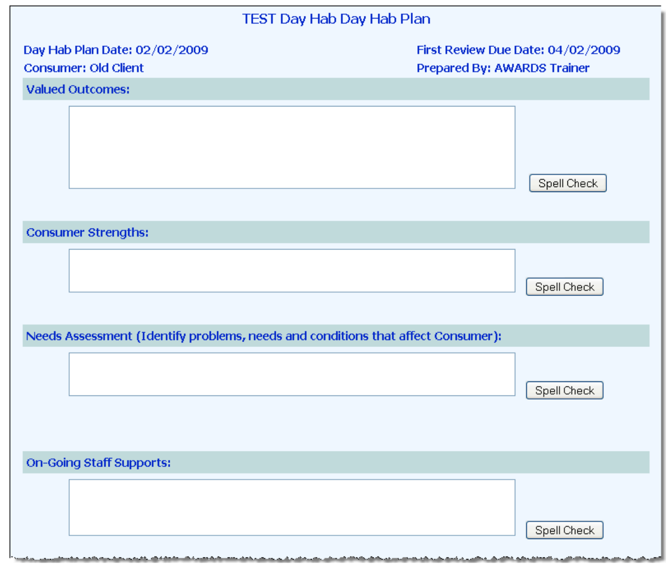
    The following options are available:

    - **Due Date –** In this field, type the date on which the plan/review must be done (using the mm/dd/yyyy format).
    - **Plan Type –** Click this drop-down arrow and select "Res Hab Plan" or "Day Hab Plan," as applicable.
    - **Reviewer –** Click this drop-down arrow and select the worker responsible for working on the plan.
    - **Done –** Click this drop-down arrow and select "Yes" or "No" to indicate whether the plan has been completed.
    - **Done Date –** If "Yes" was selected for the Done option, in this field type the date on which the plan was completed (using the mm/dd/yyyy format).

11. Click **CONTINUE**. The schedule record is saved, and the updated *Plan Index* page is displayed.

12. Click the **Selected** radio button next to the res hab/day hab plan.

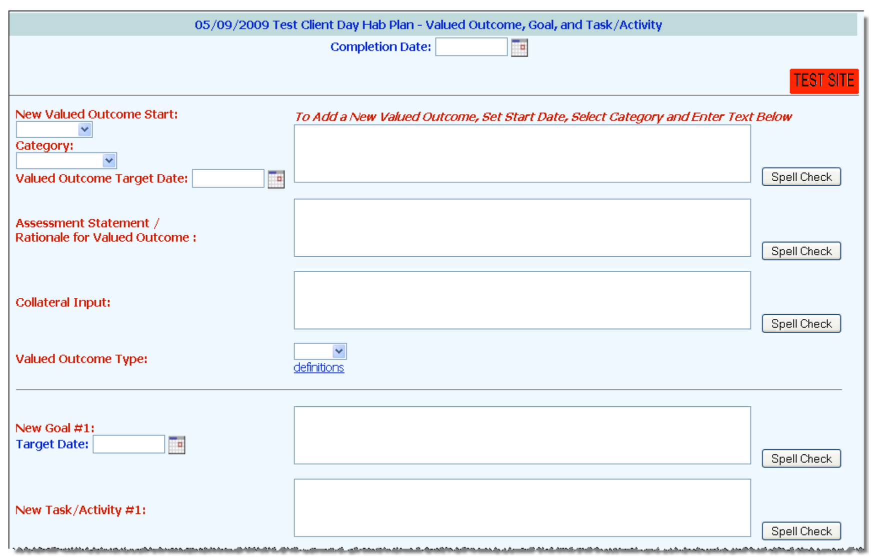
13. Click **CONTINUE**. The *Res/Day Hab Plan* page is displayed. This page is the review's cover sheet, and displays the consumer's name, the Res Hab/Day Hab Plan Date, the consumer's Medicaid CIN (if applicable) and the next Res Hab/Day Hab Plan Review due date.



14. Enter or make changes to the information in the following text boxes:

   - **Valued Outcomes**
   - **Consumer Strengths**
   - **Needs Assessment**
   - **On-Going Staff Supports**

15. Click **UPDATE & CONTINUE**. The *Res Hab/Day Hab Plan – Valued Outcome, Goal, and Task/Activity* page is displayed.



16. Enter or make changes to the valued outcome information by configuring the following service fields and options:

   - **New Valued Outcome Start –** Click this drop-down arrow and select the start date for the valued outcome.

   - **Category –** Click this drop-down arrow and select the service type of the valued outcome: "Socialization," "Mental Health," "Physical Health," or "Rehabilitation." In the corresponding text box, type or make changes to the valued outcome.

   - **Valued Outcome Target Date –** In this field, type or make changes to the target date for the valued outcome.

   - **Assessment Statement/Rationale for Valued Outcome –** In the text box provided, type or make changes to the reason(s) why the valued outcome is being set.

   - **Collateral Input –** In the text box provided, type or make changes to any input from the other individuals in contact with the consumer; for example, other service providers such as a therapist/psychiatrist, caseworkers from other programs, or family/significant other.

   - **Valued Outcome Type –** Click this drop-down arrow and select the valued outcome type.

   *Click the **definitions** link to view a description of each valued outcome type/code.*

- **Delete Valued Outcome –** Click this checkbox to delete the corresponding valued outcome. The valued outcome and any associated goals/tasks/activities are deleted after **UPDATE** is clicked.

  This option is only available after the valued outcome has been saved at least once and no progress notes have been written against the valued outcome.

- **New Goal** or **Add Goal –** In the text box provided, type a goal. Up to four goals can initially be entered for each valued outcome, after which additional goals can be added by clicking on **UPDATE**, then **Return to Data Entry** to return to the *Res Hab/Day Hab Plan – Valued Outcome, Goal, and Task/Activity* update page. New goals can also be added to existing valued outcomes.

- **Task/Activity** or **New Task/Activity** or **Add Task/Activity –** In the text box provided, type a detailed description of the task/activity for each goal entered.

- **Target Date –** In this field, type or make changes to the target date for the goal.

- **Delete Pair –** Click this checkbox to delete the goal/task/activity. The pair is deleted after **UPDATE** is clicked.

  This option is only available after the valued outcome/task/activity has been saved at least once and no progress notes have been written against the goal and goal/task/activity pair.

- **Task/Activity Start –** Click the drop-down arrow and select the date on which the corresponding task/activity began. The default value is the plan date.

  This option is only available after the valued outcome/goal has been saved at least once.

18. Click **UPDATE**. The plan information is saved, any valued outcomes or goals marked for deletion are removed, and a read-only report version of the plan is displayed on the *Res Hab/Day Hab Plan* page.

    *To make additional changes to the res hab/day hab plan at this time, such as adding valued outcomes or editing existing plan information, click **Return to Data Entry** to return to* Res Hab/Day Hab Plan – Valued Outcome, Goal, and Task/Activity *update page.*

The process of entering or updating a res hab/day hab service plan is now complete.

ENTERING/UPDATING A RES HAB/DAY HAB PLAN REVIEW

To enter or update a res hab/day hab plan review, complete the following steps:

1. From the *AWARDS Home* screen, click **Charts** from the left-hand menu, and then **Services**. The *Consumer Services Menu* page is displayed.

2. Click the **Program** drop-down arrow and select the program associated with the consumer for whom the res hab/day hab plan review is to be entered or updated.

3. Click the **Database** drop-down arrow and select "Data Entry."

4. To limit consumer selection by name, click the **A-Z** drop-down arrow and select the initial of the consumer's last name. An asterisk (*) in this field will include all consumers in the selection process.

5. If the res hab/day hab plan review to be updated is for a former (discharged) consumer, click the **Roster Archives** check box.

6. Click **Service Plans**. The *Service Plan Consumer Selection* page is displayed.

7. Click the **Consumer** drop-down arrow and select the consumer for whom the res hab/day hab plan review is being entered or updated.

8. Click **CONTINUE**. The *Individual Service Plan Index* page is displayed. This page contains a list of existing plans scheduled for the selected consumer.

   - If a res hab/day hab plan review schedule record must be entered or updated, continue with step **9**.

   - If an existing res hab/day hab plan review is to be worked on and it is not necessary to enter or update a schedule record, continue with step **12**.

   The first res hab/day hab plan review is automatically scheduled for the consumer when his or her res hab/day hab plan is opened and updated for the first time. Subsequent plan reviews are automatically scheduled for a consumer when the previous review for that consumer is opened and updated for the first time.

   If the client whose index is being viewed is also admitted in a Medicaid Services Coordination (MSC) program and has a completed MSC service plan, a link to that MSC service plan may also appear on this service plan index page. When the link is clicked, the MSC service plan will open in read-only mode.

9. Click **Update Schedule**. The *Individual Res/Day Hab Plan Review Schedule* page is displayed.

10. To update an existing schedule record, make changes to the review schedule fields/options as necessary. To enter a new schedule record, configure the blank **NEXT** or **BACK FILL** review schedule fields/options:

    - **Due Date –** In this field, type the date on which the res hab/day hab plan review development must be done (in mm/dd/yy format).

    - **Plan Type –** Click the drop-down arrow and select "Res Hab Plan Review" or "Day Hab Plan Review," as applicable.

    - **Reviewer –** Click the drop-down arrow and select the worker responsible for working on the plan review.

    - **Done –** Click the drop-down arrow and select "Yes" or "No" to indicate whether the review has been completed.

    - **Done Date –** If "Yes" was selected for the Done option, in this field type the date on which the plan review was completed (in mm/dd/yy format).

11. Click **CONTINUE**. The schedule record is saved and the updated *Individual Res/Day Hab Plan Index* page is displayed.

12. Click the **Selected** radio button next to the res hab/day hab plan review to be worked on.

13. Click **CONTINUE**. The *Res Hab/Day Hab Plan Review* page is displayed.

14. If necessary, in the **Next Review Due Date** field, make changes to the date on which the first plan review must be done for this consumer.

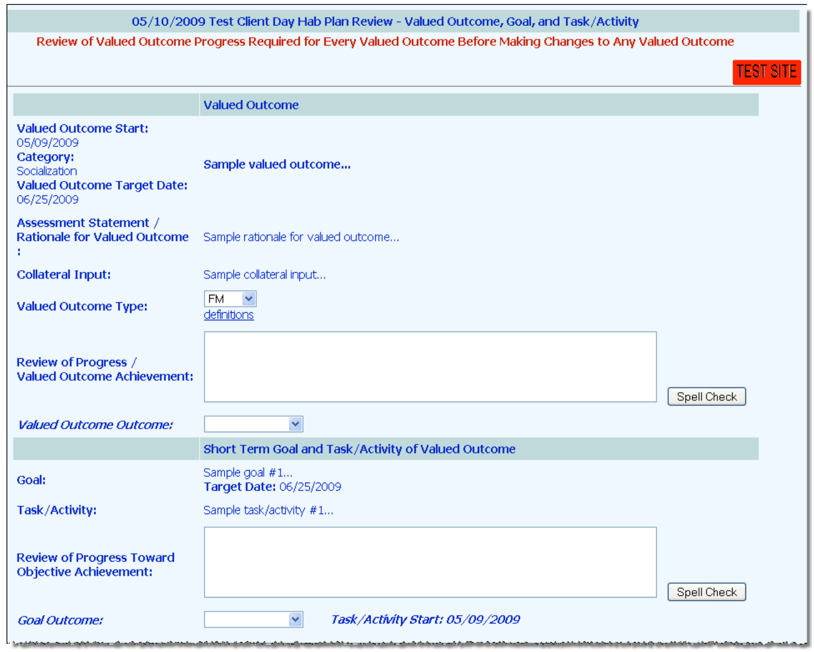
15. Enter or make changes to the information in the following text boxes as necessary:

    - **Valued Outcomes**

    - **Consumer Strengths**

- **Needs Assessment**
- **On-Going Staff Supports**.

16. Click **UPDATE & CONTINUE**. The *Res Hab/Day Hab Plan review – Values Outcome, Goal, and Tasks/Activity* page is displayed.



17. If applicable, in the **Completion Date** field, type the date on which the plan review was completed.

    A completion date cannot be entered until a review of progress has been completed.

18. Review the progress on all existing valued outcomes/goals by configuring the following fields/options:

    Plan changes such as the addition of new valued outcomes cannot be made until this step is complete.

    - **Review of Progress/Valued Outcome Achievement –** In the text box provided, describe the progress toward achievement of the valued outcome.
    - **Valued Outcome Outcome** or **Goal Outcome –** Click the drop-down arrow and select one of the following outcome options for each valued outcome and goal: "Attained," "Progress," "No Progress," "Reconsidered," or "Not Worked On."
    - **Review of Progress Toward Objective Achievement –** In the text box provided, describe the progress toward achievement for each goal/task.
    - **Consumer Comments –** In the text box provided, type any consumer comments.

    Continue this process through all existing valued outcomes and goal/task pairs.

19. Click **UPDATE**. The res hab/day hab plan review information is saved, and a read-only report version of the plan review is displayed on the *Res Hab/Day Hab Plan Review* page.

20. To add new valued outcomes/goals and/or to continue to revise the plan, click **Return to Data Entry**. The *Res Hab/Day Hab Plan review – Values Outcome, Goal, and Tasks/Activity* update page is re-displayed.

21. To further revise existing goals/objectives, configure the following fields/options:

    - **Valued Outcome Outcome –** Click the second Valued Outcome Outcome drop-down arrow and select one of the following outcome options: "Valued Outcome Continued," "Valued Outcome Revised (Below)," or "Valued Outcome Discontinued." If "Valued Outcome Revised" is selected, configure the corresponding **Revised Category**, **Goal Target Date**, **Revised Valued Outcome**, **Assessment Statement**, **Collateral Input**, and **Valued Outcome Type** fields/options to set the revised goal.
    - **Goal Outcome –** Click the second Goal Outcome drop-down arrow and select one of the following outcome options: "Task/Activity Continued," "Task/Activity Revised," or "Task/Activity Discontinued." If

"Task/Activity Revised" is selected, configure the corresponding **Revised Goal** and **Task/Activity** fields/options to set the revised goal.

22. To add new valued outcomes/goals follow the same steps necessary to add a new valued outcome/goal in a res hab/day hab plan. This includes the configuration of the following fields/options: "New Valued Outcome Start," "Category," "Assessment Statement/Rationale for Valued Outcome," "Collateral Input," "Valued Outcome Type," "New Goal" or "Add Goal," "New Task/Activity" or "Add Task/Activity," and "Target Date." If necessary, valued outcomes and goal/task pairs can also be deleted using the **Delete Valued Outcome** and **Delete Pairs** options, respectively.

    Delete Valued Outcome and Delete Pairs options are only available after the valued outcomes/tasks have been saved at least once and no progress notes have been written against the valued outcome and/or goal/task pair.

23. Click **UPDATE**. The res hab/day hab plan review information is saved, any valued outcomes or goals marked for deletion are removed, and a read-only report version of the plan is displayed on the *Res Hab/Day Hab Plan Review* page.

    *To make additional changes to the plan at this time, such as adding valued outcomes/goals or editing existing plan information, click **Return to Data Entry** to return to the* Res Hab/Day Hab Plan *review – Values Outcome, Goal, and Tasks/Activity update page.*

The process of entering/updating a res hab/day hab plan review is now complete.

VIEWING A RES HAB/DAY HAB PLAN REPORT

To view a read-only plan report, complete the following steps:

1. From the *AWARDS Home* screen, click **Charts** from the left-hand menu, and then **Services**. The *Consumer Services Menu* page is displayed.

2. Click the **Program** drop-down arrow and select the program associated with the consumer for whom the res hab/day hab plan report is to be viewed.

3. Click the **Database** drop-down arrow and select "Reports."

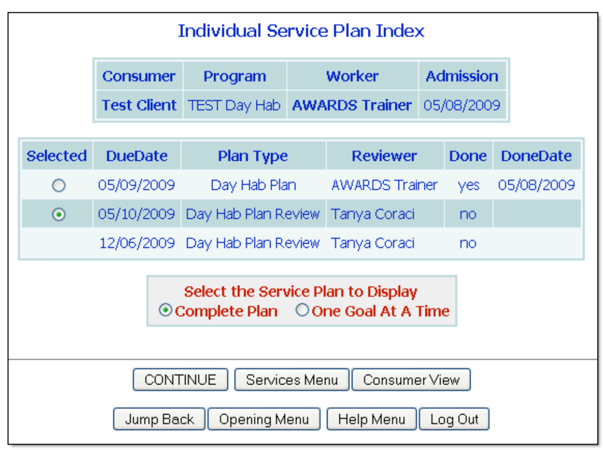
4. To limit consumer selection by name, click the **A-Z** drop-down arrow and select the initial of the consumer's last name. An asterisk (*) in this field will include all consumers in the selection process.

5. To select the service plans report to be viewed from those for former (discharged) consumers only, click the **Roster Archives** check box.

6. Click **Service Plans**. The *Service Plan Consumer Selection* page is displayed.

7. Click the **Consumer** drop-down arrow and select the consumer for whom the res hab/day hab plan report is to be viewed.

8. Click **PLAN INDEX**. The *Individual Service Plan Index* page is displayed.



9. Click the **Selected** radio button next to the plan/review to be viewed.

10. Click one of the following **Service Plan to Display** radio buttons to indicate how information is to be viewed:

    - **Complete Plan –** Displays the res hab/day hab plan report in its entirety on a single page.
    - **One Goal At A Time –** Displays the res hab/day hab plan report one valued outcome at a time with each valued outcome/goal on a separate page.

11. Click **CONTINUE**. The res hab/day hab plan report is displayed on one of two pages depending on the type of plan selected – the *Res Hab/Day Hab Plan* page, or the *Res Hab/Day Hab Plan Review* page.

12. If the One Goal At A Time option was selected, scroll down to the bottom of the report page and click **NEXT** to view the next plan valued outcome/goal.

The process of viewing a res hab/day hab plan report is now complete.

COMPLETING THE RES HAB/DAY HAB DAILY CHECKLIST

To complete the res hab/day hab daily checklist, complete the following steps:

1. From the *AWARDS Home* screen, click **Charts** from the left-hand menu, and then **Services**. The *Consumer Services Menu* page is displayed.

2. Click the **Program** drop-down arrow and select the program associated with the consumer for whom the checklist is to be completed.

3. Click the **Database** drop-down arrow and select "Data Entry."

4. To limit record selection by consumer name, click the **A-Z** drop-down arrow and select the consumer's last name initial. An asterisk (*) in this field will include all consumers in the selection process.

5. If the checklist to be updated is for a former (discharged) consumer, click the **Roster Archives** check box.

6. Click **Res Hab Daily Checklist** or **Day Hab Daily Checklist** (the button label will vary depending on the type of program). The *Res Hab/Day Hab Daily Checklist* page is displayed.

7. Click the **Consumer** drop-down arrow and select the consumer for whom the checklist is being completed.

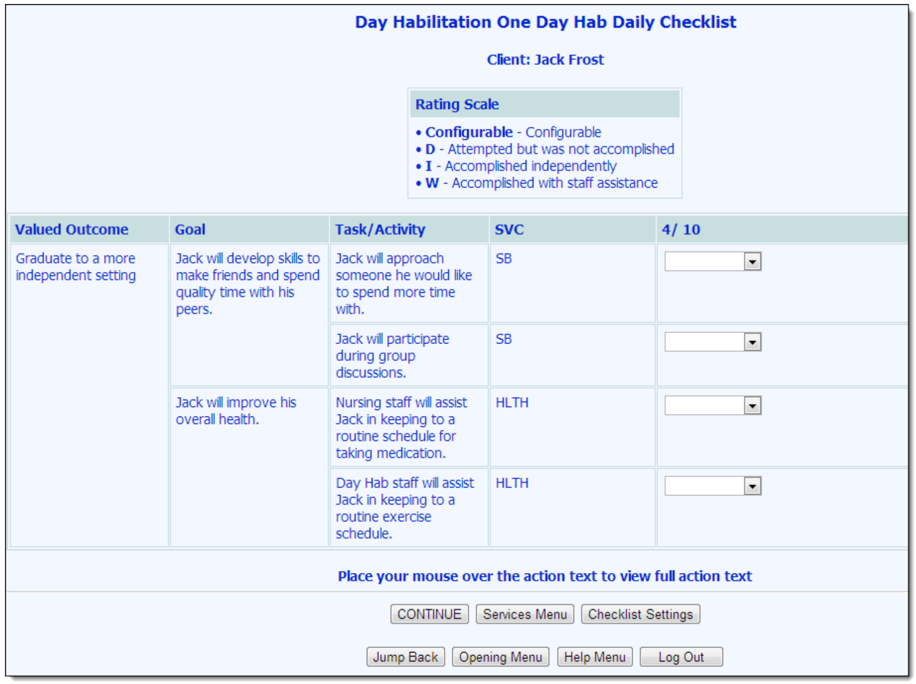
8. Click the **Display** drop-down arrow and select the type of checklist to be completed:

    - If "Daily" is selected, continue with step **9**.
    - If "Weekly" is selected, continue with step **12**.
    - If "Monthly" is selected, continue with step **15**.

9. Enter the date to which the checklist applies in the **Date** field (using mm/dd/yyyy format).

   In order to complete data entry on the checklist, the date entered must fall within the standard note-editing window, which is set using the Business Rules feature in the System Setup module.

10. Click **CONTINUE**. The *Res Hab/Day Hab Daily Checklist* page is displayed and contains a table listing current goals on the res hab or day plan for the consumer, their valued outcome type, and a rating scale to indicate consumer accomplishment for the day.



11. Click the drop-down arrow and record the rating for each goal. Continue with step **20**.

    *Entering a rating for a goal on the checklist creates a service plan linked progress note related to that particular goal (written by the worker entering the rating). Some programs may also display duration drop-downs (shown as drop-downs for **hrs** and **mins**) to be associated with the note. If you would like this functionality turned on, please contact the Help Desk.*

    If a rating has already been entered by another worker, it will appear above the drop-down list, displaying the rating chosen and the worker's initials (and note duration, if entered).

    If no drop-down list is available, the date entered is outside of the standard note-editing window.

12. Enter the date that begins the week which the checklist applies in the **Date** field.

    For example, if February 1 is entered, the monthly checklist will display dates 2/1 – 2/7.

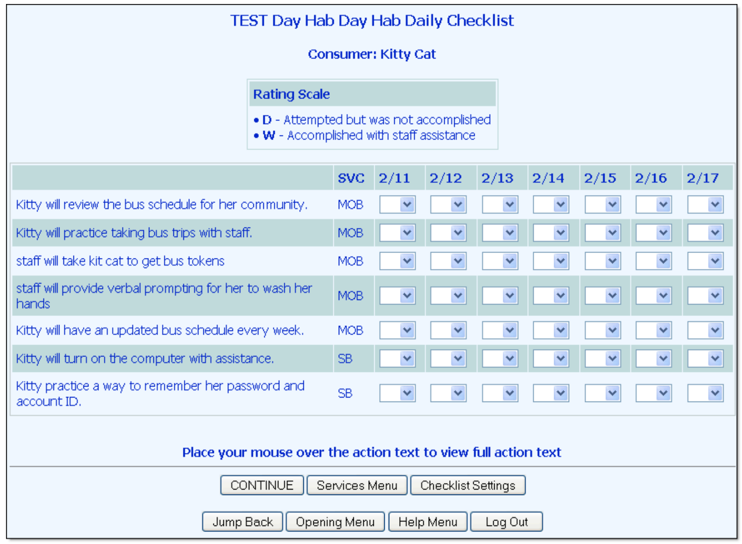
    If today's date or any dates within the past 6 days are entered in this field, the checklist will display the seven dates surrounding (and including) the date entered, but future dates will not display.

    In order to complete data entry for a date on the checklist, the date must fall within the standard note-editing window.

13. Click **Res Hab/Day Hab Daily Checklist**. The *Res Hab/Day Hab Daily Checklist* page is displayed and contains a table listing current goals on the res hab/day hab plan for the consumer, their valued outcome type, and a rating scale to indicate consumer accomplishment for each day of the specified week.

14. Click each drop-down arrow and record the rating for each goal, for each day of the week. Continue with step **20**.

    *Entering a rating for a goal on the checklist creates a service plan linked progress note related to that particular goal (written by the worker entering the rating). Some programs may also display duration drop-downs (shown as drop-downs for **hrs** and **mins**) to be associated with the note. If you would like this functionality turned on, please contact the Help Desk.*


TEST Day Hab Day Hab Daily Checklist

Consumer: Kitty Cat

Rating Scale
• D - Attempted but was not accomplished
• W - Accomplished with staff assistance

	SVC	2/11	2/12	2/13	2/14	2/15	2/16	2/17
Kitty will review the bus schedule for her community.	MOB							
Kitty will practice taking bus trips with staff.	MOB							
staff will take kit cat to get bus tokens	MOB							
staff will provide verbal prompting for her to wash her hands	MOB							
Kitty will have an updated bus schedule every week.	MOB							
Kitty will turn on the computer with assistance.	SB							
Kitty practice a way to remember her password and account ID.	SB							

Place your mouse over the action text to view full action text

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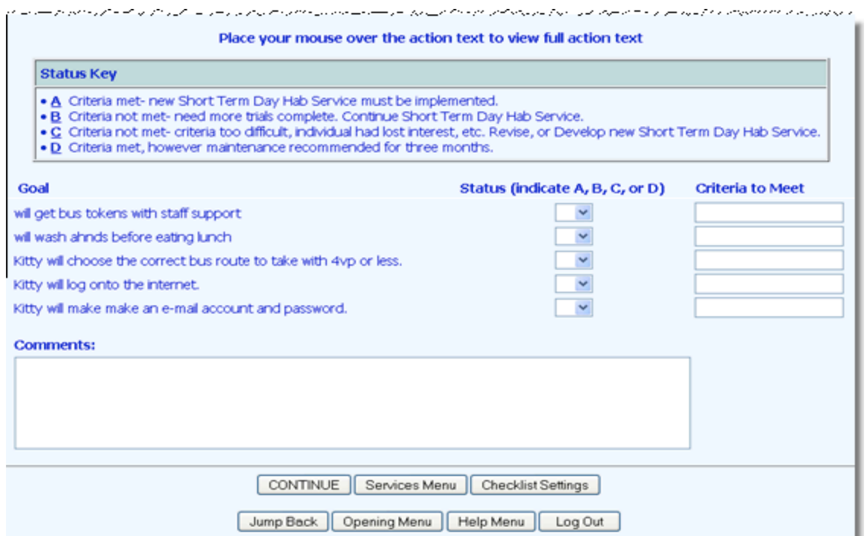
    If a rating has already been entered by another worker, it will appear above the drop-down list, displaying the rating chosen and the worker's initials (and note duration, if entered).

    If no drop-down list is available, the date entered is outside of the standard note-editing window.

15. Click the **Month** and **Year** drop-down arrows and select the values for the month and year combination to which the checklist applies.

16. Click **Res Hab/Day Hab Daily Checklist**. The *Month/Year* page is displayed and contains a table listing this month's and the previous month's data as entered on the daily and weekly displays of the checklist.

17. At the bottom of the page, click the **Status (Indicate A, B, C, or D)** drop-down and select the status of each individual goal.


Place your mouse over the action text to view full action text

Status Key
• A Criteria met- new Short Term Day Hab Service must be implemented.
• B Criteria not met- need more trials complete. Continue Short Term Day Hab Service.
• C Criteria not met- criteria too difficult, individual had lost interest, etc. Revise, or Develop new Short Term Day Hab Service.
• D Criteria met, however maintenance recommended for three months.

Goal	Status (indicate A, B, C, or D)	Criteria to Meet
will get bus tokens with staff support		
will wash ahnds before eating lunch		
Kitty will choose the correct bus route to take with 4vp or less.		
Kitty will log onto the internet.		
Kitty will make make an e-mail account and password.		

Comments:

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    The drop-down list for this field is configurable and may vary by program type. If you'd like to edit this list, please contact the Help Desk.

18. Enter the criteria to meet information in the **Criteria to Meet** field for each individual goal.

    The label for this field is configurable and may vary. If you'd like to edit this label, please contact the Help Desk.

19. If necessary, enter comments in the **Comments** text area.

20. Click **CONTINUE**. The checklist is saved and a report version of the checklist is displayed.

    If the "Monthly" checklist was completed, the process of completing the res hab/day hab checklist is now complete. Otherwise, continue with step 21.

21. If a "Daily" or "Weekly" checklist was completed, the attempt/accomplishment data entered appears as a link with the worker's initials, which provides an option to write a goal-linked progress note. To enter a progress note linked to a goal, click the corresponding link. The *Progress Note Data Entry Settings* page is displayed. The **Service Type** and **Date** will be carried over from the checklist, but users can update the **Duration** and **Start Time** fields before clicking **CONTINUE**.

    These progress notes are also available for editing using the Services module Progress Notes feature. See the "Entering a Res Hab/Day Hab Plan Linked Note" section of this document for more information.

22. If necessary, enter progress note information in the **Staff Action and Consumer Response** and **Enter General Narrative Note in Text Box Below** fields.

23. Click **SAVE NOTE.** The progress note is saved and the checklist is displayed once again.

The process of completing the res hab/day hab daily checklist is now complete.

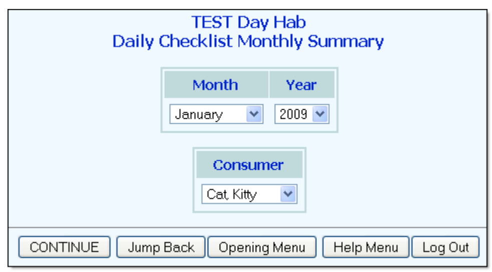
VIEWING THE DAILY CHECKLIST MONTHLY SUMMARY REPORT

To view the daily checklist monthly summary report, complete the following steps:

1. From the *AWARDS Home* screen, click **Charts** from the left-hand menu, and then **Outcomes**. The *Outcomes Menu* page is displayed.

2. Click the **Program** drop-down arrow and select the program for which the report is to be viewed.

3. Click **Daily Checklist Monthly Summary**. The *Daily Checklist Monthly Summary* page is displayed.



4. Click the **Month** drop-down arrow and select the month for which the report is to be viewed.

5. Click the **Year** drop-down arrow and select the year for which the report is to be viewed.

6. Click the **Consumer** drop-down arrow and select the consumer whose report is to be viewed.

7. Click **CONTINUE**. The Daily Checklist Monthly Summary report is displayed.

The process of viewing a daily checklist monthly summary report is now complete.

ENTERING A RES HAB/DAY HAB PLAN LINKED NOTE

To enter a res hab/day hab plan linked progress note, complete the following steps:

1. From the *AWARDS Opening Menu* page, click **Services**. The *Consumer Services Menu* page is displayed.

2. Click the **Program** drop-down arrow and select the program associated with the consumer for whom the note is to be entered.

3. Click the **Database** drop-down arrow and select “Data Entry.”

4. To limit record selection by consumer name, click the **A-Z** drop-down arrow and select the consumer’s last name initial. An asterisk (*) in this field will include all consumers in the selection process.

5. If a note to be updated is for a former (discharged) consumer, click the **Roster Archives** check box.

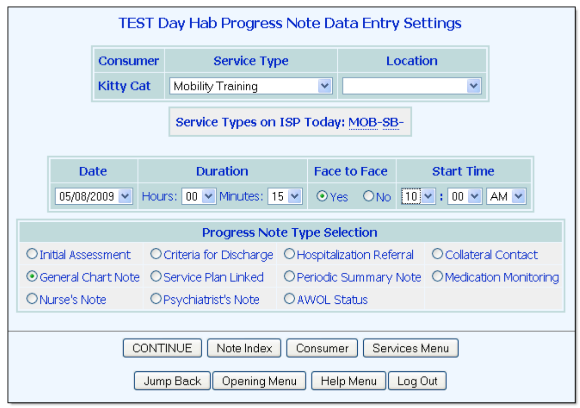
6. Click **Progress Notes**. The *Progress Note Data Entry* page is displayed.

7. Click the **Consumer** drop-down arrow and select the consumer for whom the note is being entered.

8. Click **CONTINUE**. The *Progress Notes Editing Index* page is displayed. This page contains a list of any notes available for editing, the Medicaid-Billable Residential Habilitation Note Requirements, and a list of any plan-linked notes already completed for the consumer during the month.

9. Select the radio button for a New Note.

10. Click **CONTINUE**. The *Progress Notes Data Entry Settings* page is displayed.



11. Enter the following information on this page:

    - **Service Type –** Click the drop-down arrow and select the type of service provided during the contact. Beneath the Service Type selection list is the “Service Types on ISP Today” section, which lists the service types on the ISP today. These are the valued outcome types that are current on the Res Hab/Day Hab service plan; one of these types must be selected in order to link the note to the plan.

    - **Location –** Click the drop-down arrow and select the location at which the contact with the consumer occurred.

    - **Date –** Click the drop-down arrow and select the date on which contact with the consumer occurred.

    - **Duration Hours / Minutes –** Click the drop-down arrows and select the duration of the contact. The default value is 15 minutes for day programs and 30 minutes for housing programs.

    - **Face to Face –** Click either the “Yes” or “No” radio button to indicate whether the contact was face to face (in person).

    - **Start Time –** Click the drop-down arrows and select the time at which contact with the consumer began.

    - **Progress Note Type Selection –** Click the radio button next to the “Service Plan Linked” option.

12. Click **CONTINUE**. The *Service Plan Note Linkage* page is displayed and lists the tasks/activities related to the service type selected. Each task/activity displays in a row with its related valued outcome and goal and a radio button for selection.

    If a service type is selected for a date on which there are no related tasks/activities in effect in the Res Hab/Day Hab service plan, this page will provide a notice that there is “No Match” and no note can be written.

13. Click the radio button that corresponds to the task/activity to which the note should be linked.

14. Click **CONTINUE**. The *Progress Note Data Entry page* is displayed.

15. Click the **Res/Day Hab Daily Checklist** drop-down arrow and select the appropriate rating: "D-Attempted but did not accomplish," I-Accomplished independently," or "W-Accomplished with staff assistance."

    The drop-down list for this field is configurable and may vary by program type. If you'd like to edit this list, please contact the Help Desk.

16. Enter the following information on this page: **Staff Action and Consumer Response** and **General Narrative** (entered in the **Enter General Narrative Note in Text Box Below** text area).

17. Click **SAVE NOTE**. The text entered in the General Narrative text box is saved as a general chart note, and the *Progress Notes Editing Index* page is displayed containing the new note.

The processing of entering a res hab/day hab plan linked progress note is now complete.

FREQUENTLY ASKED QUESTIONS

The following frequently asked questions regarding the res hab/day hab plan and checklist can be a useful reference when you have your own questions about the functionality.

A CLIENT WAS DISCHARGED BEFORE DATA ENTRY ON HIS/HER PLAN WAS COMPLETED. HOW CAN WE COMPLETE THAT DATA ENTRY?

To update plan data for a discharged client, select the roster archives option on the Services module menu page before accessing the Service Plan feature. When that option is used, the consumer selection list will be comprised of former clients instead of active clients.

A SIGNATURE IS BEING REQUIRED FOR EACH PLAN VALUED OUTCOME/GOAL WHEN A PLAN IS PRINTED IN REPORT MODE. CAN THAT BE CHANGED?

Yes. It is possible to adjust service plan reports for each program so that there is only one signature line at the end of the plan rather than one after each valued outcome/goal. To find out if this change is right for your program or to request that it be made, contact your Client Services representative or the Help Desk.

A STRANGE SYMBOL (Â) APPEARS IN A TEXT BOX ON A CLIENT'S PLAN. HOW DID IT GET THERE?

When text that is cut and paste from a Word document into AWARDS is spell checked using the AWARDS spell checker, it may result in the insertion of an Â character in the text. This is a known issue, which can usually be prevented by doing one or more of the following:

- Save the Word document from which the text will be pasted as plain text.
- Delete any blank spaces before or after the text once it has been pasted into AWARDS.
- Use the Word spell check feature prior to pasting the text into AWARDS.

In the event that the Â does appear in a client's plan, the user can manually delete it from the text box and save the plan.

CONSUMER COMMENTS ARE NOT INCLUDED ON PLANS. WHY?

This is working as designed. The residence/consumer comments portion of the plan is considered part of the review data and as such will only be included on plan reviews.

HOW DO I CHANGE WHO A PLAN/REVIEW IS ASSIGNED TO?

To change the staff person a plan/review is assigned to, use the Update Schedule feature located beneath the service plan index. Within update schedule make changes to the "Reviewer" selections as necessary, then click CONTINUE to save your changes.

HOW DO I CORRECT OR ADD A PLAN/REVIEW DATE?

To correct the date of a plan/review, use the Update Schedule feature located beneath the service plan index. Within update schedule make changes to the "Due Date" values as necessary, then click CONTINUE to save your changes.

To add a plan/review date, use the NEXT line within update schedule to enter the information for that date, and then click CONTINUE to save it. Keep in mind that within update schedule dates must be entered in order from top to bottom. If it is necessary to insert a new date between two existing dates, use the BACK FILL line instead of NEXT.

HOW DO I DELETE A PLAN/REVIEW?

If no data has been entered in a plan/review, it can be deleted using the Update Schedule feature located beneath the service plan index. Plans available for deletion will have a delete check box next to them.

I ENTERED A DONE DATE FOR A REVIEW USING UPDATE SCHEDULE, BUT AM BEING TOLD THAT THE REVIEW IS OVERDUE WHEN TRYING TO WRITE A PLAN LINKED NOTE. WHY?

Service plan done dates control whether or not charting timetable reminder notices are sent for the plans - they do not determine whether or not a review has been completed for progress note data entry purposes. In such cases, AWARDS looks in the plan to see whether there is actual review data entered. If not, you will be prevented from writing plan linked notes against that plan if the last review was not completed within the last 90 days.

I RECEIVED A "NO PLAN DATA" ERROR WHEN I CLICCKED ON THE DATE LINK FOR A PLAN/REVIEW IN THE PLAN INDEX. WHY?

The date links on the plan index can only open a report version of the plan if there is data in that plan. Information entered on the first page of a service plan is not considered data, so it is possible that you will have completed that page of the plan and still receive the "no plan data" error.

I REVIEWED A PLAN BUT STILL DON'T HAVE THE OPTION TO ADD TO THE PLAN OR MAKE CHANGES TO IT. WHY?

Double-check that each and every part of the plan has been reviewed. If review of progress text and progress selections have not been entered for every valued outcome/goal on the plan the review will not be considered complete.

I TRIED TO DELETE "COLLATERAL INPUT" TEXT FROM A PLAN BUT MY CHANGES DID NOT SAVE. WHY?

In some text boxes and fields within AWARDS existing text must be replaced rather than removed entirely. The "Collateral Input" text box on plans/reviews is one of those places. In the event that you do not have new text with which to replace the existing text, it can be replaced with a placeholder such as a period. (Note that a space is not considered a placeholder - an actual character must be entered.)

I WANT TO REVISE A VALUED OUTCOME BUT IT IS READ-ONLY AND UNDERNEATH IT SAYS "VALUED OUTOCME TEXT LOCKED BY SUBSEQUENT REVISION." WHAT DOES THAT MEAN?

The bold red "valued outcome text locked by subsequent revision" notice beneath a valued outcome indicates that the valued outcome cannot be changed because one or more of its goals have already been revised. In the event that it is necessary to update both a valued outcome and its goals, you must first revise the valued outcome, the goals will then be restarted, and you can make any necessary changes to those goals. In order to revise a valued outcome after one of its goals has already been revised, you must undo the revision, schedule a plan amendment and revise the valued outcome within that amendment, or wait until the next review and make the changes at that time.

IF A CLIENT IS DISCHARGED FROM A PROGRAM AND LATER RE-ADMITTED TO THAT SAME PROGRAM, SHOULD HIS/HER ORIGINAL PLAN BE AVAILABLE IN THE NEW PROGRAM?

No. When a client is discharged from a program the data from the plan entered during the original program stay does not transfer over to the plan for the new program stay when the client is re-admitted.

THERE IS A RED "LOCKED BY SUBSEQUENT NOTES" MESSAGE BENEATH PART OF A PLAN/REVIEW AND I CANNOT MAKE CHANGES TO THAT PART OF THE PLAN. WHY?

When a valued outcome or goal is locked by "subsequent notes" it is an indication that there are notes written against that part of the plan that have dates that are on or after the plan date. If the locked portion of the plan needs to be revised, you can either complete a plan amendment using a date after the plan linked note date(s), or you can temporarily unlink the notes. To do so, view the progress notes report and make note of the dates of those notes linked to the part of the plan to be changed. Next, go into the Progress Notes feature in report mode and open the first of the notes in question. (Keep in mind that you must be the note writer or have the "Surrogate Data Entry" permission in order to do this, and that it is possible that you will need the "Backdated Progress Notes Data Entry" permission depending on the note dates.) Once the note is open, change the note type from service plan linked to general chart note and save. Repeat as needed until all relevant notes are unlinked, then go into the plan and make the necessary changes. Once those changes are complete, go back into the Progress Notes feature and relink all of the notes to the correct plan components.

THERE IS A SCHEDULED PLAN REVIEW ON A CLIENT'S PLAN INDEX THAT CANNOT BE SELECTED AND OPENED IN DATA ENTRY MODE. WHY?

By default, AWARDS prevents users from opening and working on plan reviews whose due dates are more than a month in the future. In the event that you need to work on a plan that is not available for selection on the service plan index for this reason, you will need the "Service Plan Early Review" permission. That permission enables users who have it to open and work on any scheduled reviews, regardless of their due dates.

WHAT IS A PLAN AMENDMENT?

Amendments are typically used when a service plan or part of one needs to be reviewed before its scheduled due date. Within amendments, only the part of the plan to be changed needs to be reviewed unlike regular reviews where the entire plan must be reviewed before changes can be made.

Amendments are scheduled using the Update Schedule feature located beneath the service plan index; however, not all programs are set up to schedule amendments. If you do not see an amendment plan type within update schedule and would like more information on whether amendments are right for your program, please contact your Client Services representative.

WHEN USING UPDATE SCHEDULE TO CHANGE A PLAN DATE I RECEIVED A "DUPLICATE DATE" ERROR AND COULD NOT PROCEED. WHAT DO I DO?

AWARDS does not allow for duplicate plan dates; however, in rare instances (for example, due to problems with automatic plan scheduling) a duplicate date may be created. In the event that this happens, please contact the Help Desk for assistance. Be sure to provide them with the client name, program, existing plan date, and what new date you were entering. They will assist you in making the correction.