



PWDD Services for MSC Programs

AWARDS INSTRUCTION SHEET

People with Developmental Disabilities (PWDD) service information can be entered into AWARDS via the Individualized Service Plan (ISP) for Service Coordination, and the Monthly Service Coordination (MSC) notes, both within the Services module. (Monthly Service Coordination notes are used to document Medicaid Service Coordination services for Medicaid billing.) Reports are also available for the information entered using these tools.

REQUIRED PERMISSIONS

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

- **Chart Access** – You must have chart access permission for each program associated with the consumer for whom PWDD service information is to be entered, updated, and/or viewed.
- **Data Entry/Access** – You must have the “Display Chart Records Services Button” and “Display Any Chart Records Buttons” data entry/access permissions to see the Service module in the Chart Records portion of your opening menu page.

ABOUT THIS DOCUMENT

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

- **Entering/Updating an Individualized Service Plan** – Learn how to enter/update a plan. Page 1
- **Entering/Updating a Monthly Service Coordination Note** – Learn how to create/update a note. Page 4
- **Viewing a Monthly Service Coordination Note Report** – Learn how to run an MSC notes report. Page 5
- **Frequently Asked Questions** – Learn the answers to common PWDD service questions. Page 6

ENTERING/UPDATING AN INDIVIDUALIZED SERVICE PLAN

To enter or update an individualized service plan, 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 Service Coordination 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**

Consumer Services Menu

Program: TEST Day Hab Database: Data Entry A-Z Roster Archives

Individual

Contacts Log Progress Notes

Service Plans Charting Timetable

Service Coordinators Service Referrals

Calendar Utilization Reports

Group

Activities

Group Notes

Group Schedule Setup

Select Consumer Program and Data Entry/Report Mode
Use A-Z Option to Limit Consumer Selection by Lastnames

Jump Back Opening Menu Help Menu Log Out

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 **CONTINUE**. 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 review is to be worked on and it is not necessary to enter or update a schedule record, continue with step **12**.
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. 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 the correct plan type to be scheduled.
 - **Reviewer** – Click this drop-down arrow and select the worker responsible for completing the plan/review.
 - **Done** – Click this drop-down arrow and select “Yes” or “No” to indicate whether the plan/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 (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 plan/review to be worked on.
13. Click **CONTINUE**. The *Individualized Service Plan* page is displayed. This page is the review's cover sheet, and displays the name of the person, the ISP Date, and the consumer's Medicaid CIN. →
14. Enter or make changes to the information in the following text boxes, using the on-screen instructions for guidance:

TEST MSC SITE
Individualized Service Plan Review

Name of Person: Fred Flintstone ISP Date: 12/01/2010
Medicaid #: AB12345C

Section 1: The Narrative
(Profile, the Person's Valued Outcomes and Safeguards)

Profile

Include selected person-centered information about the person discovered during the planning process. For example, abilities, skills, preferences, relationships, health, cultural traditions, community service and valued roles, spirituality, career, challenges, needs, pertinent clinical information, or other information that affects how supports and services will be provided.

Valued Outcomes

List the person's valued outcomes that derive from the profile. Outcomes are brief, clearly stated and as specific as possible. Please ensure that there is at least one outcome for each Waiver Habilitation service that the person will receive.

- **Valued Outcomes**
- **Safeguards**
- **Natural Supports and Community Resources**

15. Click **CONTINUE**. The *Individualized Service Plan* page is displayed. Instructions appear at the top of this page on how to complete the form. To see the full set of instructions, click the "More..." link. →

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

- **Service Category** – Click this drop-down arrow and select the applicable service category.
- **Type of Service** – In this field, type or make changes to the type of service being provided.
- **Provider Information** - In this field, type or make changes to the provider information such as name, practice, address or phone number.
- **Frequency** – In this field, type or make changes to the frequency of which the service is being provided (e.g., monthly, 3x per week).
- **Duration** – In this field, type or make changes to the duration of which the service will be provided (e.g., ongoing, 6 months).
- **Effective Date** – In this field, type or make changes to the date the services began.
- **Status** – If you are completing a review on an existing service, click this drop-down arrow and select the appropriate status from the choices offered: "Active," "Completed," and "Discontinued."
- **Delete?** – To delete a service that has not yet been reviewed, check the corresponding Delete? check box that appears to the left of the service.

17. Click **CONTINUE**. The individualized service plan information is saved, and a read-only report version of the plan is displayed on the *Individualized Service Plan* page. This report version of the plan will have additional fields at the top of the plan for reviewer initials.

*To make additional changes to the plan at this time, click **Return to Data Entry** to return to the services list.*

The process of entering or updating an individualized service coordination plan is now complete.

For a full report version of the service plan, click the date of the plan on the *Individual Service Plan Index* page, or access the Service Plan feature in report mode. This version of the plan will include signature lines at the bottom of the plan, and will display condensed plan information. Using this view, only Name of Provider and Type of Service are displayed for all services, except for HCBS Waiver Services. Services of category HCBS Waiver Services will display Frequency, Duration, and Effective Date in addition to the Name of Provider and Type of Service.

If the client whose plan has been completed is also admitted in a PWDD Day Hab or Res Hab program, a link to the completed plan may also appear on the service plan index page in the PWDD program. When the link is clicked, the individualized service plan will open in read-only mode.

ENTERING/UPDATING A MONTHLY SERVICE COORDINATION NOTE

To enter or update a Monthly Service Coordination 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 or updated.

The Monthly Service Coordination note functionality is only available for Medicaid Service Coordination programs.

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 note to be entered or updated is for a former (discharged) consumer, click the **Roster Archives** check box.
6. Click **Progress Notes**. The Progress Notes Data Entry page is displayed.

This page contains a list of any existing progress notes written for the selected consumer by the staff member logged into the system, based on the standard or backdated window.

7. Click the **Consumer** drop-down arrow and select the consumer for whom the note is being entered or updated.
8. Click **CONTINUE**. The Progress Notes Editing Index page is displayed.
9. Click the **Selected** radio button next to the "New Note" option to create a new note, or next to the progress note to be updated.
10. Click **CONTINUE**. The Progress Note Data Entry Settings page is displayed.
11. Configure the fields and options on this page as necessary, making sure that the Progress Note Type Selection is set to "Monthly Service Coordination Note." Other settings include:
 - **Service Type** – Click this drop-down arrow and select the type of service provided during the contact.
 - **Location** – Click this drop-down arrow and select the location at which the contact with the consumer occurred.
 - **Date** – Click this drop-down arrow and select the date on which contact with the consumer occurred. If entering a new note, the default value is today's date.
 - **Duration** – Click the **Duration Hours** and **Minutes** drop-down arrows and select the length of the contact.

- **Face to Face** – This setting indicates whether the contact with the consumer was face to face (in person).
- **Start Time** – Click these drop-down arrows and select the time at which the contact with the consumer began.
- **Progress Note Type Selection** – Click the “Monthly Service Coordination Note” radio button.
- **Include** – If your agency is using the FormBuilder form created for these notes, click this drop-down arrow and select “Monthly Service Coordination Note.”

12. Click **CONTINUE**. The *Progress Note Data Entry* page is displayed with the FormBuilder form template inserted after the page header if it was selected to display on the [previous](#) page.

13. If the Monthly Service Coordination Note template is displayed, complete fields and options in that portion of the page as necessary.

14. In the **Description of monthly contact** text box, enter or update the narrative describing the visit.

15. In the **Satisfaction of consumer, Health and safety issues, Documentation addressed** text box, enter or update the narrative as necessary.

16. Click the **Transitional Billing** drop-down arrow and select “Yes” or “No” to indicate if transitional billing applies.

17. Click **SAVE NOTE**. The Monthly Service Coordination note is saved and the updated *Progress Notes Editing Index* page is displayed.

To view the note in report mode, click the date of the note on this page, which appears as a link.

The process of entering or updating a Monthly Service Coordination note is now complete.

VIEWING THE MONTHLY SERVICE COORDINATION NOTE REPORT

To view the Monthly Service Coordination notes report, 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 Medicaid Service Coordination program or program type for which the report is to be viewed.
3. Click the **Database** drop-down arrow and select “Reports.”
4. To limit the report 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 report selection process.
5. If the report is to be viewed for a former (discharged) consumer, check the **Roster Archives** check box.

6. Click **Progress Notes**. The *Progress Notes Report Selections* page is displayed.
7. To limit the report selection by note writer, click the **Writer** drop-down arrow and select the writer whose notes are to be included in the report. The default value is "All Writers."

*The Writer selection list is initially limited to users with caseloads in the selected program. Click **Expand Writers List** if it is necessary for the writer selections to include all users with chart access to the selected program.*

If the Roster Archives option was selected on the Consumer Services Menu page, "All Writers" must be selected.

8. Click the **Consumer** drop-down arrow and select the consumer(s) whose notes are to be included in the report. The default value is "All Consumers,"

If a writer was selected in step 7, select "Writer Caseload" to view the progress notes report for all consumers assigned to that writer.

The "Writer Caseload" and "All Consumers" options are not available when consumer selection has been limited using the A-Z option on the Consumer Services Menu page.

9. Only those notes written for contacts occurring within the date range in the **From** and **To** fields on this page will be included in the report. If necessary, make changes to the default date range (using the mm/dd/yyyy format).
10. If note information contained in the "Monthly Service Coordination Note" FormBuilder form should also display in the report, click the **Include Monthly Service Coordination Note** check box to select it.
11. To limit the report to Monthly Service Coordination notes only, click the **All Progress Notes** drop-down arrow and select "Monthly Service Coordination Note."
12. Click **SHOW NOTES**. The report containing Monthly Service Coordination notes is displayed.

The process of viewing the Monthly Service Coordination note report is now complete.

FREQUENTLY ASKED QUESTIONS

The following frequently asked questions regarding PWDD services for MSC programs can be a useful reference when you have your own questions about the functionality.

HOW DO I SELECT NOTES FOR BILLING?

Users with the "MC Billing Notes Selection" permission are able to select progress notes to be billed for from within the Progress Notes feature in report mode. In order to do so, the report contents must be limited to service plan linked notes or monthly service coordination notes using the "Service Plan Linked Notes Only" or "Monthly Service Coordination Notes Only" progress note type selection on the report settings page. Once the report is generated, it will include a "Bill?" check box next to each note. Check off those notes to be billed for and update. Note that once a note has been billed against, the "Bill?" check box will change to a read-only bullet.

HOW DO I WRITE A PROGRESS NOTE FOR A DISCHARGED CLIENT?

Progress notes can be written for discharged clients by selecting "roster archives" on the services module menu page, then going into the Progress Notes feature as usual. Note that if the note is being written for a date that is not

recent, the user may need the "Backdated Progress Notes Data Entry" permission in order to complete the note. If the backdating window does not extend back far enough, it can be adjusted using the System Setup module, Business Rules, Note Editing Rules feature.

I'M TRYING TO WRITE A NEW PROGRESS NOTE BUT THE SYSTEM IS TREATING IT AS IF IT WERE AN AMENDMENT OF THE PREVIOUS NOTE. WHY?

In the event that there is a locked note for a specific date, time, and type and the user attempts to enter another note using the same settings, the system will interpret that as the user making an amendment to the existing note. In order to differentiate between the notes, the user should specify a different start time for the new note.

Similarly, if there is an unlocked note for a specific date, time, and type and the user attempts to enter another note using the same settings, the system will interpret that as the user making a change to the existing note. Again, the solution would be to specify different start times for the notes.

I AM UNABLE TO WRITE A PROGRESS NOTE FOR A CLIENT FOR A DATE FURTHER BACK THAN THE RECENT PAST. WHY?

In the event that you are unable to write a progress note for a client for a specific date in the past, first check that client's admission date. AWARDS will not allow you to write a progress note for a client prior to his or her admission date unless the program is specifically set up to allow data entry for "*pending" clients. If the admission date is prior to the note date, next verify that you have the backdated progress notes data entry permission. Keep in mind that this permission expires every 7 days, so even if you had it in the past you may no longer have it now. And finally, if you have the backdating permission but are still unable to select the required note date, verify that the backdating window is set far enough back to include that date. This is done using the System Setup module Business Rules feature. (Your supervisor may need to assist you in checking for the permission and setting the backdating window if you do not have access to the necessary features in the System Setup module.)

I WROTE A PROGRESS NOTE THAT I'M NO LONGER SEEING ON THE PROGRESS NOTE INDEX IN DATA ENTRY MODE. WHY?

There is a default note editing window in place for all users in a program for progress notes data entry purposes. This window, set using the System Setup module, Business Rules, Note Editing Rules feature, is 10 days by default (but can be adjusted as needed for each program). If a note was written for a date that is outside of the default note editing window it will only be accessible from the Progress Notes feature in report mode and cannot be edited without the "Backdated Progress Notes Data Entry" permission. Keep in mind that there is also a set backdating window for each program, and if the note was written outside of that window adjustments can only be to it if the backdating window is extended using the System Setup module, Business Rules, Note Editing Rules feature.