I-Therapy Training

Purpose of I-Therapy

At CHILL, we have selected I-Therapy as our platform for all of our service notes. This is how our system works:

Providers submit note for services provided - Notes are approved by the client's service coordinator - Notes are sent to Human Resources where they are submitted for billing and processed for payroll. It is important your notes are submitted in a timely manner (within 24 hours of the service provided) and accurate.

January 2020 we moved forward with EVV verification, as required by our state. These slides walk you through how to enter an accurate note and how to complete our EVV verification process.

What is EVV?

Electronic Visit Verification (EVV) is a technology used to verify that home or community based service visits occur. The purpose of EVV is to ensure that services are delivered to people needing those services and that providers only bill for services rendered. EVV typically verifies visit information through a mobile application on a smartphone or tablet, a toll-free telephone number, or a web-based portal.

What is EVV?

Please watch the below video for a brief overview on EVV?

Please watch the below video for a brief overview on EVV from a caretakers perspective?

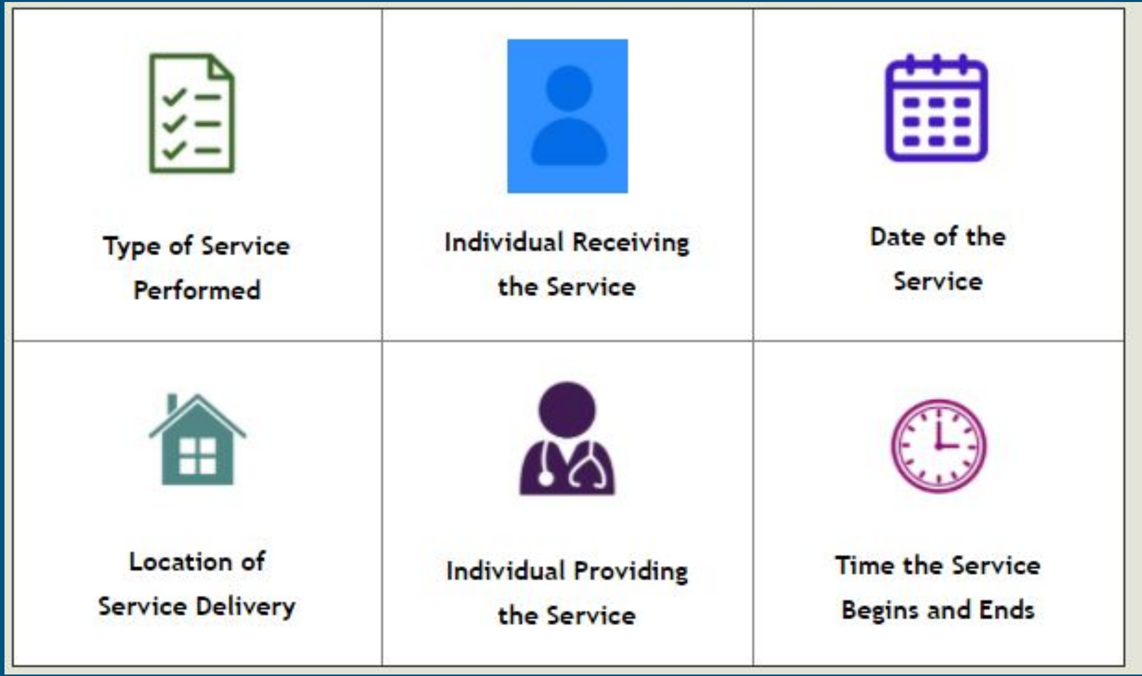
Why is EVV Required?

Section 12006 of the 21st Century Cures Act requires all state Medicaid agencies implement an EVV solution for Home and Community Based Services. States that do not implement EVV will incur a reduction of Federal funding. The Department has expanded the scope of EVV in Colorado to other services similar in nature and service delivery.

EVV in Itherapy Docs

- Beginning April 1st, 2021 all agencies in Colorado will be required to implement EVV in order to get reimbursed for services provided. CHILL is currently working with Itherapy Docs to get EVV fully implemented into our system beginning April 1st.
- Providers will be required to clock in and clock out of all shifts worked, as well as sign in and sign out all clients for all services provided in order to be in compliance with EVV requirements.
- Fortunately for CHILL, our Itherapy Docs system allows us to complete the requirements associated with EVV documentation. Utilizing our current note documentation system will make this an easy transition.

What EVV must capture?



Positives of EVV

1. Quick and easy staff clock in and clock out system to track hours worked.
2. Quick and easy client sign in and sign out system to track hours and services worked with all clients.
3. Automatic note creation after client is signed out.
4. Itherapy will make the Federal mandate of EVV compliance fairly seamless for us at CHILL.

How to Create a Note with EVV

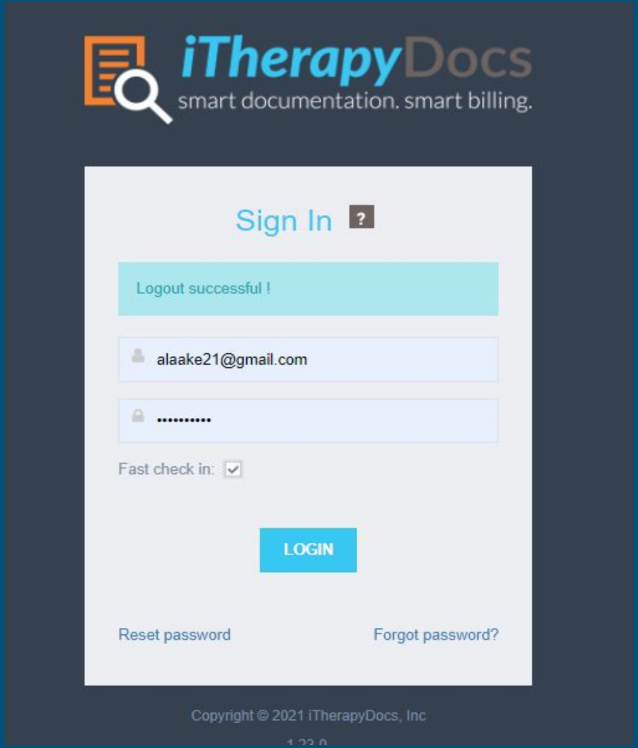
Log into I-Therapy

CHILL login home page link:
https://ghome.itherapydocs.com/chill/login

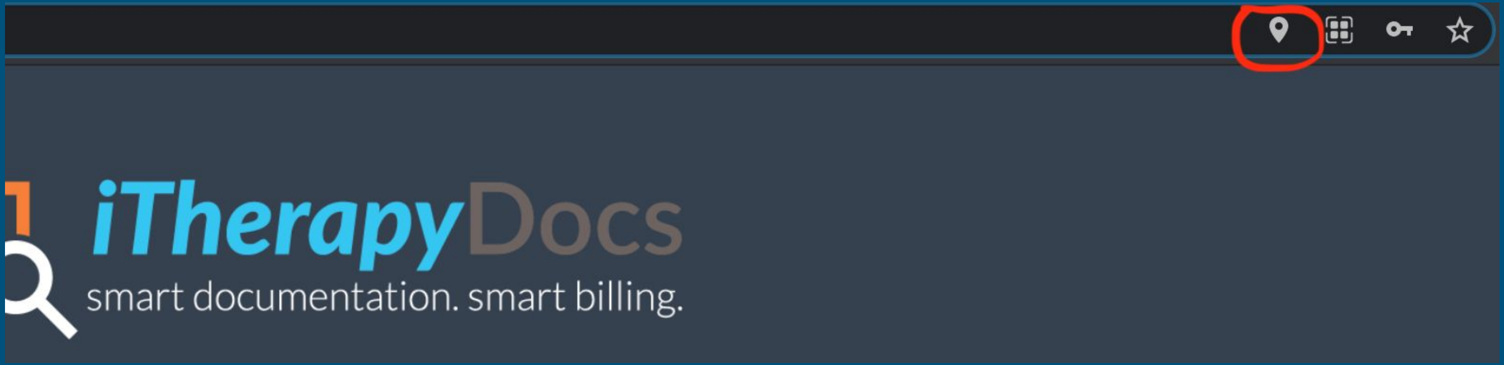
After you have created an account you will login using your credentials..

a. User Name: Your email
b. Password: Password you created when creating an account

When signing in, put in your credentials, and check the fast check in box which will bring you to the Dashboard quick access screen.



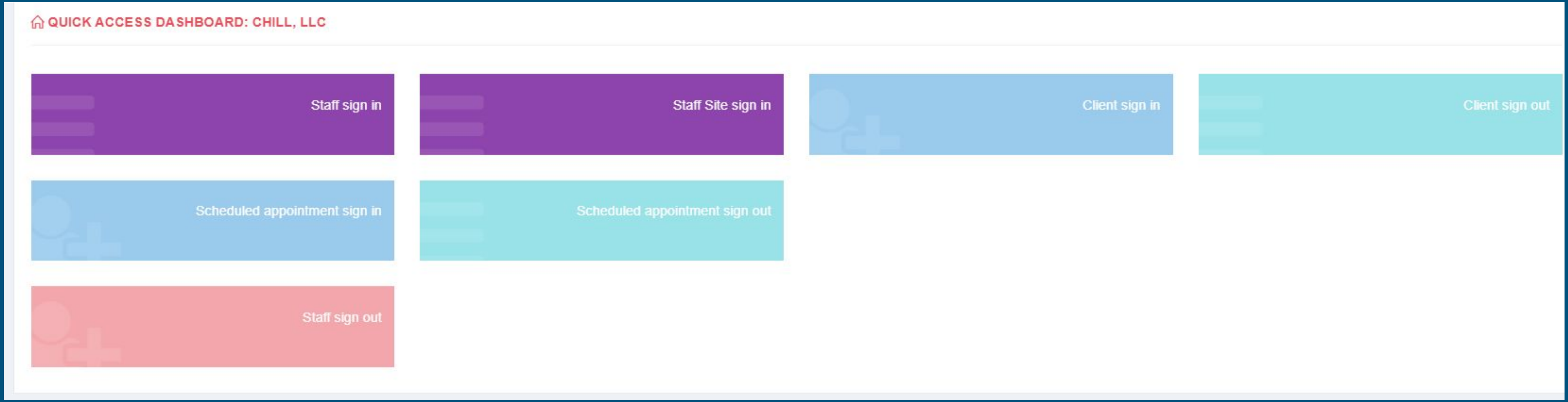
You must allow/enable location services on your phone or computer



You will need to go into your settings and enable location services in order to log into I-Ttherapy. This will vary based on the device you are using.

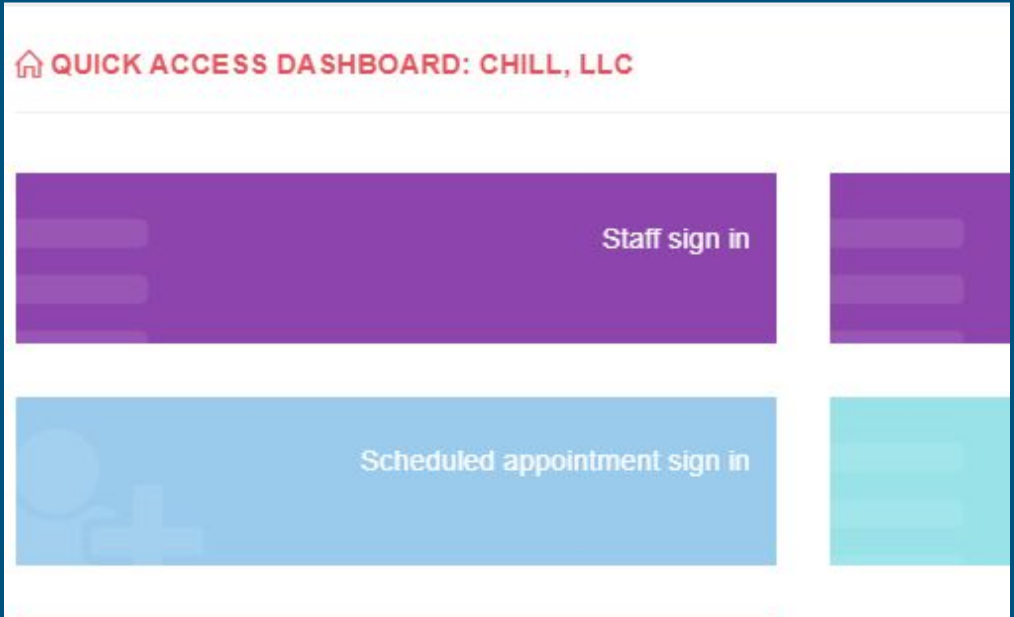
Quick Access Dashboard

Once you login using the fast check in you will be directed to the quick access dashboard.



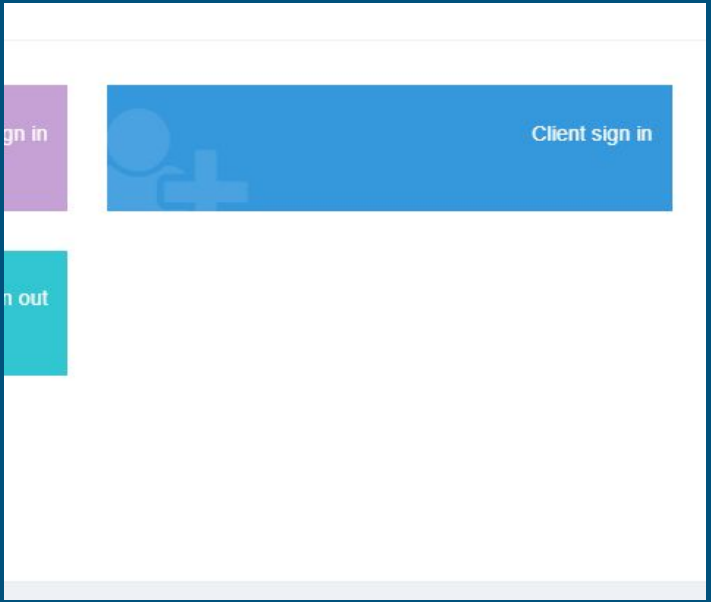
Sign In to Start your Shift

From the quick access dashboard, you will do a staff sign in when you start your shift.



Sign In Client Receiving Services

Next, you will click the client sign in widget to sign in the client(s) you are providing services to during that shift.

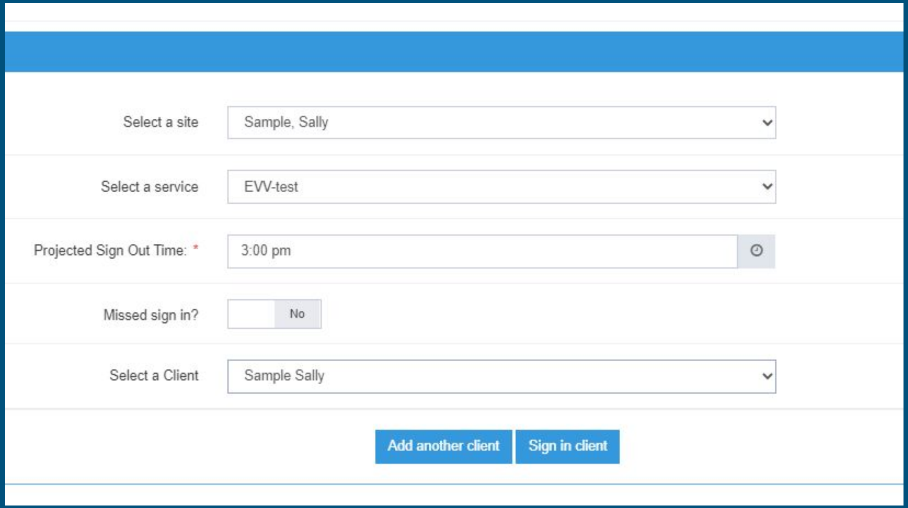


Selecting Service Details

Once you select the client sign in widget, you will be directed to the client sign in page.

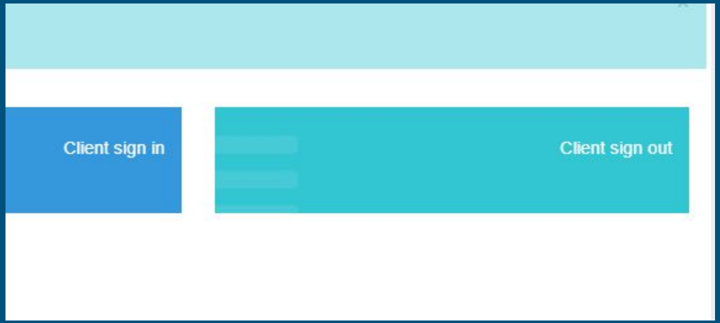
On this page you will pick the site, services, projected sign out time, and the client(s) you are working with during that shift.

Select “Sign in client” if you are working 1:1 or “Add another client” if you have a group.

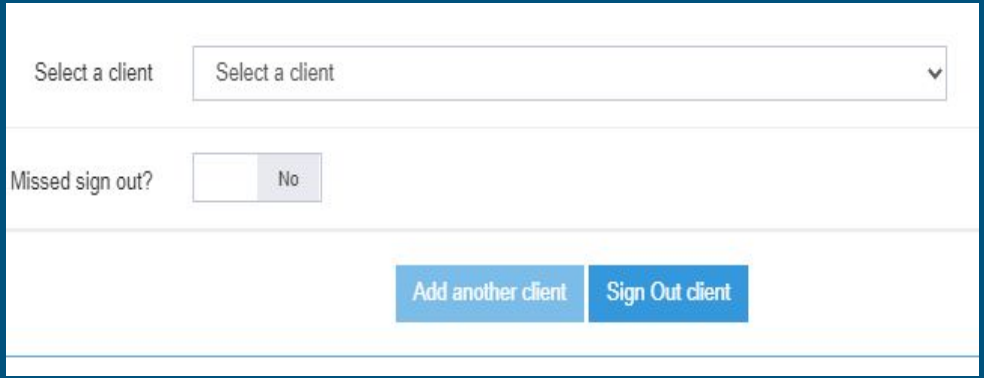


Signing Out a Client

After you have finished a shift with a client or are moving to a different service category you will need to sign out the client by selecting the client sign out widget.

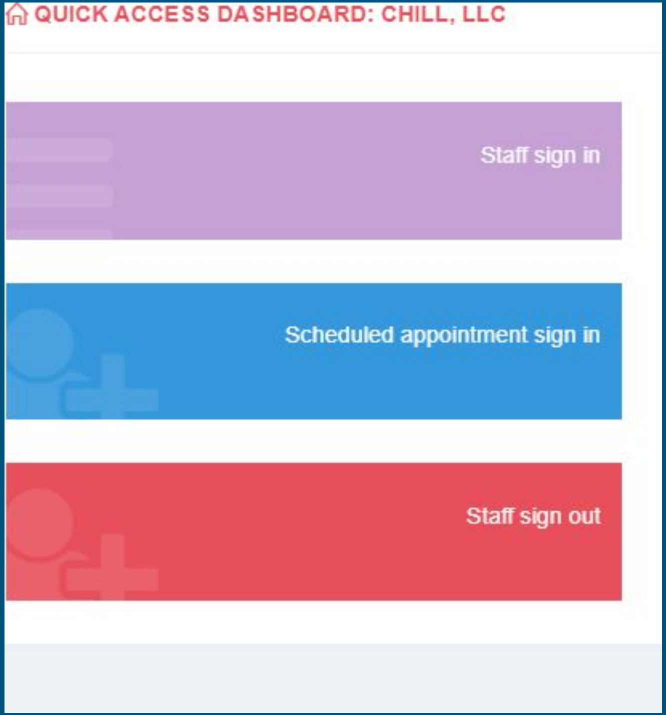


That will bring you to the sign out client screen. You will then choose the client you are signing out from the drop down menu.



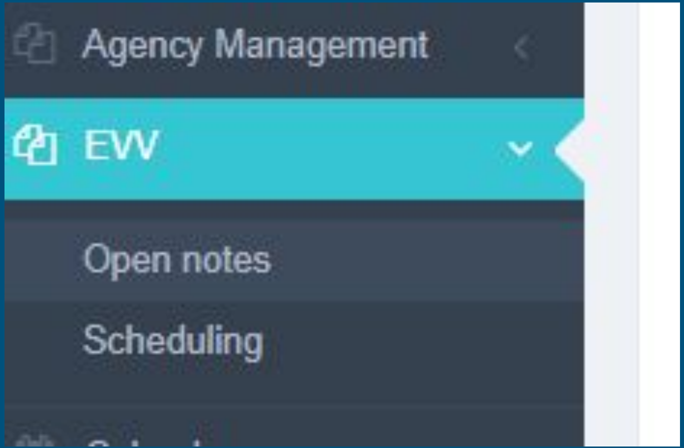
Staff Sign Out

Once you have completed your shift or are moving over to a shift with a new client you will need to sign yourself out of that shift.



Location of of Open Notes

Once the individual is signed in, a note will automatically be created and will be found under the EVV tab under Open notes. This will allow you to write the description of the services and submit your note after your shift.



Closing Your Note

Once you click on the open notes you will find all notes for the individuals you have created an EVV note for. From this screen you will be able to update the time of the notes, edit the note (add details to the note throughout the shift), and once the client has been signed out, you can close the note. (You do not submit the note from this section - submission details on following slides.)

50 er

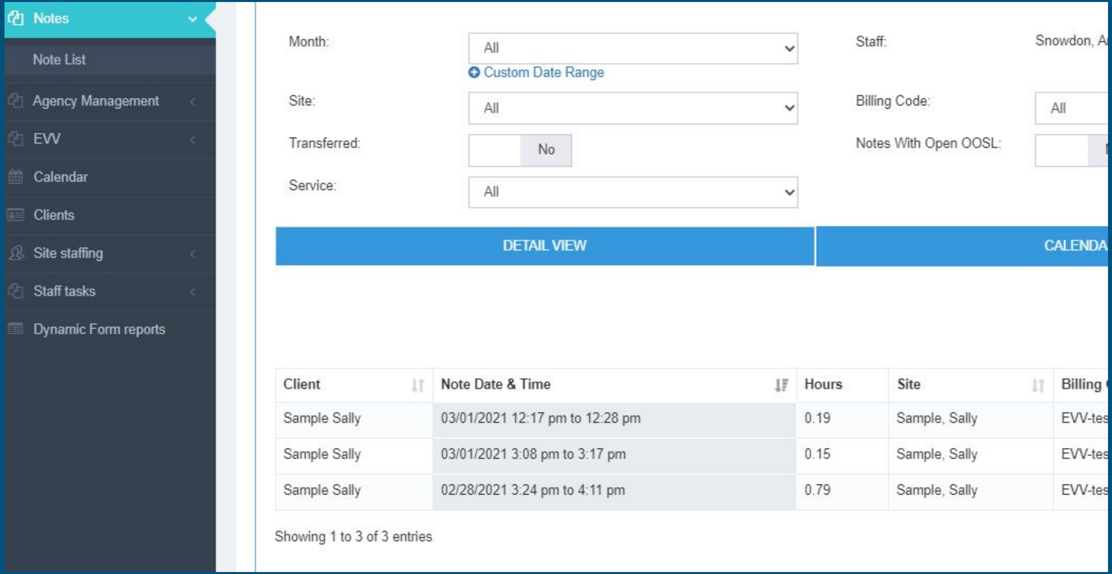
ordinates In	Coordinates Out	Actions
5733686999999996--105.05994559999999	40.5733783--105.05994009999999	Close Update time Edit Delete
5733514--105.0599823	40.5733453--105.059984	Close Update time Edit Delete

Submitting Notes for Approval

Closed EVV notes move to your notes list. From your notes list you can continue to edit the note and add more detail.

When you are finished with the note, select Submit Note.

Notes are then sent to the coordinator for approval.



Special Circumstances

Transportation Trips - Some individuals in Adult Services may require transportation. This service requires an additional note.

ISSPs - Some people in Adult Services may have an ISSP plan. These plans detail specific goals the individual is working toward. If your client has an ISSP, you will need to complete an additional step when writing your service note.

Incident Reporting - There are situations that may arise that require additional documentation.

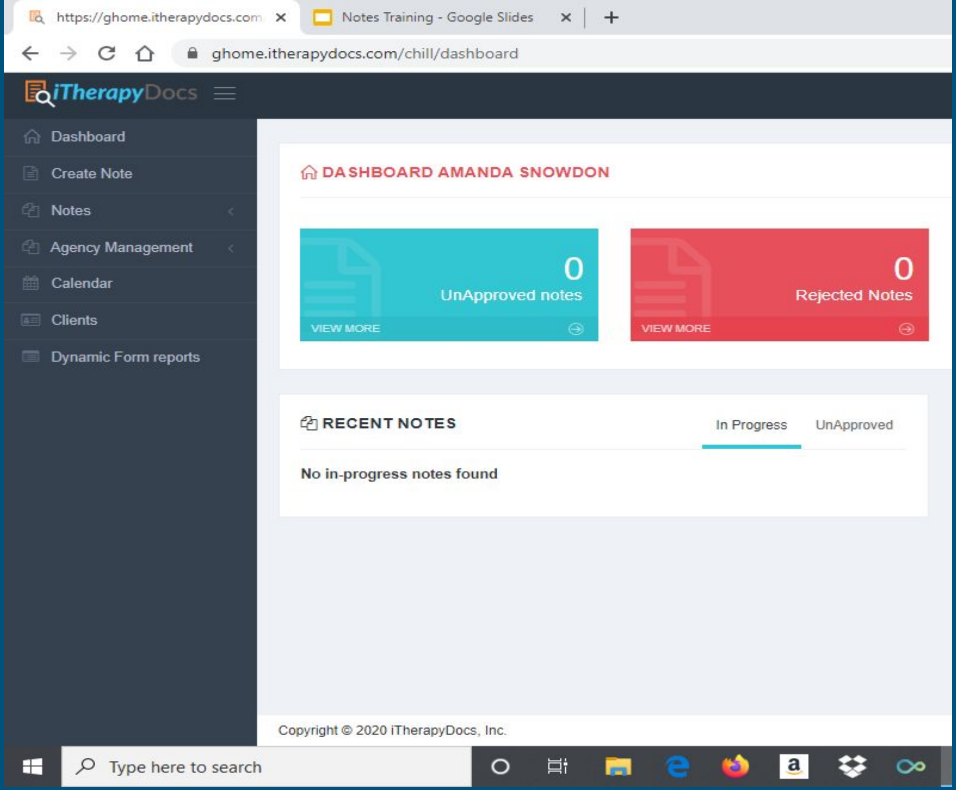
Employee Dashboard

When you login (without Quick login), you will have access to your Employee Dashboard. On your dashboard you will see 2 widgets: Unapproved Notes and Rejected Notes

Unapproved Notes are the notes you have submitted but that have not been approved by a coordinator.

Rejected Notes are the notes that a coordinator has reviewed but they are requiring more information.

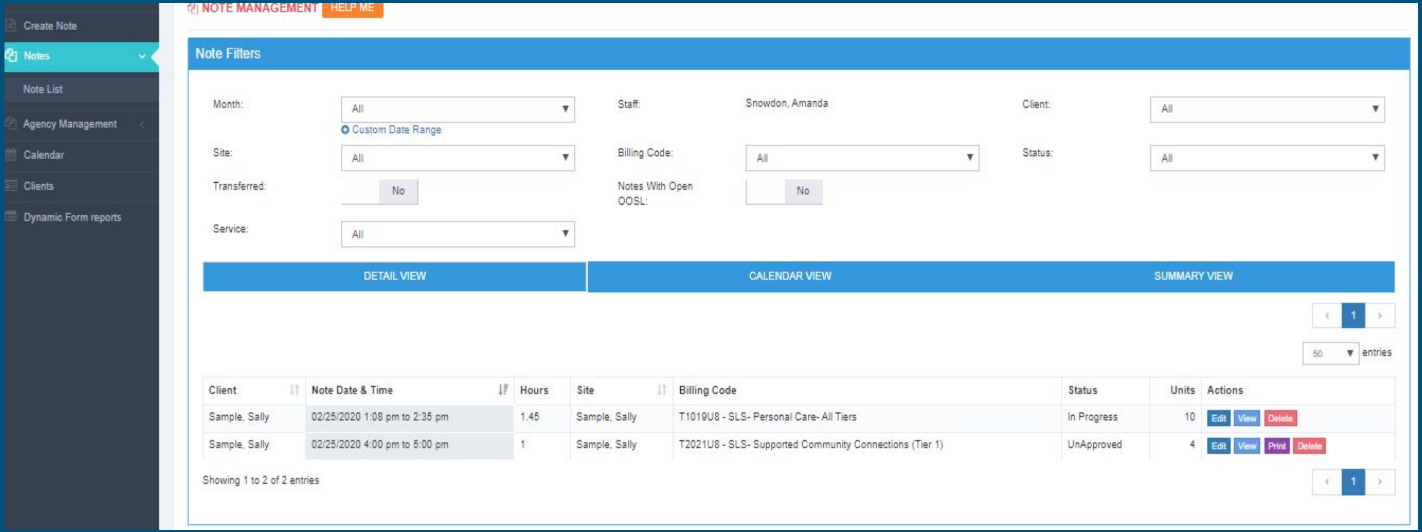
Recent Notes shows notes that are In Progress. These notes have not been submitted for approval. You need to select “submit” at the bottom of the note to finish it.



Review Submitted Notes

After you have submitted notes you will be able to view the notes and the status of the note by clicking the Notes tab, then select Note List. If a note is in progress you will be able to continue to work on the note by clicking edit. If a note has been submitted but is still in unapproved status you also will be able to make changes to the note. Once a note is approved you will no longer be able to edit the note.

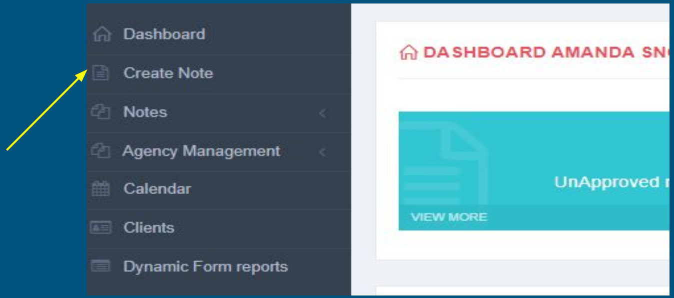
Click Notes Tab and then note list to review notes.



Creating a Note for Transportation Trip

Creating a Note

On the left side of your dashboard you will click Create a note.

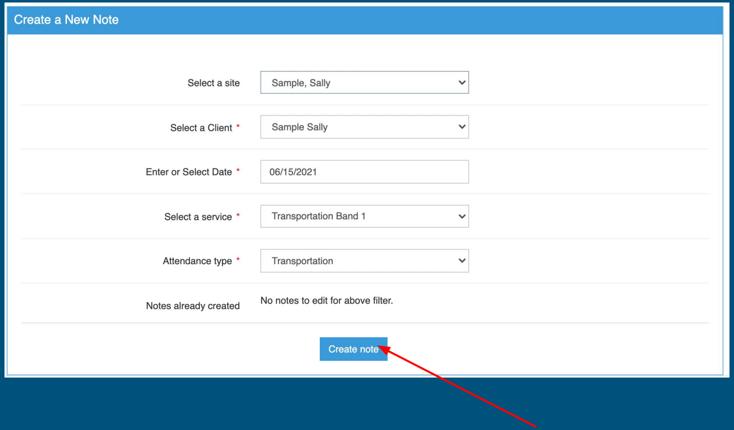


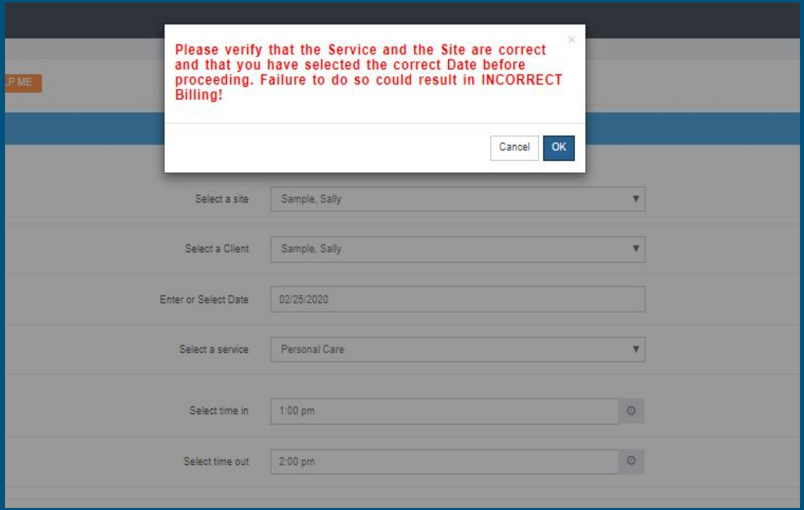
Once you choose create a note you will be directed to a drop down menu with the title “Select a site”. You will click on the arrow and scroll to the individual you are creating the note for. (Site = Client)

Creating a note cont'd….

Once you have selected the site/client you would like to create a note for, a drop down menu will appear asking for the date and service you are creating the note for.

Once you click the create note button, a warning will pop up asking you to verify that the service, site, and date are correct. If everything is correct you will hit the OK button and proceed to the next step of the note documentation.



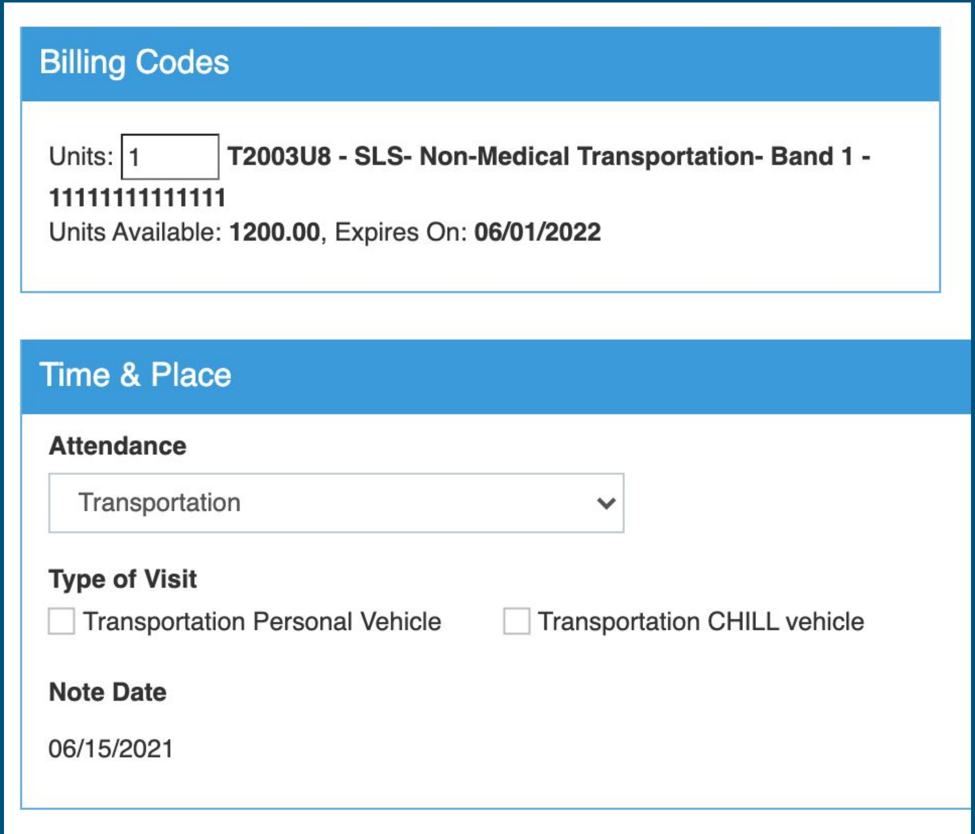


Creating a note cont'd....

This page will show you the individual you are completing the note for and the billing code.

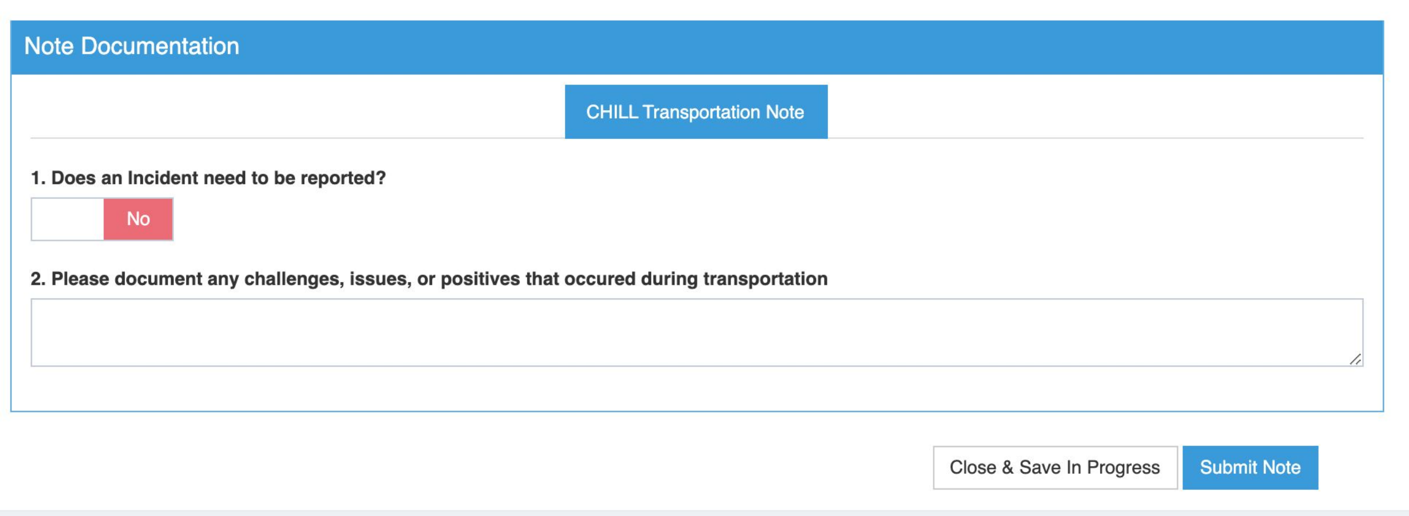
Under Billing Codes, enter the units you are making the note for.
1 = 1 transportation trip
2 = 2 transportation trips

Type of Visit - Select the type of vehicle you drove for transportation.



Submitting Note for Approval

Select the CHILL Transportation Note button to show the questions you need to answer. Once you have answered all of the questions and completed any narrative sections you will submit the note.
Once the note is submitted it will be reviewed by the individual's service coordinator. The coordinator will either approve the note for billing or they will reject the note and give the reason the note was rejected.



Adding ISSP Documentation

Outcomes/Action Steps (ISSP's)

ISSP: Individual Service and Support Plan : means a plan of intervention or instruction which directly addresses the needs identified in the person's Individualized Plan and which provides specific direction and methodology to employees and contractors providing direct service to a person.

Service Categories that Require an ISSP/Outcome:

- Homemaker Enhanced: Cooking and Cleaning
- Individuals in the HCBS-DD waiver participating in Supported Community Connector Services

All individuals that have a service in their plan that requires an ISSP Outcome will automatically require Direct Care Staff to complete the required tracking sheet along with the service note.

Note Documentation tab

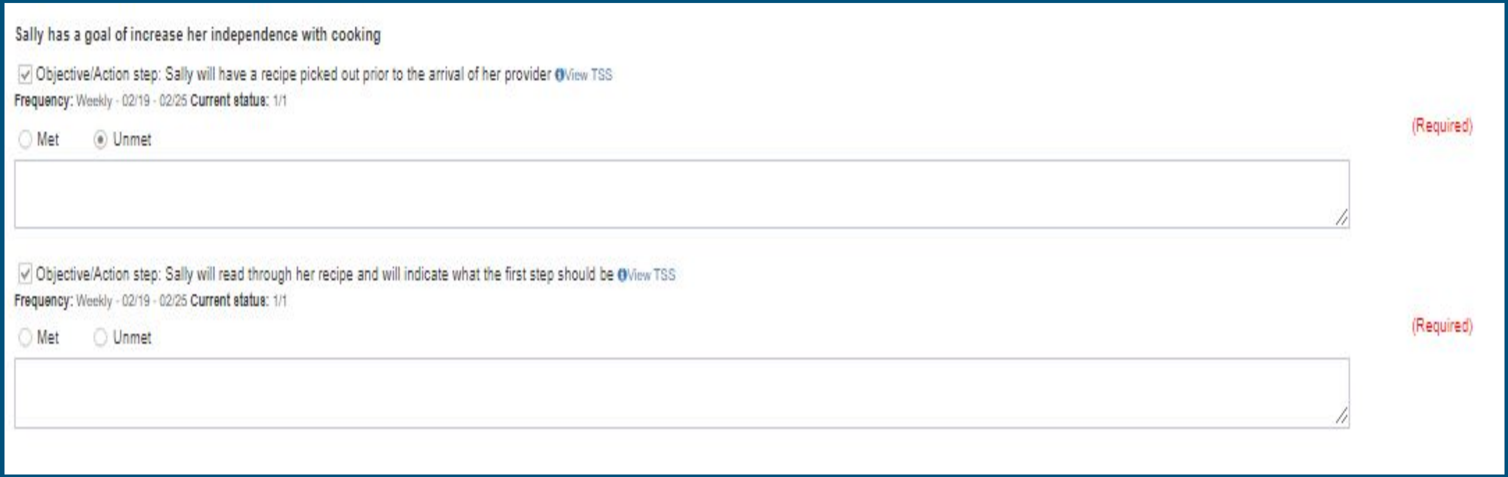
ISSP tracking sheet tab

Outcomes/Action Steps (ISSP's) cont'd.....

Once you click on the ISSP tracking tab the individuals goals for that service will populate. You will then check the box of the goals that were worked on during that service. Once you check the box a section will drop down that asks if the individual met the goal or the goal was unmet. You will then write a small narrative on how the goal was met or unmet.

Check ISSP goals worked on during the Service.

Indicate if the goal was met or unmet and complete a small narrative in regards to the goal being met or unmet.



Submitting an Incident Report

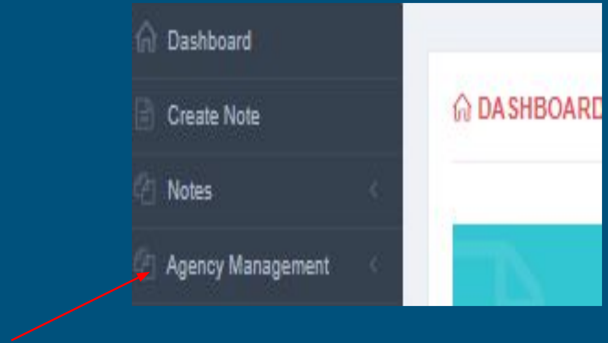
Incident Reporting

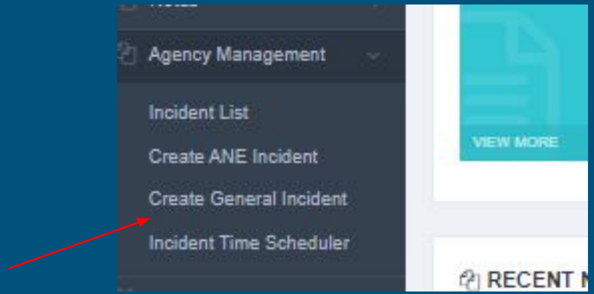
All incidents will be reported in Itherapy Docs.

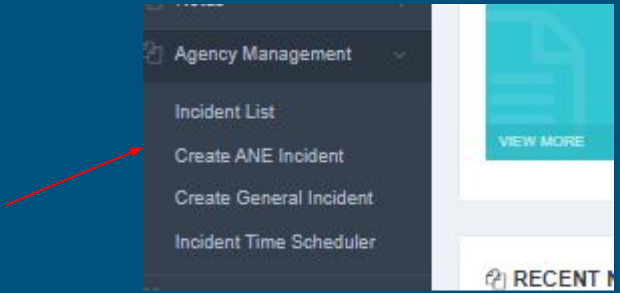
To create an incident report, select agency management from the menu. After you select agency management a list with populate.

To create a general incident you will select create general incident.

If an incident falls under Abuse, Neglect, or Exploitation you will click create ANE incident. ANE incidents require stricter timelines and follow up from CHILL supervisors.







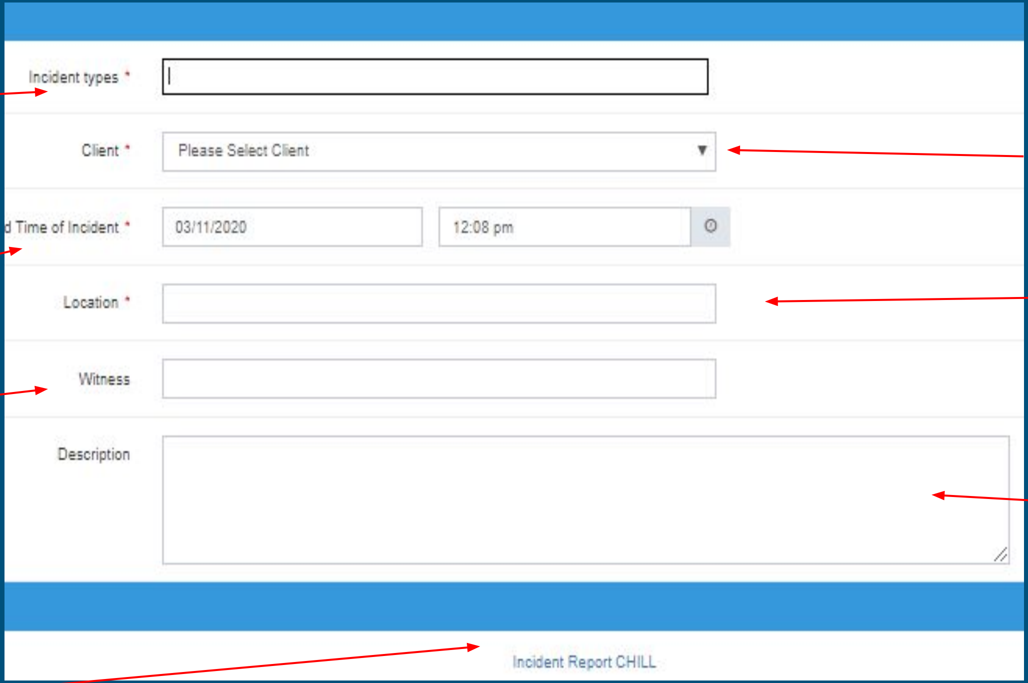
Completing the Incident Report

Once you select create an incident you will be taken to the next screen to create the incident.

Select the incident type. If you don't see the name of the incident type that best fits the incident please select other.

Date and time of incident

Witnesses- If anyone besides you observed the incident.



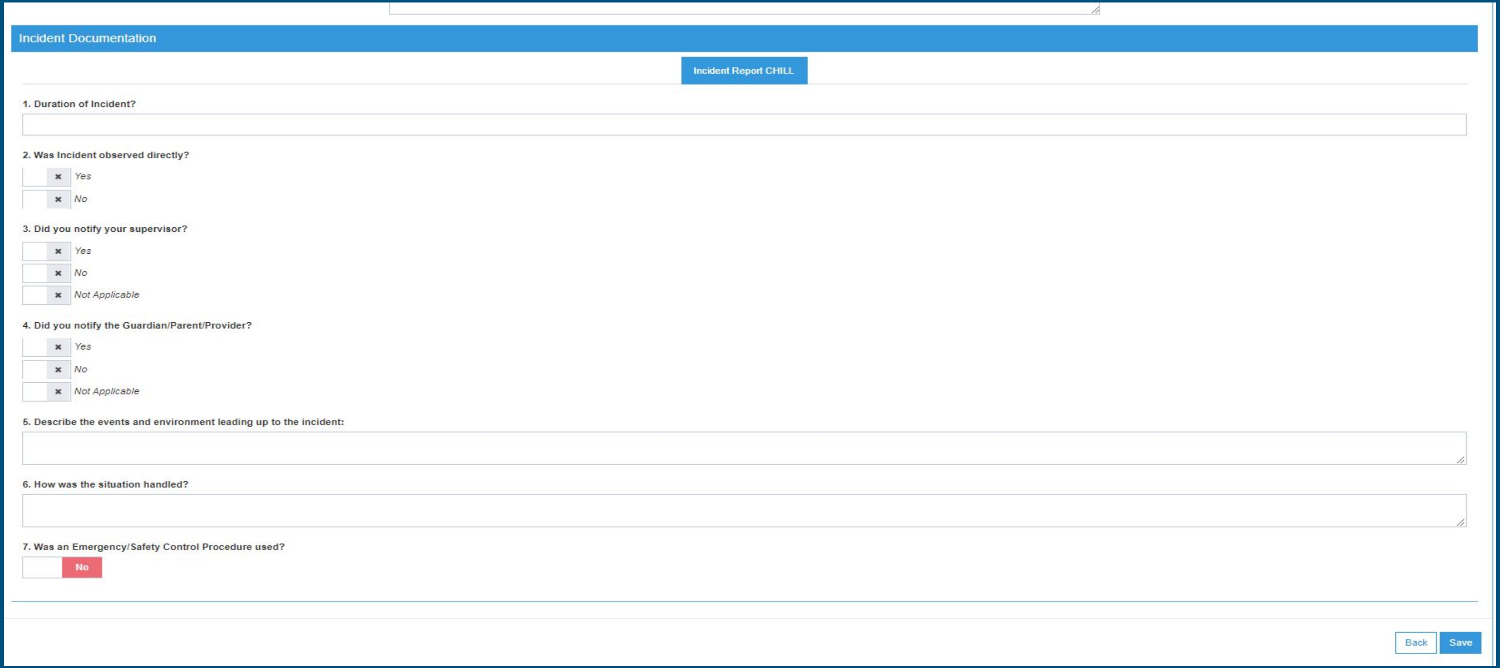
Select the name of the client you are filling out the incident report for.

Location incident occurred

Description of the incident- Please give detailed factual information of the incident.

After all of the above information is put in you will then click on the Incident Report CHILL tab and finish completing the required information.

Finishing Incident Report



Incident Documentation

Incident Report CHILL

1. Duration of Incident?

2. Was Incident observed directly?

Yes

No

3. Did you notify your supervisor?

Yes

No

Not Applicable

4. Did you notify the Guardian/Parent/Provider?

Yes

No

Not Applicable

5. Describe the events and environment leading up to the incident:

6. How was the situation handled?

7. Was an Emergency/Safety Control Procedure used?

No

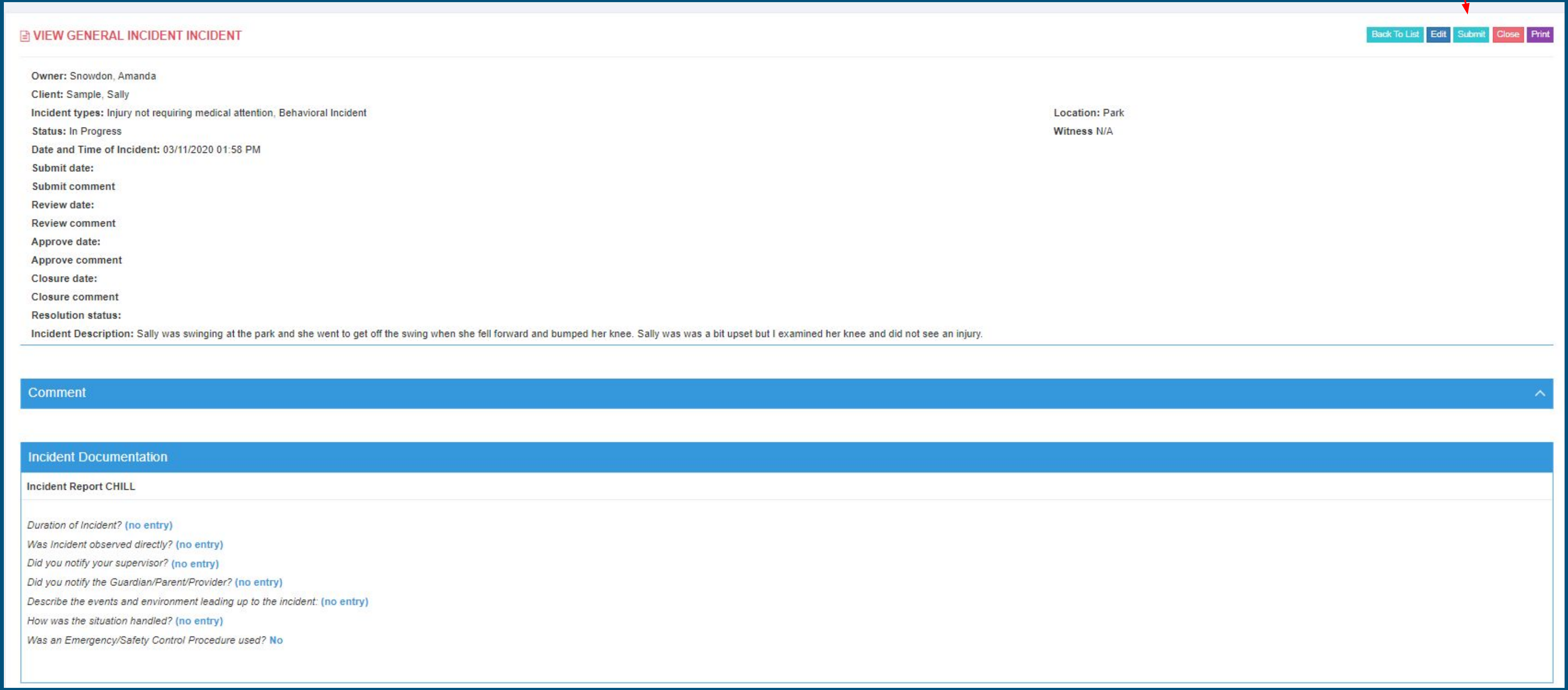
Back Save

Once you click on the Incident Report CHILL it will populate the questions you need to complete. Once the questions are complete you will hit the save button.

Save

Review and Submit

After you review you incident and it looks good you will hit the submit button.



VIEW GENERAL INCIDENT INCIDENT

Back To List | Edit | Submit | Close | Print

Owner: Snowdon, Amanda
Client: Sample, Sally
Incident types: Injury not requiring medical attention, Behavioral Incident
Status: In Progress
Date and Time of Incident: 03/11/2020 01:58 PM
Submit date:
Submit comment
Review date:
Review comment
Approve date:
Approve comment
Closure date:
Closure comment
Resolution status:
Incident Description: Sally was swinging at the park and she went to get off the swing when she fell forward and bumped her knee. Sally was was a bit upset but I examined her knee and did not see an injury.

Location: Park
Witness N/A

Comment

Incident Documentation

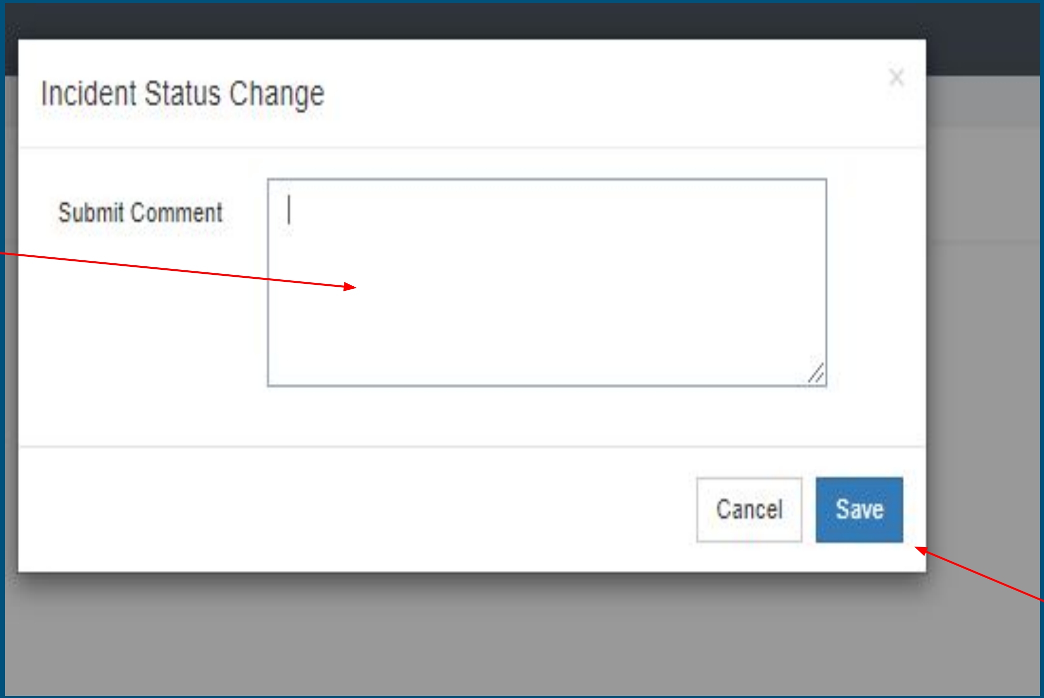
Incident Report CHILL

Duration of Incident? (no entry)
Was Incident observed directly? (no entry)
Did you notify your supervisor? (no entry)
Did you notify the Guardian/Parent/Provider? (no entry)
Describe the events and environment leading up to the incident: (no entry)
How was the situation handled? (no entry)
Was an Emergency/Safety Control Procedure used? No

Final Incident Report Details

Once you hit submit a box labeled incident status change will pop up. This box allows you one last opportunity to add any additional comments about the incident .

If you do not have any additional comments hit the save button and the incident will be submitted.



Why we do notes?

Progress notes are valuable information that show how providers have supported clients with meeting their goals and needs. It is a description, in your words, of how you are helping individuals live their best lives.

Notes serve several purposes

- Timesheets/Paychecks
  - Your notes serve as your timesheet and proof that you have worked a shift and therefore they are how you get paid. Missing notes means missing paychecks
  - A note must be written per client, per category, after each shift. It is asked that you complete the note within 24 hours of the shift.
- Billing
  - Notes are requirements from Medicaid. We need to have written, documented proof of appropriate services being provided to our clients. Without notes, Medicaid can deny our billing/funding.
- Monitoring
  - Coordinators review notes weekly to see how services are going and to make sure goals are being supported, activities being provided are appropriate, and support are sufficient. Your notes provide valuable information, and help build annual plans and progress reports for all of the clients.
- Quality Care
  - Your notes are mapping out the care of an individual and telling their story. You are a part of this story and this story is being told to team members that include therapists, family members, medical personnel, and others.
- Tracking Progress
  - Notes help us track a client’s progress towards their goals and make sure the goals are still relevant and achievable.

Notes Ugh!

It is easy to have negative feelings towards notes; they are busy work, pointless, annoying and time consuming.

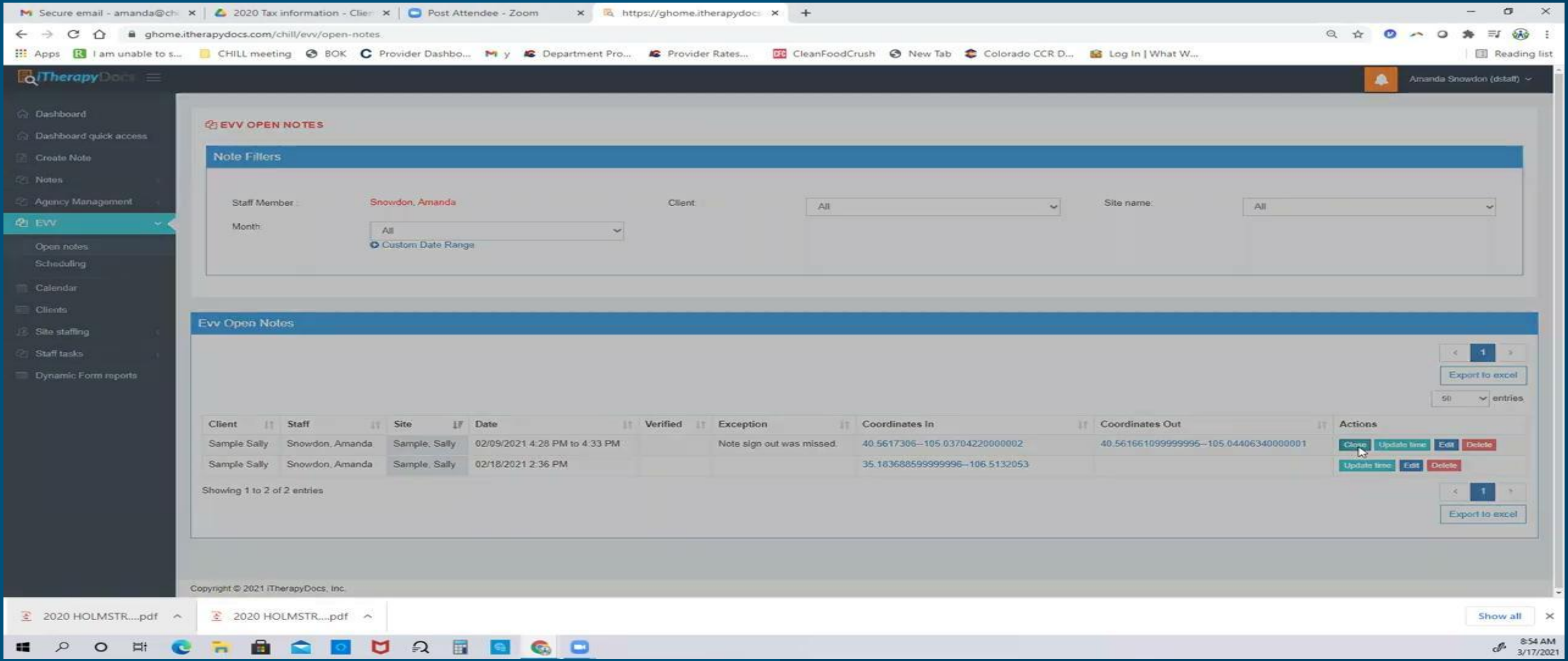
Try to remember that notes are an opportunity for you to reflect on your time with each client. They show how you are supporting and improving their lives, and what role you are taking to removing barriers and helping them reach their goals.

General Expectations for Notes

- Use good grammar and complete sentences.
- Avoid short hand and slang. Write in plain language that is easily understood.
- Use initials when referring to other clients receiving services
- Try to stick to facts and support these facts with details related to the person's goals and service plan
- Try to be objective, avoid opinions
  - Ask yourself what did you
    - Hear?
    - Say?
    - See?
    - Do?
- You can write about emotions and feelings. But use phrases such as 'I interpreted this to mean…'
- Keep the notes positive
- Write down your actions or responses to any issues or behaviors that came up
- If the person did not meet their goals for the day, make a note of why
- Avoid saying you made them do something
- You do not need to be technical or fancy with your notes

Example

Now that you have read how to enter a note, watch this video to see a note entered from beginning to submission.



Questions...

We are here to answer any questions you have:

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