

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?

 <p>Type of Service Performed</p>	 <p>Individual Receiving the Service</p>	 <p>Date of the Service</p>
 <p>Location of Service Delivery</p>	 <p>Individual Providing the Service</p>	 <p>Time the Service Begins and Ends</p>

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

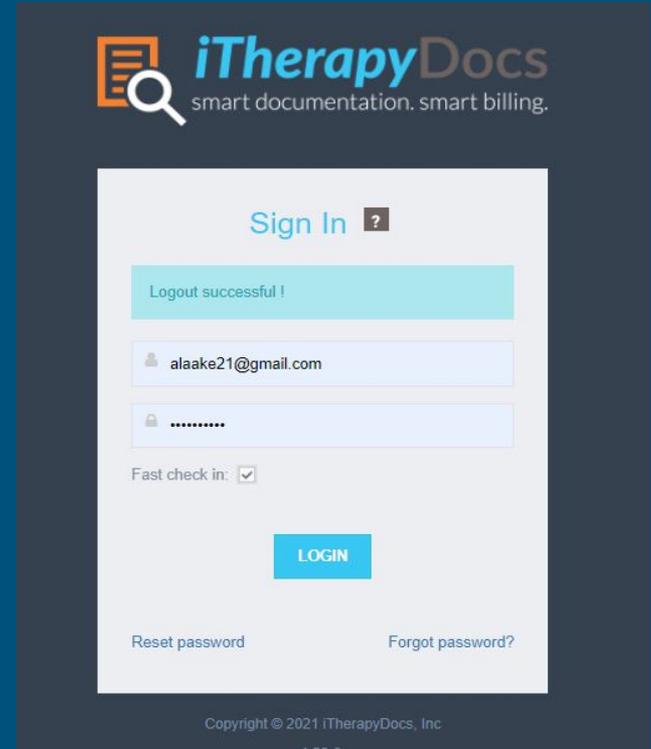
CHILL login home page link:

<https://ghome.itherapydocs.com/chill/login>

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

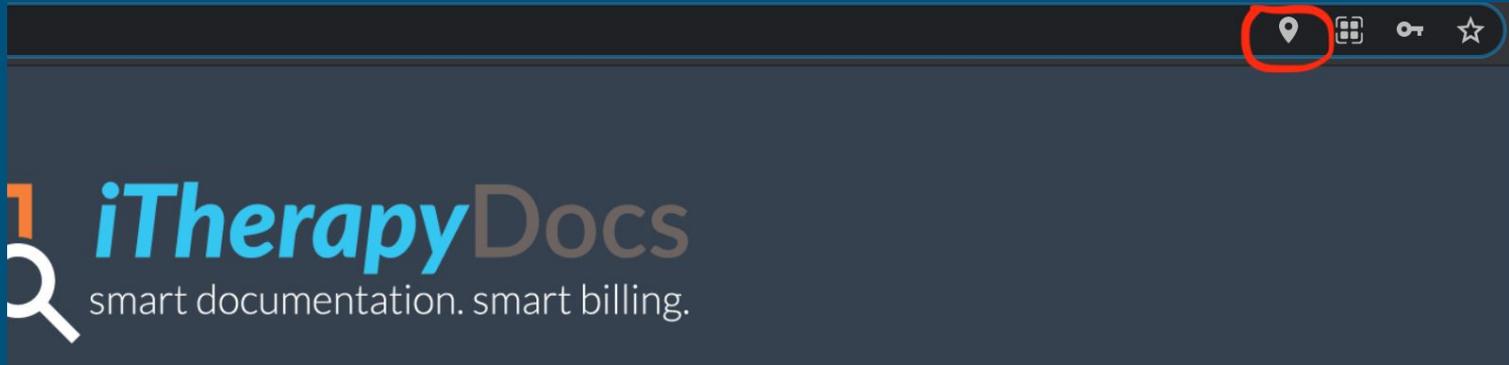
- a. User Name: Your email
- b. Password: Password you created when creating an account

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



The screenshot displays the iTherapyDocs login interface. At the top, the logo features a magnifying glass over a document icon, with the text "iTherapyDocs" in blue and "smart documentation. smart billing." in grey. Below the logo, the "Sign In" link is highlighted with a dark blue box and a question mark icon. A light blue notification bar at the top of the form area reads "Logout successful!". The login form includes an email input field containing "alaake21@gmail.com" and a password input field with masked characters. A "Fast check in:" checkbox is checked. A prominent blue "LOGIN" button is centered below the fields. At the bottom of the form, there are links for "Reset password" and "Forgot password?". The footer contains the copyright notice "Copyright © 2021 iTherapyDocs, Inc." and a small "4/22/21" timestamp.

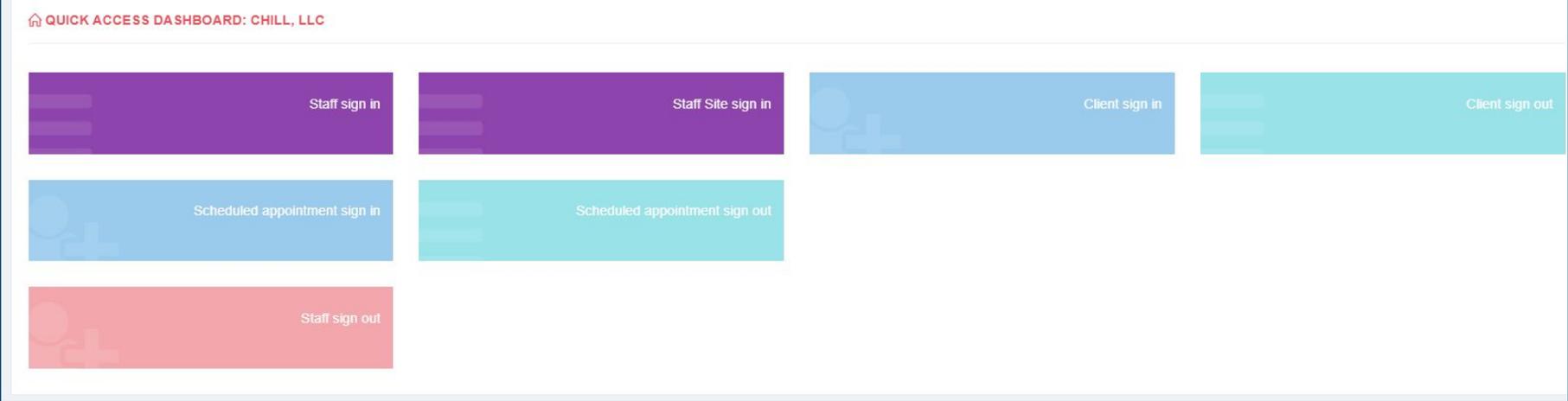
You must allow/enable location services on your phone or computer



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.

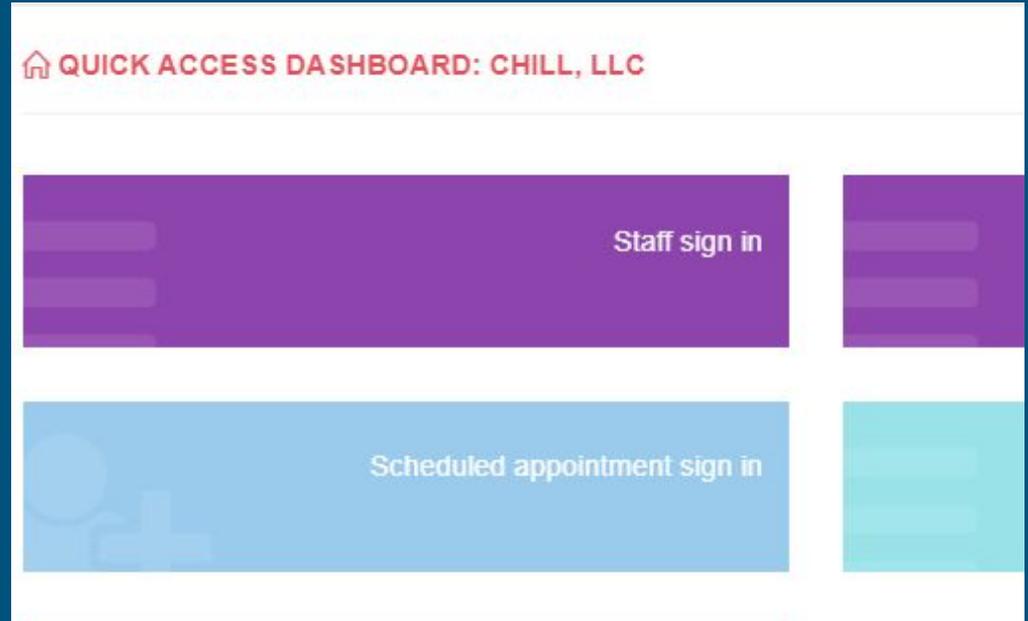
Quick Access Dashboard

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



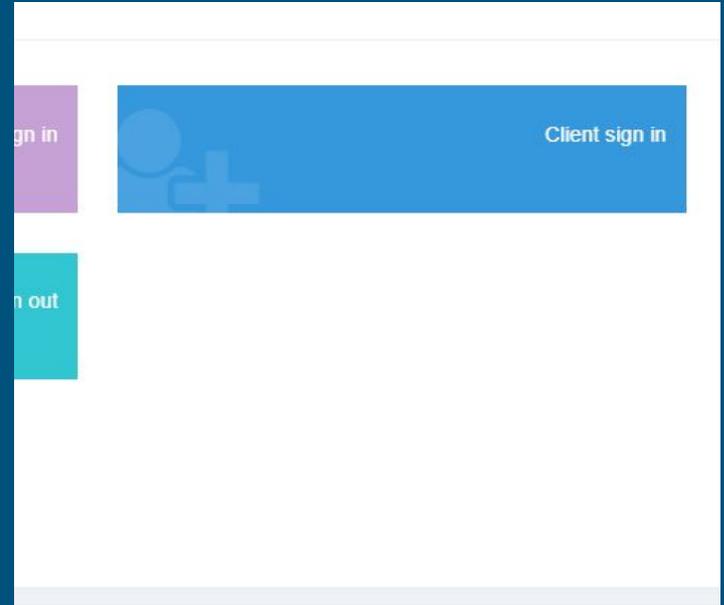
Sign In to Start your Shift

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.

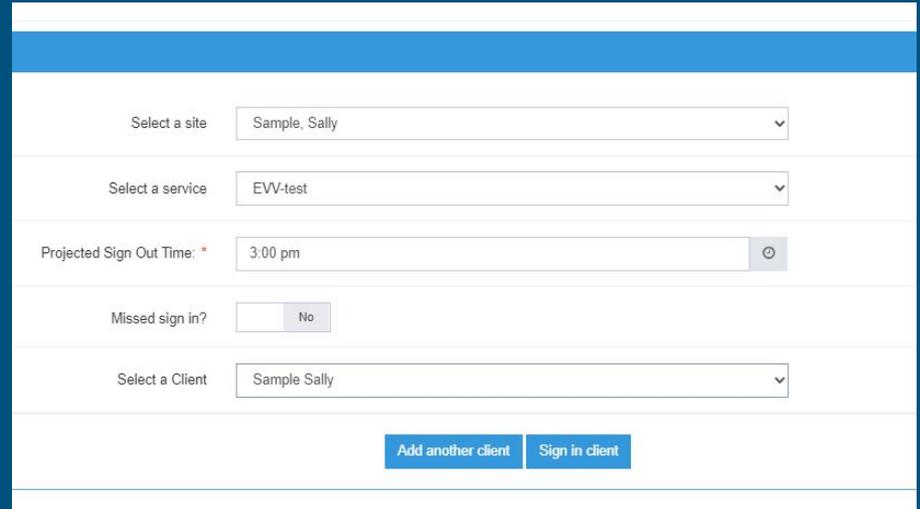


Selecting Service Details

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.



The screenshot displays a web form for selecting service details. It features five rows of input fields:

- Select a site:** A dropdown menu with the selected value "Sample, Sally".
- Select a service:** A dropdown menu with the selected value "EWV-test".
- Projected Sign Out Time: ***: A text input field containing "3:00 pm" and a clear button (X).
- Missed sign in?:** A radio button group with the "No" option selected.
- Select a Client:** A dropdown menu with the selected value "Sample Sally".

At the bottom right of the form, there are two blue buttons: "Add another client" and "Sign in client".

Signing Out a Client

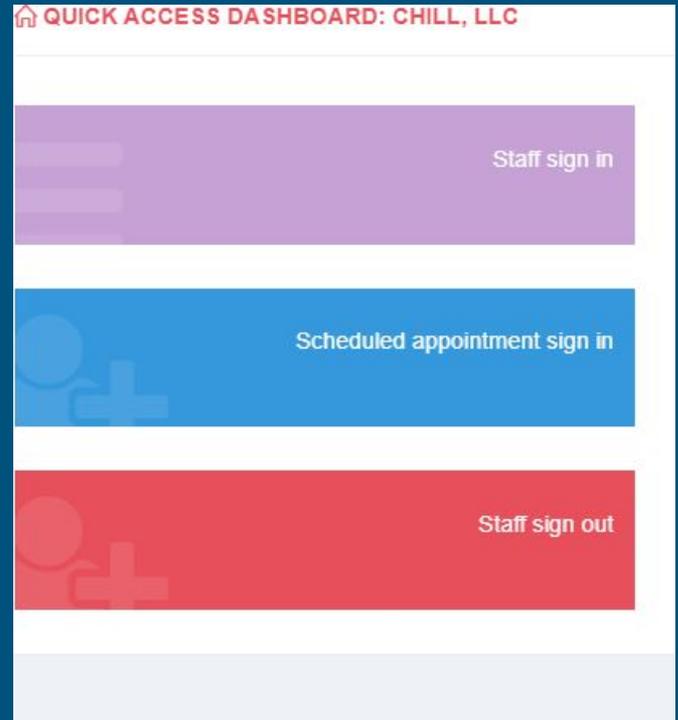
After you have finished a shift with a client or are moving to a different service category you will need to sign out the client by selecting the client sign out widget.

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.

A screenshot of a sign out client screen. It features a white background with a light blue header bar. The main content area contains a "Select a client" label next to a dropdown menu with the text "Select a client" and a downward arrow. Below this is a "Missed sign out?" label next to a radio button labeled "No". At the bottom, there are two blue buttons: "Add another client" and "Sign Out client".

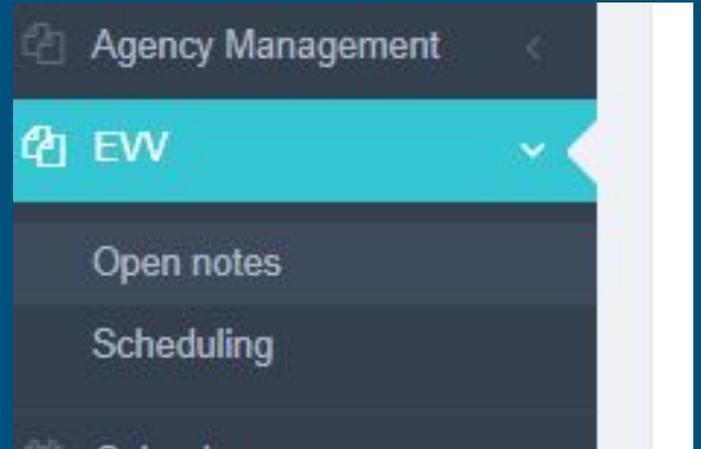
Staff Sign Out

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.



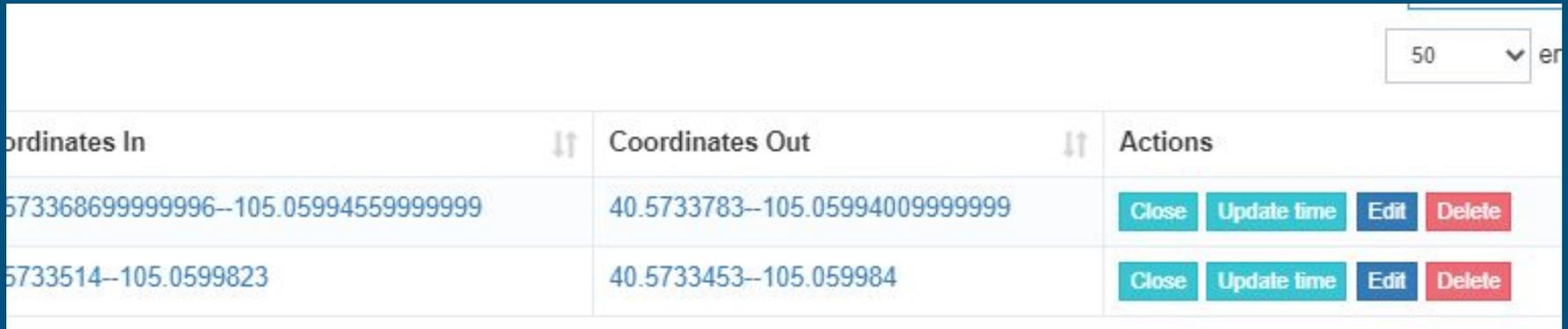
Location of of Open Notes

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.)



The screenshot shows a table with two columns for coordinates and one for actions. The table has two rows of data. In the top right corner, there is a dropdown menu showing the number '50' and a partial label 'er'.

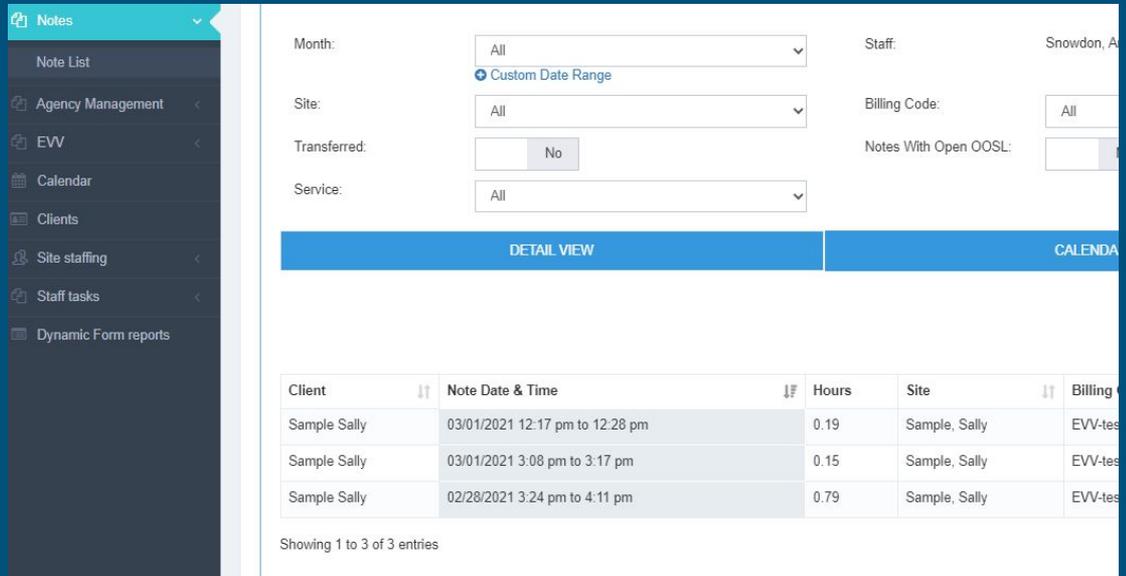
Coordinates In	Coordinates Out	Actions
5733686999999996--105.05994559999999	40.5733783--105.05994009999999	Close Update time Edit Delete
5733514--105.0599823	40.5733453--105.059984	Close Update time Edit Delete

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.



The screenshot displays a software interface for managing notes. On the left is a dark sidebar menu with the following items: Notes (selected), Note List, Agency Management, EVV, Calendar, Clients, Site staffing, Staff tasks, and Dynamic Form reports. The main content area features a header with filters: Month (All), Site (All), Transferred (No), Service (All), Staff (Snowdon, A), Billing Code (All), and Notes With Open OOSL. Below the filters are two tabs: 'DETAIL VIEW' (active) and 'CALENDAR'. The 'DETAIL VIEW' tab shows a table with the following data:

Client	Note Date & Time	Hours	Site	Billing
Sample Sally	03/01/2021 12:17 pm to 12:28 pm	0.19	Sample, Sally	EVV-tes
Sample Sally	03/01/2021 3:08 pm to 3:17 pm	0.15	Sample, Sally	EVV-tes
Sample Sally	02/28/2021 3:24 pm to 4:11 pm	0.79	Sample, Sally	EVV-tes

Showing 1 to 3 of 3 entries

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.

The screenshot shows a web browser displaying the iTherapyDocs Employee Dashboard for Amanda Snowdon. The browser address bar shows the URL <https://ghome.itherapydocs.com/chill/dashboard>. The dashboard features a dark sidebar with navigation options: Dashboard, Create Note, Notes, Agency Management, Calendar, Clients, and Dynamic Form reports. The main content area is titled "DASHBOARD AMANDA SNOWDON" and contains two large widgets: "UnApproved notes" (0) and "Rejected Notes" (0), both with "VIEW MORE" links. Below these is a "RECENT NOTES" section with tabs for "In Progress" and "UnApproved". The "In Progress" tab is selected, and it displays "No in-progress notes found". The footer of the dashboard includes the copyright notice "Copyright © 2020 iTherapyDocs, Inc." and a Windows taskbar at the bottom with a search bar and various application icons.

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.

NOTE MANAGEMENT | HELP ME

Note Filters

Month: All | Custom Date Range | Staff: Snowdon, Amanda | Client: All

Site: All | Billing Code: All | Status: All

Transferred: No | Notes With Open OOSL: No

Service: All

DETAIL VIEW | CALENDAR VIEW | SUMMARY VIEW

Client	Note Date & Time	Hours	Site	Billing Code	Status	Units	Actions
Sample, Sally	02/25/2020 1:08 pm to 2:35 pm	1.45	Sample, Sally	T1019U8 - SLS- Personal Care- All Tiers	In Progress	10	Edit View Delete
Sample, Sally	02/25/2020 4:00 pm to 5:00 pm	1	Sample, Sally	T2021U8 - SLS- Supported Community Connections (Tier 1)	UnApproved	4	Edit View Print Delete

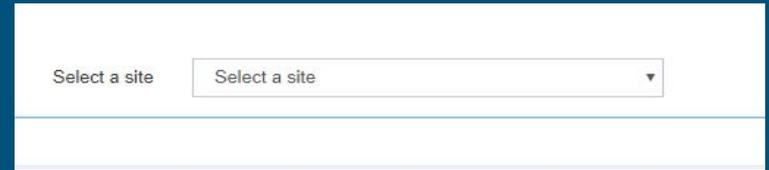
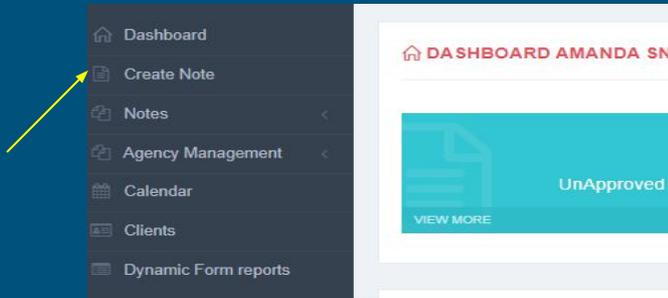
Showing 1 to 2 of 2 entries

Creating a Note for Transportation Trip

Creating a Note

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

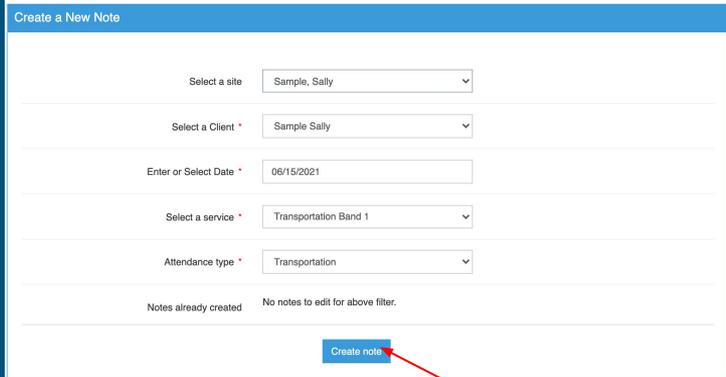
Once you choose create a note you will be directed to a drop down menu with the title "Select a site". You will click on the arrow and scroll to the individual you are creating the note for. (Site = Client)



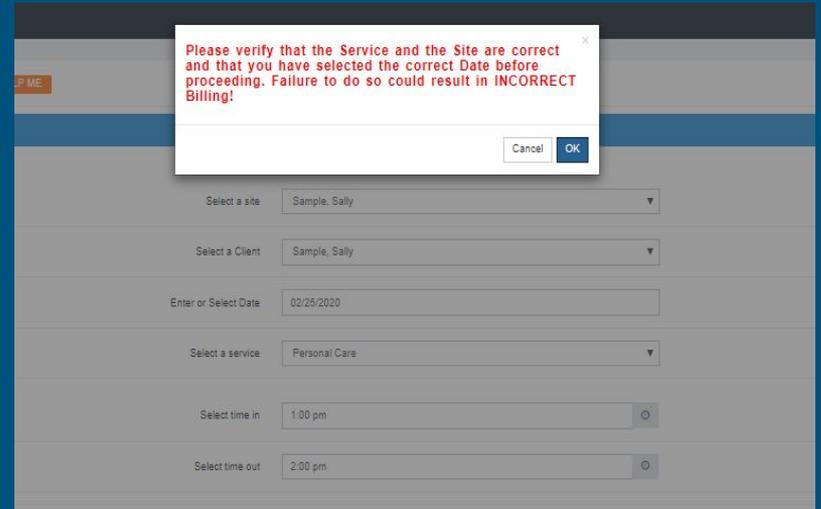
Creating a note cont'd....

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.



The screenshot shows a web form titled "Create a New Note". It contains several input fields: "Select a site" (dropdown menu with "Sample, Sally" selected), "Select a Client" (dropdown menu with "Sample Sally" selected), "Enter or Select Date" (text input with "06/15/2021"), "Select a service" (dropdown menu with "Transportation Band 1" selected), and "Attendance type" (dropdown menu with "Transportation" selected). Below these fields, it says "Notes already created: No notes to edit for above filter." At the bottom right, there is a blue button labeled "Create note" with a red arrow pointing to it.



The screenshot shows the same "Create a New Note" form, but with a warning dialog box overlaid on top. The dialog box has a red border and contains the text: "Please verify that the Service and the Site are correct and that you have selected the correct Date before proceeding. Failure to do so could result in INCORRECT Billing!". There are "Cancel" and "OK" buttons at the bottom right of the dialog box. The form fields behind the dialog are dimmed. The "Enter or Select Date" field now shows "02/28/2020", and the "Select a service" dropdown shows "Personal Care".

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.

Billing Codes

Units: **T2003U8 - SLS- Non-Medical Transportation- Band 1 - 1111111111111111**
Units Available: **1200.00**, Expires On: **06/01/2022**

Time & Place

Attendance

Type of Visit
 Transportation Personal Vehicle Transportation CHILL vehicle

Note Date
06/15/2021

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.

Note Documentation

CHILL Transportation Note

1. Does an Incident need to be reported?

No

2. Please document any challenges, issues, or positives that occurred during transportation

Close & Save In Progress Submit Note

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.

The screenshot shows a software interface with a blue header bar labeled "Note Documentation". Below the header, there are two tabs. The left tab is labeled "CHILL Enhanced Homemaker Cooking Note" and is currently selected. The right tab is labeled "Homemaker Enhanced Cooking ISSP tracking" and is currently unselected. Below the tabs, there is a text prompt: "Please check any objective/action step that the individual worked on and enter comments where appropriate. (At least one item is required)". Two red arrows originate from the labels below the image: one points to the "CHILL Enhanced Homemaker Cooking Note" tab, and the other points to the "Homemaker Enhanced Cooking ISSP tracking" tab.

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.

Sally has a goal of increase her independence with cooking

Objective/Action step: Sally will have a recipe picked out prior to the arrival of her provider [View TSS](#)
Frequency: Weekly - 02/19 - 02/25 Current status: 1/1

Met Unmet

(Required)

Objective/Action step: Sally will read through her recipe and will indicate what the first step should be [View TSS](#)
Frequency: Weekly - 02/19 - 02/25 Current status: 1/1

Met Unmet

(Required)

Submitting an Incident Report

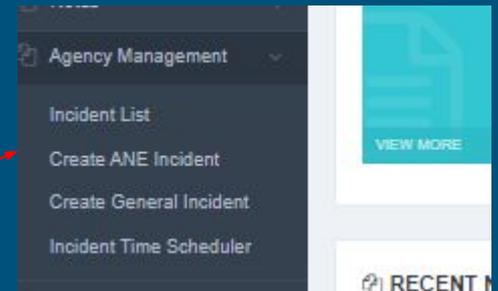
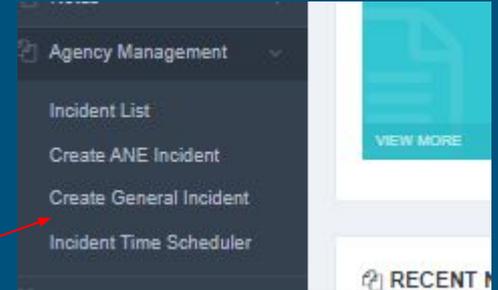
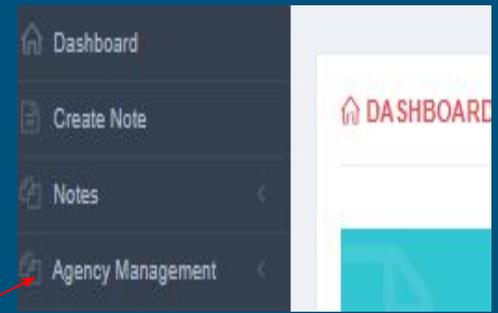
Incident Reporting

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 will 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.

The screenshot shows a form for creating an incident report. The form has a blue header and a white body. The fields are: Incident types (text input), Client (dropdown menu), Date and Time of Incident (date and time pickers), Location (text input), Witness (text input), and Description (text area). A blue bar at the bottom contains the text 'Incident Report CHILL'. Red arrows point from text annotations to each of these fields.

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.

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

Location incident occurred

Incident Report CHILL

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

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: [\(no entry\)](#)

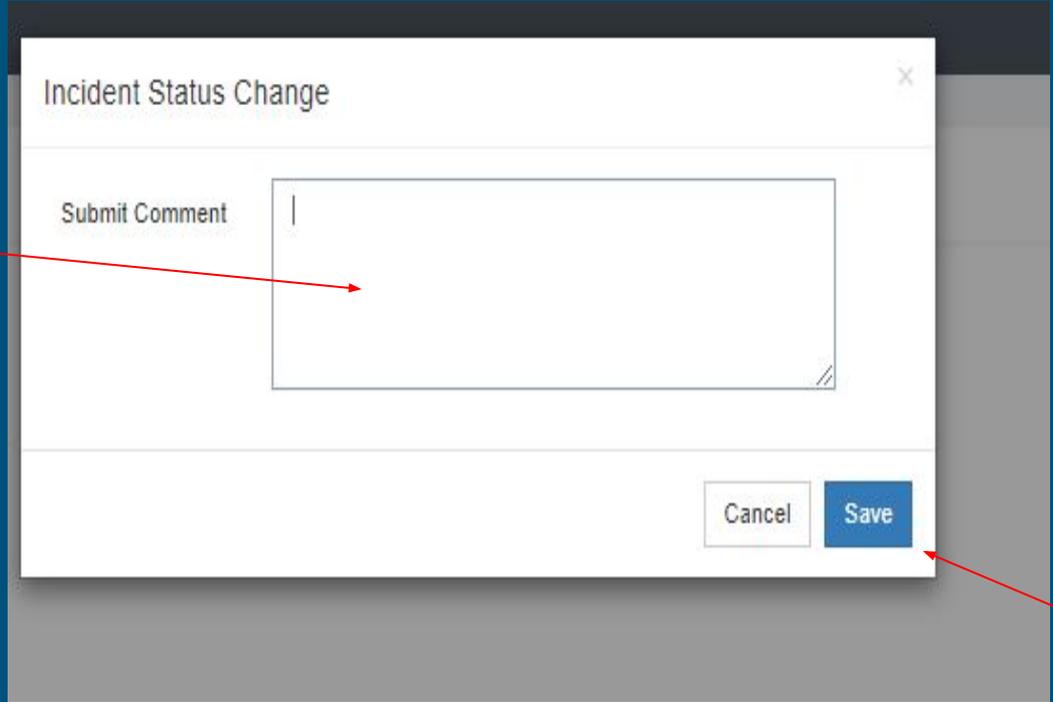
How was the situation handled? [\(no entry\)](#)

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.



The screenshot shows a dialog box titled "Incident Status Change" with a close button (X) in the top right corner. Below the title bar is a text input area labeled "Submit Comment" with a vertical cursor. At the bottom right of the dialog are two buttons: "Cancel" and "Save". A red arrow points from the "Submit Comment" text area to the left, and another red arrow points from the "Save" button to the right.

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.

The screenshot displays the iTherapyDocs web application interface. The top navigation bar includes the iTherapyDocs logo and a user profile for Amanda Snowdon. The sidebar on the left contains navigation options such as Dashboard, Create Note, Notes, Agency Management, and EVV. The main content area is titled 'EVV OPEN NOTES' and features a 'Note Filters' section with dropdown menus for Staff Member (Snowdon, Amanda), Client (All), Site name (All), and Month (All). Below the filters is a table of 'Evv Open Notes' with columns for Client, Staff, Site, Date, Verified, Exception, Coordinates In, Coordinates Out, and Actions. The table shows two entries for 'Sample Sally' with notes entered by 'Snowdon, Amanda'. The 'Actions' column for each entry includes buttons for 'Clone', 'Update time', 'Edit', and 'Delete'. The interface also includes pagination controls and an 'Export to excel' button.

Client	Staff	Site	Date	Verified	Exception	Coordinates In	Coordinates Out	Actions
Sample Sally	Snowdon, Amanda	Sample, Sally	02/09/2021 4:28 PM to 4:33 PM		Note sign out was missed.	40.5617305-105.03704220000002	40.561661099999995-105.04406340000001	Clone Update time Edit Delete
Sample Sally	Snowdon, Amanda	Sample, Sally	02/18/2021 2:36 PM			35.183688599999996-106.5132053		Update time Edit Delete

Show all

Questions...

We are here to answer any questions you have:

Amanda Snowdon (Director): amanda@chillllc.com

Tenisha Loveall (Assistant Director): tenisha@chillllc.com

Sage Prutch (Human Resources Director): sagep@chillllc.com

Cammy Cortes (Coordinator): cameronc@chillllc.com

Kim Espinoza (Coordinator): kim@chillllc.com

Lara Montez (Coordinator): laram@chillllc.com

Lauren Sturges (Coordinator): laurens@chillllc.com