AUDIENCE: Providers of Consolidated, Person/Family Directed Supports Waiver or Base-funded services.

PURPOSE: To provide notice of ODP’s intent to re-issue Bulletin # 00-17-02 entitled “Claim and Service Documentation Requirements for Providers of Consolidated and Person/Family Directed Support Waiver Services and Targeted Services Management” and provide a correction related to the timing for completion of progress notes.

DISCUSSION:

On July 21, 2017, ODP issued Bulletin # 00-17-02 entitled “Claim and Service Documentation Requirements for Providers of Consolidated and Person/Family Directed Support Waiver Services and Targeted Services Management.” The bulletin specifies that progress notes are to be “completed during the calendar month the service is provided.” This is to advise you that pending re-issuance of a new bulletin on claim and service documentation requirements, progress notes may be completed the month following the delivery of the service. This change is effective immediately and applies to services rendered by providers or through a participant-directed option (Vendor Fiscal/Employer Agent or Agency with Choice).

There is no change to the existing requirements for supports coordinators or targeted service managers. Completion of the individual monitoring tool by the supports coordinator or targeted service manager as specified in the approved waivers or State Plan Amendment (for Targeted Service Management) satisfies the assessment of progress requirements.
ODP encourages completion of progress notes as soon as possible in the month after the service was delivered. Progress notes are an important tool in ensuring that the service is provided as outlined in the ISP, is having the desired impact and, if not, that adjustments are made promptly.

When a service is provided periodically or intermittently, a progress note may be completed when the service is provided. ODP Bulletin # 00-17-02 shall continue to be used for guidance regarding the expectations for development of a progress note. Specifically, “…to formulate a progress note the person preparing the notes should review service documentation, observe service delivery and speak with the individual, the individual’s parent or legal guardian as appropriate, staff and other team members or person’s involved with the individual as appropriate.”