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Topics

- ► Independent Support Broker Documentation
- ► Employee Documentation

Independent Support Broker

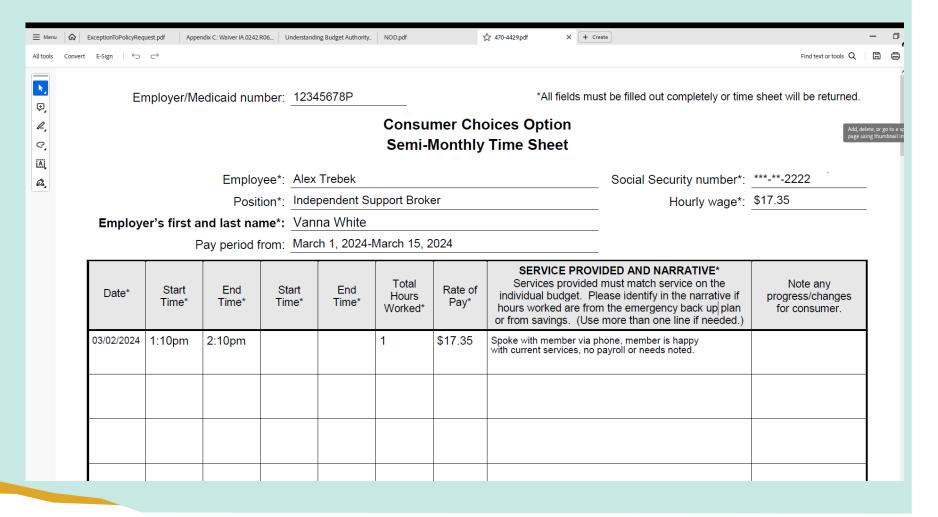


ISB Documentation Requirements

▶ Documentation in writing on the independent support broker timecard every contact the broker has with the member. Contact documentation shall include information on the extent to which the member's individual budget has addressed the members needs and satisfaction of the member.

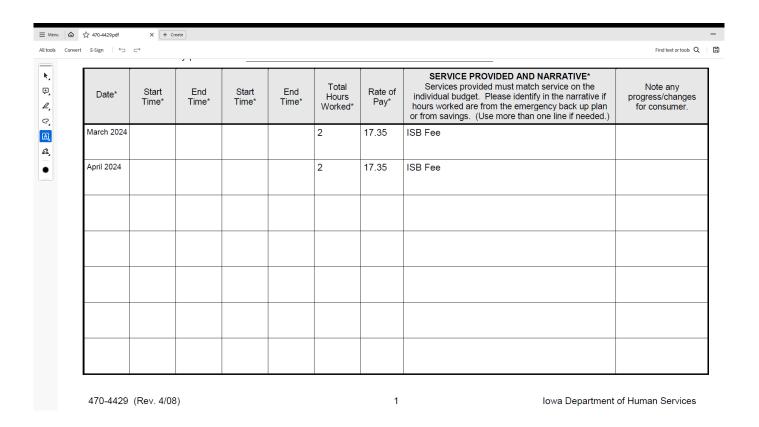


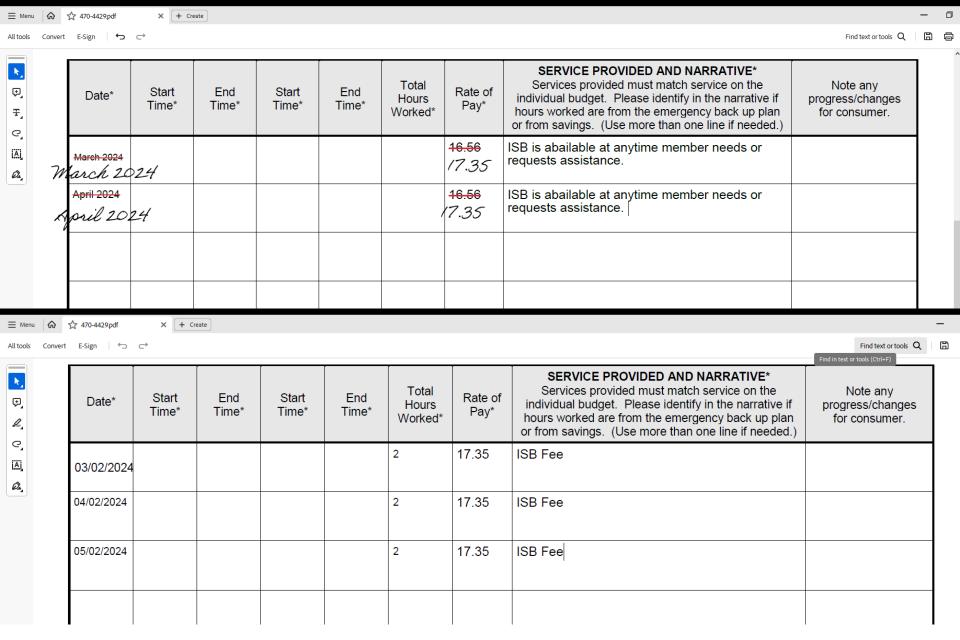
Correct Time Sheet





Examples of what we are seeing







Signatures

► We are seeing a lot of signatures that appear to be photo copied. All timesheets should be signed by the member and employee each time it is submitted, they are NEVER to be photocopied.

Employee Documentation



Documentation Components

- ▶ What needs to be included?
 - Supports and services provided
 - Goals documented
 - Interventions
 - Individualized (should not be cut and paste from day to day or member to member)
 - Frequency monitored (how often, how many)
- ► What does documentation look like?
 - Narrative is no longer required.
 - Can use a "check list"



Documentation Components (continued)

► Examples of acceptable documentation format

	Name	Date	
Supports provided to Client in	Services:		
□Medication □ Transportation □ Drills/Safety □ Budgeting/Money Mgmt □Benefits/Mail □ Community Activities			
☐ Household skills ☐ Boundaries/Relationships ☐ Meal Prep/Nutrition ☐ Advocacy ☐ Communication Skills ☐ Other			
Goal:	Intervention:	Time Spent:	Response:
List from Service Plan			
summarized below	List from Service plan		□ Actively Participated
□Budgeting	□Checklist made		□ Progress Made
□Socialization	□ Checklist used		□ Declined
□Meal Plan/Prep/Making	☐ Assistive decice used		□ Not offered Today
	□ Planning Completed		□ Did not have time
	☐ Assistance given from Staff		
	☐ Communication device use	d	



Documentation Components(continued)

CDAC Services for John Doe Provider Name: Date: _____ Time: Start ____ End_____ ☐ Meal Prep ☐ Dressing ☐ Communication Financial assistance Essential Housekeeping Medication assistance Essential Transportation Comments: Provider's Signature_____ Date _____



Documentation Components (continued)

Narrative Example

- Goal: I want to be healthy and exercise more.
 - I will purchase a membership to the YMCA
 - I will go to the YMCA 3 times a week with support from my staff.
 - I will set up a meeting with the trainer at the YMCA with support from my staff.

02/03/2023: John and his staff went to the YMCA to purchase his membership and set up a time to meet with the trainer. John and his staff will meet with the trainer on 02/07/2023 at 2:30pm to get a orientation of the YMCA and discuss fitness goals. John's staff encouraged him to ask questions and talk to the staff at the YMCA.



What we are seeing

► We drove joe to his friend's house to watch football. Joe greeted everyone independently. Joe worked on a puzzle with his friend, and I assisted. Joe didn't want to eat dinner there but had a few pieces of candy and his one soda for the day. We visited for awhile and Joe asked to leave. We said goodbye and left for home (Goal 5,6,7).



What we are seeing continued.

► Worked on SCL goals 4:00pm-6:00pm.

► Missing times, missing goals, missing signatures.



Over Authorizations





