

# **Entering Service Notes in HCSIS**

**Bureau of Autism Services**

Deloitte Consulting LLP

## Overview

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HCSIS is a web-enabled information system that serves as the information system for the Bureau of Autism Services (BAS). This on-the-job reference guide details the process used to enter, edit, check spelling, and save non-billable service notes in HCSIS.

After the Supports Coordinator (SC) or SC Supervisor has an indirect or direct interaction with an individual, individual's family, provider, or other support staff information about the interaction should be captured in a service note in HCSIS.

HCSIS Service Note functionality includes:

- *Search for a Service Note*
- *Create a New Service Note*
- *Check Spelling in a Service Note*

## Key Terms and Definitions

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- **Service Note:** Service notes document meetings and other contacts with an individual, the individual's family, provider, or other support staff. These notes are recorded in the service notes portion of an individual's record in HCSIS. It is recommended that service notes begin with a descriptive phrase, such as:
  - Face to face with...
  - Conversation with...
  - Facilitated Plan meeting...
  - Call to/from...
  - Team meeting at...
  - Reviewed and filed notes from...
  - Completed referral packet for...

When recording service notes, remember to be specific and to the point, include only facts (not opinions) and specify all relevant dates.

- **Follow-up Service Notes:** When creating a service note, you can indicate whether the service note requires follow-up action

## Key Terms and Definitions (continued)

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- **Service Note Views:** Service Notes may be displayed using several different views. Supports Coordinators can only view notes for individuals on their caseload. Support Coordinator Supervisors can view notes for individuals assigned to their SCs.
  - **Follow-up required service notes only:** This view provides a list of Service Notes requiring follow-up action to be taken
  - **Summary:** This view displays the notes in a table with the following information: Date of Contact, Date of Entry, Service Type, Category, Sub-Category, Number of Units, and a few words of the Note. The number of service notes displayed on a single page is limited to twenty. Users may click on the hyperlink in the Note column of the record to open the note and edit it. Notes are grouped together by the name of the individual.
  - **Text:** This view displays the notes in an abbreviated format and includes the following information: Date of Service/Contact, Location of Service, the Service Note text, Supervisory Edits, and the user name and date the note was updated.
- **Units:** Some services are billed as one unit but for most services, one unit represents 15-minutes of activity. For more information about definition of a unit for each service, please refer to the *Adding Services Tip Sheet* posted on the Learning Management System.

## Roles and Responsibilities

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- **Supports Coordinator (SC):** The SC is responsible for locating, coordinating and monitoring the services and supports for a individual assigned to his/her caseload. The SC takes the lead in establishing contact with the individual's family/guardian, scheduling meetings, assisting with the selection of Planning Team members, completing assessments, creating and updating the plan when necessary, assuring that services are provided as specified in the plan, and documenting all contacts with the individual, the individual's family, and providers by entering service notes in HCSIS. The SC can update and view service note information for individuals assigned to their caseload.
- **Support Coordination Supervisor (SC Supervisor):** The SC Supervisor is responsible for overseeing the activities of one or more SCs and the care of the individuals on those SC's caseloads. The SC Supervisor initiates and maintains their SC's HCSIS profiles, assigns SCs to an SC Supervisor, creates new caseloads, and assigns, reassigns and transfers individuals between caseloads when necessary. The SC Supervisor can enter supervisory edits to their SC's service notes, update and view service note information.

## Service Notes: Writing Tips

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- **Write Objectively**

Remember that the service note is not about you or your feelings. Make sure that your service notes do not reflect negative feelings or reactions that you have toward the individual, other people or events. Avoid terms and descriptions that seem judgmental.

- **Write Clearly**

Be objective and descriptive; be precise about what you are describing. Try to avoid vague or general terms. Use proper grammar and be sure that each sentence has proper sentence structure and sequencing of words so others can understand what you are documenting.

- **Write What You Observe**

Documenting the following can provide useful information: the individual's appearance, mannerisms, dress, response to situations/events or to the interaction with you or others, intensity of mood, etc.

- **Write So Others Can Understand**

Your primary purpose is to explain things so others can understand what you are documenting. It is more important to be understood than to sound "professional" by using terminology that only people with specific knowledge or interests would understand.

- **Write Using *People First* Language**

When describing the individual and referencing their disability, identify the individual first then the disability. The disability represents only one of many characteristics of the person.

Some of the suggestions included above are adapted from the following text:

Summers, Nancy (2001). *Fundamentals of Case Management Practice*. Brooks/Cole Thomson Learning, United States

# Login to HCSIS

- Navigate to the HCSIS Homepage: <https://www.hcsis.state.pa.us>
- Click the HCSIS Login button
- Enter your **Username** and **Password** on the Keystone Login screen, then click[LOGIN]

The image shows a composite of two screenshots from the HCSIS website. The top screenshot is the homepage, featuring the HCSIS logo and the text 'The Home and Community Services Information System'. Below the logo, it says 'Welcome to HCSIS' and 'Please click below to choose the HCSIS component you would like to access.' There are four buttons: 'HCSIS Login' (with a house icon), 'Provider Access' (with a person icon), 'Frequently Asked Questions (FAQ)' (with a book icon), and 'Learning Management System (LMS)' (with a graduation cap icon). A green callout box points to the 'HCSIS Login' button with the text 'Click the HCSIS Login button.' The bottom screenshot is the 'Keystone Key' login page, which has a blue background with a map of Pennsylvania. It features a 'Keystone Key' logo, a 'Username:' field, a 'Password:' field, and a 'LOGIN' button. A green callout box points to the login fields with the text 'Enter your user name and password to log in.' Below the login fields are links for 'Self-service for Business Partners', 'Forgot Userid', 'Forgot Password', 'Edit Profile', 'Self-Service for Commonwealth Employees', and 'Change CWOPA Password or Hint Questions'.

# Search for an Existing Service Note

- Navigate to the *Service Note Search* screen by following the path **SC > Service Notes > Search**

The screenshot shows the 'Service Note Search Criteria' form in the HCSIS system. The breadcrumb path 'SC > Service Notes > Search' is highlighted in red. The form contains the following fields and options:

- Last Name:
- From Contact Date (MM/DD/YYYY):
- Identifier Type:
- Caseload:
- Sort By:
- First Name:
- To Contact Date (MM/DD/YYYY):
- Identifier:
- View: \* **See drop-down options below**

Buttons:

Callout: Click [Advanced Search] to see more search options.

Footer: You are presently logged into HCSIS Thursday, April 09, 2009 13:34 Your session expires sometime after 13:59

**Note:** The search date range must be less than 31 days unless the First and Last Name or Identifier Type and Identifier are specified.

If the First Name and Last Name or Identifier and Identifier Type are specified, the date range must be less than 6 months.

Service Notes may be displayed using several different views. Select the view that is most appropriate.

The screenshot shows the 'View' dropdown menu with the following options:

- Follow-up required service notes only
- Summary
- Text

\*Review slide 4 of this training for view details.



# Advanced Search

- Click [Advanced Search] on the basic search page (shown on the previous slide) to use advanced search options

The screenshot shows the HCSIS (The Home and Community Services Information System) interface. At the top, there is a navigation bar with the HCSIS logo and a 'Help' button. Below this is a menu with links: Home, M4Q, Individual, Plan, SC, Provider, Financial, Admin., Tools, Indiv Monitoring, Service Notes, TSM Claims, Caseload Management, and Indiv. Facesheet. A secondary menu includes Search and New Service Note. The main content area is titled 'SC - Service Notes - Search - Service Note Search'. The central part of the page is a 'Service Note Search Criteria' form with the following fields:

Last Name:	<input type="text"/>	First Name:	<input type="text"/>
From Contact Date (MM/DD/YYYY):	<input type="text" value="3/10/2009"/>	To Contact Date (MM/DD/YYYY):	<input type="text" value="4/9/2009"/>
From Entry Date (MM/DD/YYYY):	<input type="text" value="3/10/2009"/>	To Entry Date (MM/DD/YYYY):	<input type="text" value="4/9/2009"/>
Identifier Type:	<input type="text"/>	Identifier:	<input type="text"/>
Comment Author Last Name:	<input type="text"/>	Comment Author First Name:	<input type="text"/>
Category:	<input type="text"/>	Subcategory:	<input type="text"/>
Caseload:	<input type="text"/>	Service Type:	<input type="text"/>
Sort By:	<input type="text"/>	View:	<input type="text" value="*"/>

At the bottom of the form are 'Reset' and 'Search' buttons. The footer of the page contains the text: 'You are presently logged into HCSIS', 'Thursday, April 09, 2009 13:47', and 'Your session expires sometime after 14:12'.

## Create a New Service Note

- To create a new service note, follow the path **SC > Service Notes > New Service Note**
- The *Service Note* screen allows you to search for the individual for whom you would like to enter a service note
- If there is only one match, the *New Service Note* screen will appear for that individual. If multiple responses appear, the system will prompt you to select the individual by clicking Add A Service Note in the *Action* column adjacent to the correct individual

The screenshot shows the HCSIS interface. At the top left is the HCSIS logo. The main header reads 'The Home and Community Services Information System' with a 'Help' button on the right. A navigation bar contains links: Home | M4Q | Individual | Plan | SC | Provider | Financial | Admin. | Tools | Indiv Monitoring | Service Notes | TSM Claims | Caseload Management | Indiv. Facesheet | Search | New Service Note. Below this is a breadcrumb trail: SC - Service Notes - New Service Note - Service Note.

The 'Individual Search Criteria' form contains the following fields:
 

- Last Name: thompson
- First Name: (empty)
- Identifier Type: (dropdown menu)
- Identifier: (empty)

 There are 'Reset' and 'Search' buttons at the bottom of the form.

Below the form, a message states: 'Your search found multiple matches. Please select the desired consumer.'

Individual Name	(Cty/Jndr)/Agency	Date of Birth	Supports Coordinator	Action
THOMPSON, CHRISTINE	WEST	1/17/1985	THOMAS, TAYLOR	<a href="#">Add a Service Note</a>
THOMPSON, KEVIN	WEST	8/22/1996		<a href="#">Add a Service Note</a>

The footer of the page contains: 'You are presently logged into HCSIS', 'Thursday, April 09, 2009 13:49', and 'Your session expires sometime after 14:14'.

# Service Note Fields

- Use the following field descriptions to enter a service

**Service Note** field captures the SC's service note information. **Service Note** field captures the SC's service note information.

The screenshot shows the 'New Service Note' form in the HCSIS system. The form includes a navigation bar with links like 'Home', 'M4Q', 'Individual', 'Plan', 'SC', 'Provider', 'Financial', 'Admin.', and 'Tools'. Below this is a search bar and a table with the following data:

Current Individual	Name: SMITH, BASALERTS	SSN:	MCI#: 150331091	Reside
MA Eligible:	No			
Program Diagnosis:	F84.0 Autistic disorder			

The 'SERVICE NOTE DETAILS' section contains the following fields:

- Date of Service/Contact (MM/DD/YYYY): \* 10/1/2015
- Location of Service: \* [Dropdown]
- Service Type: \* [Dropdown]
- Category: \* [Dropdown]
- Sub-Category: \* [Dropdown]
- No. of Units: 0
- Credited to: N/A
- Follow-up: \* [Dropdown]
- Follow-up Due Date (MM/DD/YYYY): [Calendar]
- Billable:  Yes  No

Two callout boxes provide additional information:

- A red-bordered box on the right side of the form contains the text: **Note:** These fields are used to capture information for billable service notes; they do not apply to non billable service notes. Red arrows point from this box to the 'Location of Service', 'Service Type', 'Category', 'Sub-Category', and 'Follow-up' fields.
- A white-bordered box with a red border, located below the 'Service Note' field, contains the text: The **Service Note** field captures the SC's service note information.
- A white-bordered box with a red border, located below the 'Supervisory Edit' field, contains the text: The **Supervisory Edit** field allows the SC Supervisor to enter additional comments; this field is only available to HCSIS users with an SC Supervisor role.

At the bottom of the form are buttons for 'Reset', 'Save And Add New', 'Save', and 'Check Spelling'.

## Service Notes: Field Descriptions

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Field Name	Description
Date of Service/Contact	Represents the date the individual was contacted or the service was provided. Contact can be made through a face-to-face meeting or telephone conversation with the individual, the individual's family, the service provider, or other support staff. The date you enter determines the diagnosis that appears, once the ICD-10 diagnosis has been entered. Enter a date of 9/30/2015 or before, and the ICD-9 diagnosis is displayed. Enter a date of 10/1/2015 or after, and the ICD-10 diagnosis is displayed. When no date is selected, the ICD-10 code is displayed.
Location of Service	Select the location of service: <ul style="list-style-type: none"> <li>▪ <b>SC Entity Office:</b> Select this option if the meeting/telephone conversation took place at the SC Entity Office</li> <li>▪ <b>Individual's Home:</b> Select this option if the meeting took place in the individual's home</li> <li>▪ <b>Community:</b> Select this option if the meeting took place at a site within the community</li> </ul>
Service Type	Select the type of service: <ul style="list-style-type: none"> <li>▪ <b>Locate:</b> An activity which links an individual to a service</li> <li>▪ <b>Coordinate:</b> An activity which entails communication/interaction with others</li> <li>▪ <b>Monitor:</b> An activity that entails ongoing evaluation/assessment of current services</li> <li>▪ <b>Other/Non-billable:</b> An activity not covered by the other three options available</li> <li>▪ <b>TSM -Transition Activities:</b> Transitioning individuals to a home and community based setting.</li> </ul> <p><b>Note:</b> TSM-Transition Activities should only be selected by ODP-ID users, although this value is shown for ODP-BAS and OLTL users.</p>

## Service Notes: Field Descriptions (continued)

Field Name	Description
Category	<p>Select the category of the service note:</p> <ul style="list-style-type: none"> <li>▪ <b>Referral:</b> Activity that focuses on intake/referral for a service</li> <li>▪ <b>Plan:</b> Activity that focuses on the development, implementation or review of a plan</li> <li>▪ <b>Eligibility:</b> Activity that focuses on determination of eligibility for services</li> <li>▪ <b>Budget:</b> Activity that focuses on the planning/implementation/review of fiscal matters</li> <li>▪ <b>Health and Safety:</b> Activity that focuses on evaluation and assessment of the individual's support systems and environment</li> <li>▪ <b>Case Transfer:</b> Activity that focuses transferring service responsibility from one person to another</li> <li>▪ <b>SC Individual Monitoring:</b> Activity that focuses on compliance monitoring and quality assurance of services</li> <li>▪ <b>Daily Living:</b> Activity that focuses on assessment of daily activities such bathing, washing, cooking, home movement, etc</li> <li>▪ <b>Respite:</b> Activity that focuses on providing services to individuals on a short term basis in the absence or relief of persons normally providing care</li> <li>▪ <b>Vocational:</b> Activity that focuses on job related services</li> <li>▪ <b>Adult Day:</b> Activity that focuses on health and social services furnished in an outpatient setting</li> <li>▪ <b>Educational:</b> Activity that focuses on education and related services as defined in the Individuals with Disabilities Education Act (IDEA)</li> <li>▪ <b>Community Integration:</b> Activity that focuses on assisting individuals in acquiring, retaining, and improving self-help, socialization and adaptive skills necessary to reside in the community</li> <li>▪ <b>Personal Emergency Response System (PERS):</b> An electronic device that enables an individual at high risk of institutionalization to secure help in an emergency</li> <li>▪ <b>Environmental Adaptations:</b> Activity that focuses on physical modification to the home required by the individual's plan of care</li> </ul>

## Service Notes: Field Descriptions (continued)

Field Name	Description
Category (Cont.)	<ul style="list-style-type: none"> <li>▪ <b>Assistive Technology/Specializes Medical Equipment:</b> Devices, controls or appliances which enable individuals to increase their abilities to perform activities of daily living</li> <li>▪ <b>Extended State Plan Services:</b> Activities that include Physical, Occupational, Speech Therapy, Part time nursing, and visiting nurses services</li> <li>▪ <b>Transportation:</b> Activity that focuses on enabling consumers to gain access to waiver and other community related activities</li> <li>▪ <b>Family Counseling/Training:</b> Activity that focuses on providing individuals and their families counseling and training to support daily living</li> <li>▪ <b>Nutritional Counseling:</b> Activity that focuses on assisting individuals to attain and maintain nutritional health</li> <li>▪ <b>Behavior Specialist Services:</b> Activity that focuses on providing specialized behavioral intervention to support the participant’s inclusion in home, family or community life</li> <li>▪ <b>Crisis Intervention:</b> Activity that focuses on crisis intervention</li> <li>▪ <b>Other:</b> Activity not covered by the other options</li> </ul>
Sub-Category	<p>Select the sub-category of the service note:</p> <ul style="list-style-type: none"> <li>▪ <b>Home and Community Services:</b> Services that occur in home or community settings</li> <li>▪ <b>Employment Services (Competitive Employment):</b> Services that link the individual with job training and placement</li> <li>▪ <b>Respite Services:</b> Substitute caregiver responsibility for a defined period of time</li> <li>▪ <b>Transportation Services:</b> Services that facilitate community mobility</li> <li>▪ <b>Personal Support Services:</b> Services that support ADL needs</li> <li>▪ <b>Vendor Services (No ITQ Services):</b> Services that are outsourced to the individual</li> </ul>

## Service Notes: Field Descriptions (continued)

Field Name	Description
Sub-Category (Cont.)	<ul style="list-style-type: none"> <li>▪ <b>Supported Integration:</b> Service designed to assist consumers in acquiring, retaining, and improving self-help, socialization and adaptive skills necessary to reside in the community; this service is also referred to as community integration</li> <li>▪ <b>Visiting Nurses:</b> Nursing services such as visiting nurses or private duty nurses</li> <li>▪ <b>Therapies:</b> Services which provide various therapies, examples include PT, OP, Speech/Language Therapy, Behavior Therapy and Visual/Mobility Therapy</li> <li>▪ <b>County:</b> County activities</li> <li>▪ <b>Development/Revision:</b> Development of revision of a individual's plan</li> <li>▪ <b>Incident:</b> Reporting an incident involving the individual</li> </ul>
No. of Units	Enter the total number of units for the activity: unit of service varies on the service provided but for most services one (1) unit is defined as 15 minutes of activity .
Credited To	This pertains to billable service notes and is not applicable to BAS at this time.
Follow-up	Indicate whether a follow-up is needed by selecting either required or not required.
Follow-up Due Date	Enter the due date for the follow-up information. This field is mandatory if Required is selected in the Follow-up field. If this date passes before a follow-up service note is entered for this service note, an alert will be sent to the SC.
Billable	This field is non editable; it applies to billable service note functionality which is not available for BAS at this time.
Service Note	Enter service note information. Service notes can include a maximum of 4000 characters. (4000 characters equals approximately 1.25 pages of Times New Roman, font size 12, single spaced text.)

# Service Notes: Finalizing a Service Note

The screenshot displays the HCSIS (The Home and Community Services Information System) interface. The main window shows the 'New Service Note' form for a client named SMITH, BASALERTS. The form includes fields for 'Date of Service/Contact' (9/1/2015), 'Service Type' (Coordinate), 'Category' (Vocational), and 'Sub-Category' (Employment Services). The 'Service Note' text area contains the text: 'Spoke with the consumer's mother to assess how her employment serach is going.' A spelling error 'serach' is highlighted in red. A 'Spelling Errors Found' pop-up window is overlaid on the form, showing the error and suggestions: 'search', 'Zurich', and 'xerasia'. The pop-up window has buttons for 'Ignore', 'Ignore All', 'Change', 'Change All', and 'Finish'. At the bottom of the form, there are buttons for 'Reset', 'Save And Add New', 'Save', and 'Check Spelling'. A green box with a note points to the 'Save And Add New' and 'Save' buttons. Another green box with a note points to the 'Check Spelling' button and the spelling error pop-up.

**Note:** To save a note click [Save]. To save the current note and add a new note click [Save And Add New]

**Note:** To check spelling, click [Check Spelling]. If there are spelling errors, a new window will pop-up with the spelling errors. Click [Ignore] or [Ignore All] to disregard the suggested changes. Click [Change] or [Change All] to accept suggested changes. Click [Finish] when you have finished checking the text in the service note.