Entering Service Notes in HCSIS Bureau of Autism Services Deloitte Consulting LLP

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Overview

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

- **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)

- 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

- 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

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

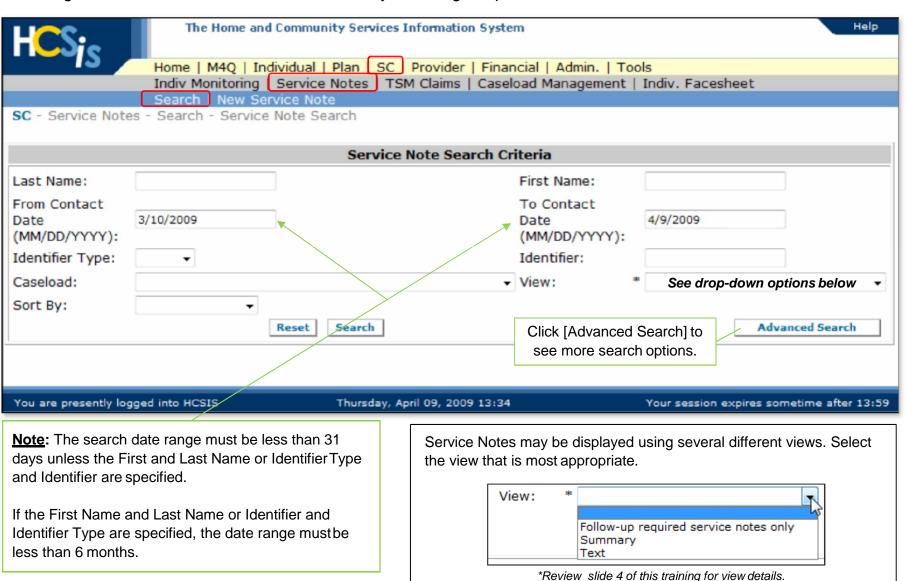
- Navigate to the HCSIS Homepage: https://www.hcsis.state.pa.us
- Click the <u>HCSIS Login button</u>
- Enter your Username and Password on the Keystone Login screen, then click[LOGIN]



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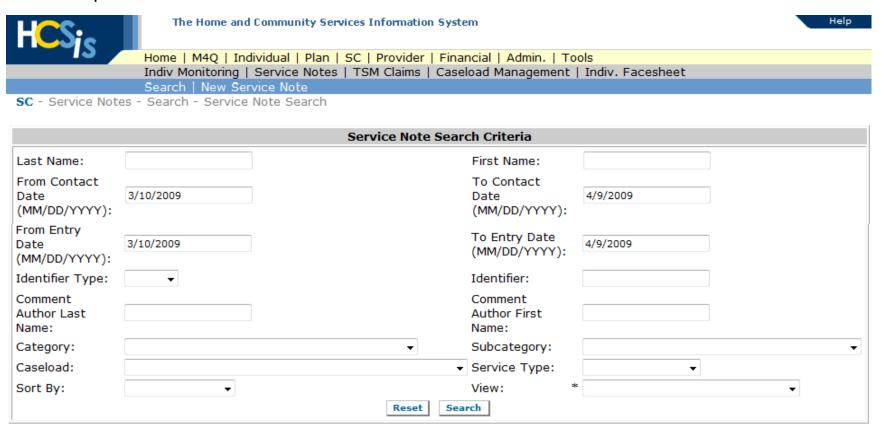
Search for an Existing Service Note

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



Advanced Search

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



You are presently logged into HCSIS

Thursday, April 09, 2009 13:47

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 <u>Add A Service Note</u> in the *Action* column adjacent to the correct individual



Your search found multiple matches. Please select the desired consumer.

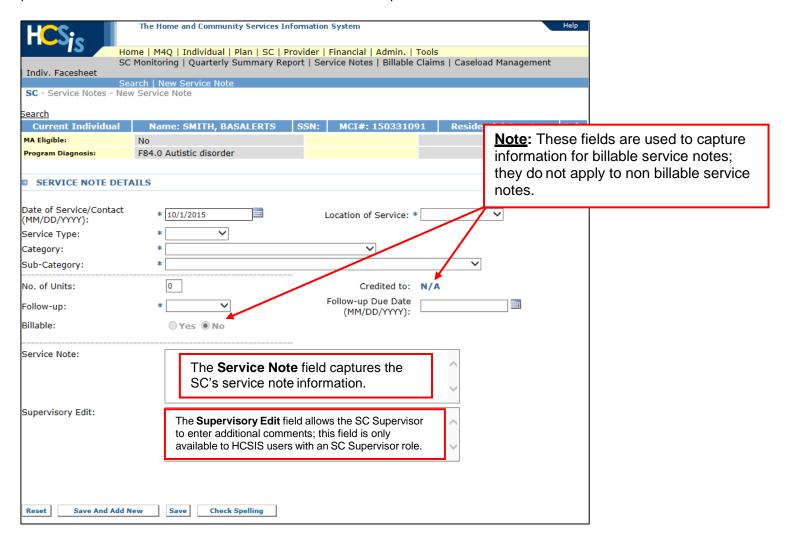
Individual Name	(Cty/Jndr)/Agency	Date of Birth	Supports Coordinator	Action
THOMPSON, CHRISTINE	WEST	1/17/1985	THOMAS, TAYLOR	Add a Service Note
THOMPSON, KEVIN	WEST	8/22/1996		Add a Service Note

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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.



Service Notes: Field Descriptions

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: SC Entity Office: Select this option if the meeting/telephone conversation took place at the SC Entity Office Individual's Home: Select this option if the meeting took place in the individual's home Community: Select this option if the meeting took place at a site within the community
Service Type	 Select the type of service: Locate: An activity which links an individual to a service Coordinate: An activity which entails communication/interaction with others Monitor: An activity that entails ongoing evaluation/assessment of current services Other/Non-billable: An activity not covered by the other three options available TSM -Transition Activities: Transitioning individuals to a home and community based setting. Note: TSM-Transition Activities should only be selected by ODP-ID users, although this value is shown for ODP-BAS and OLTL users.

Service Notes: Field Descriptions (continued)

Field Name	Description
Category	Select the category of the service note: • Referral: Activity that focuses on intake/referral for a service
	■ Plan: Activity that focuses on the development, implementation or review of a plan
	■ Eligibility: Activity that focuses on determination of eligibility for services
	 Budget: Activity that focuses on the planning/implementation/review of fiscal matters
	 Health and Safety: Activity that focuses on evaluation and assessment of the individual's support systems and environment
	• Case Transfer: Activity that focuses transferring service responsibility from one person to another
	 SC Individual Monitoring: Activity that focuses on compliance monitoring and quality assurance of services
	 Daily Living: Activity that focuses on assessment of daily activities such bathing, washing, cooking, home movement, etc
	 Respite: Activity that focuses on providing services to individuals on a short term basis in the absence or relief of persons normally providing care
	 Vocational: Activity that focuses on job related services
	 Adult Day: Activity that focuses on health and social services furnished in an outpatient setting
	 Educational: Activity that focuses on education and related services as defined in the Individuals with Disabilities Education Act(IDEA)
	 Community Integration: Activity that focuses on assisting individuals in acquiring, retaining, and improving self-help, socialization and adaptive skills necessary to reside in the community
	 Personal Emergency Response System (PERS): An electronic device that enables an individual at high risk of institutionalization to secure help in an emergency
	 Environmental Adaptations: Activity that focuses on physical modification to the home required by the individual's plan of care

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Service Notes: Field Descriptions (continued)

Field Name	Description
Category (Cont.)	 Assistive Technology/Specializes Medical Equipment: Devices, controls or appliances which enable individuals to increase their abilities to perform activities of daily living
	 Extended State Plan Services: Activities that include Physical, Occupational, Speech Therapy, Part time nursing, and visiting nurses services
	 Transportation: Activity that focuses on enabling consumers to gain access to waiver and other community related activities
	 Family Counseling/Training: Activity that focuses on providing individuals and their families counseling and training to support daily living
	 Nutritional Counseling: Activity that focuses on assisting individuals to attain and maintain nutritional health
	 Behavior Specialist Services: Activity that focuses on providing specialized behavioral intervention to support the participant's inclusion in home, family or community life
	■ Crisis Intervention: Activity that focuses on crisis intervention
	 Other: Activity not covered by the other options
Sub-Category	Select the sub-category of the service note:
	■ Home and Community Services: Services that occur in home or community settings
	 Employment Services (Competitive Employment): Services that link the individual with job training and placement
	 Respite Services: Substitute caregiver responsibility for a defined period of time
	■ Transportation Services: Services that facilitate community mobility
	 Personal Support Services: Services that support ADL needs
	 Vendor Services (No ITQ Services): Services that are outsourced to the individual

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Service Notes: Field Descriptions (continued)

Field Name	Description
Sub-Category (Cont.)	 Supported Integration: 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 Visiting Nurses: Nursing services such as visiting nurses or private duty nurses Therapies: Services which provide various therapies, examples include PT, OP, Speech/Language Therapy, Behavior Therapy and Visual/Mobility Therapy County: County activities Development/Revision: Development of revision of a individual's plan Incident: Reporting an incident involving the individual
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.)

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Service Notes: Finalizing a Service Note

