Neuro Community Care

PROCEDURE:

1. The Community Independence Progress Note will be pre-populated by the NCC Case Manager (CM) with the client's current goals and given to the provider agency as a template for CSS/staff provider documentation.

2. The Provider agency will utilize the Community Independence Progress Note to document billing information for each client (i.e. session time, team meeting, supervision, etc.) CSS supervisors should utilize the form to complete <u>one</u> monthly note summarizing the supervision tasks completed and the dates of occurrence. (see step #10 for additional information).

3. Using the Neuro Community Care Community Independence Progress Note the CSS/staff will add: **client name (first name, last initial), CSS/Provider name, CSS supervisor, date, total session time, indirect time (documentation, calls, etc.), travel time (to/from session) and mileage and enter total amount of expenses for the session.**

4. Check appropriate activity type for the session/billing time: face-to-face meeting, phone, correspondence, etc. (Multiple boxes can be checked for one note)

5. If client cancelled within 24 hours, check "cancellation box" then document why (illness, appt, etc.) in *reason* section. In the "Summary of Activity" the CSS should document how the cancellation was communicated (text, call, email) and provide a brief description of the activity that would have occurred (i.e. volunteer job, recreational activity, appt, etc.) Please communicate cancellations with the NCC CM via text/call/email.

6. Under "Summary of Activity" there is a **text box**. In the text box describe specific locations for the session (i.e. office--client home--volunteer site--Harris Teeter grocery--client home--office). If Activity Type is **not** a face-to-face meeting, then provide general information about the billing activity (Example: call with CM) and add more detailed information in the "Additional Information" section (Example: call with CM to review ideas for recreational opportunities such as kayaking, fishing and chess group.)

7. CSS/staff should check the appropriate box under each goal for the billing time: **Goal addressed, Goal Not Addressed**

8. Under each goal the CSS/staff should document the activity/task that was completed to address the goal. The CSS/staff should provide information on how they helped facilitate, guide and/or support the client with the goal and note how the client responded and the effectiveness of the support.

9. For the section listed "Additional Information," list any information that is important related to the session that may not specifically relate to the goals. For example: observed or stated emotional, physical or behavioral information. (client overslept and was not ready on time, client not feeling well and stated had headache)

10. **The "Additional Information" section <u>should also be used for the CSS supervisors</u>** to record their monthly summary of the supervision tasks and dates completed. Supervisors should record the date the note is written in the "Date" section and record their monthly supervision time in the "Indirect Time" section of the Community Independence Progress Note. Under the "Additional Information" the date range should be provided (Ex: 1/1/18-11/30/18) and then list each date supervision was provided with the specific task (call with CSS, review documentation, complete invoice, etc.) under "Additional Information".

11. The CSS/staff should add information in the "Plan" section noting next session date and general information about plans or activities for upcoming sessions.

12. Documentation should be completed at the end of each session and monthly notes along with the invoice should be added to NetSuite portal by the 7th of each month.