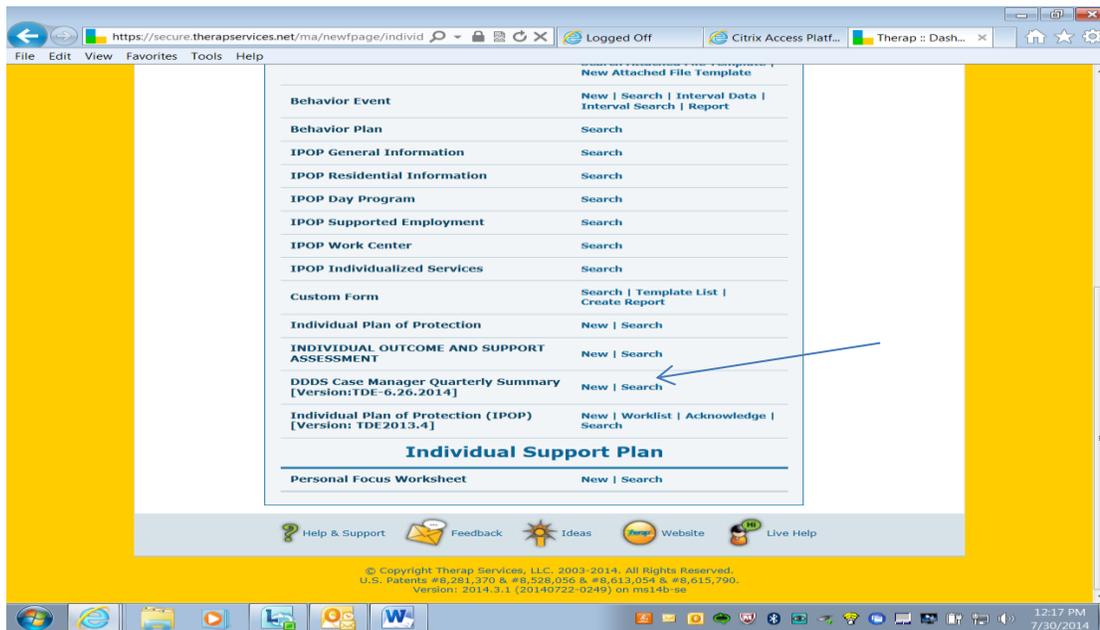


## Monthly/Quarterly Case Review Reports (Effective 10/1/2014)

The purpose of this guidance is to assist Case Managers to document their required review process. This will essentially serve as a quarterly report as made into an easy reference for team meetings and quality improvement. This function needs to be conducted and captured in the **residential provider's** Therap account for each individual. For those individuals in Shared Living and Natural Family arrangements, the information should be documented in the **State of Delaware – DDDS** account within Therap.

### To begin:

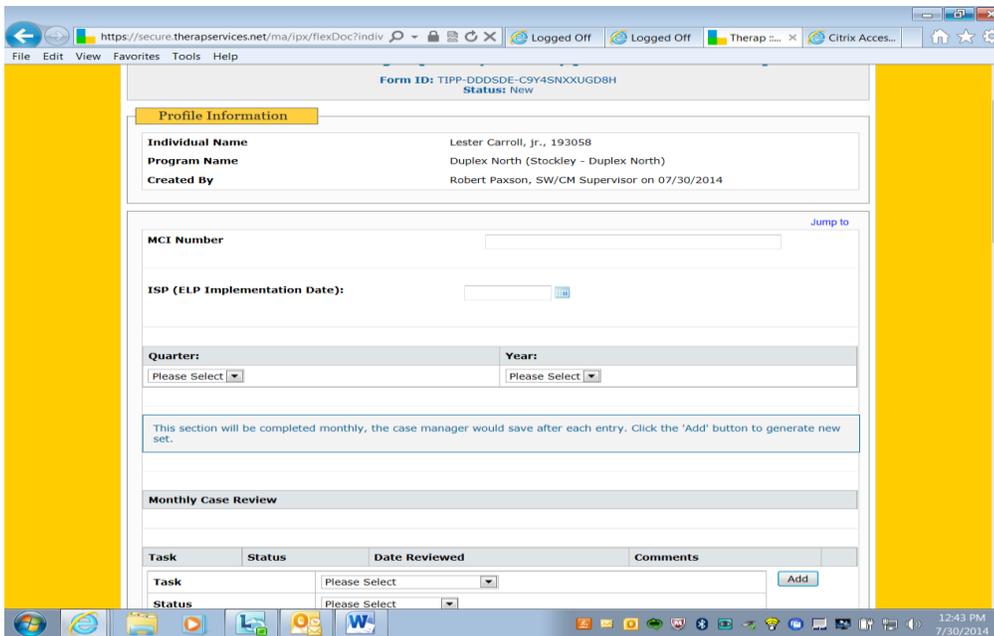
1. Switch to the provider's account in which you need to conduct the review and document your findings.
2. Click on the "Individual" tab.
3. Scroll down to DDDS Case Manager Quarterly Summary
4. Click "New"



Once you have clicked the "New" button, another screen will display all of your sites. Select the correct program sight, then the individual's name.

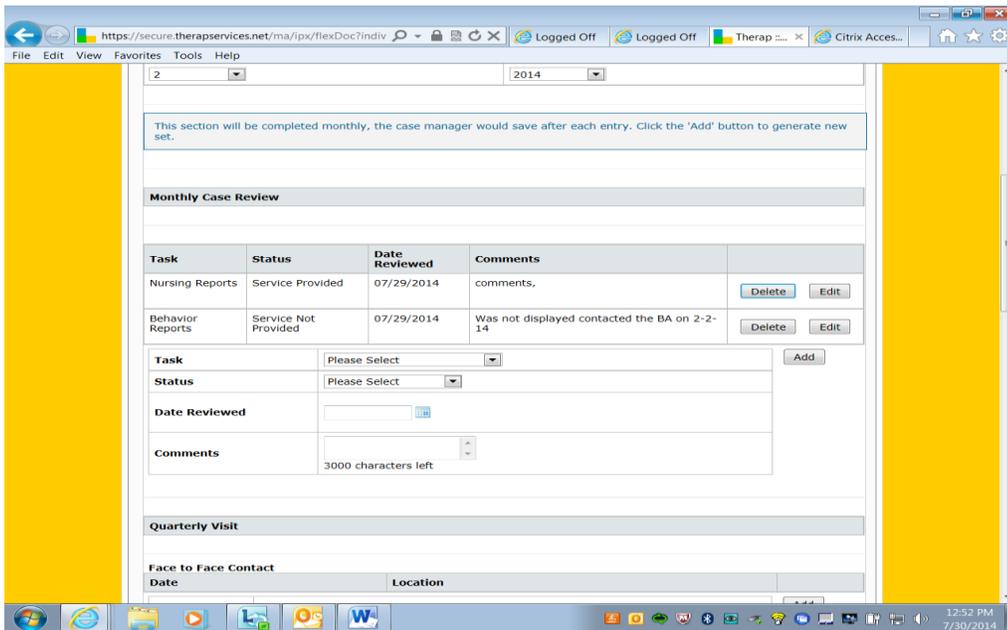


You will be brought to this screen below:



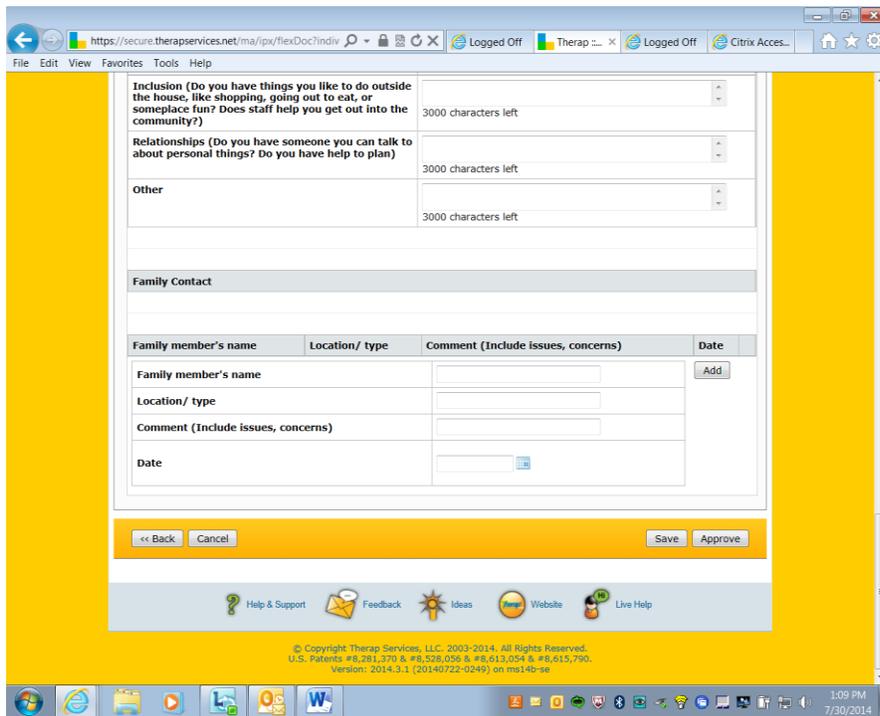
To begin your report:

1. Enter the Annual Meeting Effective date (ELP Effective Date)
2. Select the calendar quarter from the drop down box,
3. Select the year from the drop down box ex: 2014



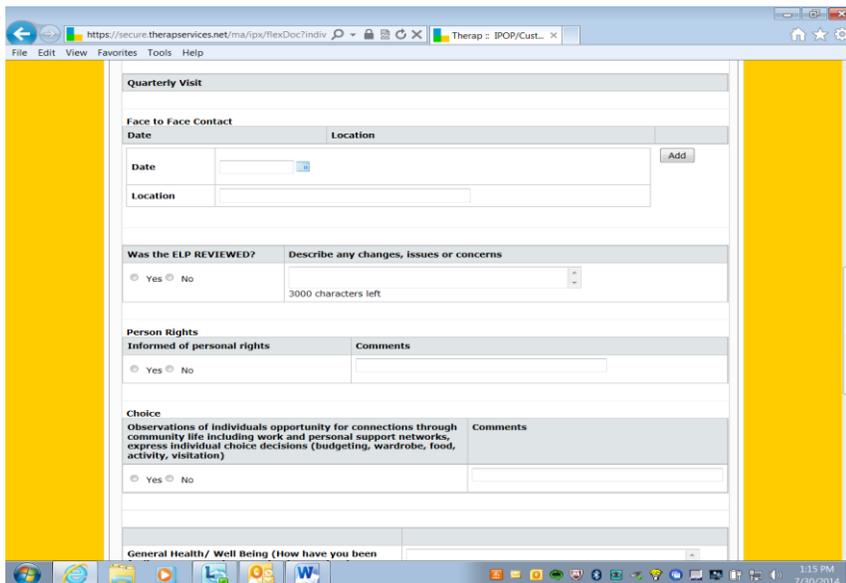
## **MONTHLY:**

1. Under the DDDS Case Manager Quarterly tab select "Search"
2. Locate the individual that you will be documenting and click on their name
3. Under Monthly Case Review select the "Report Type" under the task button
  - a. Nursing Reports - Required Monthly
  - b. Behavioral Reports – If applicable
  - c. PC/Home reports - Required Monthly
  - d. Day/work services – Required Quarterly
  - e. GER – Required Monthly
  - f. Employment Navigation – If applicable
  - g. Career Exploration and Assessment – If applicable
  - h. Small Group Supported Employment – If applicable
  - i. Individual Supported Employment – If applicable
  - j. Benefits Counseling- If applicable
  - k. Financial Coaching Plus – If applicable
  - l. Orientation, mobility – If applicable
  - m. Non-medical Transportation – If applicable
4. Status
  - a. Service provided (completed the report and provided service)
  - b. Service Not provided (did not complete report or did not provide service)
  - c. N/A (not applicable/ if only needs to be documented 1/4ly)
5. Select the date that YOU reviewed the reports
6. Comments: make any comments, issues concerns/ follow-ups regarding the selected report
7. After you completed steps 1-4 click the "Add" button
8. Repeat this process for all required reports
9. When completing all reports scroll down to the bottom of the page and select "Save".



### Family contact:

1. Under the DDDS Case manager Quarterly tab select “Search”
2. Locate the individual that you will be documenting on and click their name
3. Anytime you contact the family/ Guardian select the individuals document under Case Manager Quarterly Summary
4. Scroll down to the family contact section
5. Complete the highlighted areas: Family members name, location (home, office, store) type (phone, mail, email) complete any comments and the date of contact
6. After completing these fields select the “Add” button. This can be repeated for multiple contacts
7. When you are finished with this section select the “Save” button



## Quarterly Face to Face:

1. Under the DDS Case manager Quarterly tab select "Search"
2. Locate the individual that you will be documenting on and click on their name
3. Select the individual from the DDS Case Manager Quarterly Summary
4. Scroll to the face to face contact section
5. Select the date of contact and location select add (if you see them more than 1 time repeat this process with the date and location you may add numerous contacts)
6. Answer the required yes or no questions and make any comments
7. Complete the general questions below (be specific as this proves our service delivery)

**Note:** The ELP section is utilized to assist with changes to the ELP and to make the document as reflective to the person and ensures accuracy of any changes. Document any changes to the ELP, you can then copy and paste the changes to the ELP Document.

The screenshot displays a web browser window with the URL <https://secure.therapyservices.net/ma/tpx/flexDoc?indiv>. The page content includes a form with several sections:

- A section with radio buttons for "Yes" and "No".
- A section titled "General Health/ Well Being (How have you been feeling? Have you been to the doctor, dentist? Any change to medications?)" with a text area labeled "3000 characters left".
- A section titled "Home (How are things at home? Do you like living here? Do you feel safe)" with a text area labeled "3000 characters left".
- A section titled "Work/Day Program (Do you like where you work/go during the day? Would you like to have a different job? Do you feel safe there?)" with a text area labeled "3000 characters left".
- A section titled "Inclusion (Do you have things you like to do outside the house, like shopping, going out to eat, or someplace fun? Does staff help you get out into the community?)" with a text area labeled "3000 characters left".
- A section titled "Relationships (Do you have someone you can talk to about personal things? Do you have help to plan)" with a text area labeled "3000 characters left".
- An "Other" section with a text area labeled "3000 characters left".
- A "Family Contact" section containing a table with the following columns: "Family member's name", "Location/ type", "Comment (Include issues, concerns)", and "Date". Below the table is an "Add" button and input fields for "Family member's name" and "Location/ type".

The Windows taskbar at the bottom shows the system clock as 1:20 PM on 7/30/2014.

8. After you complete this section scroll to the bottom and select "Save"

## End of the quarter:

1. At the end of each quarter/ the 3<sup>rd</sup> month after you document select "Approve"
2. At the end of the year you will have 4 reports created documenting service delivery in ONE place

https://secure.therapservices.net/ma/px/list?sortCol... Therap: IPO/Cust... x

File Edit View Favorites Tools Help

Therap Test Mode State Of Delaware - DDDS Robert Paxson, SW/CM Supervisor Logout

Dashboard | Quick Links

### DDDS Case Manager Quarterly Summary [Version:TDE-6.26.2014]

Program (Site) Connections - Clinical Nursing (Test Site)  
Individual Name Collison, Harley  
Created By Paxson, Robert / SW/CM Supervisor

3 items found, displaying all.

Form ID	Create Date	Approved By	Status
TIPP-DDDSDE-C9Y4SPZWMGD89	07/30/2014	Paxson, Robert / SW/CM Supervisor	Approved
TIPP-DDDSDE-C8U4QX2YQA57L	06/26/2014		Draft
TIPP-DDDSDE-C8U4QX2ZNA57U	06/26/2014	Paxson, Robert / SW/CM Supervisor	Approved

Export To Excel  
New Search

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U.S. Patents #6,281,370 & #6,528,056 & #6,615,054 & #6,615,790.  
Version: 2014.3.1 (20140722-0245) on ms14b-se

1:31 PM 7/30/2014

## At the beginning of the new Quarter

1. Repeat the process labeled "To Begin"