



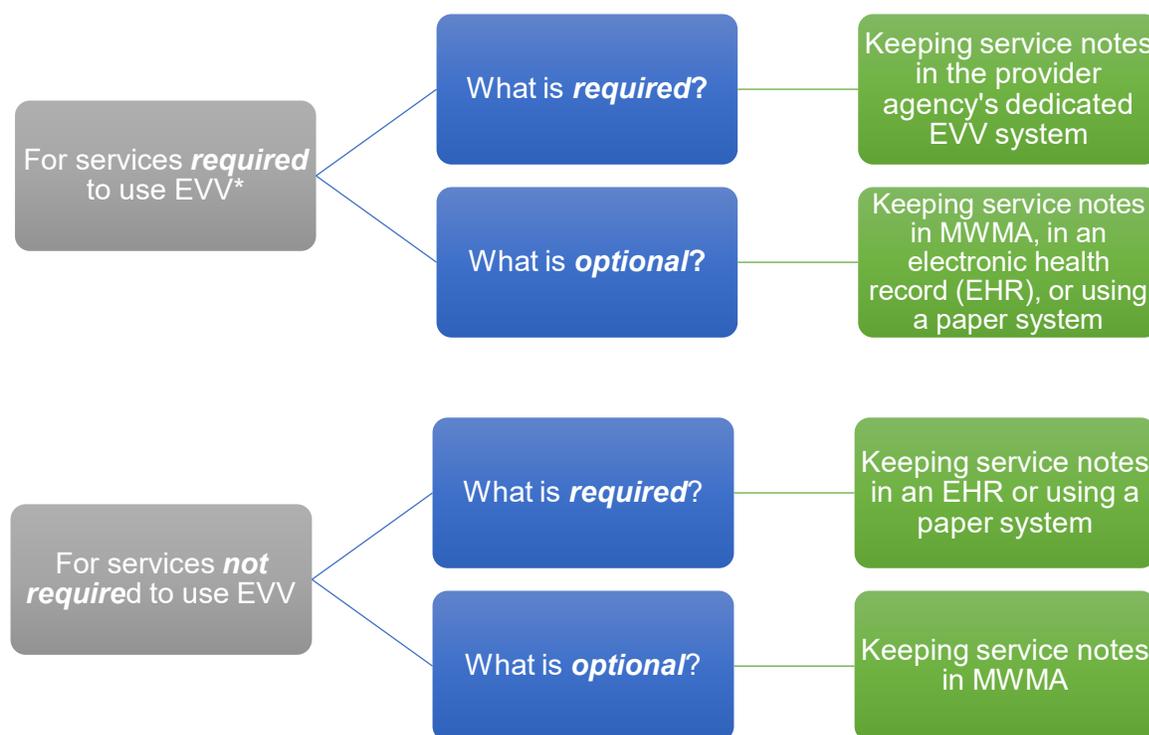
## Documenting Service Notes for 1915(c) Home and Community Based Services Waivers

With the expansion of Medicaid Waiver Management Application (MWMA) access and the implementation of [electronic visit verification \(EVV\)](#), Kentucky's 1915(c) Home and Community Based Services (HCBS) waiver providers have multiple, state-sponsored systems in which they can document service notes. The Department for Medicaid Services understands this is causing confusion for providers and is issuing this document to clarify service note expectations.

### Where Should Provider Agencies Keep Service Notes?

Figure 1 below outlines where services notes should be kept based on service type. DMS initially released this information in a [letter issued in November 2020](#).

**Figure 1: Where to Keep Service Notes**



\*The listing of services required to use EVV is available at <https://bit.ly/kyevvservices>.

### How to Document Services Required to Use EVV

Due to their personal-care nature and to reduce the burden on paid caregivers and participant-directed services (PDS) employees, DMS is transitioning service notes to a “documentation by exception” approach for services required to use EVV. “Documentation by exception” means



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paid caregivers/PDS employees only need to provide a detailed note when a visit differs from what is expected.

- If nothing unusual happens during a service visit, the paid caregiver/PDS employee should only check the activities they completed during the visit. No additional notes are needed. Figure 2 is an example of what the task list looks like if a paid caregiver/PDS employee is using the Mobile Caregiver+ App.

**Figure 2: Task Checklist**

Actual Start Time	Actual End Time
11:16 AM	11:17 AM

581 Personal Care	0:00	<input checked="" type="checkbox"/>
Prepare Dinner		<input checked="" type="checkbox"/>
Monitor H/S/W		<input checked="" type="checkbox"/>
Make/Change Bed Linen		<input checked="" type="checkbox"/>

Total Time	0:00	0:00	Adjusted Time
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Complete Check Out

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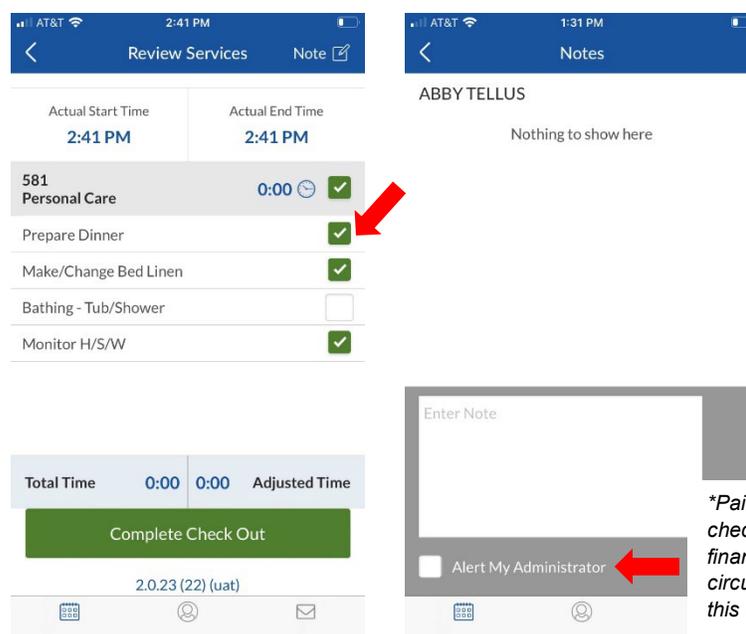
- If an expected task is not completed, the paid caregiver/PDS employee should uncheck it and create a note explaining why the task wasn't completed. Figure 3 below shows where paid caregivers/PDS employees tap to create a note in the Mobile Caregiver+ app and what the notes page looks like.
  - For example, a paid caregiver/PDS employee might typically assist with bathing when providing personal care. If a participant wishes to skip their bath during a visit, the paid caregiver/PDS employee should uncheck the bath option and enter a note indicating the participant did not want to bathe during that visit.
- Paid caregivers/PDS employees should also enter a note in EVV when:
  - A visit starts earlier or later than scheduled, ends earlier or later than scheduled, or begins or ends at a different location than scheduled. The note should briefly explain the reason for the change.



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- There is a health, safety, and/or welfare concern. Paid caregivers/PDS employees have the option to select the “Alert My Administrator” checkbox when entering a note, however, they should verify if their provider agency or financial management agency wants them to use this option or another method for notification of health, safety, and/or welfare concerns.
- Paid caregivers/PDS employees **do not** need to document work toward goals and objectives, progression, or regression with EVV-affected services.

Figure 3: Entering a Service Note



If you are using Mobile Caregiver+, additional instructions on completing a visit are available in the Mobile Caregiver+ App User Guide. If you are using a third-party EVV system, please refer to the system’s training information and/or user guides for information on completing visits and entering notes.

### Setting Up the Task List in the Mobile Caregiver+ Provider Portal

If a provider agency or financial management agency is using Mobile Caregiver+, it will need to set up the list of tasks associated with each service code. Provider agencies/financial management agencies should only have to do this setup once, however, they do have the ability to add, edit, or delete tasks as needed, which is shown in Figure 4 below.



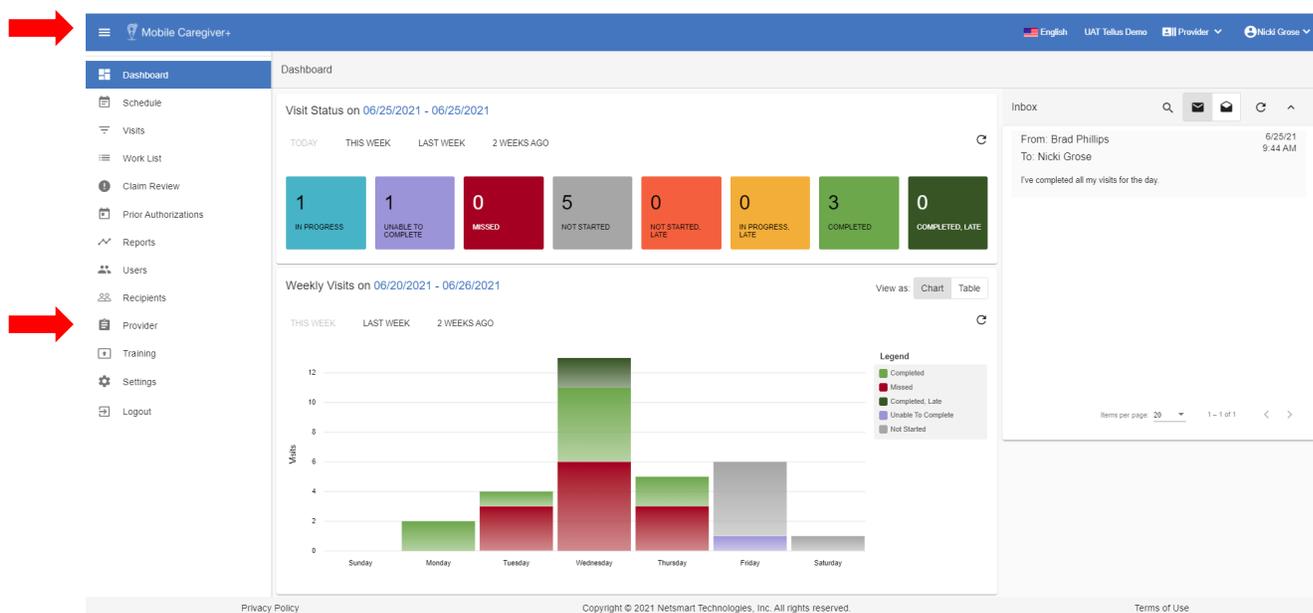
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There are some key considerations provider agencies/financial management agencies need to make when setting up this list.

- If a service code does not have a task list, completed visits using that service code will not show up on a visit report.
- **For traditional agencies:** when scheduling visits for paid caregivers using the Mobile Caregiver+ Provider Portal, all tasks on the task list will be checked. Schedulers should uncheck all tasks except those the paid caregiver is expected to provide. When the paid caregiver completes the visit in the Mobile Caregiver+ app, they will only see the tasks the scheduler left checked. The paid caregiver can uncheck any tasks they did not provide.
- **For financial management agencies:** all tasks listed under a service code will be visible to PDS employees when they scheduled their visits. The PDS employee will need to choose the tasks they intend to provide when scheduling. Any tasks they do not provide can be unchecked when completing the visit.

### Figure 4: Adding, Deleting, and Editing Tasks in Mobile Caregiver+

To set up the task list, log into the Mobile Caregiver+ Provider Portal, chose the main menu icon, and then choose “Provider.”



Choose the “Payers” tab at the top of the screen and then select Kentucky Department for Medicaid Services (DMS).



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The screenshot shows the 'Providers' section with the 'Payers' tab selected. A search bar is present with the text 'Search Payers' and 'Enter Payer ID or Payer Name'. Below the search bar is a table with the following data:

Payer ID	Payer Name
CHFS	Kentucky Department for Medicaid Services (DMS)

The portal will generate a list of services. Choose the service for which you want to add, edit, or delete tasks and click the three dots next to the service. A box that reads “Manage Tasks” will pop up. Click it.

The screenshot shows the 'All Services(14)' page with a table of services. The table has columns for Code, Name, and Number Of Tasks. A red arrow points to the 'Manage Tasks' button that appears next to the 'Personal Care' service.

Code	Name	Number Of Tasks
580	Attendant Care	5
581	Personal Care	3
582	Homemaker	
589	Community Living Supports	
660	Respite Care	
662	Specialized Respite Level I	
97535	Community Living Supports	
S5108	Homecare train pt 15 min	
S5125	Attendant care service /15m	
S5130	Homemaker service nos per 15m	

Once you click “Manage Tasks,” Mobile Caregiver+ will generate the list of tasks associated with that service. To edit or delete an existing task, click the three dots next to the task. To add a new task, click the blue “Add Task” button at the top right. When you are done adding, editing, or deleting tasks, click the blue “Save” button at the bottom of the page.



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The screenshot shows the Mobile Caregiver+ Admin User Guide interface. On the left is a navigation menu with options: Schedule, Visits, Work List, Claim Review, Prior Authorizations, Reports, Users, Recipients, Provider (highlighted), Training, Settings, and Logout. The main content area displays a table titled "All Tasks (63)". The table has columns for "SelectRow", "CSV TypeCode", and "Description". A blue "+ Add" button is located at the top right of the table. A red arrow points to this button. The table lists 8 tasks, with the second task selected. A dropdown menu is open for the second task, showing "Edit" and "Delete" options, with a red arrow pointing to the "Delete" option.

SelectRow	CSV TypeCode	Description	
<input checked="" type="checkbox"/>	1	ROMT	Range of motion (ROM)
<input checked="" type="checkbox"/>	2	TSCH	Transport/Attendance (School)
<input type="checkbox"/>	3	LOCO	Locomotion
<input type="checkbox"/>	4	MLUN	Prepare Lunch
<input type="checkbox"/>	5	SMED	Assist with Self-Admin Medication
<input type="checkbox"/>	6	EAFD	Assist with Easting/Feeding
<input type="checkbox"/>	7	IBOW	Incontinence - Bowl
<input checked="" type="checkbox"/>	8	MMED	Managing Medications

Managing tasks by service code is also covered in the Mobile Caregiver+ Admin User Guide.

### Additional Information



For additional electronic visit verification information, review the [EVV QRG – Who to Call](#), visit the [DMS EVV website](#), or scan the QR code to the left using your mobile device.

If your direct service provider agency or FMA has a technical issue with Mobile Caregiver+, you can submit a support ticket using the [Netsmart Customer Support Portal](#) or by calling Netsmart Customer Support at (833) 483-5587.

If you have a question about EVV policy, contact the 1915(c) Waiver Help Desk at [1915cWaiverHelpDesk@ky.gov](mailto:1915cWaiverHelpDesk@ky.gov) or (844) 784-5614.