

Bureau of Long Term Care

Electronic Progress Notes

Provider Help Aid

PURPOSE

This Help Aid is designed to support *Home and Community Based Service (HCBS) Providers that elect to utilize an electronic documentation system for maintaining daily Progress Notes. These providers include Personal Assistance Agencies, Certified Family Homes and Residential Assisted Living Facilities.

*Providers delivering services to Medicaid participants on the Aged & Disabled (A&D) Waiver or State Plan Personal Care Services

RECORD REQUIREMENTS

Service delivery records must be maintained on all participants who receive Aged & Disabled (A&D) Waiver or Personal Care Services. Electronic documentation systems must meet the same minimum requirements as hard-copy progress notes.

The provider must maintain documentation of every visit made to a participant's home (for Personal Assistance Agencies) or every care task performed (for Residential Assisted Living Facilities or Certified Family Homes). Each service delivery record must contain the following elements as outlined in IDAPA 16.03.10.328.07 and 16.03.10.304.04:

- Date and time of visit – the time of day that services are delivered is to be identified by a.m. or p.m. unless military time is utilized
- Length of visit
- Services provided during the visit
- Documentation of participants response to the services(s), services provided any changes noted in the participant's condition or any deviations from the plan of care

The participant must be allowed to review each element outlined above prior to signing the electronic record.

- Participant signature
- Participant date
- Provider (caregiver) signature
- Provider date

A copy of the progress notes, including all information as outlined above, must be kept in the participant's home. This may be in either in a printed format or in an excel, word or pdf document if the participant is able to review electronic records. It is the responsibility of the provider to ensure the documents are received by the participant and available for review on at least a weekly basis or at any time the participant and/or legal representative may request it.