

# IN FOCUS: Documentation

**In January, we began a year-long FOCUS on service documentation – to make it simpler, clearer, and a better reflection of the great work you’re doing!**

The first step was finding out what works well and what needs attention. We asked these questions online and got many responses, both online and via hardcopies.



## Here’s what you said:



### What’s working well?

- Location Identification
- Yes/No Scoring is a lifesaver!
- Therap is very user friendly
- Online platform > hand written reporting



### What could be improved upon to make Therap entries easier?

- Not limiting the start of entries to the last hour of a shift
- Not having to list the address of every stop made

## Other survey responses:

- ~60% of respondents reported that a Therap shift entry takes 10 min or less.
- >90% of respondents reported that the hardest part of a Therap entry is the Narrative Description.
- >70% of respondents reported that they complete their shift entries on the company iPads vs a personal device.

**Thank you all for participating in this process. Next step: improvements!**

## First Responses to Employee Feedback

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Based on your feedback, Iowa FOCUS will implement these improvements to our Therap process **immediately**.

- To allow more time to complete entries before 'logging back in', the Login limit will be extended. All Devices will be checked to ensure there are no 'auto logout' settings.
- To make entry timing more flexible, an allowance for making Periodic Entries will be made, and staff will be trained on this process.
- To accommodate verbal users, allowances for Speech-to-Text will be expanded.
- To catch errors and oversights before they grow serious, Administrative review of Therap Entries will increase.
- To help meet the Medicaid rule requiring location addresses be listed, frequently visited addresses will be made available at sites for easy reference.

## When to Make Your Therap Entry

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**Documentation cannot be completed before a service has been provided.**

We cannot document what we *plan* to do. We can only document what has been done.

Typically, this means beginning documentation at (or very near) the end of the scheduled shift, after all services have been provided. This 'best practice' is encouraged.

However, to provide greater flexibility for all staffing situations, we are expanding an allowance to make Periodic Entries – which means 'documenting as you go' throughout your scheduled shift rather than waiting until the end.



**There are two ways to make Periodic Entries:**

- Break a scheduled shift into smaller 'parts', documenting each as a separate Entry. For example, a scheduled 2pm-8pm could be documented with Therap Entries 2-4pm, 4-6pm, and 6-8pm.
- Begin a Therap Entry, and return to it throughout the shift making edits each time.

Both of these methods are acceptable and provide flexibility for better time management.

## **General Event Report (GER)**

The **General Event Report (GER)** is a close-up on a particular event. The GER goes "in depth" on a single occurrence that you need to share with others immediately.

You must complete a General Event Report (GER) for any of the critical events that Iowa Medicaid considers a **MAJOR INCIDENT**:

- Medication error
- Child or dependent adult abuse reported to IHHS
- Physician treatment at a clinic, urgent care, or hospital for a physical injury
- A face-to-face visit or phone call with a mobile crisis unit or suicide prevention hotline, admission to a crisis stabilization unit, or an ER visit or inpatient admission for a mental health concern
- Law enforcement intervention for an incident directly involving the member or the member is arrested and/or charged with a crime or for a welfare check
- Location Unknown or elopement when a provider is responsible for oversight of the member
- Urgent or emergent medical treatment at a hospital or urgent care for a medical concern (routine primary physician care excluded)
- Use of a physical, chemical, or mechanical restraint or isolation to restrict, subdue, sedate, or confine the member
- Member death.

**Notify your Lead or Supervisor immediately upon completion of a GER on any of these critical events.**

You should also complete a GER for any of these less critical, but still important, happenings:

- application of basic first aid
- event resulting in bruising
- seizure activity
- event resulting in damage to property
- behavior of concern

Again, be sure to notify your Lead or Supervisor of the activity right away.

# Steps for a Successful General Event Report

Below are the steps to completing a General Event Report within Therap. Please see the adjacent images for help navigating the various tabs and fields. If you have any questions, please reach out to your Lead or Supervisor.

**Step 1:** Determine whether the event you experienced meets the criteria for a GER (see above lists). If you need help determining whether the situation requires a GER, contact your Lead or Supervisor immediately.

**Step 2:** If the event meets the criteria for a GER submission, navigate to Therap on your device.

**Step 3:** After opening and logging into Therap on your device, navigate to the **'Individual HomePage'** tab.

**Step 4:** From here, pick your person for whom you need to enter a GER.

**Step 5:** Go to the **'Modules'** tab on the left hand side of the screen.

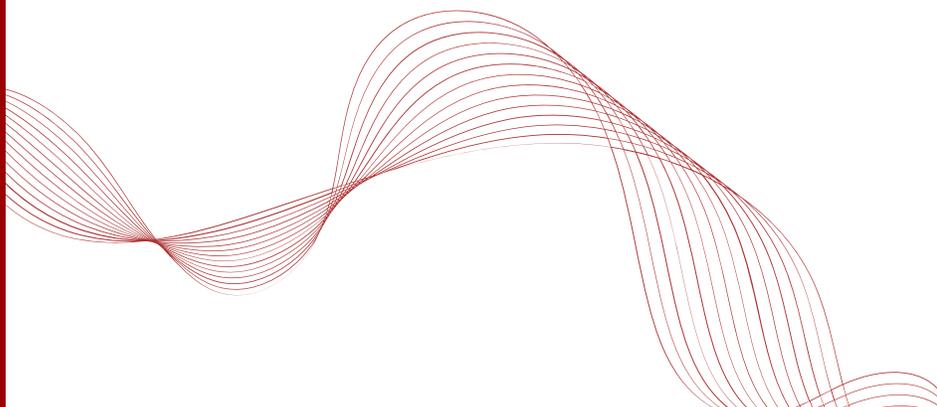
**Step 6:** Select the drop-down for **'General Event Reports (GER)'** and select **'New'**.

**Tip:** Under 'Event Basics', the 'Notification Level' will always be 'Low'.

**Step 7:** Fill out the GER form with as much detail as possible. It is very important to be thorough, accurate, and descriptive in your documentation as it is vital at both a company and state level.

**Step 8:** After submitting your fully completed GER, notify your Lead or Supervisor immediately.

The screenshot displays the Therap application interface. At the top, there is a yellow header with the 'Therap' logo and 'HomePage'. Below the header, a 'Photo Not Available' placeholder is shown. The main content area is titled 'Modules' and includes a navigation menu with 'Document Storage' and 'General Event Reports (GER) CLICK'. Under 'General Event Reports (GER)', there are options for 'New <-- SELECT 'NEW'', 'Last Week', 'Last Month', and 'Search'. A dropdown menu for 'Reporter's Relationship to Individual' is set to '- Please Select -'. The 'Event Basics' section contains a radio button for 'Event Type' (Injury, Medication Error, Restraint Related to Behavior, Restraint Other, Death, Other), a 'Notification Level' dropdown set to 'Low' (with a red arrow pointing to it and the text '<-- ALWAYS 'LOW''), and a 'Location' section with fields for 'Address' (Street 1, Street 2), 'City', 'State', 'Zip Code', and 'Country'. There are also fields for 'Phone' and 'Fax'. A text area for 'Describe what happened before the event' is present. The 'Event Other' section includes a dropdown for 'Event Type', a time picker for 'Event Time' (hh:mm), a radio button for 'This event was' (Observed, Discovered), a date/time picker for 'Discovered Date/Time' (MM/DD/YYYY hh:mm), a dropdown for 'Specific Location', and a 'Summary' text area with the instruction 'BE SPECIFIC AND DESCRIBE EVENT COMPLETELY' and a character count of 'About 4000 characters left'. At the bottom, there are 'Cancel', 'Previous', and 'Next' buttons.



## Narration in a Therap Entry

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**'Narration'** is a staff description of service.

- It does not need to be long, but it does need to explain "what happened".

**'On-Going-Supports (OGS)'** should contain whatever kind of basic care supports the staff is providing on shift, which includes supervision and oversight. Community engagement could also be included here, if it is not specifically addressed in a **'Goal/Objective'**.

**The '2nd Location Box' is always scored: Yes**

**'On-Going-Supports' is always scored: Yes**

**'Medical Issues'** includes the passing of medications, medical appointments made or attended, and any health issues or sicknesses that occur.

- **'Medical Issues'** can be scored Yes or No depending on if there was anything of note on shift. Yes requires narration.

**'Mental Health and Behavioral Concerns'** is a narration of any behavioral obstacles that arose on shift or any out-of-the-ordinary behaviors to report.

- **'Mental health and Behavioral Concerns'** can be scored Yes or No depending on if there was anything of note on shift. Yes requires narration.

**'Goals and Objectives'** is where staff describe what was done to meet the goal. Identify staff actions and member responses. If a goal was not worked, write "Goal not worked".

- **'Goals and Objectives'** can be scored Yes or No depending on if there was anything of note on shift. Yes requires narration.

