Getting Started and Maintaining Clients

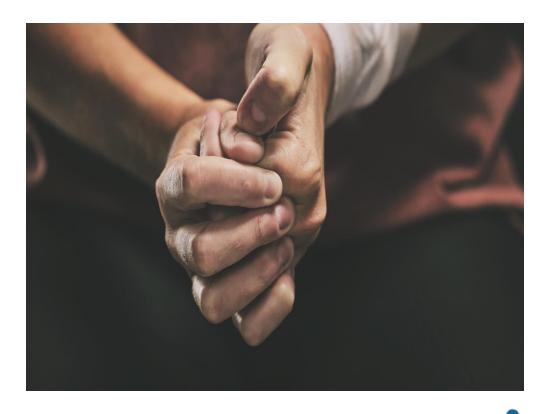
Part 2 of Navigating Therapeutic Behavioral Consultation



DBHDS>>>



This training is intended to provide a basic summary and highlight information and resources for providers. It is not possible for this training to review the entirety of regulations, guidance documents, provider manuals, etc. Trainees must reference and adhere to the overarching regulations, provider manuals, and associated guidance documents to guide their service provision, documentation requirements, billing, etc.









Trainees will be provided with a basic overview, along with resources and where to find them on the following topics:

Part 1:

- Provider enrollment
- WaMS registration
- Obtaining referrals

Part 2:

- Authorization types
- WaMS
- Required Documentation

Part 3:

- DBHDS and DMAS regulations
- DBHDS/DMAS
 Practice
 Guidelines and
 BSPARI
- Human Rights







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Part 1:

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Part 2:

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- WaMS
- Required Documentation

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- DBHDS/DMAS
 Practice
 Guidelines and
 BSPARI
- Human Rights







Receive contact about a potential new client from Support Coordinator

Complete the Part V and other required documentation

Begin services











Support
Coordinator will
open up the
person to you in
WaMS so you
can enter
authorization
information.

Once approved, you will receive a notification through WaMS;







Receive contact about a potential new client from Support Coordinator

Complete the Part V and other required documentation

Begin services











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Receive contact about a potential new client from Support Coordinator

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Begin services





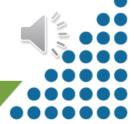






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Types of Authorizations



Initial Authorization

Secondary Authorization



Initial Authorization Documentation Required



Initial Authorization

- Part V that outlines the following:
 - · That a Functional Behavioral Assessment (FBA) will be conducted
 - That a Behavior Support Plan (BSP) will be created
 - The plan for data collection during this period

Secondary Authorization



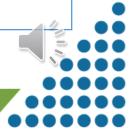
Secondary Authorization Documentation Required



Initial Authorization

Secondary Authorization

- BSP
- FBA (note, this may be included in the BS itself)
- Any baseline data or treatment data
- Part V request for training for stakeholders
- Part V or BSP needs benchmarks for behaviors





Annual Authorization Documentation Required



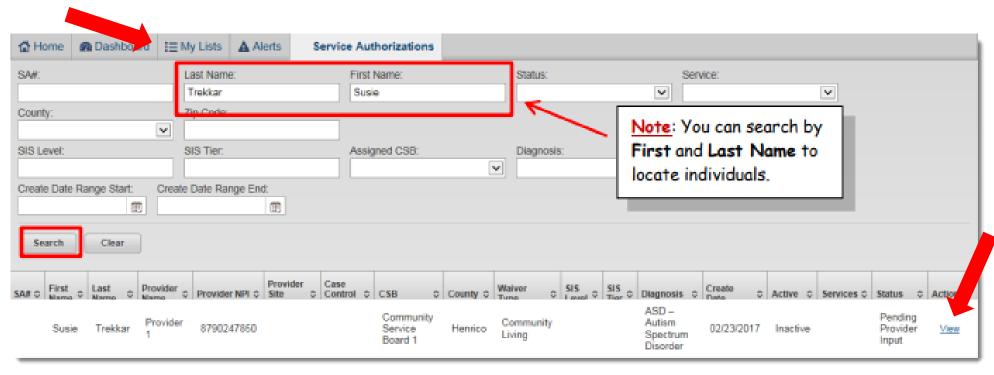
Initial Authorization

Secondary Authorization

- Graphical display(s)
- BSP
- FBA (note, this may be included in the BSP itself)
- Part V request for training for stakeholders
- Documentation of at least 1 training completed within the timeframe of the most recent authorization period.
- Part V or BSP needs benchmarks for behaviors



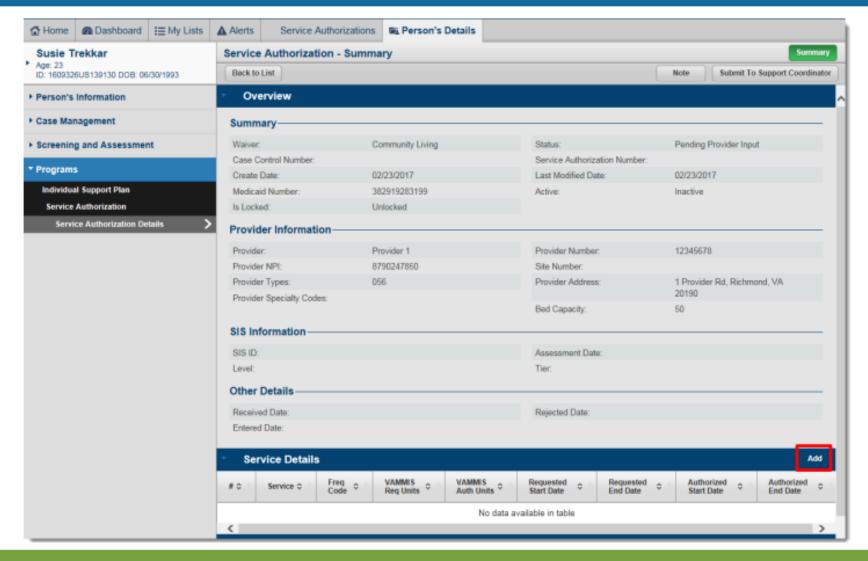




For more information see: Tips and Tricks for WaMS Users







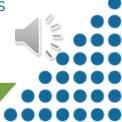




- Click the Service drop down menu to select the appropriate service:
 - LBA or LaBA choose: Therapeutic Consultation, Therapists, Behavior Analysts, Rehab Engineers – 97139
 - PBSF choose: Therapeutic Consultation, Other Professionals – 97530



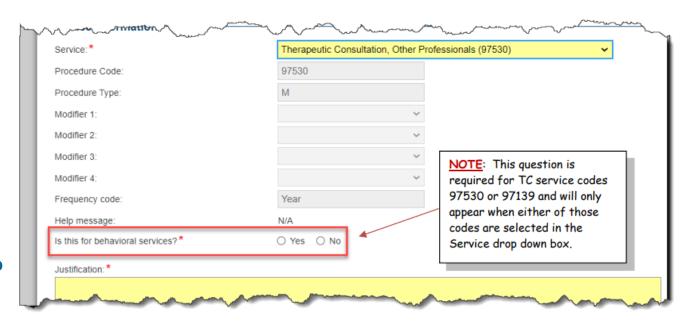
For more information see: Tips and Tricks for WaMS Users







- Select "Yes" for this question.
- Add the justification including targeted behaviors, plan for treatment, why individual needs this service
- Add the start date and end date
 - For initial authorizations, the end date is up to 180 days from start date.
 - For secondary and annual authorizations, the end date is the ISP end date.
- Enter number of units requested-hours per year
- Click on save







Part V Plan for Supports



- A Part V Plan for Supports must be submitted for all three authorization periods.
- You must be attached to at least 1 outcome in order to complete the Part V section of the ISP.
- Providers have 2 choices to complete a Part V: Complete Use or Modified Use
- Additional instructions on how to complete the Part V section in WaMS can be found in the ISP 4.0 user guide.



Part V Complete Use vs Modified Use



| Part V Use Comparison | | | | | |
|--|--------------------------|--------------------------|--|--|--|
| Part V Element | Complete WaMS ISP Use | Modified WaMS ISP Use | | | |
| Outcome section pre-populated by WaMS | Yes | Yes | | | |
| At least one support activity per outcome | Yes | Yes | | | |
| A <i>summary</i> of support activities per outcome | No | Yes | | | |
| Support activity measures entered | Yes | No | | | |
| Data method identified | Yes | No | | | |
| Skill-building indicated (radio button, yes/no) | Yes | Yes | | | |
| Frequency of supports | Yes | No | | | |
| Target date | Yes | Yes | | | |
| General Schedule | Yes | No | | | |
| Safety Restrictions (only if applicable) | Yes | No | | | |







Providers should use the *Alerts* or *My Lists* tabs to locate and open the ISP for their individuals to add the Part V.



In the individual's ISP:

1. Click on the **Add** for *Part V. Plan for Supports. The Add Plan for Support dialog box appears.*



2. Click on **Continue**. The Part V: Plan for Supports – Summary page appears.









- 1. Click on **Edit** for Service and Outcomes. The Service and Outcomes window opens.
- 2. Add Effective Date and Service type for the Overview section.

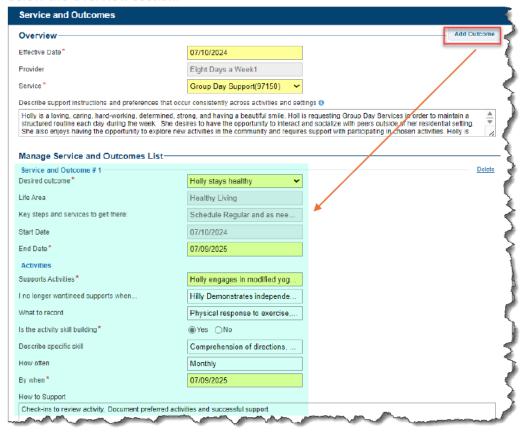








3. Click on **Add Outcome** (top right). The "Manage Service and Outcomes List" is displayed below the Overview section.

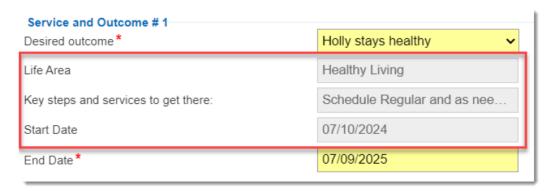


4. Click the **Desired Outcome** down arrow. All outcome(s) assigned by the Support

Coordinator in Part III are auto-populated and listed.



5. Select the appropriate **Desired outcome**. The Life Area, Key steps and services to get there, and Start Date sections are auto-populated from information entered in Part III and cannot be changed. The End Date is also auto-populated but it can be changed.



Under the Activities section (required fields are denoted with red asterisk highlighted in yellow):





- 6. Click in the Supports Activities field to type the appropriate information.
- 7. Click in the I no longer want/need support when... field to type the appropriate information.
- 8. Click in the What to record field to type the appropriate information.
- 9. Select Yes or No if the activity is or is not skill building.
 - a. If Yes, describe specific skill
- 10. Click in the **How often** field to type the appropriate information.
- 11. Click in the By when field to select the appropriate date.

12. Click on Add New.



The outcome is added to the Activities section.



13. Click on Save. Click on Save. The ISP Main page reappears.





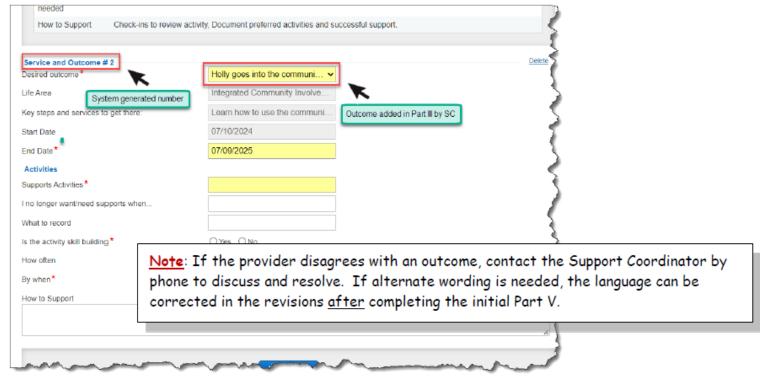


To add additional outcomes for the service, follow steps 5-13 in Section 12.2 above.

1. Click on Add Outcome (scroll up if necessary – located in top right).

A new "Service and Outcome" section is added <u>below</u> the previous "Activities" section.

<u>Note</u>: Providers should add as many outcomes as are assigned in Part III to complete Part V.











Use the Link Below for Tips for Therapeutic Consultation Services addressing Risks in Part V

https://dbhds.virginia.gov/wp-content/uploads/2025/01/ISP-PartV-Therapeutic-Risk-Tips-Final011425.pdf



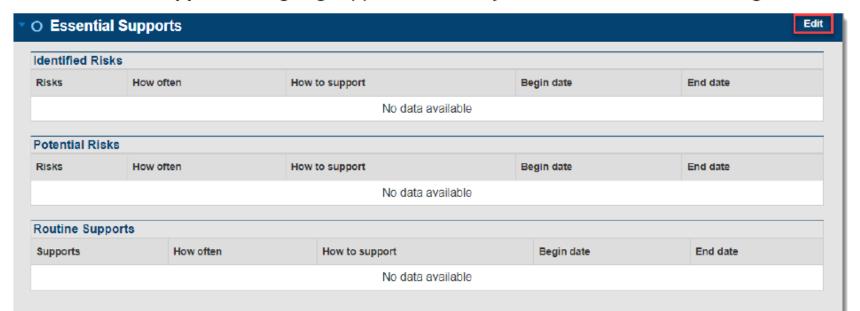
DBHDS>>>



Essential Supports do not require outcomes unless they reflect something important **TO** the individual. In Part V, this section is divided into three areas, carried over from Part III:

<u>Note</u>: All providers completing a Part V must address the Identified Risks and the Potential Risks.

- Identified Risks Known risks at the time of annual planning.
- Potential Risks Risks identified through secondary questions in Part III.
- Routine Supports Ongoing supports necessary for the individual's well-being.



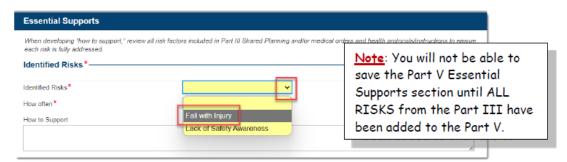
1. Click on **Edit** for the *Essential Supports* Section of the **Part V: Plan for Supports-Summary** page. *The Essential Supports* window appears.



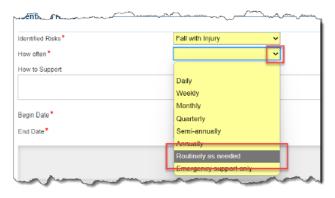




2. Click on the Identified Risks drop-down arrow to select the risk.



3. Click on the **How often** drop-down arrow to select the frequency.



4. Click in the **How to Support** field to add narrative.



Note: For example, for therapeutic clinicians, if a risk is included as part of the treatment plan (e.g., it is targeted in the behavior support plan (BSP), document that the risk is addressed through the BSP.







Click in the Begin Date and End Date fields to select the time frame.



6. Click on Add New buttton. The risk is added to the table with an option to Edit or Remove.



7. Follow steps 1-6 above to continue adding all additional risks from the *Identified Risks* drop down.







Potential Risks are identified via the secondary questions in Part III. Potential Risks are added to Part V in the same manner as the Identified Risks.

When **Routine Supports** are carried over from Part III Shared Planning into Part V, providers should focus on identifying which supports are relevant to their specific services and settings.

Unlike risks, which must be addressed by all providers, routine supports only need to be addressed if they are applicable to the provider's service or setting.

Routine supports are added to Part V in the same manner as the Identified and Potential Risks.

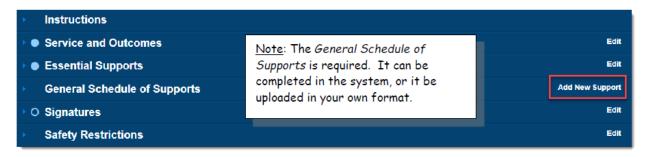




General Schedule of Supports and Signatures



The General Schedule of Supports is a general blueprint of activities and supports, based on the person's preferences and routine. The authorized support time allotted to each group of activities is included in the authorized hours and totals sections. The General Schedule of Supports can be developed in various ways, but must include: support activities and outcome numbers, time frames for activities, as well as authorized totals.



1. Click on Edit for Signatures.

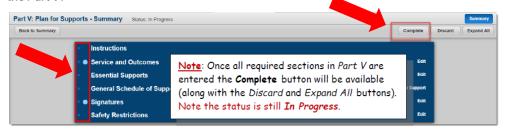




DBHDS>>>

Completing the Part V

Once all of the required sections in *Part V* have been entered and finalized (*filled in blue circles*) using either the *Complete Use* or *Modified Use* method, the provider can **Complete** the *Part V*.



The Part V status shows as *In Progress* and is considered *Inactive* until the *Part V* the provider clicks the Completed button (shown above).



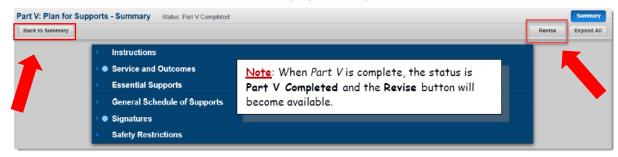
Click on View, if necessary, to open, review or edit the Part V – Plan for Supports.

To Complete the Part V:

1. Click on Complete. The Confirmation dialog box appears.



2. Click on Continue. The Part V status displays as completed.



- 1. Click on Back to Summary to view the main ISP Summary page.
- 2. Click on the Part V. Plan for Supports heading to expand the section to see details.



When the Part V has been completed by the provider, the status shows as Part V Completed and the Part V is considered Active.

 $\label{eq:REMEMBER: The ISP will not be completed (status "ISP Completed") until \underline{ALL} providers with outcomes complete their respective Part V's.}$







17. UPLOAD ATTACHMENTS

ISP attachments can be uploaded in two areas in WaMS, depending on the type of attachments. The two locations are 1) under to the Person's Information / Attachments section, and 2) directly under the ISP / Attachments section.

Note: A provider will be able to upload an attachment when: 1) an ISP has been created; and 2) the provider has been added to the ISP or has an active Service Authorization.



ISP /
Attachments

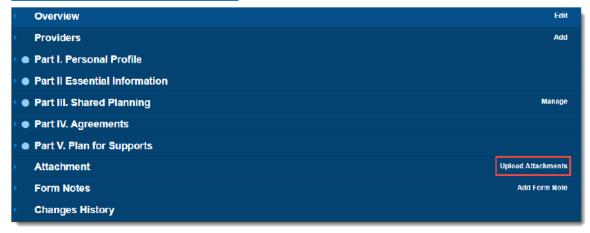




Uploading the BSP and FBA

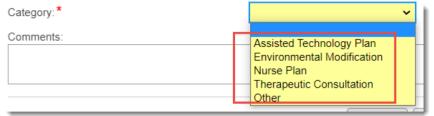


17.2. Upload to ISP Attachments Area



Do not upload FBA and BSP Information into "Person Information-Attachment Section"

- 1. From the Attachments section in the ISP, click on **Upload Attachments**. The New Document Upload window appears.
- 2. Click Attach File and browse to locate the attachment to upload.
- 3. Select the file to upload and click **Open**. The file is attached and the file name appears above the "Attach File" button.
- 4. Click the Category down arrow to select the appropriate attachment category.



- 5. Type a description for the attachment in the Comments field.
- 6. Click **Upload**. The file is uploaded and available in the ISP Attachments section to everyone with access to the ISP.

| ▼ Attachment | | | Upload Attachmen | | | |
|--------------|--------------------------------|----------|--------------------------|---|--------|-----------|
| Create Date | Document Name | Category | Description | Uploaded By | Action | |
| 01/28/2025 | Onsite Visit Tool 2022.docx | Other | | SCStaff2 CITY OF VA BEACH CSB MHMRSAS (CITY OF VA BEACH CSB MHMRSAS) | Delete | Edit View |
| 01/28/2025 | BehavioralSupportPlan2024.docx | Other | Behavior Support Plan | Doc Dwarf(Eight Days a Week) | View | |

Note: The Delete and Edit options are only available to the uploader. Edit allows the uploader to modify the Description and/or Category for the attachment. Delete allows the uploader to remove the attachment from the ISP Attachments section. If you are not the uploader, only the View option will be available.

7. Repeat steps 1 through 6 above to add additional attachments.



Creating an Interim Plan for Supports

2. Click on Create New. Holly Golightty Age 35 10: 10090910+208121 DOB: 1020+1889 Person's Information Case Management Screening and Assessment Programs Individual Planning Calendar Retain Stot Form Individual Planning Calendar Service Authorization Customized Rate Service Authorization Create New Active Authorization Customized Rate

22.1. New Provider: Create IPFS

The IPFS *Create New* option for providers becomes available under the *Programs* menu once that provider is added to the ISP by the Support Coordinator. The provider completes the IPFS, including adding the outcome(s).

Note: Be sure the SC has added the new provider to the ISP (Follow steps 1 through 4 in Section 4.1 - Add Provider). The provider will receive an alert stating that an ISP has been assigned.

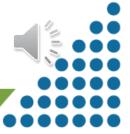


1. While in the individual's record, click on **Programs**, **Interim Plan for Support**. The Interim Plan for Support – List window appears.

The Select Provider Search box appears.



3. Click on Search. The Provider Search box appears.

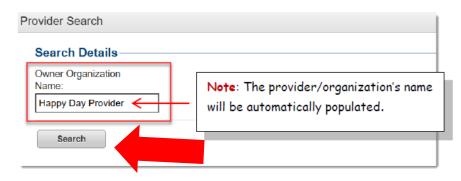




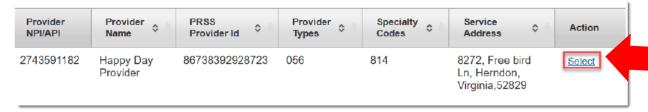
2025

Creating an Interim Plan for Supports

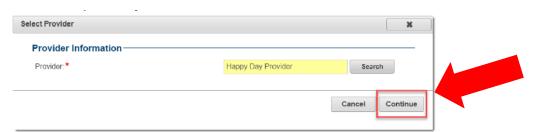




4. Click on Search again under Search Details. The provider's information appears for selection.



5. Click on Select under Action. The Select Provider dialog reappears with the selected provider listed in the provider field.



Click on Continue. The Interim Plan for Support – Summary page appears. The status is "In Progress".



The provider should complete the IPFS in the same manner by using either the Complete Use or Modified Use methods.







Progress Notes

Quarterly and Annual Reviews

Final Disposition Summary







May be contact by contact or monthly

Contemporaneously signed and dated

Identify each contact, including

- Location and recipient of training activities
- The amount of time spent on the activity,
- What was accomplished
- The professional that rendered the service.



Quarterly Summaries

Align with the ISP dates

Information that pertain to effectiveness of services

Any significant events

Individual/caregivers' satisfaction with services

Changes in desired outcomes

Graphed data and a summary of the data



Annual Reviews

Plan for supports reviewed with the individual and their team

Submitted to support coordinator for service authorization

Graphed data or tabled data trended across first 3 quarters



Final Disposition Summary Requirements



Contemporaneously signed and dated

Consultant recommendations

Forwarded to support coordinator within 30 days

Unresolved issues

Strategies utilized

Objectives met



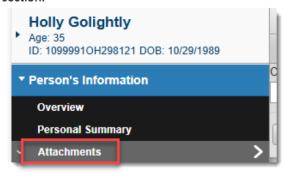
DBHDS>>>

Uploading Other Paperwork



17. UPLOAD ATTACHMENTS

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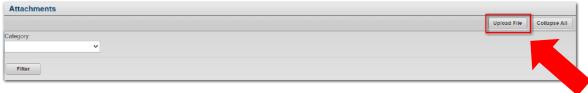
Note: A provider will be able to upload an attachment when: 1) an ISP has been created; and 2) the provider has been added to the ISP or has an active Service Authorization.

Person's Information / Attachments



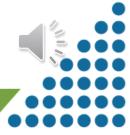
17.1. Upload to Person's Information Area

1. From the Person's Information menu, click on Attachments. The Attachments window appears on the right.



- 2. Click on **Upload File**. The New Document Upload dialog box appears.
- 3. Click Choose File and browse to locate the attachment to upload.
- 4. Select the file to upload and click **Open**. The file is attached and the file name appears above the "Attach File" button.

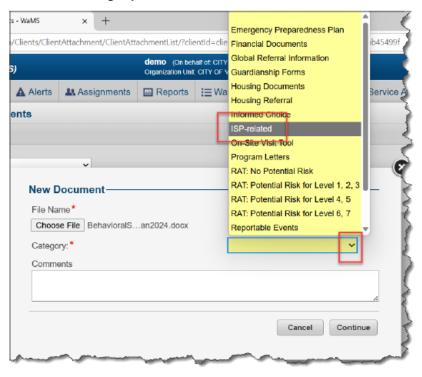
Do not upload quarterlies and disposition summaries in the "ISP-Attachment Section"







5. Click the Category down arrow and select ISP-related.



- 6. Type a description for the attachment in the Comments field.
- 7. Click on **Continue**. The file is attached and available in the Person's Information / Attachments section.
- 8. Repeat steps 1 through 6 above to add additional attachments.







- Behavioral Services Page Website
 - https://dbhds.virginia.gov/developmental-services/behavioral-services/

- Next up in Part 3:
 - DBHDS and DMAS regulations
 - DBHDS/DMAS Practice Guidelines and BSPARI
 - Human Rights

