

Therapy Documentation Table – 2021 DDW Standards

| Document | Procedural Requirements | Due | Distribution | DDSD Template Available |
|----------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|-----------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Initial Therapy Evaluation Report | Needed when Therapy Services begin | Within 44 days of initial budget | IDT members | YES |
| Annual Therapy Re-Evaluation Report (inclusive of progress made) | Needed for ongoing therapy on an annual basis | 14 days prior to Annual ISP meeting | IDT members | YES |
| DDW Therapy Documentation Form (TDF) * TDF sections used for ongoing therapy | | | | |
| <u>Initial Request</u> : Page #1 ONLY (header, footer, middle box with 180 unit request & signature under box) | Needed to obtain an initial prior authorization for any therapy service | <u>Initial</u> : 14 days following receipt of Secondary Freedom of Choice | Case Manager | YES This Template is REQUIRED for all submissions <ul style="list-style-type: none"> Update the TDF throughout the ISP year using the same form for all submissions (initial, revisions, SAR) |
| *Therapy Intervention Plan (TIP) | Complete annually for ongoing therapy; revise as needed | <u>Initial TIP and BW</u> : within 44 days of initial budget approval | IDT members | |
| *Budget Development Worksheet (BW) (not required for JCMs) | Needed to develop therapy unit request that will be indicated on the TDF | <u>Ongoing TIP and BW</u> : 14 days following annual ISP meeting | IDT members | |
| *Semi-Annual Therapy Review (SAR) | Complete for any individual receiving ongoing therapy services | <u>SAR</u> : 190 days following ISP effective date | IDT members | |
| Written Direct Support Instructions (WDSI) | <u>New</u> : minimum of 1 developed within first 6 months of therapy service initiation | <u>New</u> : after strategy development; before DSP implementation (< 6 months) | IDT members | NO <ul style="list-style-type: none"> Refer to 2021 DDW Standards Section 12.4.7.12.6 pp. 179-180 |
| | <u>Ongoing (continued or maintenance)</u> : review, revise, and redistribute annually, and as needed | <u>Ongoing</u> : at least 2 weeks prior to new ISP effective date, and as needed | | |
| Training Roster | Completed when training occurs | Within 7 days of training date | Agency of DSP trained | YES |
| Trainer Designation Form | Completed when training has been designated to another IDT member | Within 7 days of designation date | Agency of designated trainer | YES |
| Assistive Technology (AT) Inventory | Therapists contribute to this form when they are monitoring specific AT | Initiate or update annually, by the 190 th day following the person's ISP effective date | IDT members | YES |
| Billable Service Contact Notes | Completed for all billable services | Following each billable service | Therapy provider's individual case file | NO |
| Discontinuation of Therapy Services Report | Needed when an ongoing <u>therapy agency</u> discontinues services | 14 days following therapy discharge | IDT members | YES |