

Therapy Documentation Table – 2021 DDW Standards – Reissued 7/1/24

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				
<i>Initial Request: Page #1 ONLY</i> (header, footer, middle box with 180 unit request & signature under box)	Needed to obtain an initial prior authorization for any therapy service	<i>Initial:</i> 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	<i>Initial TIP and BW:</i> within 44 days of initial budget approval	IDT members	
*Budget Development Worksheet (BW)	Needed to develop therapy unit request that will be indicated on the TDF	<i>Ongoing TIP and BW:</i> 14 days following annual ISP meeting		
*Semi-Annual Therapy Review (SAR)	Complete for any individual receiving ongoing therapy services	<i>SAR:</i> 190 days following ISP effective date	IDT members	
Written Direct Support Instructions (WDSI)	<i>New:</i> minimum of 1 developed within first 6 months of therapy service initiation	<i>New:</i> 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. 184-185
	<i>Ongoing (continued or maintenance):</i> review, revise, and redistribute annually, and as needed	<i>Ongoing:</i> 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	CM reviews before sending to 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