



California Association for Adult Day Services
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INSTRUCTIONS FOR SEPARATELY BILLABLE SERVICES LOGS

The State of California – Department of Health Care Services (DHCS) does not require a specific form or log to use for recording separately billable services (SBS). CAADS Clinical Work Group has designed these forms to assist you in quickly implementing the requirement to count separately billable services for the ADHC cost report.

The sample log forms developed by CAADS will work in conjunction with your existing flow sheets, requiring only minor modification on your flow sheet form and how you record daily services. Other approaches may certainly be used as long as you are correctly counting units of service and time for each of the treatment modalities: individual (I), concurrent (C) and group (G).

If you choose to utilize a different form or log, please keep in mind that the format you use will be used as an “audit trail” and should adequately document information required. These forms are to be used as documentation to support the information disclosed in the annual cost report required by DHCS and will be subject to review during the onsite audit.

This sample system requires the flow sheet (modified), a daily log for each SBS, and a monthly summary worksheet. It is important as you apply this system to your center or another system that you may wish to design, that your logs link to each other and to the flow sheets.

NOTE: If you design your own log, please keep in mind that the log will be used as supporting documentation during an onsite audit of the annual cost report.

SEE CAADS PT EXAMPLE FLOW SHEET AND FORMS

Flow Sheet

Your ADHC participant flow sheet should already contain the means to record treatments (Tx) provided, notation for participant’s tolerance to treatment, and a place for the signature of the person providing the service.

For this sample flow sheet, additional codes for unit of service and codes for modality: individual (I), concurrent (C) and group (G) have been added.

In addition, two new rows to record Unit of Service and, Tx Time Code have been added at the bottom of the flow sheet.

Daily Log

The daily log form for SBS is a way to record the required data each day that can then be transferred by the clinician to the flow sheet on a daily basis. **NOTE:** if you use this system, be sure that the flow sheet is completed and signed each day by the therapist responsible for the treatment(s).

Rows: Each line is a record of Tx each person received, both unit of service and actual time spent performing the treatment. As in the PT example provided, it is recommended that staff insert dashes to indicate that no unit or time was overlooked.

The column to the left of “Name” column is used to group the participants into either the Group or the Concurrent service they received.

On the PT example, the first names are coded “C-1” to signify the first concurrent therapy group of the day and G-1 to signify the first group therapy of the day. If more than one Concurrent or Group mode is provided during the day, they would be coded C-2, G-2, etc.

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Columns: The columns include the units and minutes spent providing each modality. Individual, Concurrent and Group for PT and OT, and Individual and Group only for SLP, MH and RD.

Summary: INDIVIDUAL COLUMN: For Individual Tx, calculate the actual time spent providing the treatment in minutes and calculate the total units.

Note: When the time data is transferred to the Monthly Worksheet, minutes will be converted to a percentage of time (minutes divided by 60). This way, the therapist does not need to perform calculations each day. The conversion calculation will be done on the Monthly Worksheet, saving time and reducing errors.

CONCURRENT COLUMN: For concurrent Tx, total the units provided and for time circle the greatest length of time spent during each concurrent session because you are recording therapist time spent performing the Tx for the concurrent session, not for each individual.

GROUP COLUMN: For group Tx, total the units only. For group Tx time, circle one time per each of the group treatments because you are recording therapist time spent performing the Tx for the group, not for each individual.

Totals: TOTAL COLUMN: Total the number in each Individual Tx column. For Concurrent Time and Group Time total only the circled times.

Signatures: The licensed / registered / certified professional must sign the daily log as part of the documentation audit trail. In the example, the PT and PTA (if applicable) sign each the daily log. The PT must always counter-sign the PTA signature to attest that the PTA provided the service in accordance with scope of practice.

Monthly Summary Worksheet

The monthly summary worksheet allows you to take the daily log information and summarize it by week to arrive at a monthly total of time and total units of service.

NOTE: The auditors will match timesheets with the data displayed on the daily logs and monthly logs. By adding the timesheet data on the monthly log, it provides a cross check to avoid errors. Time totals should never be greater than timesheet hours. On the Monthly Worksheet all time should be converted to minutes divided by 60.

Rows: Use the rows to add up the daily totals to arrive at weekly totals.

Columns: The columns are used to summarize units and time for each therapist (if more than one).

Totals: The totals row is used total the units and hours devoted to SBS during the month.

Optional: To determine the total percent of time spent providing SBS, record total time worked for the month and divide it by the units provided to arrive at percent of time spent providing SB for each therapist. For cost report purposes, this calculation will be done within each cost report. The reason to do it on the logs is for management information to begin to understand and analyze the impact of separately billable services on the center budget.