



# WELLIGENT SERVICE DOCUMENTATION

Reviews & News  
March 23, 2018

# LAUSD

## Is a school Medi-Cal provider

As a School Medi-Cal Provider the District Must:

- Meet Federal and State Special Education requirements
- Provide Individuals with Disabilities Education Act (IDEA) eligible students with an IDEA compliant IEP that specifies all special education and related services needed by the child (IDEA, Part B)
- Meet Medi-Cal requirements in addition to Special Education requirements

# How Are We Doing IEP Documentation Aug 2017 – March 2018 186 IEPs review

- Student with documented counseling has a current IEP: 98%
- DIS Counseling is on the IEP: 99%
- Present Level of Performance Meets the Standards of Practice: 94%
- IEP Goal aligns with the Present Levels of Performance: 84%



# How Are We Doing?

## 337 Service Records Reviewed August 2017-March 2018

- Service is on the IEP – 100%
- Service has an outcome – 83%
- Service has a description of the activity – 66%
- Service relates to the goal on the IEP – 68%
- Service has an objective measure of the student's progress – 50%



# Welligent service documentation: Quality Assurance

## THREE CRITICAL COMPONENTS

1. ALIGNMENT WITH IEP
2. STANDARDS OF PRACTICE
3. ACCURACY AND  
COMPLETENESS

# Service Documentation Review

## 3 COMPONENTS of Quality Assurance

### **#1 ALIGNMENT WITH IEP:**

- Service documentation must align with each student's individual education plan as reflected in the:
  - Present Level of Performance (PLP) Summary
  - FAPE Part 2, Summary of Services
  - When counseling is documented in Welligent must be relevant to the goal(s) on the IEP.

# #1 Potential Pitfalls

## IEP ISSUES

- PLP and GOAL– should be named **Social Emotional**
- Annual is held – you aren't invited – no plp, no goal, but no exit information either ... student should still receive counseling but Amendment needs to be held **ASAP – DO NOT INACTIVATE SERVICE RECORD**
- PLP recommends counseling, no PUC on FAPE (check!)
- IEP discussion results in PUC, need not reflected in PLP

# Service Documentation Review

## 3 COMPONENTS of Quality Assurance

### **#2. STANDARDS OF PRACTICE:**

- Providers in each discipline are educated to know how to describe accurately and completely the nature and type of service they deliver to individual students.
- The description of the service entered into Welligent must therefore reflect the standards of practice for each discipline.



## #2 Standard of Practice Pitfalls

- The description of counseling activities should not be activities that could be conducted in a classroom – you may use worksheets but connect them to the goal and skills that are being practiced/learned
- Description of activities is too brief and/or not specifically linked to the goal - for example a 60 minute session activity is reported as “therapeutic conversation”
- Tip: select key words/tasks from the counseling goal – how are these being addressed in the activity and student’s response?

# Service Documentation Review

## 3 COMPONENTS of Quality Assurance

### #3. ACCURACY AND COMPLETENESS:

- Welligent service documentation should include the following:
- a **detailed** description of the intervention/activity
- an outcome statement (what happened – how the student responded) in that session
- an objective measure of the student's response to the intervention as indicated by progress to the IEP goal

## #3 Pitfall: Measurable Outcome

- Must be numerical – use numbers 😊
- Must capture **progress to goal** (whether annual or incremental goal), not just progress made in the session
- Shouldn't be exactly the same every session

## Exception for an Initial Session:

*This is the first counseling session with student and progress towards goal of utilizing positive coping skills will be monitored.*

# August 2017- March 2018 Audit

## Service Documentation: Continuing Issues

- **Service Does Not Include Description of Activity** (could be a description is missing, too brief, copied & pasted, etc.)  
Monthly audits Aug to Jan range from 41% to 75% compliant
- **Service does not include an objective measure of student outcomes** (could be nothing numerical, may be numerical but not be directly connected to goal (i.e. only the session), etc. Monthly audits Aug to Jan range from 33% to 75% compliant
- Activity relates to the IEP goal ranges from 88% to 75% compliant

# Reminders

## **Intervention Related to IEP Goal:**

- Consists of counseling terminology related to the goal
- Is detailed and descriptive
- Is session specific

## **Response to Treatment:**

- Outcome about what happened in session as it relates to the IEP goal

## **Measurable Progress Towards IEP Goal:**

- An objective measure towards goal with numerical indicators

## **Examples of Therapeutic Interventions:**

- **Engaged student in reciprocal conversation by providing scenarios for student to practice in session**
- **Discussed how to read social cues in different social settings**
- **Role-played how to initiate conversation with peers and adults**

# Time to Critique!

Use the 3 critical components of quality assurance listed below in order to evaluate the following case examples.

Start by asking yourself, does the service documentation in the case example ...

**#1: ... ALIGN WITH IEP?**

**#2: ... MEET PROFESSIONAL STANDARDS OF PRACTICE?**

**#3: ... PROVIDE AN ACCURATE AND COMPLETE  
DESCRIPTION OF THE SERVICE?**



# Examples of Not Billable Documentation

**IEP Goal:** Student will initiate and maintain a social interaction with peers 3 out of 5 trials per week as measured by self-report and teacher/counselor observation

**ACTIVITY RELATED TO GOAL:** Session consisted of a therapeutic discussion

**RESPONSE TO ACTIVITY:** He presents as engaged, based on the following behaviors: exhibition of self-reflection, some eye contact, sharing thoughts, listening and disclosure of personal experiences

**PROGRESS TO IEP GOAL:** Based on psych observation and student self-report, he has reached objective #1

# Examples of Not Billable Documentation

**IEP GOAL:** Student will distinguish between safe and unsafe situations and behaviors and identify reliable sources for support by engaging peers and adults appropriately in 4 out of 5 trials per class period with moderate support as measured by role playing in session and teacher observations

**ACTIVITY RELATED TO THE GOAL:** Student was asked to complete a collage. Student was required to share items to make the collage

**RESPONSE TO ACTIVITY:** He again was combative with the group member he requested to work with. He was not responsive to directions and began calling SP names in session.

**PROGRESS TOWARDS IEP GOAL:** He can identify unsafe and basic behaviors. H struggles with identifying reliable sources for support to engage peers and adults appropriately within his school environment

# Examples of Billable Documentation

**IEP GOAL:** Student will evaluate the consequences of irresponsible/responsible behaviors, alternatives and their effects on others and the achievement of personal goals in 3 out of 4 trials per opportunity with minimum support as measured by teacher/counselor observation

**-ACTIVITY RELATED TO THE GOAL:** Provider met with student, identified status using Feeling Scale, discussed progress towards meeting goals and identified obstacles impacting progress toward evaluating the consequences of responsible/irresponsible behaviors. Discuss behavior and their effects on student's personal goals.

**-RESPONSE TO ACTIVITY:** Increased effort and participation was noted during individual counseling. Was engaged and has made improvement in his overall attitude and behaviors at school. He asked questions regarding high school and college. He was respectful and able to take responsibility for irresponsible behaviors displayed to his teachers last month. He was able to identify obstacles (influence from peers) impacting his progress meeting his goals in a timely manner.

**- PROGRESS TOWARDS IEP GOAL:** Student is meeting his goals in 2 out of 4 trials per opportunity

# Examples of Billable Documentation

**IEP GOAL:** Student will identify unwelcome teasing or bullying behaviors, discuss why those behaviors are harmful and evaluate the effectiveness of strategies for prevention/stopping them in 5 out of 5 trials per month with 70% adult support as measured by observations/interviews.

**ACTIVITY RELATED TO THE GOAL:** Engaged student in a group activity that included worksheet and discussion on types of bullying (teasing, exclusion, harassment, physical aggression), the group discussed difference between these types and teasing

**RESPONSE TO ACTIVITY:** Student was an active participant in the group session. Student was able to correctly identify 'calling students insulting names' as both teasing and harassment. Student reported no bullying incidents this month.

**PROGRESS TOWARDS IEP GOAL:** Student has been able to correctly identify unwelcome teasing or bullying and discuss why it is harmful in 5 out of 5 trials however he still needs support in evaluating the effectiveness of strategies for prevention.

## Providing Additional Minutes

- Need to indicate in the Activity/Intervention Related to IEP Goal section why additional minutes were provided for that particular session and the documentation also needs to have sufficient justification to indicate the time provided.

**Example:** a student who is normally seen for 60 minutes on a weekly basis (with a total of 240 minutes per month) and is seen for more minutes for this session due to provider's absence.

**Provider met with student for an additional 20 minutes today due to last week's cancellation of session because provider was out ill.**

FINAL

Reminder!

## Service Details Page

Save

Print

Details

Recommendation

Goals

Events/Referrals/Notes

### Service Details

Duration: From

28-APR-2017



\*

To:



| Type                        | Frequency    | Time                   |
|-----------------------------|--------------|------------------------|
| Individual Direct Service   | 4 x/ Monthly | 30 Minutes Per Session |
| Individual Indirect Service | x/           | Minutes Per            |
| Group Direct Service        | x/           | Minutes Per            |

Assistive Tech Required:

☐

Transp. Needed:

☐ Total (Roundtrip) Mileage: mile(s)

Service Delivery Model:

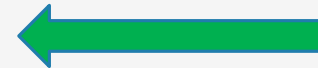
Diagnosis (ICD):

Provider/Assistant Type:

Confidential:

Highly Confidential \*

Included in the IEP?



Setting:

N/A \*

Service Status:

Active

Date Closed

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"I'm here about the details."



The  
Details

1. Credential Updating

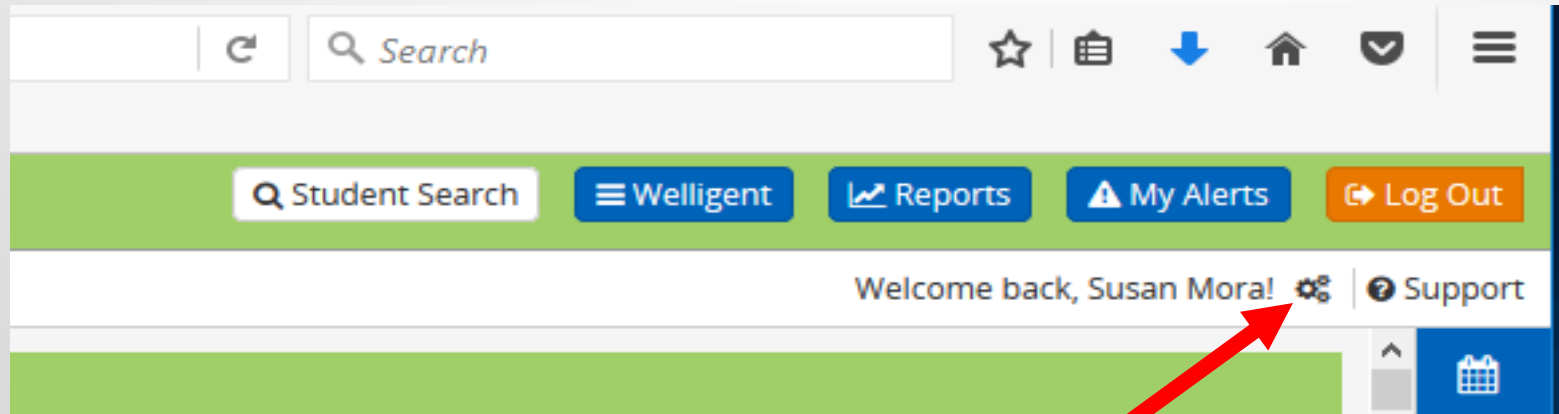
2. Session Type

3. Signature

4. Attendance



# Reminder: Updating Credentials in Welligent



Gear  
Icon:

The Gear Icon will  
lead you to your  
individual Welligent  
profile

# In your profile – Select Certifications

The screenshot shows a web application interface for a user profile. At the top is a green header bar with the text "Schl. Psychological Svcs." on the left, a "Student Search" input field with a magnifying glass icon in the center, and a blue "Welligent" button with a hamburger menu icon on the right. Below the header is a white bar with a home icon and the text "My Preferences". Underneath that is a blue bar with a small "ABC" logo and a green checkmark, followed by the text "My Preferences". Below the blue bar is a horizontal navigation menu with six tabs: "User Details" (orange), "Normal Work Hours", "Schedule Exceptions", "Certifications", "HR/Benefits", and "Signature History" (all blue). A red arrow points to the "Certifications" tab. The main content area below the tabs is mostly blank, with some faint horizontal lines visible.

Schl. Psychological Svcs.

Student Search

Welligent

My Preferences

My Preferences

User Details Normal Work Hours Schedule Exceptions Certifications HR/Benefits Signature History

# Why Are We Reviewing This Again?!

The screenshot shows a web application interface for 'Schl. Psychological Svcs.'. The top navigation bar is green and contains a search bar labeled 'Student Search', a 'Welligent' button, a 'Reports' button, and a 'My Alerts' button. Below this is a blue header with 'My Preferences' and a welcome message 'Welcome back, Susan Mora!'. A sub-header bar is also blue and contains 'My Preferences', 'Other »', and a 'Save' button. The main content area has a green bar with 'ABC Certification Information', 'Refresh', and 'New Certification' buttons. Below this is a table with columns: Edit, Certification, Beginning Date, Expiration Date, Certification Number, Notes, Doc On File, Lifetime, and Provisional.

1. Credentials must be updated when they expire (when you renew the credential)
2. For existing credentials – you only have to UPDATE – “New Credential” should only be selected if you are adding something totally new
3. No one should be checking “Lifetime Credential”

# Counseling Sessions w Contradictory Information...

View/Enter Appointment Details

Enter Notes

## Event Schedule

Date of Service:

12-MAR-2018



Scheduled/Start Time:

01:30pm



Appointment Duration:

30

(Minutes)

Other Time:

(Minutes)

Time In:

01:30pm



Time Out:

02:00pm



Provider:



Alternate Provider:



Status:

Completed

Provider E-signature:

*Signed*

Encounter Type:

Group



Make sure that the “Encounter Type” reflects the actual session – should the student have been seen individually but the Encounter Type indicates group – billing can be turned off

# E Signature

ABC Session Notes - [REDACTED]

Event Schedule

Date of Service: 12-MAR-2018

Scheduled/Start Time: 01:30pm

Appointment Duration: 30 (Minutes)

Other Time: (Minutes)

Time In: 01:30pm

Time Out: 02:00pm

Provider: [REDACTED]

Alternate Provider:

Status: Completed

Provider E-signature: **Signed**

Encounter Type: Group

1. You must close out a session with the Provider E-signature...
  2. However should you fill out this page, including the e-signature and then go to log the session notes, Welligent **will not save the session notes** (when you sign, Welligent thinks you are finished w the session....)
- Not-So-Good News



# Attendance

- Reoccurring session are a good thing 😊
- However... Medical Audits are looking at:
  - Student Attendance
  - Provider Attendance

Should you be absent and make up a session: make sure to change the date

Should a student be absent (for group, for individual): make sure to change the date



Thank you all for all you do!