

Getting Started and Maintaining Clients

Part 2 of Navigating Therapeutic Behavioral Consultation





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.



Disclaimer





Part 2 Topics



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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- 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



Starting with a New Client



Starting with a New Client



DBHDS Starting with a New Client Receive contact about a potential new Complete the client from Part V and other required Support Begin Coordinator documentation services Once **Support Coordinator** approved, will open up the you will person to you in receive a WaMS so you can notification enter authorization through WaMS; information.

DBHDS Starting with a New Client Receive contact about **Complete the** a potential Part V and new client other required from Support documentation Coordinator **Begin services** Support Once Coordinator will approved, you will receive a open up the notification person to you in WaMS so through WaMS; you can enter authorization information.

DBHDS Starting with a New Client Receive contact about a potential new client from Support Coordinator Complete the Part V and other required documentation Begin services 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;

DBHDS Starting with a New Client Receive contact about a potential Complete the new client Part V and other Begin from Support required services documentation Coordinator Support Once approved, Coordinator will you will receive a notification open up the through WaMS; person to you in WaMS so you can enter authorization information.



Types of Authorizations



Initial Authorization

Secondary Authorization

Annual Renewal



Navigating Therapeutic Behavioral Consultation

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

Annual Renewal





Annual Renewal



Adding Service Authorizations

🔂 Home	🗿 Dashbo	a i≡ M	y Lists 🔺	Alerts	Service Aut	horizations										
SA#:			ast Name: Frekkar		First Susi	Name: e		Status:			Sen	vice:		V		
County:			in Code								Note: Yo					
SIS Level:		S	IS Tier:		Assig	ned CSB:	[Diagnosi	SC	_	First and ocate in			`		
Create Date	Range Start:		Date Range E	End:						4						
Search	Clear															
SAR C First	≎ Last ≎	Provider ç	Provider NPI	C Site C	Case Control ©	CSB ¢	County 0	Waiver 0	SIS Lovel ©	SIS Tior ©	Diagnosis 0	Create 0	Active 0	Services 0	Status 0	Actio
Sus	ie Trekkar	Provider 1	879024785	0		Community Service Board 1	Henrico	Community Living			ASD – Autism Spectrum Disorder	02/23/2017	Inactive		Pending Provider Input	View

For more information see: Tips and Tricks for WaMS Users



Navigating Therapeutic Behavioral Consultation

Adding Service Authorizations

Susie Trekkar	Persies Authorization	Pumman/		Summary
Age: 23	Service Authorization -	oummary		
ID: 1609326US139130 DOB: 06/30/1993	Back to List			Note Submit To Support Coordinator
Person's Information	 Overview 			
Case Management	Summary			
Screening and Assessment	Waiver:	Community Living	Status:	Pending Provider Input
	Case Control Number:		Service Authorization Number:	
Programs	Create Date:	02/23/2017	Last Modified Date:	02/23/2017
Individual Support Plan	Medicaid Number:	382919283199	Active:	Inactive
Service Authorization	Is Locked:	Unlocked		
Service Authorization Details	Provider Information—			
	Provider:	Provider 1	Provider Number:	12345678
	Provider NPI:	8790247850	Site Number:	
	Provider Types:	056	Provider Address:	1 Provider Rd, Richmond, VA 20190
	Provider Specialty Codes:		Bed Capacity:	50
	SIS Information			
	SIS ID:		Assessment Date:	
	Level:		Tier:	
	Other Details			
	Received Date:		Rejected Date:	
	Entered Date:			
	 Service Details 			Add
	# \$ Service \$ Freq	e C VAMMIS C VAMMIS Auth Units C	Requested Start Date Requested End Date	Authorized Authorized Authorized Authorized End Date
		No data	available in table	
	<			>



Navigating Therapeutic Behavioral Consultation

Adding Service Authorizations



- 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

Service Information	
Service:*	· · · · · · · · · · · · · · · · · · ·
Procedure Code:	Private Duty Nursing, Registered Nurse (T1002) Respite (RESPI)
Procedure Type:	Respite - CD (S5150) Shared Living (T1020)
Modifier 1:	Skilled Nursing, Licensed Practical Nurse (S9124)
Modifier 2:	Skilled Nursing, Registered Nurse (S9123) Sponsored Residential (T2033)
Modifier 3:	Sponsored Residential (Customized Rate) (T2033/U1) Supported Employment, Group (H2024)
Modifier 4:	Supported Employment, Group - 2 or Fewer Members per Staff (H2024/UA) Supported Employment, Group - More Than 2, Up to 4 Members per Staff (H2024/U2)
Frequency code:	Supported Employment, Group - More Than 4 Members per Staff (H2024/U3) Supported Employment, Individual (H2023)
Help message:	Supported Living (H0043)
Justification: *	Supported Living (customized rate) (H0043/U1) Therapeutic Consultation, Other Professionals (97530)
	Therapeutic Consultation, Psychologist/ Psychiatrist (H2017)
	Therapeutic Consultation, Therapists, Behavior Analysts, Rehab. Engineers (97139)
	Transition Services (T2038) Workplace Assistance (H2025)

For more information see: Tips and Tricks for WaMS Users



Adding Service Authorizations

DBHDS

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

М		
	~	
	~	
	~	NOTE: This question is
	~	required for TC service codes
Year		97530 or 97139 and will only
N/A		appear when either of those codes are selected in the
🔿 Yes 🔿 No		Service drop down box.
	Year N/A	Year N/A







- 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 summary 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.

×	Overview	
	Providers	
•	Part I. Personal Profile	
•	Part II Essential Information	
•	Part III. Shared Planning	
••	Part IV. Agreements	
• 0	Part V. Plan for Supports	Add
	Attachment	Upload Attachments
	Form Notes	Add Form Note
	Changes History	
_		

In the individual's ISP:

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

appears.		
Add Plan for Support		x
Are you sure you want to add a plan for support?		
	Cancel	tinue

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



Entering the Part V Plan for Supports

Part V: Plan for Sup Back to Summary	ports - Summary Status: In Progress		Summary Discard Expand All
	Instructions		
	O Service and Outcomes	Edit	
	▶ O Essential Supports	Edit	
	General Schedule of Supports	Add New Support	
	▶ O Signatures	Edit	
	Safety Restrictions	Edit	

- 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.





Entering the Part V Plan for Supports



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

Service and Outcomes		
Overview		Add Outcome
Effective Date*	07/10/2024	
Provider	Eight Days a Week1	
Service*	Group Day Support(97150) 🗸 🗸	
Describe support instructions and preferences t	hat occur consistently across activities and set	ings 🗊
		s requesting Group Day Services in order to maintain a and socialize with peers outside and her residential setting.
She also enjoys having the opportunity to explo	ore new activities in the community and require	s support with participating in chosen activities. Holly is
Manage Service and Outcomes List		
Service and Outcome # 1		Delete
Desired outcome*	Holly stays healthy	
Life Area	Healthy Living	
Key steps and services to get there:	Schedule Regular and as nee	×
Start Date	07/10/2024	
End Date*	07/09/2025	
Activities		
Supports Activities*	Holly engages in modified yog	
I no longer want/need supports when	Hilly Demonstrates independe	
What to record	Physical response to exercise,	
Is the activity skill building*	@Yes ○No	
Describe specific skill	Comprehension of directions,	
How often	Monthly	
By when *	07/09/2025	
How to Support		
Check-ins to review activity, Document preferre	ed activities and successful support.	

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

	Note: All outcomes assigned will	
Manage Service and Outcomes List—	display in the drop down. Each	
Service and Outcome # 1		outcome should be added
Desired outcome*	Holly stays healthy	separately.
Life Area		
Key steps and services to get there:	Holly stays healthy	5
, , ,	Holly goes into the community in order to s	spend more time with her friends 🔀
Start Date	man and a second and	warman and the second s

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.

Service and Outcome # 1	
Desired outcome *	Holly stays healthy 🗸
Life Area	Healthy Living
Key steps and services to get there:	Schedule Regular and as nee
Start Date	07/10/2024
End Date*	07/09/2025

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

Entering the Part V Plan for Supports



- 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.

Activities								
Support Activities	I no longer want/need supports when	What to record	Skill building	How often	By when	Actions		
Coordinate Medical appointments	Holly Manages medications with minimal support	Schedules/attends medical appointments	Yes (Health awareness)	Monthly	07/09/2025	Edit Delete		
How to Support	Check-ins to review a	Check-ins to review activity, Document preferred activities and successful support.						

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





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

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

A new "Service and Outcome" section is added below

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



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Essential Supports

Essential Supports

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.

O Essent	ial Supports			Ed
Identified R	isks			
Risks	How often	How to support	Begin date	End date
		No data availa	ble	
Potential Ri	sks			
Risks	How often	How to support	Begin date	End date
		No data availa	ble	
Routine Su	pports			
Supports	How often	How to support	Begin date	End date
		No data availa	ble	

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.







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

Begin Date*	07/10/2024		1
End Date *	07/09/2025		- 5
have been and the second	a service	Janaham, M.	S

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

Add New					
Support	How often	How to support	Begin date	End date	Actions
Fall with Injury	Routinely as needed	This risk is addressed in the BSP. Therapeutic consultant will follow the BSP.	07/10/2024	07/09/2025	Edit 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

DBHDS

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.

Instructions		
Service and Outcomes	Note: The General Schedule of	Edit
• Ssential Supports	Supports is required. It can be	Edit
 General Schedule of Supports 	completed in the system, or it be uploaded in your own format.	Add New Support
▹ O Signatures		Edit
 Safety Restrictions 		Edit

1. Click on Edit for Signatures.

▶ Instructions	
Service and Outcomes	Edit
• Ssential Supports	Edit
General Schedule of Supports	Add New Support
▶ O Signatures	Edit
Safety Restrictions	Edit





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).

- 👄 Part V. Plan fo	or Supports						Adc
Plans							
Provider	NPI	Create Date	Service	Outcomes	Status	Active	Actions
Eight Days a Week1	2949383587	01/07/2025	Group Day Support(97150)	3, 4	In Progress	Inactive	<u>View</u>
Attachment						Upload At	achments
American Carlos and		a second a second	a search and the second se				

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*.



IMPT: Clicking on "Complete" only completes Part V not the entire ISP. The entire ISP cannot be completed (status "ISP Completed") until the SC completes Parts I-IV and <u>ALL</u> providers with outcomes complete their respective Part V's. 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.

Plans							
Provider	NPI	Create Date	Service	Outcomes	Status	Active	Action
Eight Days a Week1	2949383587	01/07/2025	Group Day Support(97150)	3, 4	Part V Completed	Active	View

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

<u>REMEMBER</u>: The ISP will not be completed (status "ISP Completed") until <u>ALL</u> 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



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Uploading the BSP and FBA

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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.

Category: *		~
Comments:	Assisted Technology Plan Environmental Modification Nurse Plan Therapeutic Consultation Other	
		-

- 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.

 Attac 	hment				Upload Attachments
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)	<u>Delete</u> <u>Edit</u> <u>View</u>
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



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.

							_		
Person \$	Person's ID 🗘	Alert Description	0	Category \$	Date ≎	From	\$	Accepted By	A A M
Holly Golightly	1099991OH298121	The Individual Support Plan has been assigned to you <u>GQ</u>		Individual Support Plan	02/06/2025	SCStaff2 CITY OF VA BEACH CSB MHMRSAS			And and
Quinn Fuller	1229784UQ126101	Tier has changed from 1 to 3 effective		SIS	11/26/2024	Dee Dee Reynolds	~		ì

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

2. Click on Create New. Holy Golighty Age 35 10:10090010-0200121 DOB: 1029/1999 Preson's Information Provider P

The Select Provider Search box appears.

Select Provider	×
Provider Information	Search
	Cancel Continue

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





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.

Provider Information			
Provider:*	Happy Day Provider	Search	

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

Back to List	n for Support - Summary Status: In Progress	Summary Discard Expand All
	Instructions	
	• O Service and Outcomes	Edit
_	• O Essential Supports	Edit
	General Schedule of Supports	Add New Support
	O Signatures	Edit
	Safety Restrictions	Edit

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





Other Paperwork Information







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Progress Note Requirements

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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 Requirements

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 Review Requirements

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



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Navigating Therapeutic Behavioral Consultation

Final Disposition Summary Requirements



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.

Upload File	Collapse All
	_
	Upload File

- 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"



Uploading Other Paperwork

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

<u>https://dbhds.virginia.gov/developmental-services/behavioral-services/</u>

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





