South Carolina Case Management / Early Intervention FAQs

Early Intervention Specific Q&A:

Question: Will EIs be using CDSS? For what reasons?

Answer: For all responsibilities other than service notes. Service Notes are entered in Therap as a Case Note. Therap will be used for Case Notes, CDSS for Demographics and transfers and BRIDGES will be used for Babynet for Plans/IFSPs.

Question: Will we be able to edit EI Service Notes in CDSS per quality reviews?

Answer: Any notes entered into CDSS prior to 10/31/17 should be revised in CDSS. Any new notes, regardless of activity date, should be entered into Therap.

Question: As of Nov. 1st will our service notes still be transported into Bridges?

Answer: Yes.

Question: How will we transfer new EI children from CDSS into Therap?

Answer: This will be done in CDSS and will come into Therap through the interface or Intake process.

Question: Will EIs and EI Supervisors have access to historical notes in CDSS after a case is transferred?

Answer: Access to information in CDSS has not be changed from what it has always been. Once a case is transferred on CDSS, the sending provider no longer have access to the CDSS record, including service notes.

Question: When providing QA's for the files such as Case Notes, will supervisors still have access to the historical service notes in CDSS or do we need to access Therap totally? For example; how do we edit an error Case Note prior to October 31?

Answer: Any existing note in CDSS could be revised but any missed notes prior to October 31st would be entered into Therap.

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Case Management and Early Intervention Q&A:

Question: How do I switch back to my CM / EI provider dashboard when in the DDSN Oversight account instead of logging out and logging back in?

Answer: You have two options which do not require logging out and logging back in:

A. Click on Switch Provider > Logged In User's Provider Home which will bring you back to your provider's dashboard. From there, you can Switch Profile > Internal > Switch.
B. Switch Provider > Click on your provider agency's name from the list which will bring you back to your provider's dashboard. From there, you can click on Switch Profile> Internal > Switch.

Question: I have a new CM / EI staff and have done the steps in Therap including assigning their External ID and used the Batch Case Management > Assign CM by External ID, but their CDSS caseload is still not showing up in Therap.

Answer: An empty caseload (with no individuals) will not populate into Therap. Caseloads will populate once there is at least one individual assigned in CDSS.

Question: How can I get external notifications on updates to a form in Therap? For example, how would I know if a Plan Change Request is closed?

Answer: Go to the Settings tab for that specific profile and set up Notifications via Notification Profile > Configure and set it up for that specific form / module, such as the Case Management Plan. There are detailed steps in a 'How To Configure User Accounts Notifications' guide posted on Therap's South Carolina Page.

Question: When unable to upload documents due to file size, what should be done?

Answer: Be sure you've either compressed your files or are using a pdf or word doc version of the form, not taking pictures of forms and trying to attach a jpeg, as that would be a larger file size. Therap modules have the option to Export to PDF in the lower left corner of the form, or at the 'Successfully Saved' screen.

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Question: How do I find an older Case Management Plan?

Answer: When using the Case Management Plan > Search feature, change the 'Entered Date From' to a date prior to when the Plan was written. For example, if you change the date to 1/01/2017, you'd be able to find the Plan written after that date. The 'Entered Date From' field is the only required field in the Case Management Plan search criteria and will default to 30 days ago. Only the most recent plans that were complete in CDSS as of 10/22/17 were moved into Therap. Any Plan, and material related to the plan, done prior to that will be found in CDSS.

Question: How do I complete a 6 Month Review of the Case Management Plan?

Answer: Conduct a Case Management Plan > Search to locate the CM Plan. Once open, you'll need to go to the Need and Service / Interventions section, then click on 'View' to the right of the Need and click on 'Add Review' in the lower right corner and document the review. Be sure to save your work and click on 'Close' when done.

Question: I am a CM or EI Supervisor, how do I get access to my supervisee's caseloads so I can see all of their documentation?

Answer: When logged in as an admin user, go to User Privileges > Manage and click on the login name for your CM / EI Supervisor account and add the caseloads for your supervisees to the Internal and External profiles via 'Add Caseload' option. Save when done.

Question: I am a CM or EI Supervisor, how do I review all the Case Notes my supervisees have written over a date range?

Answer: When logged in as the CM / EI Supervisor and within the Internal Profile, do a Case Note > Search and search by 'Entered By' to review by one particular staff, adjust the date range and click on 'Search'. On the bottom of the Search Results page, click on 'Export to Excel' and choose 'Detailed Excel'. You'll see all the comments written within the note in the Note / Comment Column of the excel spreadsheet and can use the excel filters.

When logged in as an admin user, the CM / EI Supervisor will also have access to the Agency Reports tab > Report Library > Case Note Report:: Case Note with Questionnaire Info. This report will contain detailed information including but not limited to Service Provider, Submit Date / Time, Service Date, Activity Type and the Case Note. You'll see all the comments written within the note in the Note / Comment Column of the excel spreadsheet and can use the excel filters.

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All providers will need to get used to using excel and get data out of it that way. Ben Orner from DDSN is working on excel trainings for CM / EI providers. This will include use of macros and filters to tally up the time.

Question: What is the difference between 'Export to Excel' and 'Export to Detailed Excel'?

Answer: 'Export to Excel' shows exactly what is shown in the search results where the 'Export to Detailed Excel' includes the full note and additional information about the note.

Question: I have access to Document Storage on both my Provider account dashboard and on the External Oversight page. How do I know which one to use and when?

Answer: The Document Storage is applicable to the modules / documents you are completing within each profile. For example, if you have documents to attach to the Case Management Plan, Level of Care and other forms completed on the Oversight page, you'd use the Document Storage on that page to easily attach from within one of those modules. If you have documents that need to be attached to the Case Note or the Eligibility, you'd use the Document Storage within your provider dashboard accessible via an internal profile.

Question: Do I need to print for an Alliant review? What about Medicaid audits?

Answer: There is no need to print for Alliant reviews. Alliant staff have user access to Therap and have been trained on accessing data within the provider accounts. For Medicaid audits, a user account could be created within the CM Provider account with view-only access.

Question: How do I print if needed?

Answer: Open the module / form in Therap and at the bottom select 'Export to PDF'.

Question: Will there be a total minute billed report in Therap to help EI supervisors track billing and family training time each month?

Answer: The majority of reports in CDSS won't be there anymore. Once you start entering Case Notes in Therap, you can conduct a Case Note > Search and download into excel and filter and use macros to filter the service codes. All providers will need to get used to using excel and get data out of Therap that way.

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Question: How long will we have that access to closed cases?

Answer: Access to discharged individuals in Therap is different than 'Closed' cases in CDSS. In Therap, you will continue have access to the notes your agency has completed for 'Discharged' or closed cases, as long as you have access to that individual.

Question: Do we need to start completing new Plans for CMAP consumers or just continue as we are until their plan date comes due?

Answer: For now, you can work on your CMAP on paper, you don't have to put it into Therap until you do your Plan as it comes due. You will however see it show up on Alerts and Reminders in Therap.

Question: Will demographic information from CDSS be 'dumped' into Therap?

Answer: There will be some extent of 'dumping' info into Therap as it replaces CDSS as the system of record. For the time being, please continue to keep demographic information in CDSS.

Question: There are LOCs that are to be approved by CAT showing up in our provider Alerts and Reminders report, what do we?

Answer: If you are not responsible for approving and they show up on your Alerts and Reminders, you don't have to approve them. The DDSN team is aware that you may see those on your list and is addressing it with Therap.

Question: Can you filter the alerts for upcoming things to do for plans, contacts, and 6 month reviews for the whole month? Example: January 2018.

Answer: You can forward date to see items which are coming due and also select 'All' from the dropdown list so that you see any form within those perimeters.

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