

<b>Topic:</b>	Personal Support Worker Progress Notes
<b>Date Issued/Updated:</b>	July 8, 2016

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## Overview

**Description:** Procedures for reviewing Personal Support Worker (PSW) Progress Notes.

**Purpose/Rationale:** PSWs are responsible for providing progress notes outlining the tasks they performed with the individual served. This worker guide outlines the responsibility of the Services Coordinators, Personal Agents and Administrative Staff in reviewing progress notes.

**Applicability:** Services Coordinators, Personal Agents and Administrative Staff processing PSW Timesheets

## Procedure(s) that apply

Starting with time worked July 1, 2016, any timesheet submitted by a Personal Support Worker (PSW) must contain a progress note outlining the tasks that the PSW did. This note must be included in order for a timesheet to be considered 'properly completed.'

Timesheets submitted without a progress note will not be approved until a PSW submits a progress note for the period in question. Timesheets that cover a pay period will need at least one Progress Note. Timesheets that span multiple pay periods must include at least one Progress Note for each calendar month.

## Frequently Asked Questions

**Q. What standard should staff hold for Progress Notes (e.g., what is good enough to accept)?**

A. At this time, the presence of a Progress Note is enough to approve the timesheet as 'properly completed'.

**Q. What is the PSW does not write English, cannot read/write or has another accommodation need?**

A. The PSW may write the Progress Note in their native language if they cannot write in English, again, the presence of the note is enough to process the timesheet.

If the PSW requires another type of accommodation to be able to complete the Progress Note, they must work with their Employer or Employer's representative to reach an accommodation. STEPS can assist Employers in meeting their obligations to provide reasonable accommodations to PSW for disabilities.

**Q. What is the Progress Note does not provide information about the services authorized to be provided?**

A. If a Progress Note is submitted that is lacks detail of the service provided or does not reflect an authorized service delivered the Employer should be notified request that they work with the PSW to better document the tasks that the PSW is completing related to the services authorized. The notification to the Employer must be in writing or followed up with a written summary of the contact.

The Case Management Entity may also work directly with the PSW to assist with training the PSW to better document the tasks that they are completing.

If the Progress Note does not reflect an authorized service being delivered the Case Management Entity may need to contact the individual or their representative to do monitoring ensuring that the needs are being met.

Examples of Progress Notes are available on the [Personal Support Worker resources page](#).

Continued submission of Progress Notes that lack detail or do not reflect the authorized service being provided may be indicators of:

- A need to do an intervention with the employer per OAR 411-375; or
- A need to recommend action be taken against the PSW's provider number per OAR 411-375.

**Q. What is the responsibility of the Services Coordinator and Personal Agent in reviewing Progress Notes?**

A. Services Coordinators and Personal Agents should review Progress Notes for individuals on their case load as part of the regular monitoring of services delivered and progress toward desired outcomes.

**Q. Is a Progress Note required if submitting time for a previous services (prior to July 1, 2016)?**

A. No, timesheets submitted for time worked after July 1 must have a Progress Note in order to 'properly completed'.

**Q. Does the PSW have to complete the Progress Note in the "Progress Note" box from eXPRS?**

A. No, the eXPRS Progress Note box is not electronically fillable. The PSW may attach a typed or legible handwritten progress note to the timesheet from eXPRS. Case Management Entities may not require PSWs to submit only typed Progress Notes.

**Reference(s):**

Independent Provider Rule – OAR 411-375

Documentation Requirements for Providers of Medicaid Services – CFR 431.107(b)(1-2)

Collective Bargaining Agreement – Article 8.2, Section 6(c)

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