

Common Documentation/Audit Errors

Office Notes:

Do NOT do office notes (as duplicates of another session's information or to capture any conversation with a ptp).

1. Office notes are only to be used to capture information if the participant is ineligible at the time of the contact
OR
2. If you are asked to specifically use an Office note (ie. by your Supervisor or in a task)

Office notes do not create any form of documentation in Envolve, so no one at PHW can see any of the information that is in an Office note. This can result in points being deducted during PHW audits.

Scheduling due dates:

You need to select the correct information when you are scheduling about if the visit is after the due date or not.

1. Look at the due date for the visit on the right hand side of the FP screen
2. If your visit is after that date, then you select "The scheduled visit is after the scheduled compliance due date".
 - a. If you do not do this correctly, then the correct MCA will not be filled out and points will be deducted during PHW audit reviews

Example of correct documentation:

The screenshot displays the Envolve mobile application interface. At the top, a green header bar reads "Active - Is Eligible until 2/29/2024". Below this is a navigation bar with tabs for "Info", "Services", "Eligibilities", "Authorizations", "Sessions", and "Tasks". The "Sessions" tab is selected. The main content area shows a session scheduled for "2/20/2024 11:00 am". It asks "Is this visit Face to Face?" and "Is the scheduled visit after the scheduled compliance due date?". The answers are "This visit is Face to Face." and "The scheduled visit is after the scheduled compliance due date." respectively. Below this, it asks "Who were you trying to contact?" (Member) and "Reason for contact" (Annual Contact). A pink plus sign button is visible at the bottom right. On the right side, there is a sidebar with several items: "0 of 2 Face to Face Visits This Year (2 visits remaining)", "CAO Recertification (Due on 11/11/2021)", "NPO Date (Completed on 1/23/2023)", and "Annual Contact (Due on 1/23/2024)" with a "POSTPONE" button.