

Aging and People with Disabilities

John Thompson

Authorized signature

Number: APD-IM-13-051

Issue date: 8/12/2013

Topic: Protective Services

Subject: K Plan Documentation

Applies to (check all that apply):

- | | |
|--|---|
| <input type="checkbox"/> All DHS employees | <input type="checkbox"/> County DD Program Managers |
| <input checked="" type="checkbox"/> Area Agencies on Aging | <input type="checkbox"/> County Mental Health Directors |
| <input checked="" type="checkbox"/> Aging and People with Disabilities | <input type="checkbox"/> Health Services |
| <input type="checkbox"/> Children, Adults and Families | <input type="checkbox"/> Other (please specify): |

Message:

By now, all APSS staff should have, or be planning to, take the Webinar regarding the K Plan. The webinar power point slides will be posted on the APD Case Management Tools website. The Webinar provides specific instructions regarding how and where to narrate client contact in ACCESS.

How this applies to APSS activities:

- The K Plan, and its requirements, is only applicable to individuals receiving Medicaid funded in-home care, AFH, RCF, or ALF services. All such individuals will have an assigned case manager who is responsible for most of the activities surrounding the K-Plan. The following steps are NOT necessary for non-Medicaid clients, individuals living in nursing facilities, or individuals who are financially eligible for various benefits, such as SNAP, but are not receiving in home or community based care services.
- If an APS investigation is opened for an individual meeting the above criteria, the APSS will be responsible for completing a brief narration/documentation in the CM Services tab in ACCESS at the time the investigation is initiated. Sample narration/documentation for this purpose is included below.
- Narration/documentation must then occur monthly thereafter for as long as the case remains open. Monthly sample narrations are included below. Once the case is closed, a completed date entered into the 723C report writing system, or the 723 facility report submitted to Corrective Action, no further narration or documentation is necessary.
- Narration of APS activity is brief in nature. Narration varies based on whether the activity being narrated occurs directly with the client (direct) or with collateral contacts (indirect) in the investigation.

Examples of APSS narration for K Plan purposes follow:

Direct contact with client/initial visit:

Direct contact: Home visit with client in response to APS referral.

Direct contact with client/during investigation:

Direct contact: Phone call/home visit with client as part of APS investigation.

Indirect contact during investigation:

Indirect contact: Phone call/face to face meeting/e-mail (choose one) with family member regarding APS investigation.

Indirect contact: Phone call/face to face meeting/e-mail (choose one) with physician regarding APS investigation.

Indirect contact: Phone call/face to face meeting/e-mail (choose one) with residential service provider regarding APS investigation.

Indirect contact: Phone call/face to face meeting/e-mail (choose one) with other witnesses regarding APS investigation.

If you have any questions about this information, contact:

Contact(s):	Therese Hutchinson		
Phone:	503-945-7176	Fax:	503-945-9893
Email:	Therese.hutchinson@state.or.us		