

Note Type/Sub-Type Job Aid for Providers

V 1.2 September 24th

Note Type	Note Sub-Type	Comments
Access to Consumer Record	<i>(view only)</i>	Approved or Denied request for access
Auth Change	<i>(view only)</i>	Used by Service Authorization Staff to communicate billing information
Case Note-External	Other Case Activity	Case note for providers to use to capture additional information. No SDS review!
Change of Status	Admission/Discharge	Report "planned" admissions and discharges from facilities to SDS
Included with Inquiry	Demographic Information	Care Coordinators or PCA Admins alert SDS to changes in the the consumer record
	Legal Representative	This includes submitting new records for Legal representatives, PoA, any type of legal decision makers
	Cognitive Capacity/Service Model	when changing PCS program type due to cognitive capacity
	PCS Provider Transfer	Used to communicate PCS Provider changes. Must do an additional Release of Information note
	Provider Discharge of Services/Closure	Providers notify SDS of consumer discharges -when the agency will no longer be providing services for the Consumer
Consumer Application	Developmental Disability Application - Submitted	Submission of all applications will now use these subtypes
	Initial Application - Submitted	SDS staff will update the subtype to 'Complete' or 'Incomplete' after the application is reviewed.
	Initial Expedited Application - Submitted	ONLY for Initial Expedites; routes documents to specific SDS staff
	Renewal Application - Submitted	
	Additional Application Attachments	New subtype for application submissions. Admins can submit
Consumer Authorization	<i>(view only)</i>	These notes replace the PCA Auth subtype to be more specific and communicate clearly to the provider the type of Authorization reviewed. Will contain SLA, Authorization and CAT attachments for PCA and CFC
Consumer Communication-External	Case Note	Case note communication between SDS and external providers when necessary
Consumer Documentation	Eligibility Documentation	Attachment Category
Included with Inquiry	Appointment of Care Coordinator	For Initials and Transfers
	Medical Record	Submission of most medical records
	Non-medical Support Documents	And Non- Medical support documents use these subtypes
	PCA Travel Request	attach the completed form
	Release of Information	Used for all inquiries and any additional Releases of Information
Included with Inquiry	Shared Agency Agreement	SDS will allow access to the Consumer record by both PCS Agencies
	General Relief	<i>(view only)</i>
General Relief	<i>(view only)</i>	Contains all authorization and documentation related to General Relief
Incomplete Notice	<i>(view only)</i>	Incomplete Notices generated by SDS for external providers will use these note subtypes. There is a sequence of 3 notices (courtesy, formal, final)
LOC Determination	<i>(view only)</i>	Determination = Approved, Denied, or MIRP
LOS Determination	<i>(view only)</i>	Determination = Approved or Denied
Nursing Facility Transition	Supporting Documentation	Attachment of Transition Plan
Placement Notification Form	<i>(view only)</i>	Placement in ALH Program
Plan Note	PCS Service Plan Amendment	PCS Amendments for PCA and CFC Programs
	PCS Service Plan Amendment - Expedited	PCS Amendments Expedites for PCA and CFC Programs
	Plan Attachments	Use Plan Attachments for all Programs
	Plan Rescinded	
Request for Information	Incoming	

Subtypes are now required for all notes.

"View Only" means a provider can see notes types created by SDS but will not be able to create notes of this type.