

Instructions for Vendor Fiscal/Employer Agent (VF/EA) Financial Management Services (FMS) Service Notes

Service Notes must be completed by either the Common Law Employer (CLE) or a Support Service (SSP) to substantiate the claim for the provision of the services. The CLE is responsible to train the SSP in completing the form, prior to that person completing the form independently. The CLE is responsible for ensuring that Service Notes are completed and must be kept by the CLE for the purposes of substantiating a claim. The provider or CLE must maintain a record of the time worked or the time that a service was delivered to support the claim.

A separate Service Note must be completed for each SSP at the following frequency:

- Daily – immediately following service delivery when the SSP or vendor provides the service, typically staff might do this when they finish their shift or before they leave a person's home.

Service Notes may be completed for multiple services rendered to the participant on the same form when the services are rendered by the same SSP or vendor.

Example 1: Joe is a qualified SSP that provides both In-Home and Community Supports and Companion to participant Dave. Both the In-Home and Community Supports and Companion services provided by Tom may be documented on the same Service Note.

The following guidance is provided to aid in the completion of the Service Notes form:

- The name of the participant to whom the service(s) was provided should be entered on the first line.
- The degree/license/certificate for enhanced service levels only should be listed on the second line.
- Review any services in the ISP that are being documented, ensuring that the correct service is being provided according to the service definition.
- Document all services that are rendered by the SSP or Vendor. This should be done immediately after the service is rendered in order to provide an accurate account of the services rendered.

Completion of the Table

- The service(s) provided shall be entered in the first column of the table. Remember, if more than one service is reflected on the Service Notes, all the services documented must be rendered by the same qualified SSP or vendor.
- The date the service was provided is entered in the second column, if a service crosses over into a new day then a separate line must be entered for services provided the next day.

- The start and end time must be documented in the third and fourth column. If additional shifts or services are provided in the same day, then another line must be entered supporting those services.
- The fifth column is used to document the place that a service was rendered.
- Describe the service that was provided in the sixth column, this must accurately reflect the service listed in the first column.
- The name of the SSP or Vendor rendering the documented service must be listed on the line provided.
- Both the CLE and the SSP or Vendor rendering the services provided on the Service Note must sign and date on the lines provided.

Maintain copy:

- a. The CLE must maintain a copy of the Services Notes.
- b. The CLE must make Service Notes available to the Supports Coordinator.
- c. If the CLE provides a copy of the Service Notes to the VF/EA organization, the VF/EA is responsible to maintain a copy in the participant's file.
- d. The CLE is responsible to provide copies to ODP or the AE upon request.
- e. If the CLE has further questions regarding completion of the Service Notes, please refer to the PA ODP Guide to Participant-directed Services or the participant's SC.