NORTH Dakota | Health & Human Services
Be Legendary.

How to Create 1915(i) Case Notes

New Case Notes

If you are logged in as a care coordinator, make sure that you are in your Internal Profile. If you are in a service provider account, you only have access to the Internal Profile. Enter all case notes in the Internal Profile. Do not enter case notes in the External or Oversight profile.

From the Therap home page, in your Internal Profile, click on the Individual Home Page tab. Enter the member's name in the search box. When the member's name appears, select it to open the individual's home page, then click on the Case Note module. You will want to make sure that you are on the Home tab under the member's name to see this option. Once you click Case Note, the following options will appear: New, Last Month, Last Three Months, Search, Bulk PDF. Click on New to create a new case note.

Creating New Care Coordination Case Notes

On the New Case Note page, you will select the date for the Service Date that you rendered the care coordination services. From the Select Template drop-down, select the Care Coordination 3.12.26 case note template for care coordination services. You will select this case note template for services rendered, once a plan of care has been approved. If it is a new member and you are case noting services rendered in the initial 30 days up to when the plan of care is submitted, select the Care Coordination Case Note for Initial 30 Days template.

You are now in a new care coordination case note. You know it is new because next to Case Note at the top it has New as the status of the case note. Your name will already be selected as Service Provider. In the Time fields, enter the time you started providing services in the From box and the time you stopped in the To box. For Service Code you will select Care Coordination/H2015. For Place of Service, enter the place where you rendered the services. If you want to bill for the case note you will select Yes for Billable. Select Yes for Face to Face if services were provided in person or through video telehealth, such as Zoom.

In the Questionnaire section, select Open. This will open a pop-up where you will select the role or roles under which you provided care coordination services. You need to select at least one. Then click Save in the popup. After saving the questionnaire, select

Close Pop-up. You will now enter the narrative of your case note. If there is a document you want to add to the case note, you can do that now as well, by clicking on Add File. Once you have everything entered in the case note, you will click on Submit. To save the case note as a draft and finish it later, select Save. Saving the case note puts it in a draft status. You cannot use a case note for billing until it has been submitted.

Care Coordination Case Note for Initial 30 Days

Use the Care Coordination Case Note for Initial 30 Days template for new members to document services provided from the date of initial contact through the 30-day deadline for submitting the plan of care. This documentation supports retroactive billing for eligible services. See the Claims policy on the 1915(i) Provider Guidance and Policies webpage for more information about retroactive billing for care coordination. Answer all questions except those for Service Code and Billable. Save the case note, but do not submit it yet. Once the plan of care is approved and the pre-authorization is acknowledged, return to the saved case notes, enter the Service Code, select Yes for Billable, and submit the case note.

Supportive Services Case Notes

You will use the Supportive Service 3.9.26 case note template for all 1915(i) supportive services, except Respite and Non-Medical Transportation. You will fill this case note out like you did the care coordination case note, with two differences. One, you need to make sure that you select the correct Service Code, as it is likely more than one service code will be listed. And two, there is no questionnaire on this template to fill out.

Non-Medical Transportation Case Notes

You will use the Non-Medical Transportation 3.9.26 case note template for Non-Medical Transportation services. You will fill this case note out like you did the care coordination case note, with a couple of differences. For Service Code make sure that you select Non-Medical Transportation. Even though you are using the Non-Medical Transportation template, if you do not select Non-Medical Transportation for the Service Code, it will be billed as the wrong service. For Place of Service, select the one that best describes where you are taking the member. Complete all questions in the questionnaire included in the Non-Medical Transportation 3.9.26 case note template.

Structure of Case Notes When Rendering Non-Medical Transportation Services

Create a separate case note for each instance of non-medical transportation. The following example illustrates how to document Non-Medical Transportation Services when used with Housing Support services.

The housing support staff arrives at member James' house at 9am. James gets in the vehicle right away and they drive to the rental company office to fill out paperwork for James' apartment the housing staff helped him get. The time from when James is being picked up to when they arrive at the rental company is 9am-9:30am. The housing support staff would use the Non-Medical Transportation 3.9.26 case note template to document the non-medical transportation that took place from 9-9:30am.

While at the rental company office the housing support staff would render housing support services. The time they are there is from 9:30am-10am. The housing support staff would use the Supportive Service 3.9.2026 case note template to document the housing support services rendered from 9:30am-10am.

The housing support staff transports James home from 10-10:30am. The housing support staff would create another case note using the Non-Medical Transportation case note template to document the non-medical transportation that took place from 10-10:30am.

Once they arrive at James' home, if they just drop James' off then there is nothing more to case note.

If the housing support staff stays at James' house and renders housing support services at James' home from 10:30-11am, the housing support staff would use another Supportive Service case note template to document these services.

Non-Billable Case Note

The Non-Billable Case Note 1.1.2026 template is used to document information that is not related to a billable service. This case note cannot be used for billing, so it will not result in an unintended billing charge.