



ORIENTATION & TRAINING

COMMON MISTAKES

⚠ These are the top mistakes that we encounter on a weekly basis.

- @ Getting a new case and forgetting to contact the client - ⚠ That's a NO NO.
- @ Getting a new assessment emailed to you after the licensed clinician completed it, and failing to reach out to the client to schedule sessions - ⚠ That's a NO NO.
- @ Not checking your Caseload Reports to find out if someone is missing a consent, if the TPR is overdue, etc.
- @ Not using the same name (your name) when writing your notes from week to week. Please don't use "John Smith" one day, and "John A Smith" the next day. Again, this will cause delays in getting your note billed.
- @ When writing your note, selecting TBOS instead of Individual Therapy, when the client was not approved for TBOS. Again, this will cause delays in getting your note billed.
- @ For TCMs, when writing your notes, selecting Children vs Adults depending on the age of the child. We will NOT catch this error before the claim goes out, and when it does, it will be denied by the insurance company if you selected "Child" and the client is an adult, or viceversa.
- @ Submitting a note without a required Authorization when it's needed. In those cases, the note won't leave the building, and check your weekly reports in those cases to see which notes were not billed.
- @ Submitting a therapy note when the TPR is expired. In those cases, the note won't leave the building, and check your weekly reports in those cases to see which notes were not billed.
- @ Forgetting to complete a required OCPS Monthly Summary. If the schools don't get these, you won't be able to get OCPS cases in the future. This is for Orange County School cases (the client ID will start with an "A").
- @ Not keeping communication with Shere, Taylor, or Lisa. If they cannot reach you, they cannot trust you with future referrals. It's as simple as that.
- @ Not writing your Treatment Plan objectives in a Medicaid compliant manner.
- @ Forgetting to get your Verification Forms or Screenshots. You can't do your notes without them.
- @ For those of you completing your own intakes for whatever reason, doing the Master Treatment Plan BEFORE the LE is completed. That cannot be allowed per Medicaid rules!
- @ When doing a Treatment Plan Review (or Service Plan Review for TCMs), not having the client/parent complete and sign the review form on our website - ⚠ This must be done EVERY time a TPR or SP Review is done, because you need to upload it to your actual note.