

MONTHLY TASK

MONTHLY REPORT DEADLINES		
HAB & TRAINING & SUPPORT	HBCW, RFSS, PE, PFFA	
Submit By The 1st (By The Contractor)	Submit by the 1st (By The Contractor)	Submit by the 8th (By The Contractor) Use Template Provided
Returned By The 2 nd	Returned by the 4th	Returned by the 10th
Submit Edits By The 4th (By The Contractor)	Submit Edits By The 6th (By The Contractor)	Submit Edits By The 11th (By The Contractor)

SUBMIT YOUR INVOICE THE 1ST DAY FOLLOWING THE MONTH OF SERVICE BY MIDNIGHT (IF YOUR TIME & NOTES/REPORTS ARE NOT SUBMITTED BY THE DEADLINE THERE WILL BE A DELAY IN PAY.) SUBMIT 1 INVOICE FOR THE ENTIRE MONTH

- SUBMIT YOUR MONTHLY REPORT BY THE FIRST DAY & 8TH (Use Template) DAY OF THE FOLLOWING MONTH
- SUBMIT ALL ORIGINAL DOCUMENTS SIGNED BY THE CLIENT TO THE CLIENT FILE
- AFTER MONTHLY REPORTS ARE APPROVED. BE SURE TO UPDATE ANY/ ALL CHANGES TO THE PROGRESS NOTE IN THERANEST. (The Progress Note Must Match The Monthly Report.)
- YOU HAVE 10 BUSINESS DAYS TO COMPLETE CLIENT FILE AUDIT AND UPLOAD REQUESTED DOCUMENTS AFTER YOUR AUDIT CHART IS RECEIVED.

*****Process Discharge/ Transfer*****

1. Send "client satisfaction survey" to the client. Send referral follow up form to referral source. Load proof to the client file. (Links can be found on audit checklist.)
2. Complete final progress notes be sure to document all conversations and meetings.
3. Complete treatment plan and update where needed. Mark achieved goals and objectives. Update aftercare plan if needed.
4. Compose Discharge/Transfer report (Page 36-38)
5. Complete File Audit. (From Contractor Tool box pages 41-44)
6. Complete case change form on our partner page.
7. Staff the case with your supervisor and be sure to complete a professional consultation note mention the case discharge/transfer.