

HOW TO DOCUMENT EPSDT IN UNITY

1. In the Case Profile the child participant must be selected (highlighted).

CPS History

Referrals

REFERRAL NUMBER	RECEIVED DATE/TIME	DISPOSITION	STATUS	TAKEN
1936636	05-17-2020 - 03:12 PM	INVESTIGATION	COMPLETED	PORTE
1880831	12-23-2018 - 12:55 PM	INFO ONLY	COMPLETED	BURT, †
1838693	12-25-2017 - 08:15 AM	INVESTIGATION	COMPLETED	LINDSE
1555791	09-08-2012 - 04:21 PM	INFO ONLY	COMPLETED	HIGGIN

Reports

REPORT NUMBER	REPORT NAME	DISPOSITION	DISPOSITION DATE/TIME	C
1883896	ABLIA, YVONNE, X	INVESTIGATION	05-18-2020 - 10:06 AM	C
1816721	ABLIA, YVONNE, X	INFO ONLY	12-24-2018 - 08:30 AM	E
1767407	ABLIA, YVONNE, X	INVESTIGATION	12-25-2017 - 08:30 AM	E
1570423	ABLIA, YVONNE, X	INFO ONLY	09-08-2012 - 05:00 PM	†

Participants

- PARENT : (09-08-2012 - Active)
- Gender: FEMALE
- SSN: None
- GRANDFATHER : (09-08-2012 - Active)
- Gender: FEMALE
- SSN: None
- CHILD : (05-17-2020 - Active)
- Gender: MALE**
- SSN: XXX-XX-4885**
- CHILD : (12-24-2017 - Active)**
- Gender: MALE
- SSN: None
- PARENT : (12-25-2017 - Active)

2. Under the persons profile select "Health Information"
 - a. From the drop down select "Health Visits and Health Services"

Association
 Background Check
 Birth Information
 Characteristics
 Citizenship/Alien Status
 Clinical Referral Queue
 Developmental Milestones
 Employment
 Fatality Document Detail
 General & Adoption
 Education Profile [+]
 Health Assessments [+]
 Health Information [-]
 *Health Information
 Additional Information
 Behaviors
 Drug Tests
 Family Conditions
 Health Visits and Health Services
 Hospitalization
 Medical
 Medication (Rx)
 Policy [+]

UNITY 3.0 - Task Queue

From Date: [] To Date: 08-25-2021 Team: []

Sort By: Due Date

Find Clear Create New Task

3. Type selected must be "Medical General" (as seen below).
4. Purpose selected must be "Wellness Exam EPSDT" (as seen below).
 - a. This is for both initial AND ongoing Wellness Exams
 - b. **DO NOT SELECT** "Medical Exam"
 - i. Data will not display in the EPSDT report if you select "MedicalExam." We must track if children have a regular checkup and a Medical Exam could be for other reasons then the wellness exam.
5. Result selected must be "Attended" (as seen below), only if truly attended.

HOW TO DOCUMENT EPSDT IN UNITY

Appointment Date	Type	Result	Immunizations
09-16-2002	MEDICAL EXAM	ATTENDED	N Y
09-02-2002	WELLNESS EPSDT	ATTENDED	N Y

Create New Record

Appointment Date:* Type:* Result: Immunizations: [Add](#)

Purpose: (Press the CTRL or SHIFT keys to select multiple records)

- WELLNESS EXAM - EPSDT
- CLINICAL INTAKE
- DAY TREATMENT
- DIALYSIS
- EXAM BY WORKER
- HEARING EVALUATION
- LAB WORK
- MEDICAL EXAM
- MEDICATION REVIEW
- OCCUPATIONAL THERAPY EVALUATION

Practitioner: +

Location: +

EPSDT Items

EPSDT: Refers to the Early Periodic Screening, Diagnosis and Treatment program authorized by Medicaid. For the purpose of policy.

6. ALL data entry must occur within 5 days of the event.
 - a. **Scheduling Appointments:** When the appointment is scheduled it must be documented within 5 days of the report being scheduled AND not when the appointment occurred as 5 days is likely to have passed.
 - b. **Date of Appointment:** Results of this appointment must be entered within 5 days and “Attended” is used to track if the child attended the appointment.

TIPS

7. The creation date of the scheduled appointment is used to determine if an appointment was scheduled within 7 days per the statewide policy.
8. The initial EPSDT exam date is used to determine if an initial EPSDT occurred within 30 days from removal in the statewide policy. The removal date **MUST** be accurate in UNITY.
9. The ongoing EPSDT exam dates are used to determine if the exams are occurring within the screening age per the UPDATED statewide policy. Failure to document within 5 days will cause information to display out of compliance on some of the report data elements. Supervisors and Managers can distinguish between documentation issues and appointment compliance issues when reviewing the QA Summary report.
10. Supervisors and Managers can also distinguish which workers were responsible for the Initial EPSDT by reviewing the QA Summary report.
11. Multiple foster care episodes will impact the results in this report. Therefore, it is important to keep in mind the period under review because the report is designed to capture the first removal date. Change the Period under review if another foster care episode is desired to be reviewed.
12. **Corrections:** If the wrong type “Medical Exam” was previously selected just change it to “Wellness Exam-EPSDT” and select save. No SPUFI is needed. This will now allow appointments to display correctly in the report.

HOW TO DOCUMENT EPSDT IN UNITY

Display of UNITY data after the appointment is entered into UNITY for both Initial and Ongoing Wellness Exam.

Health Visits and Health Services Maintenance (No EPSDT required, child in home)

History

TYPE	APPOINTMENT DATE ↑	PURPOSE	RESULT	PRACTITIONER	IMMUN	NOTE EXISTS
MEDICAL-GENERAL	09-16-2003	WELLNESS EPSDT	ATTENDED		Y	Y
MEDICAL-GENERAL	08-12-2003	VISION EXAM	ATTENDED		N	Y
MEDICAL-GENERAL	08-11-2003	MEDICAL EXAM	ATTENDED		N	Y
MEDICAL-GENERAL	08-08-2003	MEDICAL EXAM	ATTENDED		N	Y
MEDICAL-GENERAL	09-10-2002	MEDICAL EXAM	ATTENDED		N	Y
MEDICAL-GENERAL	09-06-2002	MEDICAL EXAM	ATTENDED		N	Y
MEDICAL-GENERAL	09-03-2002	WELLNESS EPSDT	ATTENDED		N	Y

Create New Record

Appointment Date:* Type:* Result: Immunizations: [Add](#)