

The Great Lakes Therap Conference

May 19 & 20, 2021



**We welcome you to our
conference. We are excited
to have you here!**

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Learn about our easy-to-use EVV solution that will give your team the tools they need for state and federal compliance

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Ishya "Shae" Dotson
Assistant Director of
Person Centered Practices

“Person Centered Planning is one of the practices that helps people define their vision, path, support and resources necessary to make goal achievement easy and meaningful. Therap provides online tools that help capture the vision and story of a person's life while supporting individuals and their families to create a plan for quality support through the person-centered planning process.”

Employment Services

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Therap has brought a new style of courses in 2021

Our new training courses will offer a mix of videos, reading, screenshots, scenarios, and review questions. These new courses are available to users on Therap's Help and Support Site.



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Day 1 - 5/19/2021, Wednesday 21

Day 2 - 5/20/2021, Thursday 22



Check out our Booth in Exhibit Hall-A

Reduce Risk. Scale Expectations.

NFP is a leading insurance broker and consultant that provides employee benefits, specialized property and casualty, retirement, and individual private client solutions through our licensed subsidiaries and affiliates. Our expertise is matched by our commitment to each client's goals and is enhanced by our investments in innovative technologies in the insurance brokerage and consulting space.

NFP has more than 5,800 employees and global capabilities. Our expansive reach gives us access to highly rated insurers, vendors, and financial institutions

in the industry, while our locally based employees tailor each solution to meet our clients' needs. We've become one of the largest insurance brokerage, consulting, and wealth management firms by building enduring relationships with our clients and helping them realize their goals.

Recently NFP was named the 2nd largest retirement plan aggregator firm, as ranked by Investment News; the 6th largest US-based privately owned broker, the 5th largest benefits broker by global revenue, and the 8th best place to work in insurance by Business Insurance; the 10th largest property and casualty agency by total 2017 P&C revenue by Insurance Journal; the 13th largest broker of US business by Business Insurance; and the 13th largest global insurance broker by Best's Review.

For more information, visit [NFP.com](https://www.NFP.com).



Justin M. Brockie
Chief Operating Officer

Day 1 Plenary

Introductions - Tour of the virtual conference format. What is New in Therap

Starting time: 11:00 am EST

Day 2 Plenary

Therap's New Behavior Module

Starting time: 11:00 am EST



Michelle Saunders

Assistant Director of Business Development

Welcome to the Great Lakes Conference! We are glad you could join us and I hope that you find the event to be of value.

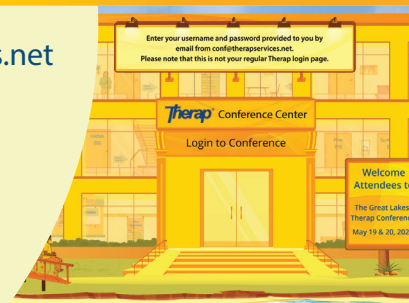
The past 15 months have proven to be a time of reassessing and reimagining. I have been impressed with the resilience of providers and feel that providers have jumped forward with the use of technology during this time (more out of necessity than choice).

As we continue to identify what the new norm will be moving forward, the same reimagining has been taking place at Therap. We look forward to sharing some of that information as well as lots of subject matter expertise over the next couple of days.

If there is anything I can do to assist to make your experience better, please let me know.

How do I login?

- Step 1: Find your username and password in an email from conf@therapservices.net
- Step 2: Then go to the Therap Conference Center by clicking the following link
<https://conference.therapservices.net/great-lakes/wp-login.php>
- Step 3: Enter your Conference username and password to login



I cannot find my login credentials, what do I do?

- Step 1: Your login name is your unique email address that you have provided while registration.
- Step 2: Your password can be found in the email. To find your password please search in your email inbox/spam with the subject - **Welcome to The Great Lakes Therap Conference, May 19 & 20, 2021 – Your ticket into the event**
- Step 3: If you still cannot find your password, try resetting your password on the Therap Conference Center login page by clicking on **Self-Password Reset** button and follow the instructions.

I forgot my password, how do I reset my password?

- Step 1: To reset your password, click on the **Self-Password Reset** link from the Therap Conference Center login page.
- Step 2: Enter your email address that was provided when registering for the conference and click on **Email my password reset link** button.
- Step 3: Click on the link provided in the email to generate a password. When you see the auto generated password, you can keep or create one for yourself and click on the **Reset Password** button.
- Step 4: If you are still having problems, click on the **Information Kiosk** for more information.



***This is not your regular Therap Login and password**



Click this green arrow and check our Exhibit Hall

Click this green arrow and check our Main Hall

Click this banner to see schedule

Say hi through the Chat



Click these green arrows and go down the hallway to these rooms

Click these green arrows and go down the hallway to these rooms

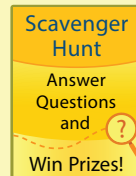
Click Quizzes to test your Therap knowledge

Click here to visit us in the Chat Lounge

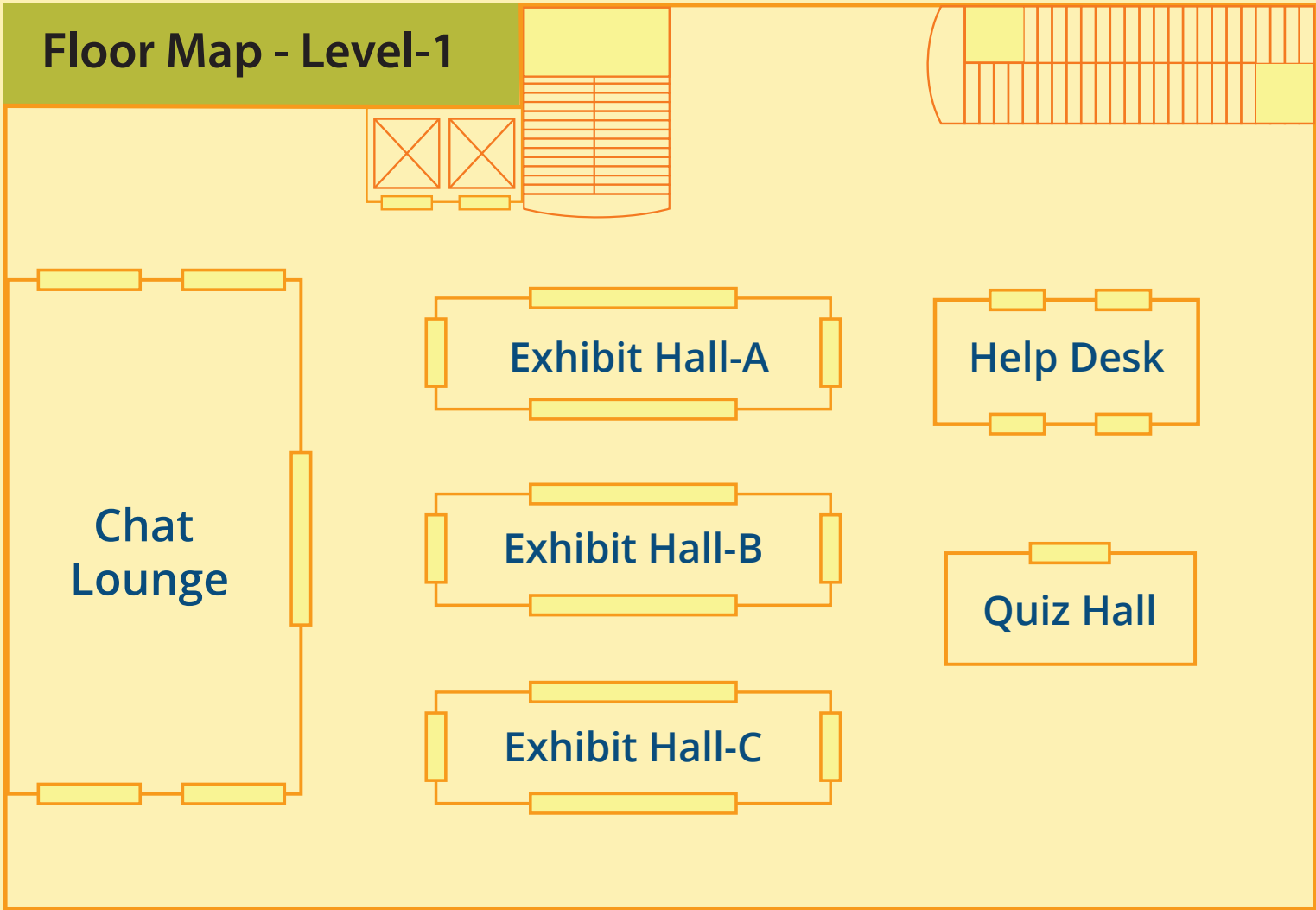
Click this door to visit our Exhibit Hall



Click here to participate in the Therap Conference Center Scavenger Hunt. Find the items, answer the questions and submit results for your chance to win prizes. Details and Rules are behind the banner.



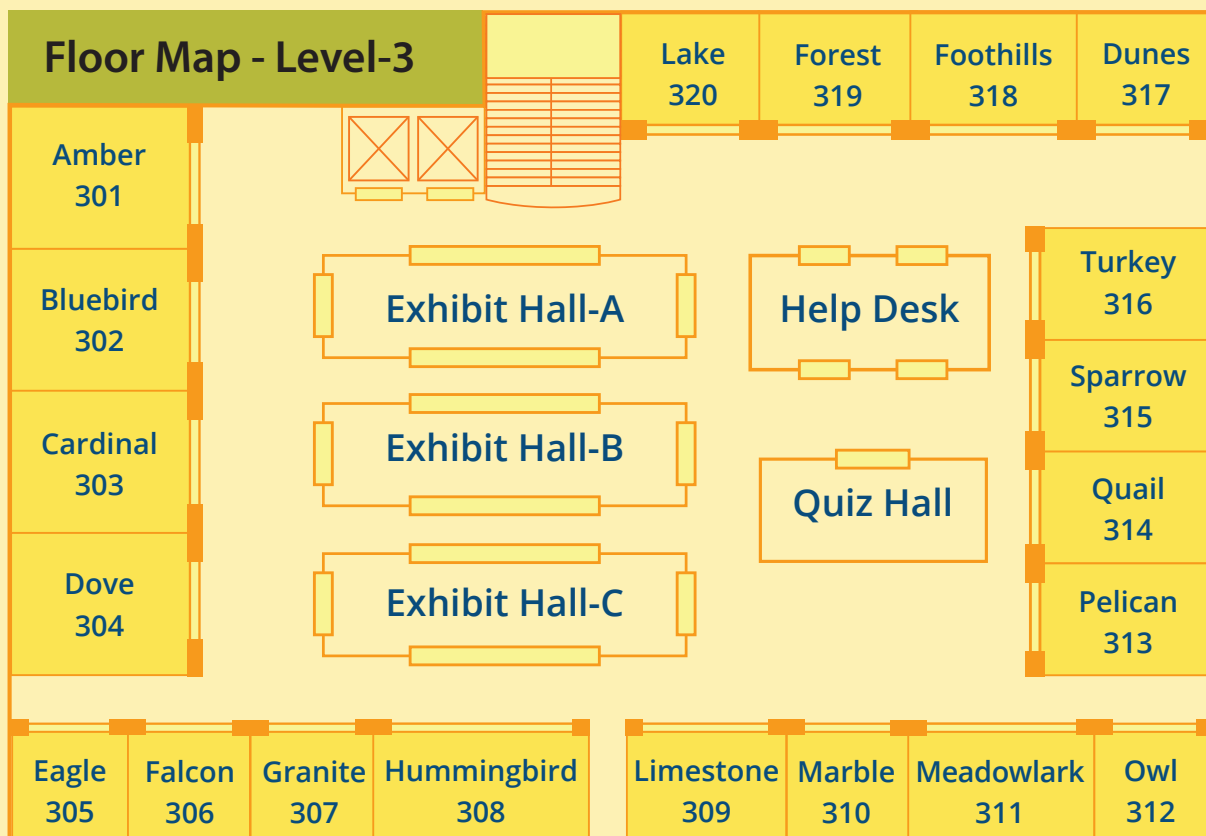
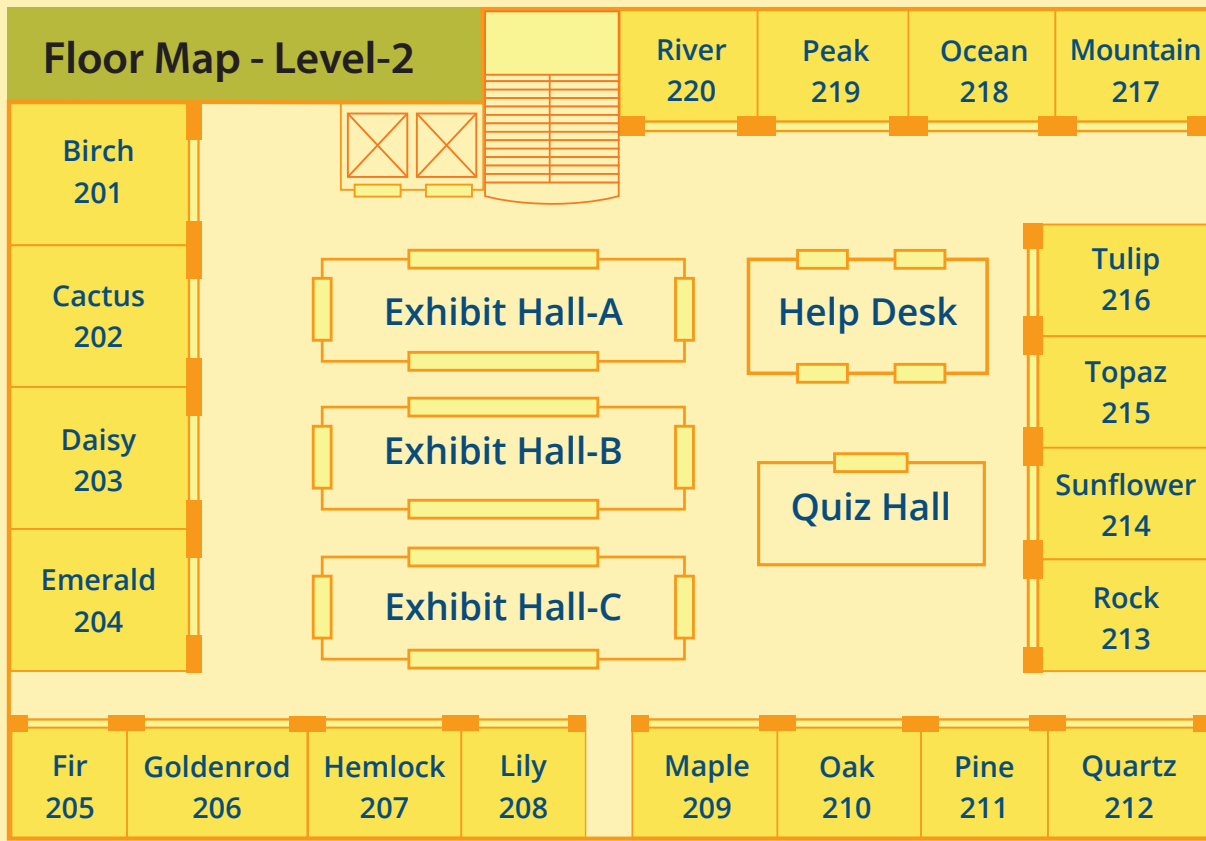
Click on Therap Conference Library to get the session materials



Check our Exhibitor/Sponsor
in Exhibit Hall-A



Therap[®] | *Person-Centered.
Data-Driven.*



Day 1, Wednesday - 5/19/2021



Kristen Thompson
Community Options, Inc.

What's in a Naming Convention?

Starting time: 2:00 pm EST

What is a naming convention and why are they important? Kristen will share her agency's experiences with naming conventions, where they have succeeded and where they have not. Learn the keys to a successful naming convention, which modules are worth the effort and which are not.

Day 2, Thursday - 5/20/2021



Josh DeZurick
Dungarvin National
Headquarters

EVV: Experience and Lessons Learned from a Multi-State Implementation.

Starting time: 11:45 am EST

Implementing Electronic Visit Verification can be complicated, but implementing in a multistate environment can bring additional challenges. This session will include a discussion surrounding strategies for implementation, difficulties along the way, and lessons learned.



Susan Lindsay
Mosaic National
Headquarters

Case Notes & Questionnaire Versatility: An alternative to ISP Programs.

Starting time: 12:30 pm EST

Case Notes can provide a variety of different uses compared to the ISP Program or other options for data collection within Therap. This session will include how to create a Questionnaire and Case Note, including the different options for answer types on the questionnaire. Examples of the versatility of the Questionnaire and Case Note will be shared as well as the different reporting options.



Michelle Young
Broadstep Behavioral
Health, Inc.

Priority List - Tracking and Managing your referrals!

Starting time: 1:15 pm EST

Join Michelle Young from Broadstep Behavior Health as she discusses how her organization uses Therap's Priority List module to track and manage referrals for existing admission as well as waitlists for programs.



Fayonne Johnson

Assistant Director of Interoperability



Sazzad Rafique

Chief of Software Design

Health Information Exchange

Therap's Health Information Exchange (HIE) module allows for the ease of exchange of health information between Trading Partners and agencies using the Therap suite of applications. With the help of this module, individual Admit/Discharge/Transfer (ADT) Messages can be sent by trading partners such as hospitals to agencies via HL7, allowing flexible tracking of individual admission, discharge, and transfer information.

Therap External Data Feed

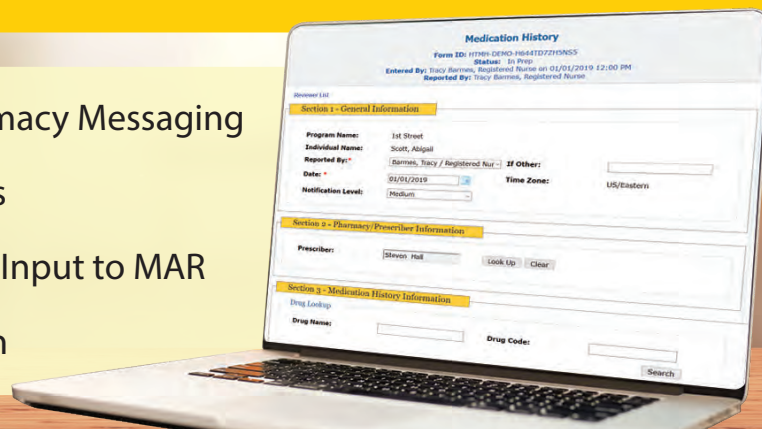
Therap's External Data Feed allows users to obtain, via Secure File Transfer Protocol (SFTP), accumulated data from various modules, such as Allergies, Appointments, General Event Reports (GER), Individual Data (IDF) and more. The data feed files that Therap provides are in CSV file format and are arranged in a specific directory structure. Each provider directory has its own data files that users can access and retrieve. Agencies are able to extract their data using the files to integrate into their own systems or Business Intelligence platforms. Therap also connects to Health Information Exchanges using these data feeds.

The current Therap External Data feed includes:

- Case Notes
- Employment History
- General Event Reports (GER)
- Health Tracking
- Individual Demographic Form (IDF)
- Individual Medical Information
- Program Enrollment

Pharmacy Interface

- Reduce Transcription Errors with Direct Pharmacy Messaging
- Create Medications from Pharmacy Messages
- Save Time between Medication Delivery and Input to MAR
- Track RX Numbers and Prescriber Information





Therap Global is working with a range of organizations including therapy centers, schools, disability empowerment agencies, vocational training agencies, and more stakeholders around the world. Our mission is to enhance the quality of support that people receive by introducing Therap's documentation system, as well as spreading best practices in person-centered, data-driven documentation.

Therap Global currently works in countries including Bangladesh, Nigeria, Philippines, Kenya, Nepal, South Africa, Indonesia, Uganda, Ghana, and Tanzania. We host weekly workshops and round-tables for users to share their experiences and tips for adjusting to challenges in communities across the world.

Check out our booths in Exhibit Hall-B

- St. Philomena School, Philippines
- Therap Global
- Therap Canada
- Little Wonder, Bangladesh
- Dynamic Occupational Therapy LTD, Kenya
- Self-help Group for Cerebral Palsy, Nepal
- Autism Therapy and Behavior Learning Center, Tanzania
- Special Children Special People, Uganda

User Testimonials



Moses Walusimbi

Founder and Executive Director of Programs
Special Children Special People, Uganda

“Therap is really nice and helpful. The system can help administrators to see the childrens’ progress and also monitor what the teachers and therapists are doing with the children.”



Mahmuda Akter Rubi

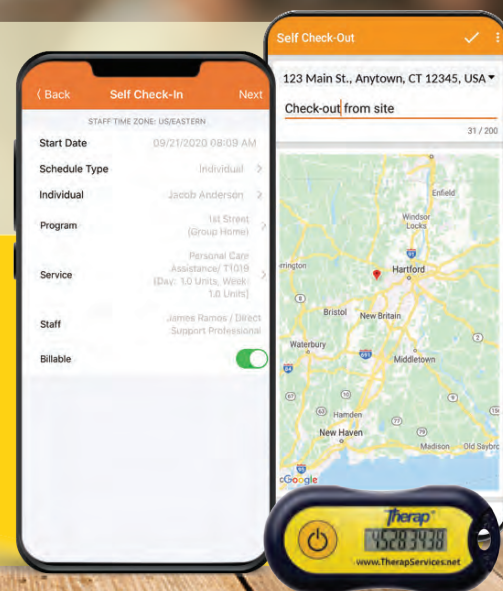
Senior Assistant Teacher
Blue Bird Foundation, Bangladesh

“All the documentation of our organization is being done in a paperless way by using Therap and the administrator can easily monitor all the information from anywhere.”

Electronic Visit Verification (EVV) Solutions

Real-time Access for Schedulers & Staff

Your team can use Therap's Scheduling & EVV, along with other system features to address compliance, communication, documentation, reporting, billing, and more.



Learn about our easy-to-use EVV solution that will give your team the tools they need for state and federal compliance:

- Capture Documentation at the Point of Service
- Create Electronic Billing Claims from EVV Data
- Single-Swipe Check-In/Out on Android & iOS
- Voice/Signature Verification
- Offline Functionality
- Direct Integration with Service Documentation
- Applicable for home and community-based services



Meet our EVV Experts



Stephanie Masters Norton
Senior Training & Implementation Specialist



Chelsea Lloyd
Training & Implementation Specialist



Michelle Saunders
Assistant Director of Business Development



Jeff Covington

Director of State Implementation



Leah Sewell

Assistant Director of State Implementation



Barry Pollack

Region Director

Therap has the expertise to meet the diverse data needs of public human services agencies.

Therap supports more than 20 state contracts; meeting the data management needs of divisions who manage Medicaid Waivers, State Plans, I/DD Services, Aging Services and other Long-Term Services & Supports (LTSS). Therap's State Solution includes: Intake, Assessment, Level of Care, Provider Management, Case Management, Electronic Visit Verification, Waiver Management, Authorization, Health Tracking and ISP-Outcome Tracking, which is integrated with provider documentation, linking service records with billing. Therap provides the functionality to control and manage the central individual record and the access to it. Therap's comprehensive data management system, coupled with our best in class support, eliminates the need for states to manage multiple internal/external IT systems or create a support infrastructure.

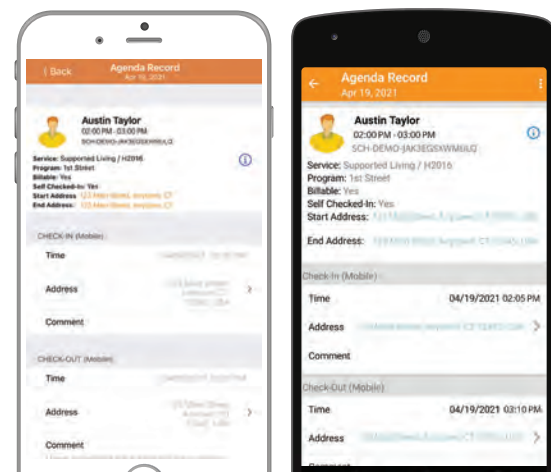
#1 Data-Driven Solution

Support & manage internal program processes, service delivery, and billing with a system that is widely-adopted across the country and contracted by 20+ states and local government.



Solutions to Improve Program Management, Performance Outcomes and Communications

- Federal, State and Local Compliance
- Manage HCBS Waivers and other Programs
- Incident Management & Risk Analysis
- Provider Management and Oversight
- Analytic Performance Dashboards featuring Data-Driven Outcomes
- Federally-Compliant EVV Solutions





Jason Laws

Director of Quality and
Data Initiatives



Catherine Hauser

Large Provider Project Manager

At Therap, we want our users to have the tools and understanding to go beyond simple data collection to the actual application and analysis of data to improve the lives of the individuals they support. We believe that harnessing the power of the data that organizations are already collecting is a crucial element to increasing the overall value and quality of services provided.



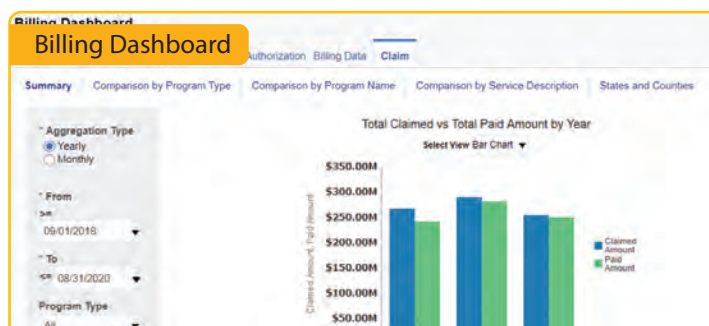
Quality Assurance, Compliance and Audit Solutions

Meaningful, Measurable, Manageable

Configurable options to assess organizational performance and comply with accreditation and regulatory standards.

Streamline documentation review, reporting, and compliance activities via:

- Assessment of outcomes at the individual, program, and provider level
- Real-time access for managers, administrators, and agency-authorized third party reviewers
- Full audit trail of all activity including date/time stamp and electronic signature
- Generation & validation of billing data directly from service documentation
- Analytic Dashboards for Demographics, Incident Reports, Data-Driven Outcomes, Billing, & more



Comprehensive e-Solution for Person-Centered Services



Ishya "Shae" Dotson

Assistant Director of
Person Centered Practices



Plan. Support. Achieve.

Support Plans and Outcome Tracking

- Document the Planning Process for Individual-Based Services
- Develop Goals, Objectives & Assessments with custom Scoring Methods
- Track Progress & Generate Reports for Review & Analysis

Use our comprehensive suite of online tools to support individuals, families, and your team's efforts to helping people reach their good life.

Planning Tools Available for Case Management Teams, States, Providers, Individuals & Families:

- Support Individuals to Create a Shared Vision for a Good Life.
- Discover, Explore, & Plan Meaningful Supports.
- Identify Personal Goals & Strategies to Achieve them.
- Configurable Options to Ensure State & Federal Compliance.
- Analytic Dashboards for Goal Acquisition and Data Driven Outcomes.
- Charting the LifeCourse tools are available to assist in the planning of integrated support, vision, and other life domains to attain the desired outcomes of the Individual.





Kevin Dierks

Regional Director-Pacific Rim



Caiti Woodburn

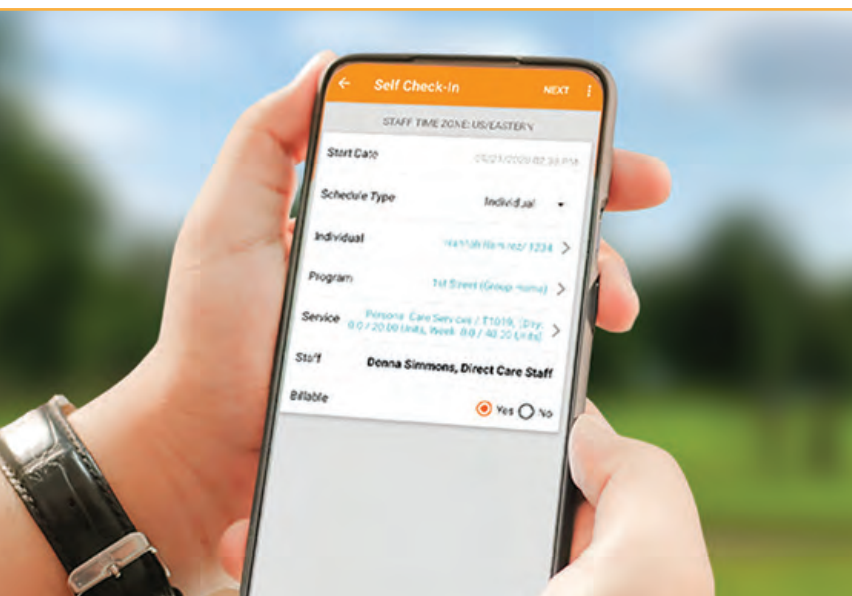
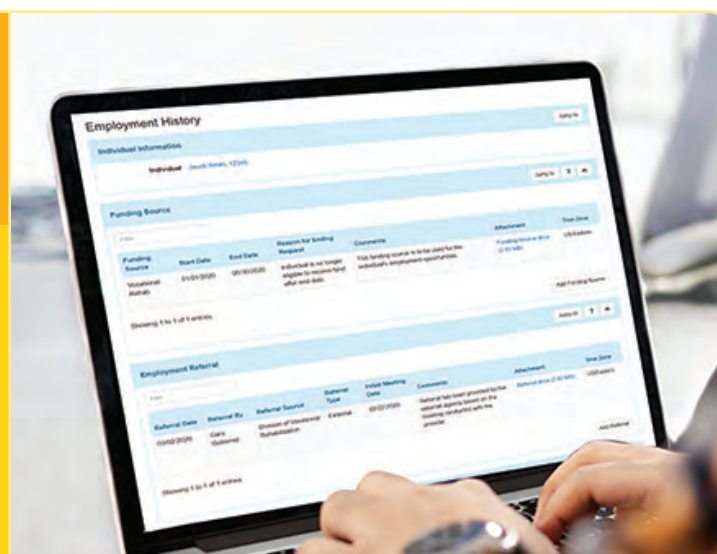
Senior State Training & Implementation Specialist

The Employment History module allows for recording comprehensive employment history for individuals in one place. It is utilized in tandem with employment service data collected on individualized supports, backed by billing service authorizations and enhanced by measurable outcomes reporting.

e-Solution for Community Employment

Employment First Tools

Maximize productivity by giving employment teams the tools to document work experience and job details at the point of service.



Functionality includes:

- Job Discovery & Career Planning
- Maintain a Job Bank
- Track Applications & Interviews
- Manage Milestones
- Track Support Provided



Maureen Noonan

Director of Customer Support



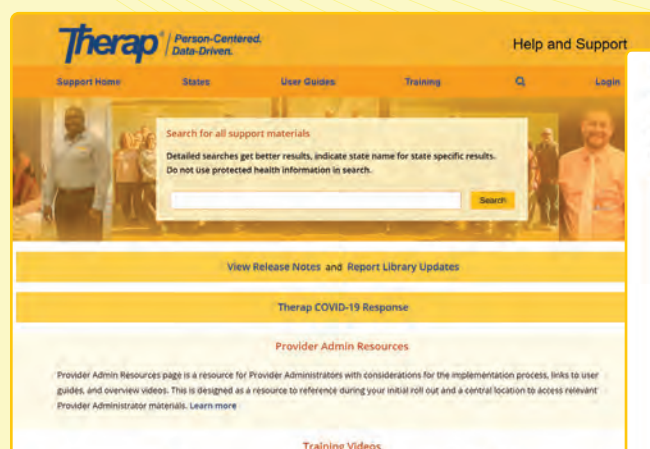
Letisha Ulmer

Deputy Director of Quality Assurance

Therap provides agencies with various training, support and information resources, from the very first stages of implementation to day-to-day usage. These include a broad array of training options, support materials, and technical assistance; all designed to cater to different learning styles and user needs. Therap staff regularly connect with agencies and State offices across the country to provide necessary training and ongoing support.

Therap Training Your Way - On demand support , 24/7

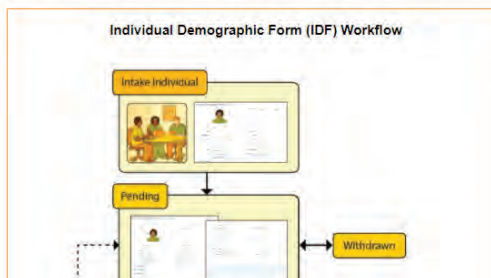
- Help and Support home page
- Module overview pages which includes user guides or step by step instructions, videos, quick guides and FAQ's
- Live and recorded webinars
- Conferences, whether State, Regional or National
- Live help where you can speak to a "live" Therap employee who will follow you through until issue is resolved or will route you to a specialist if needed
- My issues where you can communicate problems, suggestions, feedback and more!



Individual Demographic Form (IDF) Overview

The Individual Demographic Form (IDF) is designed to help users maintain essential information such as race, religion, SSN, Medicare, Medicaid number, admission date, program enrollment date, contacts, etc. for individuals, along with their basic identification details such as name, date of birth, physical features, ID numbers, etc. Users are able to attach two photographs and scanned documents in this module, and store them in a HIPAA compliant manner.

Individual Demographic Form (IDF) Workflow

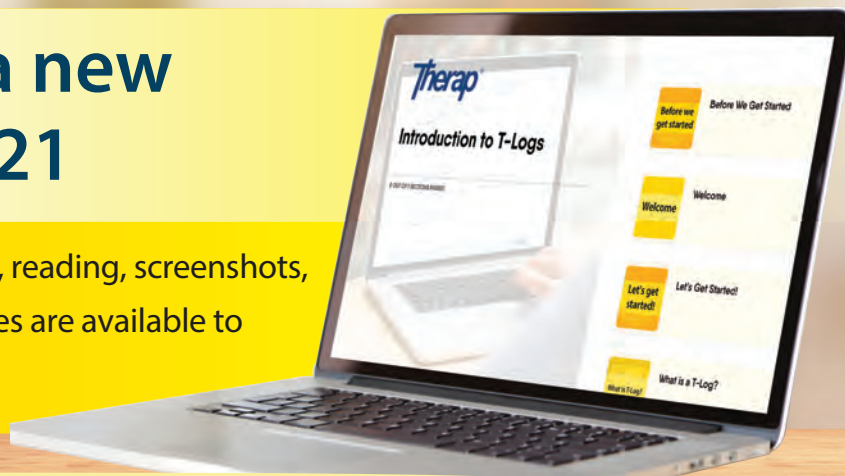


User Guides

- IDF Provider Configuration
- Intake and Admit Individuals
- Search Individuals
- Edit Sections of the Individual Demographic Form (IDF)
- Enroll, Discharge, and Re-Enroll an Individual to Programs
- Add or Remove Individuals to a Program
- Create and Update Custom Fields

Therap has brought a new style of courses in 2021

Our new training courses will offer a mix of videos, reading, screenshots, scenarios, and review questions. These new courses are available to users on Therap's Help and Support Site.



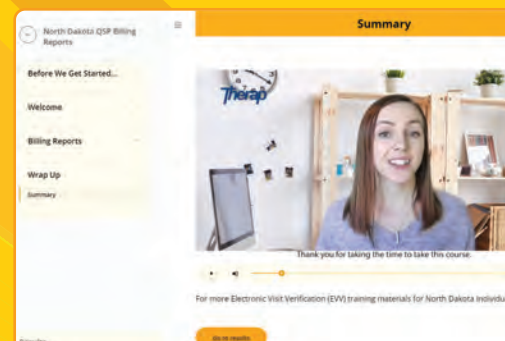
Our Training Courses are now better than ever



New Quiz and Testing Options



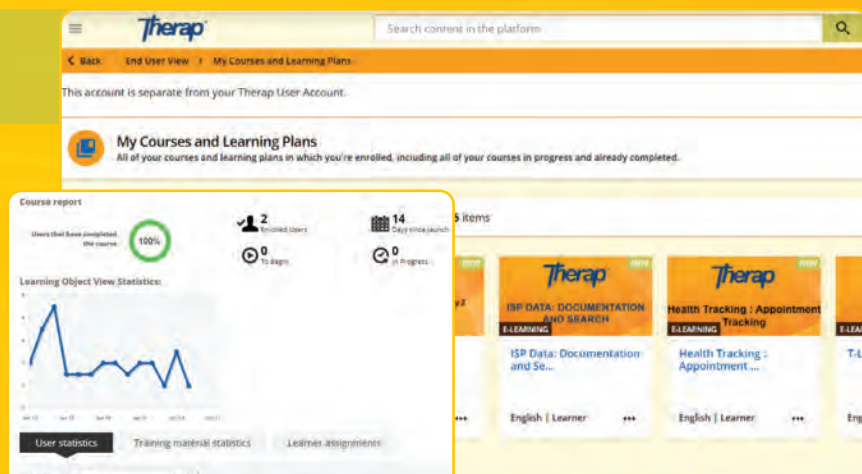
New Dynamic Content



New Practice Scenarios

Therap Academy

If your agency is interested in assigning training courses, tracking progress, and the ability to run reports, we have Therap Academy that can help you. Ask us for more information!



Check our website for more details



Nadine Sturgess

Director of Billing and
Special Projects



Susan Allen

National Business Development
Billing Consultant

Therap's Electronic Billing is a complete Revenue Cycle Management Solution for Intellectual and Developmental Disabilities Service providers. Our solution is fully integrated with the Therap Suite of Applications, making it possible to have service delivery documentation to support each billing unit.



Seamless Billing Workflows

Effective tools to streamline billing from direct service documentation to claim reconciliation. Therap's billing platform is used by service providers, agencies, counties, and states.

Our system offers the following and more, including accounting software integration:

- Staff can use the EVV Billing feature to process approved service hours recorded from check-in and check-out times. Billing data generated from EVV information can be used to submit claims
- Track Authorizations with Services Caps and More with Analytic Billing Dashboards
- Notifications of Utilization and Expirations & Extensive Reporting Tools
- Audit ready by Using Authorized Service Notes to Generate Billable Data
- Configurable Billing Rules to Support a Variety of Services & Settings



All times Eastern Standard Time if not noted otherwise

Preliminary Schedule : Subject to Change

Time	Session	Scheduling / EVV	New & Prospective Therap Users	Nursing / Health Care	Billing with Therap	Quality Assurance	State Specific Sessions
DAY 1		Wednesday, May 19, 2021					
10:30 AM - 11:00 AM (EST)		Therap Conference Center DOORS OPEN. Login Early!					
11:00 AM - 11:40 AM (EST)	1	Day 1 Plenary: Welcome / Introductions. Tour of the virtual conference format. What is New in Therap? Justin Brockie - Therap's Chief Operations Officer Room: 201 / Birch					
11:45 AM - 12:25 PM (EST) (40 Min)	2	EVV Overview: Review of what EVV is and Therap's corresponding solution RM 202 / Cactus	Overview of Therap modules for new customers: This session is for new or prospective customers and will show several of the starter modules for use with Therap RM 203 / Daisy	Health Modules - Part 1: Basic Health Tracking modules (Seizure tracking, Appointments, Intake/Elimination, Medication History, Health Care report) RM 204 / Emerald	Billing Overview RM 205 / Fir	Module Based Reporting Options - Part 1: Review of module based reports for T-Logs, GER, Health Tracking, ISP Program/Data, ISP Data Reports RM 206 / Goldenrod	WI User Group RM 207 / Hemlock
12:30 PM - 01:10 PM (EST) (40 Min)	3	EVV: How to set up Therap's Scheduling/EVV module and Sandata Interface - Part 1 RM 302 / Bluebird	Getting Started with Therap: T-Logs, GERs, Health Tracking, SComm, Individual Home Page RM 303 / Cardinal	Health Modules Part 2: Health Plus: Care Plans, eCHAT, Orders, Individual History, Health Passport, Consents, Health Screening RM 204 / Emerald	Billing Setup RM 305 / Eagle	Module Based Reporting Options - Part 2: Review of module base reports for MAR, Health Plus modules, Individual Support Plans, Personal Finance, Activity Tracking RM 206 / Goldenrod	PA User Group RM 307 / Granite
01:15 PM - 01:55 PM (EST) (40min)	4	EVV: How to set up Therap's Scheduling/EVV module and Sandata Interface - Part 2 RM 302 / Bluebird	ISP Programs, ISP Data, ISP Reports - Part 1 RM 203 / Daisy	Medication Administration Record and Pharmacy Interface - Part 1 RM 304 / Dove	MODC: Methods of Data Collection for Billing RM 205 / Fir	Quality Assurance & Data Auditing: Using the Report Library RM 306 / Falcon	OH User Group RM 207 / Hemlock
02:00 PM - 02:40 PM (EST) (40 min)	5	Trouble Shooting with EVV and the Sandata Aggregator RM 202 / Cactus	ISP Programs, ISP Data, ISP Reports - Part 2 RM 203 / Daisy	Medication Administration Record and Pharmacy Interface - Part 2 RM 304 / Dove	Generating Billing Data and QA Process RM 305 / Eagle	Excel Workshop - Part 1: Search & Export, Filtering, Conditional Formatting Pivot Tables, Charts/Graphs RM 206 / Goldenrod	User Presentation: What's in a Naming Convention? RM 307 / Granite
02:45 PM - 03:25 PM (EST) (40 min)	6	Creating your QA Process with EVV RM 302 / Bluebird	Case Note & Questionnaire RM 303 / Cardinal	Risk Assessments in Therap RM 204 / Emerald	Claims submission, Reconciliation & Reporting RM 205 / Fir	Excel Workshop - Part 2: Combining Columns Using Advanced Filters Multiple Pivot Tables Using Slicers Displaying Data for presentations RM 206 / Goldenrod	Illinois User Group RM 207 / Hemlock
03:30 PM - 04:00 PM (EST)	7	Thank you for coming! Chat and the Exhibit Hall will remain open for the next 30 minutes. Share your feedback on the new venue. Ask additional questions.					

This is a tentative schedule put up for illustration purposes. Times and Sessions are subject to change and/or cancellation.

Last update: 05/21

All times Eastern Standard Time if not noted otherwise

Preliminary Schedule : Subject to Change

Time	Session	Scheduling / EVV	New & Prospective Therap Users	Nursing / Health Care & Misc	Billing with Therap	Quality Assurance	State Specific Sessions
DAY 2		Thursday, May 20, 2021					
10:30 AM - 11:00 AM (EST)		Therap Conference Center DOORS OPEN. Login Early!					
11:00 AM - 11:40 AM (EST)	8	Day 2 Plenary: Justin Brockie - Therap's Chief Operations Officer Therap's New Behavior Module Room: 201 / Birch					
11:45 AM - 12:25 AM (EST) (40 Min)	9	Review of all things EVV RM 202 / Cactus	Person- Centered Planning Options in Therap Part 1: Personal Focus Worksheet, Individual Support Plan, ISP Agenda, Charting the LifeCourse RM 203 / Daisy	Nursing User Group/ Panel Discussion RM 204 / Emerald	Billing in Pennsylvania RM 205 / Fir	Business Intelligence for Demographics, GERs, Health Tracking, Billing. Create meaningful aggregate, Year over year data reports RM 206 / Goldenrod	User Presentation: EVV: Experience and Lessons Learned from a Multi-State Implementation RM 207 / Hemlock
12:30 AM - 01:10 PM (EST) (40 Min)	10	EVV Reporting Options RM 302 / Bluebird	Person- Centered Planning Options in Therap Part 2: Personal Focus Worksheet, Individual Support Plan, ISP Agenda, Charting the LifeCourse RM 203 / Daisy	Community Based Documentation: Using Therap's Mobile Applications to capture services on the go! RM 304 / Dove	Billing In Indiana RM 305 / Eagle	Data Driven Outcomes (DDO) - Part 1 PUT YOUR ISP DATA TO WORK! Generating aggregate Outcome reports. Using DDO for accreditation reviews. Drilling down to other service delivery levels RM 306 / Falcon	User Presentation: Case Notes & Questionnaire Versatility: An alternative to ISP Programs RM 307 / Granite
01:15 PM - 01:55 PM (EST) (40min)	11	EVV User Group RM 202 / Cactus	Therap COVID Response Tools for Documentation GER/ Incident Reporting Billing EVV RM 303 / Cardinal	Employment History. Referrals, assessments, milestones, career plans, training & coaching, application, interview & job details. Maintain your "Job Bank". Overview of the available reports RM 204 / Emerald	Billing In Illinois/ Michigan RM 205 / Fir	Data Driven Outcomes (DDO) Part 2 PUT YOUR ISP DATA TO WORK! Generating aggregate Outcome reports. Using DDO for accreditation reviews. Drilling down to other service delivery levels RM 306 / Falcon	User Presentation: Priority ListTracking and Managing your referrals! RM 207 / Hemlock
02:00 PM - 02:40 PM (EST) (40 min)	12	Final EVV Questions! RM 302 / Bluebird	Re-Imagining Training & Support for Today's 'New Normal'. Therap's Support Team has been developing new support/training methods. We share. You comment! RM 203 / Daisy	Therap's Incident Management Resources: GER, GER Resolution and Reporting RM 304 / Dove	Billing in Ohio RM 305 / Eagle	Questions/Wrap up for QA and Reporting Processes: Bring all outstanding reporting questions! RM 206 / Goldenrod	Indiana User Group RM 307 / Granite
02:45 PM - 03:25 PM (EST) (40 min)	13	Therap's New Behavior Tracking Module RM 202 / Cactus	Q&A with the Therap team: Bring all remaining questions RM 303 / Cardinal	Nursing/Medical Personnel Wrap up RM 204 / Emerald	Billing in Wisconsin RM 205 / Fir	Final Billing Questions RM 306 / Falcon	Final Questions regarding Training and Implementation of Therap RM 207 / Hemlock
03:30 PM - 04:00 PM (EST)	14	Thank you for coming! Chat and the Exhibit Hall will remain open for the next 30 minutes. Share your feedback on the new venue. Ask additional questions.					

This is a tentative schedule put up for illustration purposes. Times and Sessions are subject to change and/or cancellation.

Last update: 05/21

See You at the 2022 Therap National Conference

February 1 - 2 - 3

Registration open

