



# **Social Services Block Grant Client File Documentation Procedures**

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## I. Purpose

This document explains the procedures to be used for the completion of documentation required for clients' files.

## II. Definitions

A glossary of terms for the document

Term	Definition
<b>ADS</b>	Adult day services
<b>APS</b>	Adult Protective Services
<b>CMS</b>	Case management system
<b>SAN</b>	Strengths and needs assessment
<b>SDM</b>	Structured Decision Making Tool
<b>Units</b>	For adult day services, a unit of service is equal to one (1) full or partial day of care provided for one individual.  For personal support services, a unit of service is equal to one (1) employee hour of service provided on behalf of one individual.

## III. Procedure

### Strengths and Needs (SAN) and Risk Assessments

#### Adult Day Services (ADS)

ADS uses the Risk Assessment form, also known as the risk factor matrix, in the case management system (CMS) for all clients. Risk Assessments are due:

- at least annually upon recertification and
- when the client is available upon case closure.

If the CMS is down, the [SSBG Risk Factor Matrix](#) form should be used.

#### Personal Support Services

Personal support services replaced the Risk Assessment with the SAN effective April 2024. This assessment is intended to inform the client's Service Plan. The SAN is due:

- upon case open,
- no less frequently than every six (6) months while the case is open, and
- when the client is available upon case closure.

**Notes:**

- SANs are not required on Specific Assistance Only cases.
- Personal Support cases that were open prior to the April 2024 implementation of the Structured Decision Making Tool (SDM) used and will continue to use, the Risk Assessment.
- The SDM SAN form can be obtained from APS Grants Staff.