How to Make Retro Updates to POC
Plan Lines and Service Prior Authorizations
POC “Super User” Role – CDDP/Brokerages
(updated 10/13/16)

eXPRS allows specific users with the POC Super User role to make retro-active updates to a POC Plan Line and/or Service Prior Authorization (SPA). These retro-active updates will help facilitate edits to POC authorizations with hopefully little to no voiding of SD billings or claims.

CDDP and Brokerage users with the POC Super User role can:
• make updates to the UNITs on an entire Plan Line or SPA
• SPLIT a Plan Line or SPA into smaller date ranges, and then make Unit updates.

➡ All RATE updates must be requested from ODDS.

Key things to remember about making retro-active POC updates:
• Unit increases must be within the hours/units limit in the levels above what is being updated.
• Unit decreases cannot be decreased to a limit lower than what has already been claimed against the authorization.
• Plan Line and/or SPA date splits must align with breaks in claim dates.
• If you need to update units AND do a date split, do the date split first, then the unit updates, as needed.

To make a retro-active update to INCREASE UNITS on an entire POC Plan Line or SPA:

1. Login to eXPRS. If users have more than one organization login option, they will need to be logged in under the Local Authority (for CDDPs shown below)
or **Contractor** (for Brokerages) Organization role.

2. Using the left-hand menu, **Plan of Care → POC → Update POC**,  

3. In the **Find Plan of Care** page, search for the POC that needs to be updated. Users can search by the individual’s prime or the Plan ID to easily find the POC needed.
4. From the results list returned, click on the blue POC ID number for the POC to be updated.

5. With the Plan of Care open, search for the service Plan Line or SPA that needs updated. Click **EDIT** next to the Plan Line or SPA to open it for editing. In this example, we will edit the Units on the Plan Line.

6. With the Plan Line open for editing change the unit value to the new desired value, and then click **SAVE** to save changes.
7. Additional unit changes can be made to the SPAs under the Plan Line, if needed.

To make a retro-active update to **DECREASE UNITS** on an entire POC Plan Line or SPA:

Decreasing units is also allowed, however some analysis will be necessary to determine if the new, lower unit value desired will work. **Units on a Plan Line or SPA cannot be decreased to a value lower than what has already been billed & claimed.**

1. Follow the steps #1 – 5 above to find the Plan Line or SPA that needs edits. In this example we will make a decrease to the **circled SPA** below.

2. Right click on the blue SPA ID number to open the SPA in a new tab. Then expand the **Service Delivered** section to show what has been billed against this SPA already.

   ➡️ **Pro Tip:** Users can export the Service Delivered billings list from this section to an Excel document to make calculations easier, if needed.

   The above SPA is authorized at a monthly amount, so users will need to determine what has been billed for each month in the SPA so far. Users will need to include SD billings in **approved, pending** and **suspended** status for this calculation.
In the above example, the reduction of units cannot be made below 50 miles/month, as that is the most that has been billed so far against this authorization.

3. Unit reductions lower than what has been billed will trigger an error message.

If a reduction lower than what has been billed (ex: 50 miles/month) is needed, the some Service Delivered billings will need to be voided first.
4. With the correct lower unit value determined, that change can be made and saved.

![Image](image1.png)

**To make a retro-active Date SPLIT on a POC Plan Line or SPA:**

Date splits will divide a Plan Line or SPA into smaller date range segments. After which, UNIT or RATE updates can be made to a specific date range, and not the entire, original Plan Line or SPA.

**Key things to remember about making retro-active Date Splits:**

- If you SPLIT a Plan Line, **all the SPAs** under that Plan Line will also be split along that same date.

- Date SPLIT breaks must align with date breaks in any approved claims that are already in place against the Plan Line/SPAs.
  - Date splits at the end/beginning of a calendar month will always work; the system breaks claims by these dates automatically.
  - For SPAs that authorize PSWs paid by the FMAS payroll vendor, date splits that align with the pay periods will also work (15th/16th and end/start of month).

- If there is NO date split for a Plan Line, the SPAs under it can have different date splits.

1. Determine the Plan Line or SPA to be split. In this example we will split the **circled SPA** below.

![Image](image2.png)
2. Users will want to determine if the date they wish to split the SPA by will work by verifying if the split date aligns with a date break in any claims. In this example, we will split the SPA as of **5/15/2016**. There are 2 ways to do this claims analysis.

- Similar to Unit Decreases, right click on the SPA ID to open it in a new tab, then expand the **Service Delivered** section to see what has been billed against the SPA so far. Users will then need to look at the **Claim ICN numbers** to determine on which date the ICN numbers change indicating a date break in claims.

  ![View Service Prior Authorization](image)

  **ICN numbers change here, so a split between 5/15 & 5/16 will work.**

  ![Highlight the Auth ID & Copy.](image)

  **OR**

- From the POC authorization, highlight the SPA ID # and click **COPY**.

  ![Highlight the Auth ID & Copy.](image)
3. Then from the left hand yellow menu, go to **Claims ➔ View Claims** and right-click to open in a new tab or window.

4. In the **Claims Search** page, paste the Auth ID # in the **PA Adj #** field and select “Fee for Service” from the **Type** dropdown menu. Then click **FIND** to search for claims that are already processed against the SPA.

5. When the claims list returns, you can verify the date breaks for the claims and if the split date you wish to use will align.
In the examples above, the ICN numbers change between 5/15/2016 and 5/16/2016. This means that a date split on the 15<sup>th</sup>/16<sup>th</sup> will work without having to correct/void any claims!

6. With the split date determined, return to the SPA in the POC and click EDIT to open the SPA for changes.

7. Change the end date on the SPA to the new END DATE that applies to that SPA. In this example, the new End Date = 5/15/2016 – the same end date as the claim date break. Click SPLIT to split this SPA at that date.

The system will then end that SPA as of that new end date, create a new SPA with a Start Date the next date, and move any billings/claims that are after that date break to be under the new SPA created.
8. When the process completes, users will see the new SPA.

9. If UNIT updates are needed to either SPA (before or after the date split), users can click EDIT and update the units as needed (following the instructions above).

10. If RATE updates are needed to either SPA, then a request to ODDS must be made to make the applicable RATE updates.

11. If a specific SPLIT date is needed and there is a single claims crosses that desired split date, a request to ODDS must be made to correct that single claim before the SPLIT can be made.