

## How to Add Documents as Attachments to a Plan of Care (POC)

(11/14/2017)

There is a feature in eXPRS Plan of Care (POC) that enables the authorizing CDDP, Brokerage or CIIS Program to upload and attach supporting documents to the POC. Examples of the types of documents that a CME may wish to include in an individual's POC might be a copy of their ISP, their Needs Assessment, an exception approval memo, or other documentation related to the POC and services authorized within.

POC will accept files in various formats, such as Word, Excel or PDF. And while an unlimited number of documents can be attached to a POC, there is a size limit for each individual file/document uploaded and attached. ***That document file size limit is 4MB*** (megabytes).

Uploading and attaching a document to a POC can be done at any time; when first creating the POC or later after a POC that has been established.

A user must have the appropriate assigned **POC Update permissions** to do this POC document upload/attachment work in eXPRS.

### To upload and attach a document to an individual's POC:

1. Login to eXPRS. Users will need to select either the Local Authority (for CDDPs), Contractor (for Brokerages), or State (for State or CIIS staff) for their Organization/Program Area option when logging in to do this work.

#### CDDP:

**Login**

Password accepted. Choose your organization and/or program area for this session.

You are in the Practice environment

<b>Login Name:</b>	<input type="text" value="loginname"/>
<b>Password:</b>	<input type="password" value="....."/>
<b>Organization/Program Area:</b>	<input type="text" value="County (Local Authority)"/>

[Forgot your password?](#)

## Brokerage:

**Login**

Password accepted. Choose your organization and/or program area for this session.

You are in the Practice environment

<b>Login Name:</b>	<input type="text" value="loginname"/>
<b>Password:</b>	<input type="password" value="....."/>
<b>Organization/Program Area:</b>	<input type="text" value="Brokerage (Contractor)"/>

[Forgot your password?](#)

## State/CIIS staff:

**Login**

Password accepted. Choose your organization and/or program area for this session.

You are in the Practice environment

<b>Login Name:</b>	<input type="text" value="loginname"/>
<b>Password:</b>	<input type="password" value="....."/>
<b>Organization/Program Area:</b>	<input type="text" value="(State)"/>

[Forgot your password?](#)

2. Search for the Plan of Care that needs documents attached. From the left-hand yellow menu, click on **Plan of Care** → **POC** → **Update POC**.

<b>Client</b>	▶ <b>Home</b>
<b>Provider</b>	▶ <b>My Notifications</b>
<b>Contracts</b>	▶
<b>Prior Authorization</b>	▶
<b>Plan Of Care</b>	▶ <b>POC</b>
<b>Claims</b>	▶ <b>Service Delivered</b>
<b>CM/PA TCM Billing</b>	▶ <b>Travel Time</b>
<b>Liabilities</b>	▶ <b>Reports</b>
<b>Reports</b>	▶
<b>Financial Maintenance</b>	▶

**Filtered By Type** All Notification Types

▶ View POC
▶ Create POC
▶ Update POC

NO matching notifications were found


3. In the **Find Plan of Care** page, search for the POC that needs to have attachments added.  
→ **PRO TIP:** Searching by the individual's prime number will be the easiest search method.

Enter the individual's **Client Prime** in the corresponding field, then click **FIND** to search for POCs for that individual.

**Find Plan of Care**

Note: If criteria entered results in more than 20,000 rows, data returned will be truncated. You may need to narrow your search criteria to return a smaller dataset.


Plan ID:

Client Prime:  

Service Element: All

Plan Begin:   Overlap  Contain  Exact

Plan End:   Overlap  Contain  Exact

DHS Contract Num:  

Status:


Max Displayed: All

- From the results list, click on the **blue Plan ID** number to open the individual's POC that needs documents attached. This will likely be the individual's most current POC. Verify you are opening the correct POC needed by reviewing the **Plan Begin** & **Plan End** dates.

**Find Plan of Care**

Note: If criteria entered results in more than 20,000 rows, data returned will be truncated. You may need to narrow your search criteria to return a smaller dataset.


Plan ID:

Client Prime:  

Service Element: All





Plan Begin:   Overlap  Contain  Exact

Plan End:   Overlap  Contain  Exact

DHS Contract Num:  

Status:

Max Displayed: All

Export options:  CSV |  Excel |  PDF |  RTF

Plan ID	Client Prime	Client Name	DHS Contract Num	Plan Begin	Plan End	Status
31****66	xyz0000a	NAVCL AWMXE	14****7	06/01/2015	05/21/2016	Accepted
93****41	xyz0000a	NAVCL AWMXE	14****7	05/22/2016	05/31/2016	Accepted
93****18	xyz0000a	NAVCL AWMXE	14****7	06/01/2016	05/31/2017	Accepted
16****12	xyz0000a	NAVCL AWMXE	14****7	06/01/2017	05/31/2018	Accepted

- In the **Update Plan of Care** page, scroll down to the **Attachments** section found in the middle of the POC.

**Update Plan of Care**

<b>Plan Id:</b> 16*****12	<b>Plan Dates:</b> 6/1/2017 - 5/31/2018
<b>Client Name:</b> NAVCL AWMXE	<b>Client Prime:</b> xyz0000a
<b>Plan Total:</b> \$121,615.10	<b>Plan Status:</b> Accepted

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**Monthly Assessed Attendant Care/Skills Training Hours** **View SPAs in POC**

Draft  Pending  Accepted  Withdrawn  Void

Dates	Hour Limit
6/1/2017 - 5/31/2018	380.00

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**Weekly Employment Hours Approved per ISP**

Dates	Hour Limit	Supported Employment Only
6/1/2017 - 5/31/2018	25.00	NO

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**CDDP(s)**

PA Adj #	Provider	Auth Dates	Status
33****46	Case Management Provider	7/1/2015 - 6/30/2017	Accepted
15****52	Case Management Provider	7/1/2017 - 6/30/2019	Accepted

**Attachments**

**Type:**  Individual Service Plan  Assessment Report  Other

**Attach File:**  No file selected. File size must not exceed 4 MB

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**Plan Details - Limited by Weekly Hours**

*SE	*Procedure Code	*Modifier	*Units	*Dates	Status	Total
54	OR401 - Ind Sup Emplmt	W4 - Job Coach, Maintenance supports	25.00 Hours per Week	6/1/2017 -5/31/2018	Accepted	\$15,487.20

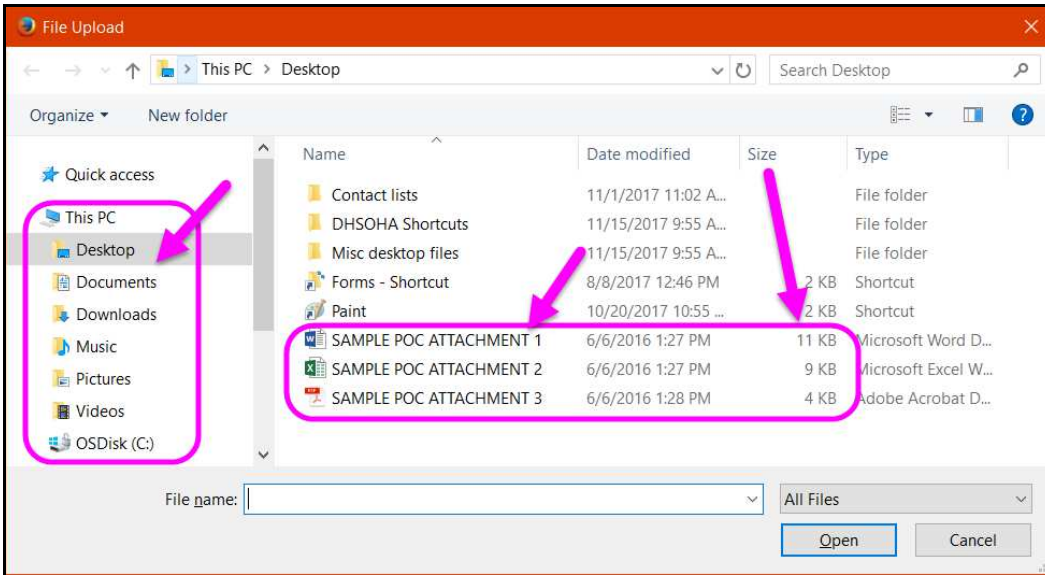
- In the **Attachments** section, click on **BROWSE** to search your computer for the file to be uploaded/attached to the POC.

**Attachments**

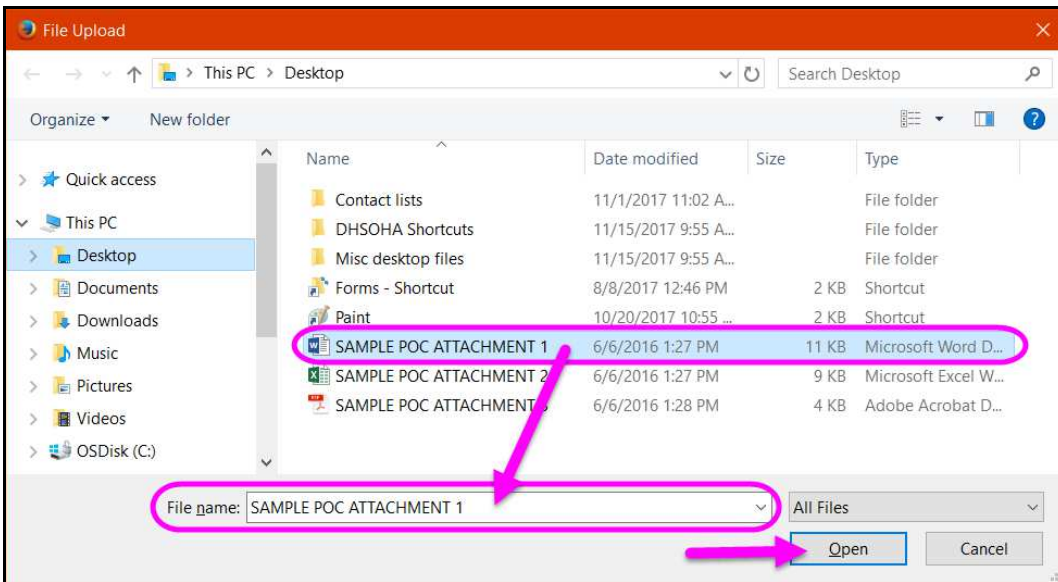
**Type:**  Individual Service Plan  Assessment Report  Other

**Attach File:**  No file selected. File size must not exceed 4 MB

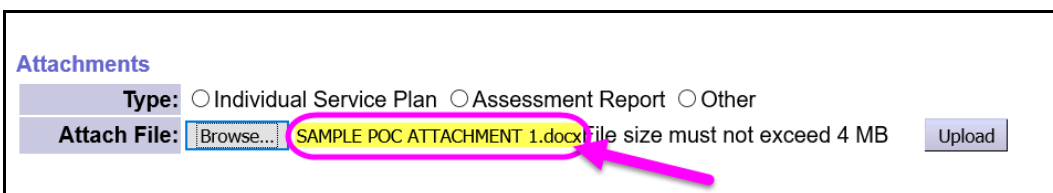
- The **Browse** button will open a pop-up search window to locate the files to be uploaded to the POC. Use this **File Upload** window to search your computer/network to find the document(s) needed. When the document is located, verify its file size to be sure that it is less than 4MB. Some files may need to be saved or converted to a different file format to reduce file size (such as saving/converting to PDF).



- From the **File Upload** window, select the file to be uploaded & attached to the POC. It will populate the **File Name** field at the bottom of the window. Click **OPEN** to send the file to the POC.



- Back in the POC, the file you just selected will now show next to the **Browse** button.



- Click one of the buttons next to a **TYPE** of file label to identify the type of file for the attachment. Then click **UPLOAD** to upload & attach the file selected to the POC.

The screenshot shows the 'Attachments' section of a form. Under the 'Type:' label, there are three radio buttons: 'Individual Service Plan', 'Assessment Report' (which is selected), and 'Other'. Below this, the 'Attach File:' section shows a 'Browse...' button, the filename 'SAMPLE POC ATTACHMENT 1.docx', and a note 'File size must not exceed 4 MB'. To the right of the filename is an 'Upload' button. A pink arrow points to the 'Assessment Report' radio button, and another pink arrow points to the 'Upload' button.

- The file will now be attached to the POC. It is viewable by anyone who has permissions to view the individual's POC by clicking on the [blue hyperlink](#) file name.

The screenshot shows the 'Attachments' section after a file has been uploaded. The 'Type:' section remains the same. The 'Attach File:' section now shows 'No file selected.' and 'File size must not exceed 4 MB'. Below this, the attached file is listed as 'Assessment-Report: SAMPLE POC ATTACHMENT 1.docx' with a 'Created:' timestamp of '11/15/2017 10:09:08 AM PST'. There are 'Upload' and 'Delete' buttons to the right of the file name. A pink arrow points to the file name.

- If the file needs to be removed from the POC (for example, the file selected/uploaded is an incorrect file), simply click on the **DELETE** button to remove the uploaded file/document.

The screenshot shows the 'Attachments' section with the file 'SAMPLE POC ATTACHMENT 1.docx' listed. The 'Delete' button next to the file name is circled in pink, and a pink arrow points to it.

- Repeat steps #6 - #10 above to add more files/documents to the POC. Users can add as many files/documents as needed.

- When the file upload is complete, click **DONE** at the bottom of the POC to close it.

The screenshot shows a table with columns: Auth Id, Provider, Units, Rate, Pay-To Provider, Dates, Review?, Status, and Amount. The table contains two rows of data for 'Public Partnerships LLC FMS Svc Location'. Below the table are buttons for 'Add Provider' and 'Add Plan Line'. At the bottom center, a pink arrow points to a 'Done' button.

Auth Id	Provider	Units	Rate	Pay-To Provider	Dates	Review?	Status	Amount
16 59	Public Partnerships LLC FMS Svc Location	1	\$44.95	Public Partnerships LLC FMS	6/1/2017 - 6/30/2017	No	Accepted	\$44.95
17 80	Public Partnerships LLC FMS Svc Location	1	\$44.95	Public Partnerships LLC FMS	7/1/2017 - 5/31/2018	No	Accepted	\$494.45

15. The files/documents can be viewed as attachments included in the POC.

### View Plan of Care

<b>Plan Id:</b> 16 ****12	<b>Plan Dates:</b> 6/1/2017 - 5/31/2018
<b>Client Name:</b> NAVCL AWMXE	<b>Client Prime:</b> xyz0000a
<b>Plan Total:</b> \$121,615.10	<b>Plan Status:</b> Accepted <span style="float: right;"><a href="#">Print</a></span>

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#### Monthly Assessed Attendant Care/Skills Training Hours

Dates	Hour Limit
6/1/2017 - 5/31/2018	380.00

#### View SPAs in POC

Draft
  Pending
  Accepted
  Withdrawn
  Void
 [Select](#)

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#### Weekly Employment Hours Approved per ISP

Dates	Hour Limit	Supported Employment Only
6/1/2017 - 5/31/2018	25.00	NO

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#### CDDP(s)

PA Adj #	Provider	Auth Dates	Status
33****46	Case Management Provider	7/1/2015 - 6/30/2017	Accepted
15****52	Case Management Provider	7/1/2017 - 6/30/2019	Accepted

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#### Attachments

<b>Assessment-Report:</b> <a href="#">SAMPLE POC ATTACHMENT 1.docx</a>	<b>Created:</b> 11/15/2017 10:09:08 AM PST
<b>ISP:</b> <a href="#">SAMPLE POC ATTACHMENT 3.pdf</a>	<b>Created:</b> 11/15/2017 10:36:17 AM PST
<b>Other:</b> <a href="#">SAMPLE POC ATTACHMENT 2.xlsx</a>	<b>Created:</b> 11/15/2017 10:36:08 AM PST

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#### Plan Details - Limited by Weekly Hours

SE	Procedure	Modifier	Units	Dates
GR401	Ind Sup Emplmt	W4	25.00 Hours/Week	6/1/2017 - 5/31/2018