

## **How to Update the Monthly Attendant Care (ANA/CAN) Hours Totals in POC** (CDDPs/Brokerages/CIIS) *(updated 6/15/2017)*

eXPRS Plan of Care (POC) uses the **Monthly Assessed Attendant Care** hours limits in a POC to ensure that services authorized & billed **do not exceed** the amount of attendant care services available to the individual, per their assessed level of need for a given month. For that reason, it is important that the POC Monthly Assessed Attendant Care hours (from the needs assessment completed for an individual) reflect the correct monthly assessed hours limit for the designated date range.

At times, there are changes to an individual's assessment in the middle of an ISP/POC plan year (for example: due to crisis or adjusting for school/summer hours differences for children) which prompt updates to the **Monthly Assessed Attendant Care** hours limits in a POC.

This guide will assist POC Managers in how to make those **Monthly Assessed Attendant Care** hours limit updates in a POC.

The **Monthly Assessed Attendant Care** hours limits in a POC can be updated when a POC is created for the first time, or can be updated later, after the POC has been in place. This guide will cover both scenarios.

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### **How to update **Monthly Assessed Attendant Care** hours limits in a POC when creating a POC for the first time:**

1. Login to eXPRS. If users have more than one organization login option, they will need to be logged in as shown below:
  - Local Authority (for CDDPs)

**Login**

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

You are in the User Acceptance environment

**Login Name:**

**Password:**

**Organization/Program Area:** <CDDP> (Local Authority) ▼

[Forgot your password?](#)

- Contractor (for Brokerages)

**Login**

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

You are in the User Acceptance environment

**Login Name:**

**Password:**

**Organization/Program Area:** <Brokerage Name> Brokerage (Contractor) ▼

[Forgot your password?](#)

- State Kids (State) (for CIIS Program)

**Login**

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

You are in the User Acceptance environment

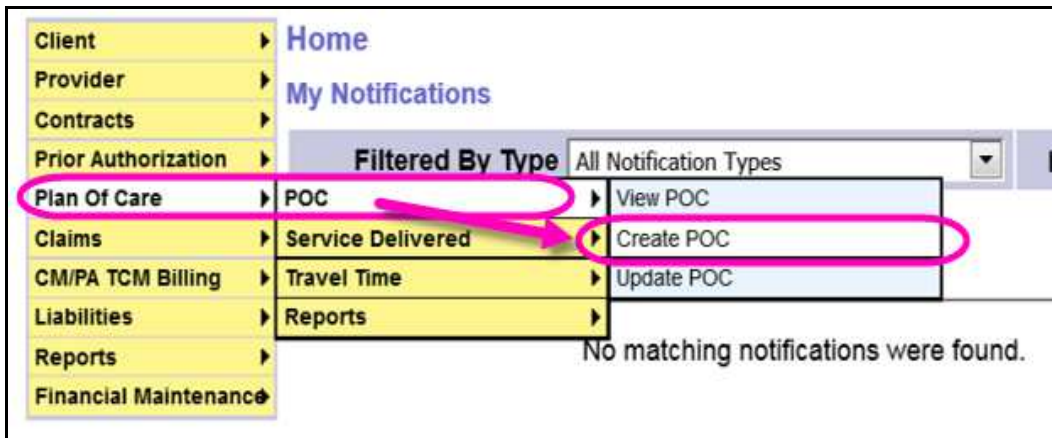
**Login Name:**

**Password:**

**Organization/Program Area:** State kids (State) ▼

[Forgot your password?](#)

2. From the yellow, left-hand navigational menu, click on ***Plan of Care*** → ***POC Services*** → ***Create POC***. This will take users to the **Create Plan of Care** page.



3. Once in the **Create Plan of Care** page, users will need to enter the required information to begin creating the POC.


- ✓ If needing to create a POC with multiple **Monthly Assessed Hours** amounts/date ranges, you can do that once the base POC is saved, and you are inside the POC to add Plan Details.
- ✓ **Best Practice:** add the **Monthly Assessed Hours** amount here that applies to the **Plan Start** date entered.


 A screenshot of the 'Create Plan of Care' form. The form has a title 'Create Plan of Care' in blue. Below the title are four input fields with labels: '\*Client Prime:' with the value 'xyz0000a' and a binoculars icon; '\*Plan Start:' with the value '5/1/17' and a calendar icon; '\*Plan End:' with the value '4/30/18' and a calendar icon; and '\*Monthly Assessed Hours:' with the value '150'. A 'Next' button is located to the right of the 'Monthly Assessed Hours' field.


With all the applicable information entered, click **NEXT** to continue.

4. The system should return the information showing the applicable Case Management CPAs that are used to support this POC. If the POC is being created by a Brokerage or CIIS Program, those Case Management CPAs will show for those authorizing agencies as well.

### Create Plan of Care

\*Client Prime: xyz0000a 

\*Plan Start: 5/1/2017 


\*Plan End: 4/30/2018 

\*Monthly Assessed Hours: 150

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### CDDP(s)

| PA Adj # | Provider                     | Auth Dates            | Status   |
|----------|------------------------------|-----------------------|----------|
| 13****1  | CME Case Management Provider | 1/12/2017 - 6/30/2017 | Accepted |



Once the POC information is returned, click **Save and Add Plan Details** to continue.

- The POC will then expand to enable adding more **Plan Details**. This is where you would add more **Monthly Assessed Attendant Care Hours** amounts/date ranges, if needed, to accurately reflect the assessed hours for the individual.
- To update the **Monthly Assessed Attendant Care Hours** to add more monthly hours limits for a specific date range, click **Add** under the **Monthly Assessed Attendant Care Hours** section.

### Update Plan of Care

Plan Id: 15\*\*\*\*\*5      Plan Dates: 5/1/2017 - 4/30/2018

Client Name: First Last      Client Prime: xyz0000a


Plan Total: \$0.00      Plan Status: Draft

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### Monthly Assessed Attendant Care/Skills Training Hours

Draft  Pending  Accepted  Withdrawn



| Dates                | Hour Limit |
|----------------------|------------|
| 5/1/2017 - 4/30/2018 | 150.00     |



- This will open a field to add an **End Date** for the first hours/date segment. The start date of the new segment will be auto populated, based on the end date entered. Users can then update the hours limit amounts that apply for the specific date ranges. Click **SAVE** to save the **Monthly Assessed Attendant Care Hours** updates.


### Monthly Assessed Attendant Care/Skills Training Hours


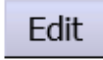
| Dates                | Hour Limit |
|----------------------|------------|
| 5/1/2017 - 5/31/17   | 150.00     |
| 6/1/2017 - 4/30/2018 | 195        |

If additional hours/date segments are needed, click **ADD** again, to update and add another hours limit & date segment. Click **Save** to save the additional updated information.



### Monthly Assessed Attendant Care/Skills Training Hours

| Dates                | Hour Limit |  |
|----------------------|------------|--|
| 5/1/2017 - 5/31/2017 | 150.00     |  |
| 6/1/2017 - 4/30/2018 | 195.00     |  |

### Monthly Assessed Attendant Care/Skills Training Hours

| Dates                 | Hour Limit |
|-----------------------|------------|
| 5/1/2017 - 5/31/2017  | 150.00     |
| 6/1/2017 - 8/17/17    | 195.00     |
| 8/18/2017 - 4/30/2018 | 150.00     |

→ **Pro Tip**: While it may be generally easiest to manage changes for the **Monthly Assessed Attendant Care Hours** segments to have those hours/date segments end/begin on the last day/first day of a month, this is not required. **Monthly Assessed Attendant Care Hours** segments can end/begin on any date.

8. The **Monthly Assessed Attendant Care Hours** segments are now in place, and SD billings against any attendant care services authorized will read these limits for the applicable service date ranges.

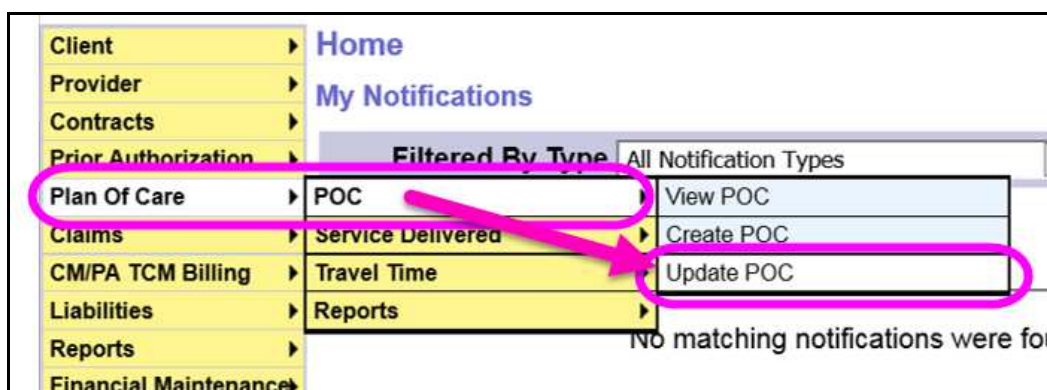
| Dates                 | Hour Limit |
|-----------------------|------------|
| 5/1/2017 - 5/31/2017  | 150.00     |
| 6/1/2017 - 8/17/2017  | 195.00     |
| 8/18/2017 - 4/30/2018 | 150.00     |

9. Adding Plan Lines and SPAs for attendant care/skills training/Day Support Activities, or other services, in the POC can now occur.

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## How to update **Monthly Assessed Attendant Care** hours limits *in an existing POC*:

1. Login in to eXPRS, as outlined above.
2. From the yellow, left-hand navigational menu, click on **Plan of Care** → **POC Services** → **Update POC**. This will take users to the **Find Plan of Care** page.



- In the **Find Plan of Care** page, search for the POC that needs **Monthly Assessed Attendant Care Hours** updated.

**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:

Plan Begin:   Overlap  Contain  Exact

Plan End:   Overlap  Contain  Exact

DHS Contract Num:

Status:

Max Displayed:

- From the results list returned, click on the Plan ID number for the POC to be updated.

status:

Max Displayed:

Export options: CSV | Excel | PDF | RTF

| Plan ID  | Client Prime | Client Name | DHS Contract Num | Plan Begin | Plan End   | Status   |
|----------|--------------|-------------|------------------|------------|------------|----------|
| 12*****7 | xyz0000a     | FIRST LAST  | 14***7           | 11/01/2016 | 10/31/2017 | Accepted |

- With the POC now open, click on **Add** under the **Monthly Assessed Attendant Care Hours** section to add new hours/dates segments, as outlined above.

**Update Plan of Care**

Plan Id: 12\*\*\*\*\*7      Plan Dates: 11/1/2016 - 10/31/2017

Client Name: FIRST LAST      Client Prime: xyz0000a

Plan Total: \$51,983.77      Plan Status: Accepted

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

Draft  Pending  Accepted  Withdrawn  Void

| Dates                  | Hour Limit |
|------------------------|------------|
| 11/1/2016 - 10/31/2017 | 299.00     |

6. Add more hours/date segments as outlined in the instructions in the first section.

→ **IMPORTANT:** *If you are reducing the hours limit in a new date segment, the system will now allow reductions lower than what has already been authorized/paid for the dates within that new segment added in the POC. Plan Line/SPA unit updates and/or SD billing/claims corrections (voiding) may be needed BEFORE that reduced hours limit amount can be added to the POC.*

The screenshot shows the 'Update Plan of Care' interface. At the top, a pink oval highlights an error message: 'Your request could not be completed because: Existing plan lines exceed new limit'. Below this, there are two columns of information: Plan Id: 12113447, Client Name: RIANNE SUSSMAN, Plan Total: \$51,983.77 on the left; and Plan Dates: 11/1/2016 - 10/31/2017, Client Prime: TH600V3J, Plan Status: Accepted on the right. An 'Edit' button is located below the client information. Below the error message is a table titled 'Monthly Assessed Attendant Care/Skills Training Hours'. The table has two columns: 'Dates' and 'Hour Limit'. The first row shows dates '11/1/2016 - 12/17/2016' with a 'Hour Limit' of '299.00'. The second row shows dates '12/18/2016 - 10/31/2017' with a 'Hour Limit' of '150'. A pink arrow points from the 'Hour Limit' cell of the second row up to the error message. To the right of the table is a section titled 'View SPAs in POC' with checkboxes for 'Dratt', 'Pending', 'Accepted', 'Withdrawn', and 'Voided', and a 'Select' button. At the bottom of the form are 'Save' and 'Cancel' buttons.

| Dates                   | Hour Limit |
|-------------------------|------------|
| 11/1/2016 - 12/17/2016  | 299.00     |
| 12/18/2016 - 10/31/2017 | 150        |

7. With the new **Monthly Assessed Attendant Care Hours** & date segments added, click **SAVE**. The POC is now updated.