

## How to Authorize Employment Discovery services in eXPRS Plan of Care (POC)

*(updated 7/8/2016)*

When an individual has been determined to receive Employment Discovery services as part of their Individual Support Plan (ISP), those services must be authorized in the individual's Plan of Care (POC) prior to the initiation of those services. This user guide will assist users in the process to authorize and update those Discovery services in POC.

Additional information on Discovery services can be found in the [Discovery FAQs](#) document located on the DD Staff Tools Page.

Users must have the corresponding **POC Manager** role for their agency to do this service authorization work.

### To authorize Discovery services in POC:

1. Login to eXPRS. Users will need to be logged in as the **Local Authority** organization role (CDDPs)

**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="userID"/>
<b>Password:</b>	<input type="password" value="••••••••"/>
<b>Organization/Program Area:</b>	<input style="border: 1px solid black;" type="text" value=" &lt;CDDP&gt; (Local Authority) "/>

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OR as the **Contractor** organizational role (Brokerages).

### Login

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

You are in the Practice environment

<b>Login Name:</b>	userID
<b>Password:</b>	••••••••
<b>Organization/Program Area:</b>	<Brokerage> (Contractor) ▼

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- From the left-hand navigational menu, select **Plan of Care** → **POC** → **Update POC** to search for the POC that needs Discovery services added.
 

**\*\*Please note:** Discovery services can also be added when initially creating a POC, if part of the individual's ISP at that time.

The screenshot shows a left-hand navigation menu with the following items: Client, Provider, Contracts, Prior Authorization, Plan Of Care, Claims, Liabilities, Reports, and Financial Maintenance. The 'Plan Of Care' item is selected, and a sub-menu is displayed with the following options: Home, My Notifications, Filtered By Type (All Notification Types), View POC, Create POC, Update POC, and Reports. The 'Update POC' option is circled in pink, and a pink arrow points from the 'POC' item to it.

- In the **Find Plan of Care** page, search for the individual's POC that needs Discovery services added. Easiest method will be to search by the individual's prime number. With the search criteria added, click **FIND** to search.

### Find Plan of Care

<b>Plan ID:</b>	
<b>Client Prime:</b>	<prime>
<b>Service Element:</b>	All ▼
<b>Plan Begin:</b>	<input type="text"/> <input checked="" type="radio"/> Overlap <input type="radio"/> Contain <input type="radio"/> Exact
<b>Plan End:</b>	<input type="text"/> <input checked="" type="radio"/> Overlap <input type="radio"/> Contain <input type="radio"/> Exact
<b>DHS Contract Num:</b>	<input type="text"/>
<b>Status:</b>	▼
<b>Max Displayed:</b>	All ▼

- From the results list returned, click on the **blue number** under **Plan ID** to open the POC needing Discovery services added.

**Find Plan of Care**

Plan ID:

Client Prime: |<prime>

Service Element: All

Plan Begin:   Overlap  Contain  Exact

Plan End:   Overlap  Contain  Exact

DHS Contract Num:

Status:

Max Displayed: All

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Export options: CSV | Excel | PDF | RTF

Plan ID	Client Prime	Client Name	DHS Contract Num	Plan Begin	Plan End	Status
3 ***** 2	<prime>	<First Last>	1 ***** 8	07/01/2015	03/31/2016	Accepted
8 ***** 9	<prime>	<First Last>	1 ***** 8	04/01/2016	03/31/2017	Accepted

- In the **Update Plan of Care** page for the individual's POC, scroll to the bottom and click **Add Plan Line** to open the fields to add the Discovery service plan line.

**Update Plan of Care**

Plan Id: 8 \*\*\*\*\* 9

Client Name: <First Last>

Plan Total: \$34,431.00

Plan Dates: 4/1/2016 - 3/31/2017

Client Prime: <prime>

Plan Status: Accepted

SE	Procedure Code	Modifier	Units	Dates	Status	Total
149	OR526 - Attendant Care, home or comm	NA	119.00 Hours per Month	4/1/2016 -3/31/2017	Accepted	\$14,860.80

- In the new Plan Line fields, select the menu options from each of the dropdowns, moving left to right, to authorize Discovery services **OR539/WA**.
  - SE = **54-Employment services** (for CDDPS) or **149-Support Services** (for Brokerages).

- Procedure code = **OR539 – Career Explore/Disc**
- Modifier Code = **WA – Employment Profile Outcome**

A screenshot of a form with three dropdown menus. The first is labeled '\*SE' and contains '149 - Support Services'. The second is labeled '\*Procedure Code' and contains 'OR539 - Career Explore/Disc'. The third is labeled '\*Modifier' and contains 'WA - Emp Profile Outcome'.

- Units = **1**; Discovery is an event/outcome service, so the number of Discovery “events” to be authorized is one (1).
- Dates:
  - **Start Date** = the date the Discovery service was authorized in the individual’s ISP (could be the first day of the ISP/POC, or a later date, if Discovery was added to an active ISP in an ISP update).
  - **End Date** = 90 calendar days from the start date.

A screenshot of a form with three main sections: '\*Units' (value: 1, unit type: Events / Year), '\*Dates' (start: 5/1/2016, end: 7/29/2016), and 'Status Total' (value: Draft). To the right of the 'Status Total' field are three buttons: 'Save', 'Split', and 'Cancel'. A pink arrow points to the 'Save' button.

- Click **SAVE** at the far right to save the plan line information to **draft**.

7. With the plan line information saved, click **Add Provider** under it to add the provider’s Service Prior Authorization (SPA) for the Discovery service.

A screenshot of a table with columns: '\*SE', '\*Procedure Code', '\*Modifier', '\*Units', '\*Dates', 'Status', and 'Total'. The first row contains: '149', 'OR539 - Career Explore/Disc', 'WA - Emp Profile Outcome', '1 Events per Year', '5/1/2016 -7/29/2016', 'Draft', and '\$1,680.00'. Below the table is an 'Add Provider' button with a pink arrow pointing to it. There are also 'Edit' and 'Delete' buttons to the right of the 'Total' column.

8. From the **\*Provider** dropdown, select the available provider who will be delivering the Discovery service.

A screenshot of a dropdown menu for the '\*Provider' field. The dropdown is open, showing a search prompt 'type to filter dropdown' and a list of options: 'To Be Determined', '<provider #1 name - \*\*\*\*>', and '<provider #2 name - \*\*\*\*>'. The dropdown is positioned over a form with other fields for '\*Units' and '\*Rate'.

9. With the provider added, in the **\*Units** field enter the number of units for this specific provider. This should also be one (1) unit.

A screenshot of a form with two main sections. The top section is labeled **\*Provider** and contains a dropdown menu with the text "type to filter dropdown" and a selected option "<provider #1 name - \*\*\*\*>". The bottom section is labeled **\*Units** and contains a text input field with the number "1" entered. A pink circle highlights the "1" in the \*Units field, with a pink arrow pointing to it from the right.

10. Continue moving left to right and add the **\*Rate** for the Discovery service for the provider selected.

A screenshot of a form with three main sections. The top section is labeled **\*Provider** and contains a dropdown menu with the text "type to filter dropdown" and a selected option "<provider #1 name - \*\*\*\*>". The middle section is labeled **\*Units** and contains a text input field with the number "1" entered. The bottom section is labeled **\*Rate** and contains a text input field with "\$1,680.00" entered. A pink circle highlights the "\$1,680.00" in the \*Rate field, with a pink arrow pointing to it from the right.

11. Finally, add the **\*Dates** for the provider to complete the Discovery service work in the date range fields.

- ➔ **Please note:** To move the SPA to **accepted** status, Discovery services should be authorized with a date range of 90 calendar days or less.
- Date ranges of 91 - 180 calendar days will **pend** for ODDS review/approval.
  - Date ranges greater than 181+ calendar days are not allowed.

A screenshot of a form with four main sections. The top section is labeled **\*Rate** and contains a text input field with "\$1,680.00" entered. The middle section is labeled **\*Dates** and contains a date range input field with "5/1/2016" and "7/29/2016" entered, separated by a hyphen. A pink circle highlights the date range "5/1/2016 - 7/29/2016", with a pink arrow pointing to it from the right. To the right of the date range are three buttons: "Save", "Split", and "Cancel". A pink arrow points to the "Save" button.

With all the SPA data entered, click **SAVE** at the far right to save the SPA to **draft**.

12. If all the information on the SPA appears correct, click **SUBMIT** at the far right to submit the SPA.

*SE	*Procedure Code	*Modifier	*Units	*Dates	Status	Total				
149	OR539 - Career Explore/Disc	WA - Emp Profile Outcome	1 Events per Year	5/1/2016 - 7/29/2016	Draft	\$1,680.00	Edit	Delete		
Auth Id	*Provider	*Units	*Rate	Pay-To Provider	*Dates	Review?	Status	Amount		
g*****0	<provider #1 name>	1	\$1,680.00	<provider>	5/1/2016 - 7/29/2016	Yes	Draft	\$1,680.00	Edit	Submit

**\*\*** If corrections to the **draft** SPA are needed, click **EDIT** to open the data fields and make any necessary changes. Click **SAVE** again to save the new information entered to **draft**. Then click **SUBMIT** to submit the SPA.

13. With the SPA now in **accepted** status, the provider can begin their Discovery work with the individual.

149	OR539 - Career Explore/Disc	WA	1.00 Events per Year		5/1/2016 - 7/29/2016			
Auth Id	Provider	Units	Rate	Pay To Provider	Dates	Review?	Allocation	Status
9*****3	<provider #1 name>	1.00	\$1,680.00	<provider>	5/1/2016 - 7/29/2016	Yes	\$1,680.00	Accepted

### Update an authorization for Discovery services in POC.

In some situations, the original 90 calendar day authorization for Discovery may need to be extended for up to an additional 90 calendar days, to accommodate completion of the Discovery work. In those situations, the Plan Line/SPA for Discovery can be edited to extend the end dates. ***Please be aware***, that extension of Discovery authorization end dates past 90 calendar days will trigger the SPA to then **pend** for ODDS review/approval.

#### To update a Discovery service authorization:

1. Login to eXPRS. Users will need to be logged in as the **Local Authority** organization role (CDDPs)

**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="userID"/>
<b>Password:</b>	<input type="password" value="....."/>
<b>Organization/Program Area:</b>	<input type="text" value="&lt;CDDP&gt; (Local Authority)"/> ▼

[Forgot your password?](#)

OR as the **Contractor** organizational role (Brokerages).

**Login**

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

You are in the Practice environment

**Login Name:**

**Password:**

**Organization/Program Area:**

[Forgot your password?](#)

- From the left-hand navigational menu, select **Plan of Care** → **POC** → **Update POC** to search for the POC that needs Discovery services updated.

The screenshot shows a left-hand navigation menu with the following items: Client, Provider, Contracts, Prior Authorization, Plan Of Care, Claims, Liabilities, Reports, and Financial Maintenance. The 'Plan Of Care' item is selected, and a sub-menu is displayed with the following options: POC, Service Delivered, Travel Time, and Reports. The 'POC' option is selected, and a further sub-menu is displayed with the following options: View POC, Create POC, and Update POC. The 'Update POC' option is highlighted with a pink circle, and a pink arrow points to it from the 'POC' option.

- In the **Find Plan of Care** page, search for the individual's POC that needs Discovery services updated. Easiest method will be to search by the individual's prime number. With the search criteria added, click **FIND** to search.

**Find Plan of Care**

**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 **blue number** under **Plan ID** to open the POC needing Discovery services updated.

**Find Plan of Care**

Plan ID:

Client Prime: |<prime>

Service Element: All

Plan Begin:    Overlap  Contain  Exact

Plan End:    Overlap  Contain  Exact

DHS Contract Num:

Status:

Max Displayed: All

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Export options: CSV | Excel | PDF | RTF

Plan ID	Client Prime	Client Name	DHS Contract Num	Plan Begin	Plan End	Status
3 *****2	<prime>	<First Last>	1 *****8	07/01/2015	03/31/2016	Accepted
8 *****9	<prime>	<First Last>	1 *****8	04/01/2016	03/31/2017	Accepted

- With the POC now open, search the POC for the Discovery authorization that needs updated. Each piece of the authorization will need to be updated separately, starting with the Plan Line, and then the SPA.

- Click **EDIT** at the far right of the **Plan Line** to open it for editing.

*SE	*Procedure Code	*Modifier	*Units	*Dates	Status	Total
149	OR539 - Career Explore/Disc	WA - Emp Profile Outcome	1 Events per Year	5/1/2016 -7/29/2016	Accepted	\$1,680.00

**Edit**

Auth Id	*Provider	*Units	*Rate	Pay-To Provider	*Dates	Review?	Status	Amount
9*****0	<provider #1 name>	1	\$1,680.00	<provider>	5/1/2016 - 7/29/2016	Yes	Accepted	\$1,680.00

**Edit** **Void**

- With the **Plan Line** now open, change the end date to be the new extended end date for the Discovery service. **Please note:** end dates that are greater than 180 calendar days from the start date are not allowed.

*SE	*Procedure Code	*Modifier	*Units	*Dates	Status	Total
149	Career Explore/Disc	WA - Emp Profile Outcome	1	5/1/2016 - 10/25/2016	Accepted	\$1,680.00

**Save** **Split** **Cancel**

Auth Id	*Provider	*Units	*Rate	Pay-To Provider	*Dates	Review?	Status	Amount
9*****0	<provider #1 name>	1	\$1,680.00	<provider>	5/1/2016 - 7/29/2016	Yes	Accepted	\$1,680.00

**Edit** **Void**

Click **SAVE** at the far right to save the new date information to the **Plan Line**.



8. Now, click **EDIT** on the **SPA** (under the Plan Line) to open it for editing.

*SE	*Procedure Code	*Modifier	*Units	*Dates	Status	Total				
149	OR539 - Career Explore/Disc	WA - Emp Profile Outcome	1 Events per Year	5/1/2016 -10/25/2016	Accepted	\$1,680.00	Edit			
Auth Id	*Provider	*Units	*Rate	Pay-To Provider	*Dates	Review?	Status	Amount		
9*****0	<provider #1 name>	1	\$1,680.00	<provider>	5/1/2016 - 7/29/2016	Yes	Accepted	\$1,680.00	Edit	Void

9. With the **SPA** now open, change the end date to be the new extended end date. The SPA date range can be the same as, or shorter than, the **Plan Line** date range.

*SE	*Procedure Code	*Modifier	*Units	*Dates	Status	Total			
149	OR539 - Career Explore/Disc	WA - Emp Profile Outcome	1 Events per Year	5/1/2016 -10/25/2016	Accepted	\$1,680.00	Edit		
Auth Id	*Provider	*Units	*Rate	Pay-To Provider	*Dates	Review?			
9*****0	<provider #1 name>	1	\$1,680.00	<provider>	5/1/2016 - 10/25/2016	Yes	Save	Split	Cancel

Click **SAVE** at the far right to save the new date information to the **SPA**.

10. With the new end date information on **Plan Line** and **SPA** saved, you will see the status of the authorization change from **accepted** to **pending**.

*SE	*Procedure Code	*Modifier	*Units	*Dates	Status	Total				
149	OR539 - Career Explore/Disc	WA - Emp Profile Outcome	1 Events per Year	5/1/2016 -10/25/2016	Pending	\$1,680.00	Edit			
Auth Id	*Provider	*Units	*Rate	Pay-To Provider	*Dates	Review?	Status	Amount		
9*****0	<provider #1 name>	1	\$1,680.00	<provider>	5/1/2016 - 10/25/2016	Yes	Pending	\$1,680.00	Edit	Withdraw

11. With the authorization now **pending** due to the extended end dates, users should contact their assigned ODDS Funds Allocation Coordinator (FAC) to have the **pending** authorization reviewed for approval.

Or, users can click **WITHDRAW** to withdraw the authorization. This will allow users to start over and create a new authorization, if needed.