

How to Create a Plan of Care in eXPRS For Employment/Day Services

Effective 9/1/2014

Beginning in Sept 2014, eXPRS will now authorize and pay for EMPLOYMENT services provided by AGENCY providers for individuals with I/DD using the Plan of Care functionality. CDDP and Brokerage users will need to create a Plan of Care and set up the individual service authorizations for employment services that correspond to the services identified in their ISP.

There have been a number of POC system updates specific to Employment services that have been added since the initial Create a Plan of Care training occurred. That new information is indicated in this guide by using the prompt:

→ NEW FOR POC FOR EMPLOYMENT SERVICES:

To create a Plan of Care in eXPRS, including adding service lines for Employment services, users will need to have either the **Local Authority POC Manager** or **Brokerage POC Manager** role to do this work.

To Create a Plan of Care for Employment Services:

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)

Login

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

You are in the User Acceptance environment

Login Name:	<input type="text" value="userID"/>
Password:	<input type="password" value="••••••••"/>
Organization/Program Area:	<input type="text" value="County (Local Authority)"/> ▼

[Forgot your password?](#)

or Contractor (for Brokerages) Organization role.

Login

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

You are in the User Acceptance environment

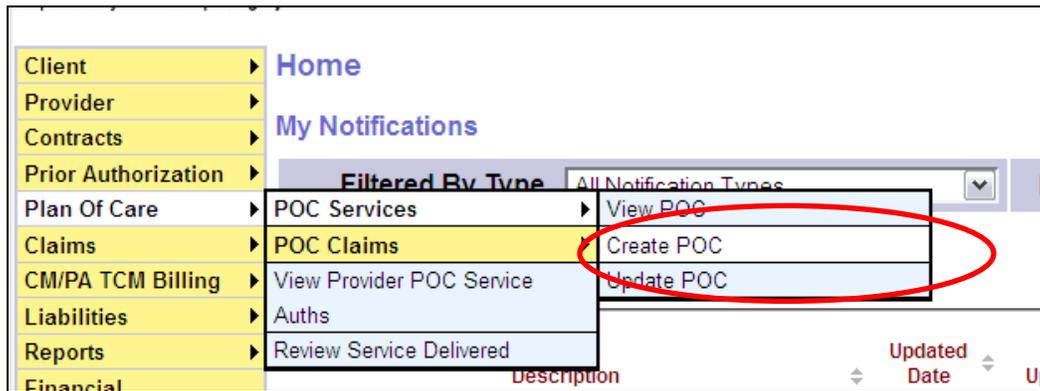
Login Name:

Password:

Organization/Program Area:

[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. For initial plan creation for Sept 2014, the date range for the POC in eXPRS should only be for the dates remaining from Sept 1 to the end of the client's current ISP, and can be less than 1 year.

Oregon Department of Human Services
Express Payment & Reporting System (eXPRS)

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Express Payment & Reporting System County (Local Authority) Switch

Client Create Plan of Care

Provider

Contracts

Prior Authorization

Plan Of Care

Claims

CM/PA TCM Billing

Liabilities

Reports

Financial

Maintenance

*Client Prime: XYZ0000A

*Plan Start: 9/1/2014

*Plan End: 12/31/14

*Monthly Assessed Hours: 150

Next

For initial plan creation, this is showing the date range of the remaining 4 months in the client's ISP, that ends on 12/31/14

Oregon Department of Human Services
Express Payment and Reporting System (eXPRS) v2-1-1-62
500 Summer St. NE
Salem, OR - 97301

For assistance contact the DHS Service Desk
Phone: (503) 945-5623
TTY: (503) 947-5330
Email: dhs.servicedesk@state.or.us

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

- After clicking **Next**, the system will search to confirm that the client has valid Case Management CPA(s) in place for the date range of the POC, and from the CM agency creating/authorizing the POC. This will include SE48 CPAs from the CDDP, and for clients enrolled with Brokerages, will also include SE148 CPAs from the authorizing Brokerage.

The system will display that CM CPA information that supports the POC. Users can then click **Save and Add Plan Details** to continue.

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*Client Prime: xyz0000a

*Plan Start: 9/1/2014

*Plan End: 12/31/2014

*Monthly Assessed Hours: 150

Next

CDDP(s)

PA Adj #	Provider	Auth Dates	Status
939005	Benton Case Management Provider	1/16/2014 - 6/30/2015	Accepted

Brokerage(s)

PA Adj #	Provider	Auth Dates	Status
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Click here to continue

Save and Add Plan Details

5. Users are now able edit and add additional information to a POC. For the Sept 1, 2014 implementation, that would be adding EMPLOYMENT/DAY services for clients under SE54 or Brokerage services.

→ **NEW ITEM FOR POC FOR EMPLOYMENT SERVICES: WEEKLY EMPLOYMENT HOURS LIMITS**

Similar to how the Monthly Assessed Hours from the ANA/CNA limits attendant care/skills training services; a limit has also been established for Employment services.

For EMPLOYMENT services, users will need to edit the POC to add the number of WEEKLY hours the client is receiving employment services, per their ISP. This is their ISP defined weekly employment service limit.

1. In the section below the Monthly Assessed Attendant Care/Skills Training Hours, click on **Add** to open the fields to add the **Weekly Employment Hours Approved per ISP** fields.

Dates	Hour Limit
9/1/2014 - 12/31/2014	150.00

Weekly Employment Hours Approved per ISP

Information in this field will be required to successfully add employment services to the POC. For existing POCs that were created prior to July 1st, users may need to edit the POC to add this information before being able to successfully submit their employment service authorizations.

2. With the **Weekly Employment Hours** section now open, users can add the number of hours per week that ALL the hourly, direct supervision EMPLOYMENT services will be limited to. Also, indicate whether this weekly hour limit is for Individual Supported Employment Only (client is not receiving any other employment service) by checking the box.

Weekly Employment Hours Approved per ISP

Dates	Hour Limit	Supported Employment Only
9/1/2014 - 12/31/2014	20.00	<input type="checkbox"/>

Save Cancel

Callouts:
 - Add the number of hours per week the client's ISP says they will be receiving HOURLY Employment services.
 - If the client is receiving ONLY Individual Supported Employment as the service for these hours, check this box.
 - With the information added, click SAVE.

3. Users can later edit these weekly hour limits, if needed, to accommodate changes in the client's ISP and employment services.
- Click **Add** to add another weekly hourly limit, with corresponding dates.
 - Click **Edit** to modify the current information.

Weekly Employment Hours Approved per ISP

Dates	Hour Limit	Supported Employment Only
9/1/2014 - 6/30/2015	25.00	NO

Add Edit

Callouts:
 - Click **ADD** to add another Weekly Hour Limit, with a date range.
 - Click **EDIT** to make changes to the current information.

→ NEW FOR POC FOR EMPLOYMENT SERVICES: DATES FOR THE WEEKLY EMPLOYMENT HOURS LIMIT MUST ALIGN WITH A CALENDAR WEEK

When adding additional weekly employment service hour limits with new date ranges, those date ranges must start/end with dates that correspond to a Sunday – Saturday calendar week.

In the example shown below, the first date segment must end on a Saturday date (9/27/14), and the system will then start the next date segment on the next date (Sunday, 9/28/14), through the end of the POC.

In adding additional Weekly Hours limits, the date ranges must correspond to a calendar week. This first entry must end on a Saturday (end of a week) which is 9/27/14.

Weekly Employment Hours Approved per ISP

Dates	Hour Limit	Supported Employment Only
9/1/2014 - 9/27/2014	20.00	<input type="checkbox"/>
9/28/2014 - 12/31/2014	40.00	<input checked="" type="checkbox"/>

The 2nd entry is for Individual Supported Employment Services only, so the corresponding box is checked.

Save Cancel

With the information added, click **SAVE**.

In addition, users can also add more POC information, as needed. For example:

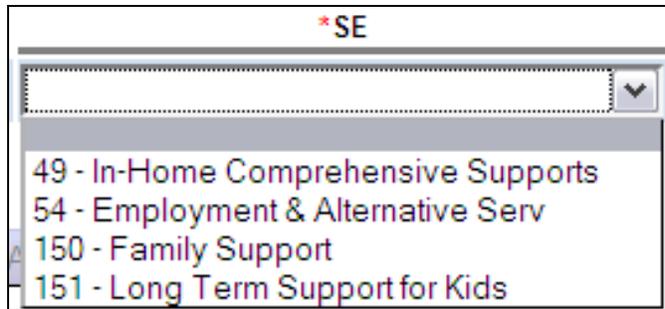
- They can edit the **Monthly Assessed Hours** information, including adding additional date range segments with different monthly total limits.
- They can upload **Attachments** or documents to the POC and save them, if they wish. This could be electronic copies of the client's ISP, the client's Needs Assessment, or other documents as needed. File size of a document cannot exceed 4MB. *Please refer to ODDS program policies and guidelines for requirements on what documents should be attached to a POC, if any.*

With this Overall POC information entered and saved, users can begin to enter specific **Plan Details** of the services and providers in the POC.

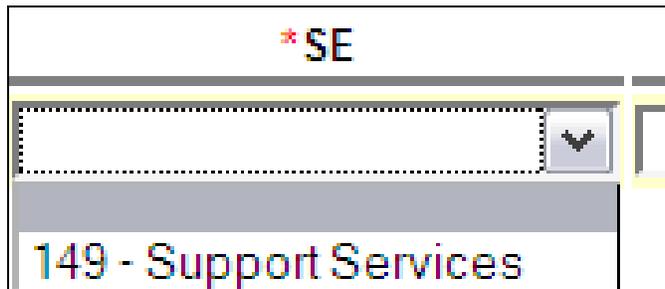
6. To add employment services and provider authorizations for a POC, click **Add Plan Line**. This will open the service plan line menus.

Moving left to right, select the appropriate options for the service you are authorizing.

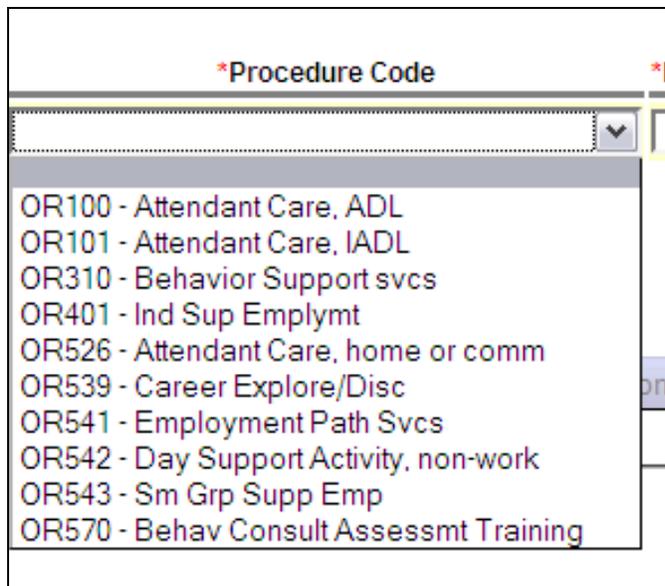
- **SE** = the service element the service is authorized under. **CDDPs** will have several options (shown in the example). For employment services authorized by a CDDP, select **“54-Employment & Alternative Serv”** from the dropdown menu.



Brokerages will have only one option – “149 - Support Services”



- **Procedure Code** = the specific service name and procedure code for the employment or day service being authorized for the client.



- **Modifier** = the specific modifier for the service procedure code (if any). In many cases, this will be auto-populated as “NA”.
- **Units** = this will be comprised of 2 components; the **number of units** (such as hours) which is the amount of service being authorized, and then **the**

frequency, or how often, that amount of units can be delivered/received. For employment services, the frequency is set to be “per week” so that is what is auto-populated.

A screenshot of a software interface showing a field labeled ***Units**. The field contains the text "Hours / Week". The field is highlighted with a yellow background.

- **Dates** = the date range for that specific service. Date ranges can be shorter than the overall POC date range, but cannot go beyond the overall POC date range.

A screenshot of a software interface showing a field labeled ***Dates**. The field contains the date range "9/1/2014 - 3/31/2015". The field is highlighted with a yellow background.

7. With all the service line information selected and entered, click **Save** at the far right end of the service line to save the service line information.

A screenshot of a software interface showing a bar labeled **Status Total**. The bar contains three buttons: "Draft", "Save", and "Cancel". The "Draft" button is highlighted with a yellow background.

8. Now the service plan line is in DRAFT status, the user can click the **Add Provider** button to add providers to authorize them to deliver that service.

*SE	*Procedure Code	*Modifier	*Units	*Dates	Status	Total		
54	OR541 - Emplmt Path Svcs	W2 - Community	20.00 Hours per Week	9/1/2014 - 11/29/2014	Draft	\$0.00	Edit	Delete

Below the table, there is an **Add Provider** button. A red callout box points to the button with the text: "Click Add Provider to add a provider authorization for this service."

If a client has multiple providers who deliver this service, users can add as many provider service authorizations as needed. Each provider will have their own authorization which includes their own unit allotment (up to the maximum for the service), rate, and date range.

- Again, moving left to right, enter the information for the provider service authorization.

*SE	*Procedure Code	*Modifier	*Units	*Dates	Status	Total		
54	OR541 - Emplmt Path Svcs	W2 - Community	20.00 Hours per Week	9/1/2014 -11/29/2014	Draft	\$0.00	Edit	Delete
*Rendering Provider		*Units	*Rate	*Dates	Review?			
<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/> Save Cancel			
Add Provider								

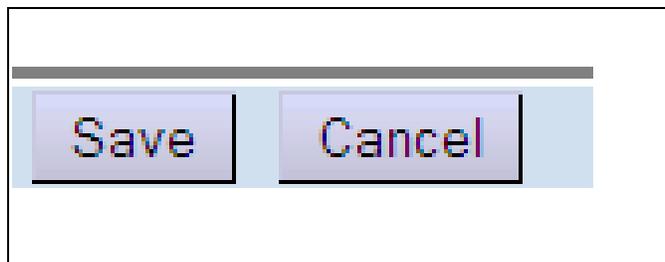
- Rendering Provider** = the provider who will be delivering the service. Select from the dropdown menu. The dropdown will only show providers who are active and “approved to work” within the date range of the service and with the type/specialty allowed for that employment service. For employment services beginning 9/1/2014, only AGENCY providers are allowed to be authorized in POC. Additional provider types will be added to POC at a later date.

*Rendering Provider	*Units	*Rate
<input type="text"/>	<input type="text"/>	<input type="text"/>
<div style="border: 1px solid black; padding: 5px;"> To Be Determined Ability Training Services LLC - 101901 Bridges Enterprises LLC SE54 Benton All - 101293 BENCO INC SE54 Benton All - 100499 Collaborative Employment Innovations SE54 Benton - 101662 CORNERSTONE ASSOCIATES INC SE54 Benton All - 100714 Good 2 Go Oregon - 101905 Hendrickson Services LLC SE54 Benton All - 99206 HOME LIFE INC SE54 Benton All - 99665 WORK UNLIMITED INC SE54 Benton All - 100454 </div>		

- Users can select the **“To Be Determined”** option to save a service plan line, when the provider is not yet known.
- Depending on the service authorized, users may be able to select **“Generic Provider”** and then type in the name of the general community retail business, such as Fred Meyer or Home Depot, that are being used for the service. Most often this will likely be used for item or supply purchases.

- **Units** = the number of units of the service authorized for this provider; the amount can be less than, but no more than maximum authorized for the service.
 → **NEW FOR POC FOR EMPLOYMENT SERVICES:** All the employment services will be authorized showing the weekly hourly limit for that service. But the COMBINATION of employment services claimed cannot exceed the ISP Weekly hour limit set for Employment services overall. This will allow for flexibility for client's to receive a varying combination of services from their array authorized, up to the overall weekly limit set.
- **Rate** = the rate for the service for that provider.
- **Dates** = the date range that the provider is authorized to provide the service. This date range can be less than, but not exceed the date range of the service. The date range for a provider also must not exceed the provider's "approved to work" credential date range, which could be less (shorter) than the service authorized.
- **Review** = this indicates that service delivered time entries (which will be used to create claims) for the provider will PENDING FOR REVIEW by the CDDP or Brokerage prior to being approved for claims creation/payment. This will default to NO, not REVIEW for Agency Provider types when the service authorization is saved.

10. With all the service line information selected and entered, click **Save** at the far right end of the provider service authorization to save the information.



11. With the provider service authorization saved, the user can submit it by clicking the **Submit** button on the far right hand side, or proceed through steps #8 - #10 again to add more providers for the service. Each provider service authorization will need to be submitted individually.

12. Repeat steps #6 - #9 to add more services plan lines and providers.
13. With all the service plan lines and provider authorizations entered (and submitted, if needed), the user can click Done at the bottom of the POC to save the POC and return to the view page.
14. In the **View Plan of Care** page, the user can now see the POC they have just created, and the status of the plan, the service plan lines/provider authorizations.

→ NEW FOR POC FOR EMPLOYMENT SERVICES: WEEKLY LIMITED EMPLOYMENT SERVICES AUTHORIZED WILL BE GROUPED TOGETHER

Once the user clicks **Done** and the plan is closed from editing, any employment services authorized that are limited by the weekly hours limit will be grouped together. This helps to quickly see which services/service lines are limited by the Employment Weekly Hours limit.

Other employment services that **are not** restricted by the Weekly Hours limit, as well as other POC services (eg: attendant care, etc.), will be shown outside the grouped area.

Oregon Department of Human Services
Express Payment & Reporting System (eXPRS)

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County (Local Authority)

Click **Print** to print a hard paper copy of the POC.

Client View Plan of Care
Provider
Contracts
Prior Authorization
Plan Of Care
Claims
CM/PA TCM Billing
Liabilities
Reports
Financial
Maintenance

Plan Id: 943560 **Plan Dates:** 9/1/2014 - 5/31/2015
Client Name: Mickey Mouse **Client Prime:** xyz0000a
Plan Total: \$61,239.50 **Plan Status:** Accepted [Print](#)

Monthly Assessed Attendant Care/Skills Training Hours

Dates	Hour Limit
9/1/2014 - 5/31/2015	30.00

Weekly Employment Hours Approved per ISP

Dates	Hour Limit	Supported Employment Only
9/1/2014 - 5/31/2015	25.00	NO

CDDP(s)

PA Adj #	Provider	Auth Dates	Status
935041	Benton Case Management Provider	7/1/2013 - 6/30/2015	Accepted

Brokerage(s)

PA Adj #	Provider	Auth Dates	Status
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Attachments

Assessment-Report:

Plan Details - Limited by Weekly Hours

SE	Procedure	Modifier	Units	Dates														
54	OR401 - Ind Sup Emplmt	W6	25.00 Hours per Week	9/1/2014 - 5/31/2015														
<table border="1"> <thead> <tr> <th>Rendering Provider</th> <th>Units</th> <th>Rate</th> <th>Pay To Provider</th> <th>Dates</th> <th>Allocation</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>BENCO INC SE54 Benton</td> <td>25.00</td> <td>\$18.50</td> <td>BENCO INC</td> <td>9/1/2014 - 5/31/2015</td> <td>\$18,481.50</td> <td>Draft</td> </tr> </tbody> </table>					Rendering Provider	Units	Rate	Pay To Provider	Dates	Allocation	Status	BENCO INC SE54 Benton	25.00	\$18.50	BENCO INC	9/1/2014 - 5/31/2015	\$18,481.50	Draft
Rendering Provider	Units	Rate	Pay To Provider	Dates	Allocation	Status												
BENCO INC SE54 Benton	25.00	\$18.50	BENCO INC	9/1/2014 - 5/31/2015	\$18,481.50	Draft												
54	OR541 - Emplmt Path Svcs	W1	25.00 Hours per Week	9/1/2014 - 5/31/2015														
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BENCO INC SE54 Benton	25.00	\$20.00	BENCO INC	9/1/2014 - 5/31/2015	\$19,980.00	Accepted												
54	OR543 - Sm Grp Supp Emp	W2	25.00 Hours per Week	9/1/2014 - 5/31/2015														
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Rendering Provider	Units	Rate	Pay To Provider	Dates	Allocation	Status												
BENCO INC SE54 Benton	25.00	\$22.00	BENCO INC	9/1/2014 - 5/31/2015	\$21,978.00	Draft												

Plan Details

SE	Procedure	Modifier	Units	Dates														
54	OR539 - Disc/Career Explore	WA	10.00 Events per Year	9/1/2014 - 5/31/2015														
<table border="1"> <thead> <tr> <th>Rendering Provider</th> <th>Units</th> <th>Rate</th> <th>Pay To Provider</th> <th>Dates</th> <th>Allocation</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>BENCO INC SE54 Benton</td> <td>1.00</td> <td>\$800.00</td> <td>BENCO INC</td> <td>9/1/2014 - 5/31/2015</td> <td>\$800.00</td> <td>Draft</td> </tr> </tbody> </table>					Rendering Provider	Units	Rate	Pay To Provider	Dates	Allocation	Status	BENCO INC SE54 Benton	1.00	\$800.00	BENCO INC	9/1/2014 - 5/31/2015	\$800.00	Draft
Rendering Provider	Units	Rate	Pay To Provider	Dates	Allocation	Status												
BENCO INC SE54 Benton	1.00	\$800.00	BENCO INC	9/1/2014 - 5/31/2015	\$800.00	Draft												

The Employment services that are limited by the Weekly Hours Limit are grouped together

Other services that are NOT limited by the Weekly Hours Limit are shown separately

- Users can print a paper copy of this plan by clicking the **Print** hyperlink in the top right corner of the POC.
- Users can open the POC again to make changes/edits by clicking the **Edit** button at the bottom.