How to Update a Plan of Care in eXPRS
NEW POC FORMAT
(updated 5/18/2022)

eXPRS Plan of Care (POC) has been updated to a new layout format that features a tabbed structure to group and organize similar services together. This layout change was made to simplify working within the POC for CME users, as well as to add functionality to support the ODDS Compass and Rate Restructuring Projects.

<mark>*NEW FUNCTIONALITY*</mark>: The data elements of a provider SPA has been reordered when creating a SPA to support the implementation of the Service Group (SG) rate table and auto-population of some service rates. You will notice that the ***Rate** field has moved in the sequence of the SPA and will not be an open text box to add the rate. The rate will read **NA** initially because when the SPA is saved eXPRS reads the new SG rate table to determine if the rate will auto-populate or return an open field to add the rate manually, depending on the service.

To update a Plan of Care in the new format, CME users will need to be assigned one of the below roles to do this update Plan of Care work:

- CDDPs: **Local Authority POC Manager** or **POC Super User**
- Brokerages: **Brokerage POC Manager** or **POC Super User**
- State Kids Services: **State Kids Svcs POC Manager** or **POC Super User**

NOTE: the screenshots used in the examples in this guide are from a CDDP user. While the dropdown menu options may be different for you, based on the type of CME you work for, the process remains the same.

To Update a Plan of Care in the New POC Layout:

1. Log in to eXPRS. If users have more than one **Organization/Program Area** option, they will need to be logged in under the correct level for POC work, like shown here:

   CDDPs choose the **Local Authority** option

Brokerages choose the **Contractor** option

State Kids services choose the **State Kids (State)** option

2. From the yellow, left-hand navigational menu, click on ***Plan of Care*** ➔ ***Plan of Care***. The new Plan of Care layout uses just one menu option.
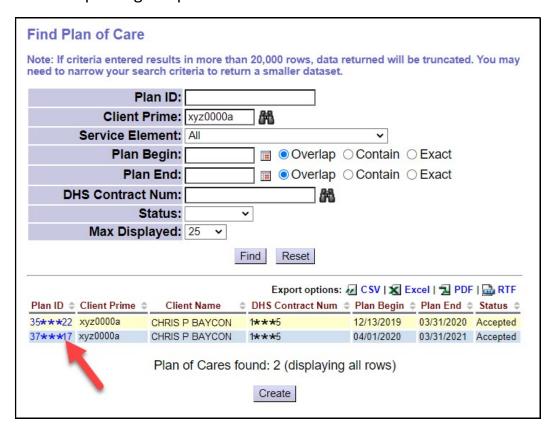
3. In the **Find Plan of Care** page you can search to find the POC that needs updating.

    Easiest method to find an individual's POC is likely to search using their **PRIME** number. Additional search criteria can also be used, as needed.

    With the search criteria entered, click **Find** to search POCs.

4. From the list of POCs returned, click on the blue **Plan ID** number for the POC that needs updating to open it.

5. Once in the view **Plan of Care** page, you'll immediately see the layout changes.

The **Action Buttons** are now located at the top of the POC, instead of the bottom.
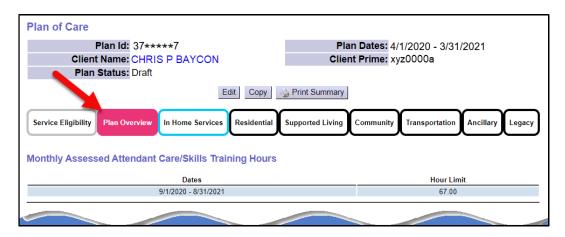

And the POC information is sorted into tabs.

The new POC tabs are described here:

POC Tab	Information/Services Contained Within
Service Eligibility	• ONA Service Group information • DD Eligibility, Level of Care, Medicaid Eligibility and Service Eligibility dates • Service Eligibility type code *(ex: DDC, DDK, etc.)* • CM enrollment *(CM CPAs)*
Plan Overview	• Monthly Attendant Care Hours limit • Weekly Employment Hours limit • Service Add-Ons • POC Attachments • POC Notes
In Home Services	• In-home attendant care services • Relief Care *(Daily & Hourly)*
Residential	• Group home services *(may be phased in)* • Foster Care services • Host Home services • Residential 2:1 staff hourly supports
Supported Living	• Supported Living Services *(coming later)*

POC Tab	Information/Services Contained Within
Community	• Employment Services • Day Support Activities • On The Job Attendant Care
Transportation	• POC Transportation Services • Mileage • Commercial/Taxis • Transit Passes • DD Provider Organizations
Ancillary	Other Ancillary services: • Behavior Consultation • Specialized Equipment & Supplies purchases • Assistive Technology purchases • Home Modifications • Vehicle Modifications
Legacy	If you view an older POC that uses service procedure and/or modifier codes that have been retired & are no longer used, they will appear under this tab.

6. In the **Plan of Care** page, you can update information, add or update service Plan Lines/SPAs as needed. While the location of POC information and Plan Lines/SPAs is new, *the service authorization functions and validations used in the old POC layout still apply*. The view **Plan of Care** will default to showing you the **Plan Overview** tab, but you can navigate to other tabs in the POC as needed.
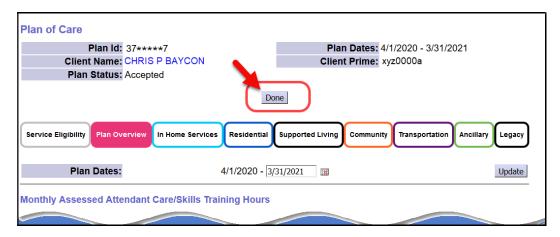

Please note: While you will see all tabs in the POC, your access to information or functionality under a specific tab may be restricted due to the type of CME organization you are working under.

For example: Brokerage CME users will see all the tabs in POC but will not be able to successfully add services under the **Residential** or **Supported Living** tabs, as those are not services Brokerages have access to authorize.

7. To update information or add/update service authorizations in the new POC layout, click on **Edit** to open the POC for updating/edits. We'll look at each tab.

When finished making changes or updates, click **Done** at the top to close the POC.
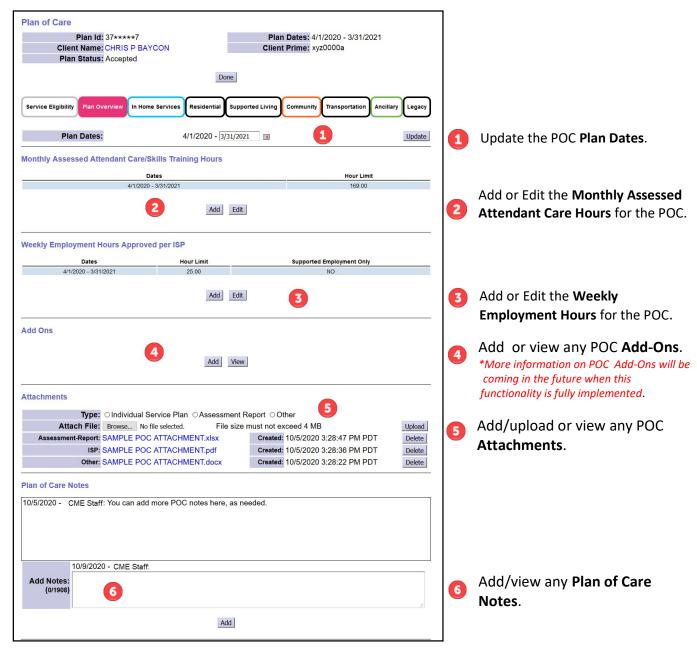

8. Steps to working within the individual tabs are reviewed on the following pages.
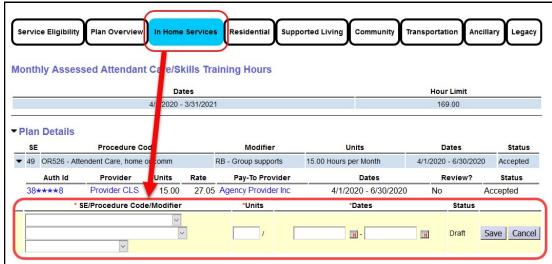
o Edits/Updates to information on the Plan Overview tab.

The **Plan Overview** tab is where you would make updates to overall POC information. Each section operates separately. Simply click **Add** or **Edit** in that section to make changes to that section's information.
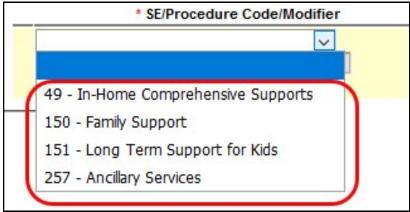
Plan of Care

Plan Id: 37★★★★★7	**Plan Dates:** 4/1/2020 - 3/31/2021
Client Name: CHRIS P BAYCON	**Client Prime:** xyz0000a
Plan Status: Accepted	

Done

Service Eligibility | Plan Overview | In Home Services | Residential | Supported Living | Community | Transportation | Ancillary | Legacy

Plan Dates: 4/1/2020 - 3/31/2021 **1** Update

(1) Update the POC **Plan Dates**.

Monthly Assessed Attendant Care/Skills Training Hours

Dates	Hour Limit
4/1/2020 - 3/31/2021	169.00

2 Add Edit

(2) Add or Edit the **Monthly Assessed Attendant Care Hours** for the POC.

Weekly Employment Hours Approved per ISP

Dates	Hour Limit	Supported Employment Only
4/1/2020 - 3/31/2021	25.00	NO

Add Edit **3**

(3) Add or Edit the **Weekly Employment Hours** for the POC.

Add Ons

4 Add View

(4) Add or view any POC **Add-Ons**.
More information on POC Add-Ons will be coming in the future when this functionality is fully implemented.

Attachments

Type: ○ Individual Service Plan ○ Assessment Report ○ Other	**5**
Attach File: Browse... No file selected. File size must not exceed 4 MB	Upload
Assessment-Report: SAMPLE POC ATTACHMENT.xlsx	**Created:** 10/5/2020 3:28:47 PM PDT Delete
ISP: SAMPLE POC ATTACHMENT.pdf	**Created:** 10/5/2020 3:28:36 PM PDT Delete
Other: SAMPLE POC ATTACHMENT.docx	**Created:** 10/5/2020 3:28:22 PM PDT Delete

(5) Add/upload or view any POC **Attachments**.

Plan of Care Notes

10/5/2020 - CME Staff: You can add more POC notes here, as needed.

10/9/2020 - CME Staff:

Add Notes:
(0/1908) **6**

Add

(6) Add/view any **Plan of Care Notes**.

- o **Edits/Updates to information on the In-Home Services tab.**
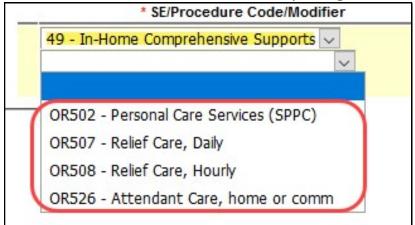
  - The POC Monthly Attendant Care hours limit will show here for reference.

  - You can make the updates to existing POC Plan Lines/SPAs, based on your assigned permissions, the same as you have in the past.

  - You can add a new Plan Lines/SPAs the same as you have in the past.

  - CDDPs do not have to create a completely new Plan of Care for individuals who are transitioning from one In-Home service element to another. For example, when a child receiving SE151 services transitions to SE49 services when they turn 18 years old. As longs as the date ranges for the services under the different service elements do not overlap, they can live inside the same Plan of Care.

  - The **SE**, **Procedure** code & **Modifier** code dropdowns for Plan Lines are now grouped together and are filtered to only show those services that are applicable to the tab you are working within.

  - First drop down is your **Service Element** options under that tab.

- Once the Service Element is selected, you'll get **Procedure code** options.
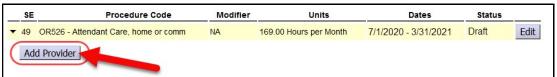

- Once the Procedure code is selected, you'll get **Modifier code** options.

- With the **SE/Procedure/Modifier** codes selected, you can continue to complete the rest of the Plan Line information. When completed, click Save to save the Plan Line.

- Click Add Provider to add a Service Prior Authorization (SPA) for a **Provider** under a Plan Line.
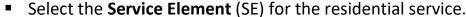

NEW FUNCTIONALITY: The data elements of a provider SPA has been reordered when creating a SPA to support the implementation of the Service Group (SG) rate table and auto-population of some service rates. The *Rate field is the last data item to be added and will read NA initially. This is because

when the SPA is saved, eXPRS now reads the new SG rate table to determine if the rate will auto-populate or return an open field to add the rate manually, depending on the service.
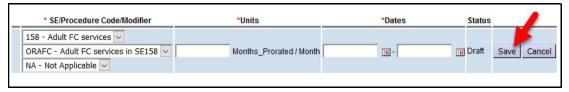
o **Edits/Updates to information on the <u>Residential</u> tab.**

   ▪ **CDDPs Only:** Residential services authorized by the same CDDP, like Foster Care, Host Homes (and eventually group homes) can now be authorized *in the same* Plan of Care for the individual as In-Home services, as long as the date ranges for the different service elements/services do not overlap. Previously, an entirely new Plan of Care was needed from the CDDP for an individual who transferred from In-Home services to Foster Care (or vice versa). That is no longer the case in the new POC layout.

   ▪ Select the **Service Element** (SE) for the residential service.

   ▪ In most cases, the **Procedure Code** & **Modifier Code** will auto-populate, based on the **Service Element** selected. Complete the rest of the Plan Line & then click Save.
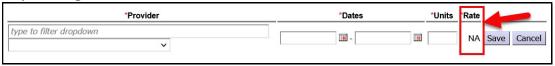

   ▪ Click **Add Provider** to add a Service Prior Authorization (SPA) for a **Provider** under a Plan Line.

   ==**NEW FUNCTIONALITY**==: The data elements of a provider SPA has been reordered when creating a SPA to support the implementation of the Service

Group (SG) rate table and auto-population of some service rates. The ***Rate** field is the last data item to be added and will read **NA** initially. This is because when the SPA is saved, eXPRS now reads the new SG rate table to determine if the rate will auto-populate or return an open field to add the rate manually, depending on the service.
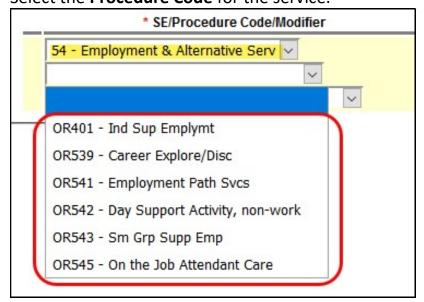
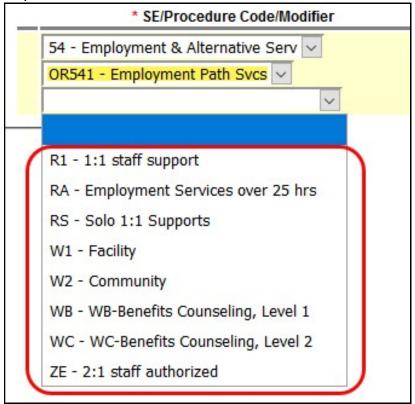o **Edits/Updates to information on the <u>Community</u> tab.**

- The Community tab is where Employment and Day Support Activities (services provided in community settings) are housed.

- The POC **Weekly Employment Hours** limit will show here for reference.

- You can make the updates to existing POC Plan Lines/SPAs, based on your assigned permissions, the same as you have in the past.

- You can add a new Plan Lines/SPAs the same as you have in the past.

- Select the **Service Element** (SE) for the Community service.

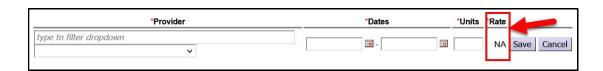
- Select the **Procedure Code** for the service.

- Select the **Modifier Code** for the service. You will see that we have implemeted new modifiers for some services.

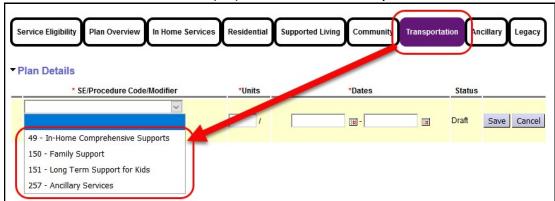- Click **Add Provider** to add a Service Prior Authorization (SPA) for a **Provider** under a Plan Line.

NEW FUNCTIONALITY: The data elements of a provider SPA has been reordered when creating a SPA to support the implementation of the Service Group (SG) rate table and auto-population of some service rates. The ***Rate** field is the last data item to be added and will read **NA** initially. This is because when the SPA is saved eXPRS now reads the new SG rate table to determine if the rate will auto-populate or return an open field to add the rate manually, depending on the service.
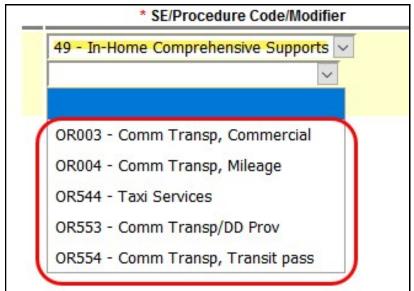
*Provider	*Dates	*Units	Rate
type to filter dropdown	☷ - ☷		NA Save Cancel

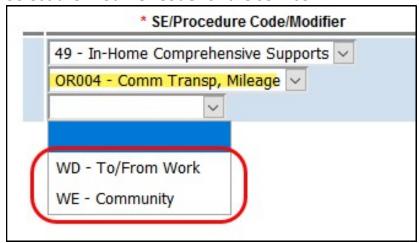o **Edits/Updates to information on the Transportation tab.**

  ▪ All Plan of Care authorized transportation services will live under the **Transportation** tab.

  ▪ You can make the updates to existing POC Plan Lines/SPAs, based on your assigned permissions, the same as you have in the past.

  ▪ You can add a new Plan Lines/SPAs the same as you have in the past.

  ▪ Select the **Service Element** (SE) for the Community service.

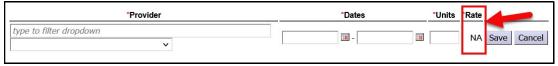 ▪ Select the **Procedure Code** for the service.

- Select the **Modifier Code** for the service.

- Click **Add Provider** to add a Service Prior Authorization (SPA) for a **Provider** under a Plan Line.
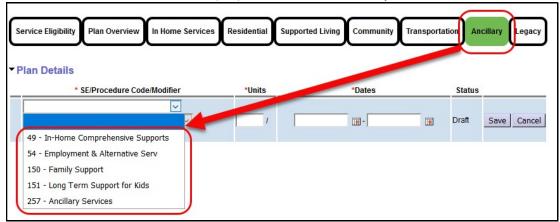

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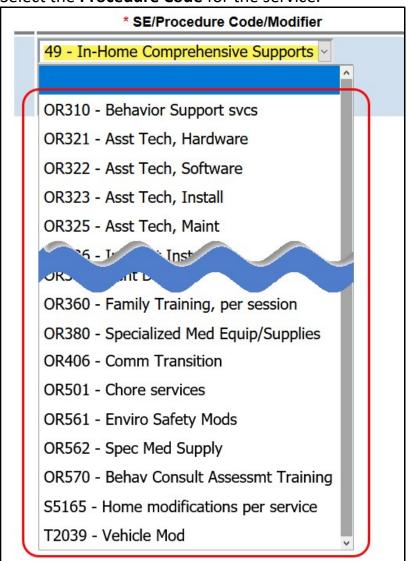
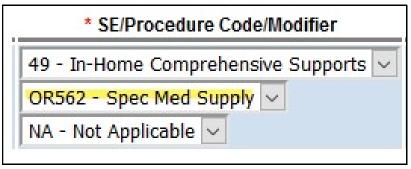- o **Edits/Updates to information on the [Ancillary](#) tab.**

  - All supplemental and ancillary services for an individual, such as Behavior Consultation or Special Equipment or Assistive Device purchases, will live under the **Ancillary** tab.

  - You can make the updates to existing POC Plan Lines/SPAs, based on your assigned permissions, the same as you have in the past.

  - You can add a new Plan Lines/SPAs the same as you have in the past.

  - Select the **Service Element** (SE) for the Community service.

- Select the **Procedure Code** for the service.

- Select the **Modifier** Code for the service. You may only have 1 modifier option to choose from.

- Click **Add Provider** to add a Service Prior Authorization (SPA) for a **Provider** under a Plan Line.

NEW FUNCTIONALITY: The data elements of a provider SPA has been reordered when creating a SPA to support the implementation of the Service Group (SG) rate table and auto-population of some service rates. The ***Rate** field is the last data item to be added and will read **NA** initially. This is because when the SPA is saved eXPRS now reads the new SG rate table to determine if the rate will auto-populate or return an open field to add the rate manually, depending on the service.

- For Generic provider SPAs, be sure to include information on the vendor the payment will be routed to in the **Generic Provider Name** field. There is a 50-character limit in that text field.