

## Overview to the New Plan of Care Format in eXPRS

(updated 12/7/2020)

eXPRS Plan of Care (POC) has been updated to a new layout format. 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. The POC layout changes and functionality will be occurring in phases, with the first phase being the overall look, information placement and navigation through the Plan of Care.

While many of the functions & processes in eXPRS Plan of Care are not changed, the new layout will organize information differently, and new functionality features will be implemented over time. This guide will give an overview of the key layout changes & enhancements. ***There are individual guides available to assist users in working within the new POC layout for specific activity (such as create new or updating existing POCs).***

### New Plan of Care Features/Changes:

- All existing Plans of Care in eXPRS at the time of the system updates to the new layout will be automatically converted to the new Plan of Care layout.
- The new Plan of Care layout uses just one menu option from the yellow, left-hand menu in eXPRS. **Create, View & Update** POC functions are accessed under this one menu option.



- When you open a POC 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.

**Plan of Care**

Plan Id: 37\*\*\*\*\*7  
 Client Name: CHRIS P BAYCON  
 Plan Status: Draft

Plan Dates: 4/1/2020 - 3/31/2021  
 Client Prime: xyz0000a

Edit Copy Print Summary

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

Monthly Assessed Attendant Care/Skills Training Hours

⇒ And the POC information is sorted into **Tabs\***.

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The new POC tabs are described here:

| POC Tab                    | Information/Services Contained Within   |
|----------------------------|---|
| <b>Service Eligibility</b> | <ul style="list-style-type: none"> <li>• ONA Service Group information (<i>coming later</i>)</li> <li>• DD Eligibility, Level of Care, Medicaid Eligibility and Service Eligibility dates</li> <li>• Service Eligibility type code (ex: DDC, DDK, etc)</li> <li>• CM enrollment (<i>CM CPAs</i>)</li> </ul> |
| <b>Plan Overview</b>       | <ul style="list-style-type: none"> <li>• Monthly Attendant Care Hours limit</li> <li>• Weekly Employment Hours limit</li> <li>• Service Add Ons (<i>coming later</i>)</li> <li>• POC Attachments</li> <li>• POC Notes</li> </ul>  |
| <b>In Home Services</b>    | <ul style="list-style-type: none"> <li>• In-home attendant care services</li> <li>• Relief Care (Daily &amp; Hourly)</li> </ul>   |
| <b>Residential</b>         | <ul style="list-style-type: none"> <li>• Group home services (<i>coming later</i>)</li> <li>• Foster Care services</li> <li>• Host Home services</li> <li>• Residential 2:1 staff hourly supports</li> </ul>  |
| <b>Supported Living</b>    | <ul style="list-style-type: none"> <li>• Supported Living Services (<i>coming later</i>)</li> </ul>   |
| <b>Community</b>           | <ul style="list-style-type: none"> <li>• Employment Services</li> <li>• Day Support Activities</li> <li>• On The Job Attendant Care</li> </ul>  |
| <b>Transportation</b>      | <ul style="list-style-type: none"> <li>• POC Transportation Services</li> <li>• Mileage</li> <li>• Commercial/Taxis</li> <li>• Transit Passes</li> <li>• DD Provider Organizations</li> </ul>   |

|                  |  |
|------------------|--|
| <b>Ancillary</b> | Other Ancillary services: <ul style="list-style-type: none"> <li>• Behavior Consultation</li> <li>• Specialized Equipment &amp; Supplies purchases</li> <li>• Assistive Technology purchases</li> <li>• Home Modifications</li> <li>• Vehicle Modifications</li> </ul> |
| <b>Legacy</b>    | 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.   |

***\*Please note:*** While users 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.*

- A key feature of the new POC layout is to support the Compass & Rate Restructuring projects and implementation of Service Group information. The integration of the Service Group (SG) information into Plan of Care will occur in phases over time, as new functionality features are built.

For **In-Home service hours**, the ONA assessed SG hours range/limit for the individual ***will not be*** auto-populated to the Plan of Care at this time. The monthly Attendant Care hours limit in the POC will need to be manually entered by CME users, based on the Individual's Support Plan.

***For example,*** *an individual was assessed at SG 3, and the hours range for that is 200 – 300 hours per month (these are just numbers for example purposes). The ISP team then determines how many of those hours in the individual's SG range will be added to the POC. Perhaps the ISP team decides that the individual only needs to use 250 of the 300 hours in their SG hours range, so 250 is what is entered on the POC by the CME. POC edits/adjustments to **add more hours up to** the individual's SG hours limit can be made per ISP team decisions without needing an exception approval. Additional hours over the individual's SG hours limit will require an ODDS exception request and approval.*

For **Group Home** or **Agency Employment/Day Support Activity rates**, the Service Group information will be used to auto-populate the specific service rate in eXPRS. This rate auto-fill functionality may be phased in for services over time, as more system structures are implemented to handle the process, so some manual entry of rates may be needed for a time.

- **NEW FEATURE/CHANGES for CDDPs:**

⇒ CDDPs no longer need to create completely new Plans 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 long as the date ranges for the services under the different service elements do not overlap, they can live inside the same Plan of Care.

⇒ CDDPs no longer need to create completely new Plans of Care for individuals who transition to/from a Residential service (*like Foster Care, Host Homes, and eventually group homes*) to/from In-Home services. **For example**, when an individual transfers from AFC SE158 to adult In-Home services SE49. As long as the date ranges for the different service elements/services do not overlap, they can live inside the same Plan of Care.

**! Important:** If you are adding services for different service settings in a single POC (*ex: In-Home to Foster Care*) you may also need to end and add new Plan Lines/SPAs under other tabs to align with the service setting transition. **For example:** if you have Transportation, Ancillary or Community services authorized under the Service Element for In-Home (SE49), those may need to be transitioned over to a different service element (SE54, SE257, etc.) to have the service continue to support the new Foster Care placement.

**NEW FEATURE: DATE OVERLAP EXCEPTION:** A one day overlap in date ranges is now allowed for individuals transferring **from** In-Home services **to** a Residential service. ***This is a one-way, one-day overlap of service dates ONLY*** to allow providers to bill for In-home services earlier in the same day an individual moves to a residential placement.

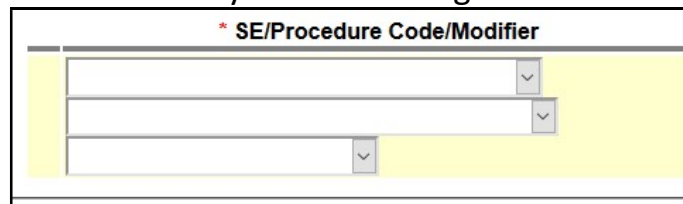
- **NO CHANGE:** the transfer of individuals to a new CME **will still require separate Plans of Care** from each CME for the dates of service to that individual within their ISP year.
  - CDDP / CDDP transfers
  - CDDP / Brokerage transfers
  - CDDP / State Kids Services transfers
- **NO CHANGE:** ongoing CDDP SE48 CM enrollment (CPA) is still required for individuals receiving ODDS funded Plan of Care services. This means when an individual transfers to a Brokerage or to State Kids Services (CIIS or Res), the individual must continue to have ongoing SE48 CM CPA enrollment from a

CDDP. Do not close your SE48 CM CPA unless the individual is transferring to a different county/CDDP.

The ongoing SE48 CM CPA enrollment can be from different counties/CDDPs.

- **For example:** an individual is receiving Brokerage POC services, but has moved from county A to county B. Both counties will need to have their own SE48 CM CPA for the dates the individual was with their respective county. The Brokerage's CM CPA & POC can remain ongoing, as long as the SE48 CM CPAs from the different counties/CDDPs are there to support the services without date gaps.

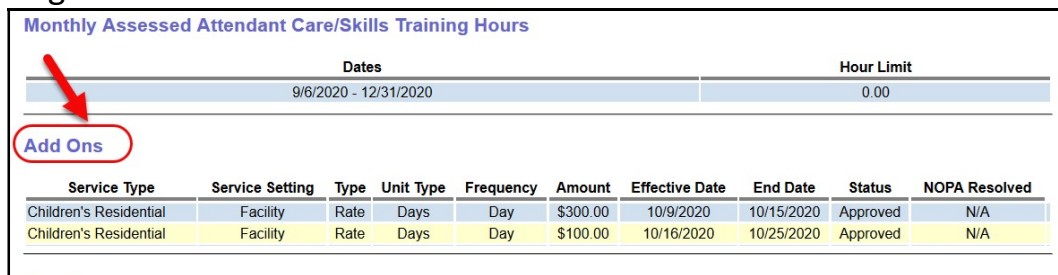
- The **Service Element (SE), Procedure Code, Modifier Code** dropdowns for Plan Lines are now grouped together and are filtered to only show those services that are applicable to the tab you are working within.



A screenshot of a dropdown menu titled "SE/Procedure Code/Modifier". The menu is open, showing three rows of input fields. Each row has a dropdown arrow on the right side. The background of the menu is yellow.

- To support the coming Compass Project/Rate Restructuring changes, the new Plan of Care layout has a new section for **Service Add Ons** under the **Plan Overview** tab.

These Add Ons will be where short-term rate increases, additional staff support hours (2:1, 3:1, etc) and other exceptional service additions will be managed.



A screenshot of a table titled "Monthly Assessed Attendant Care/Skills Training Hours". The table has two main sections: "Dates" and "Hour Limit". The "Dates" section shows "9/6/2020 - 12/31/2020". The "Hour Limit" section shows "0.00". Below these sections is a table with columns: Service Type, Service Setting, Type, Unit Type, Frequency, Amount, Effective Date, End Date, Status, and NOPA Resolved. The first row is "Children's Residential", Facility, Rate, Days, Day, \$300.00, 10/9/2020, 10/15/2020, Approved, N/A. The second row is "Children's Residential", Facility, Rate, Days, Day, \$100.00, 10/16/2020, 10/25/2020, Approved, N/A. A red arrow points to the "Add Ons" button in the top left corner of the table.

| Dates                 |  | Hour Limit |  |
|-----------------------|--|------------|--|
| 9/6/2020 - 12/31/2020 |  | 0.00       |  |

| Service Type           | Service Setting | Type | Unit Type | Frequency | Amount   | Effective Date | End Date   | Status   | NOPA Resolved |
|------------------------|-----------------|------|-----------|-----------|----------|----------------|------------|----------|---------------|
| Children's Residential | Facility        | Rate | Days      | Day       | \$300.00 | 10/9/2020      | 10/15/2020 | Approved | N/A           |
| Children's Residential | Facility        | Rate | Days      | Day       | \$100.00 | 10/16/2020     | 10/25/2020 | Approved | N/A           |

***Full implementation of the POC Service Add On features/functionality will be coming in 2021.*** There will be a separate user guide that addresses how to manage Add Ons available at that time.