

Copying a Plan of Care

(updated 9/18/2025)

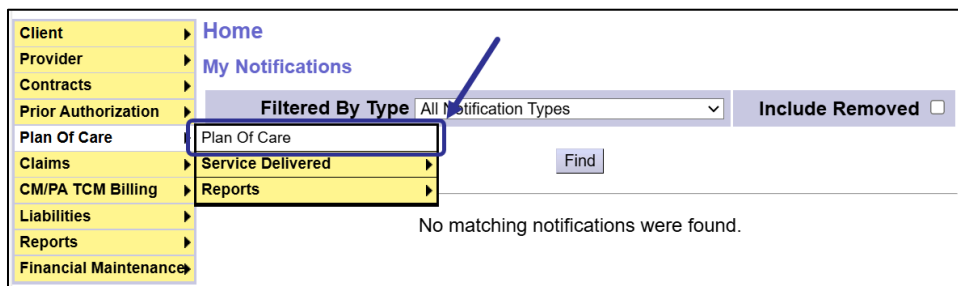
There is a Copy button on the Plan of Care that allows a user to easily create another Plan for the individual beginning on the date the current Plan of Care ends.

CME users will need one of the following roles to do this work:

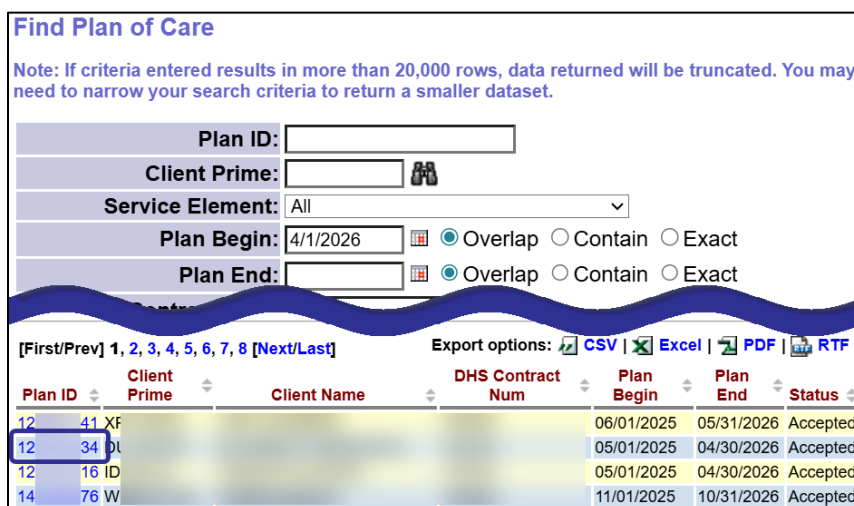
- **CDDPs:** Local Authority POC Manager or POC Super User
- **Brokerages:** Brokerage POC Manager or POC Super User
- **State Kids Services:** State Kids Svcs POC Manager or POC Super User

To Copy a Plan of Care:

1. Log in under the role that allows you to work in the Plan of Care and select **Plan of Care > Plan of Care**.



2. Search for the Plan of Care you want to copy and select the Plan ID Hyperlink.



3. On the **Plan of Care** page, select the **Copy** button.

This will create a new Plan of Care in Draft Status with a Start Date that is one day later than the Plan it was copied from. The End Date of the new draft plan will also be one year later.

The Plan Lines and Authorizations will also have copied over in Draft status. You can now enter Edit Mode and modify the Plan of Care as needed.

Plan Details							<input checked="" type="checkbox"/> Draft <input checked="" type="checkbox"/> Pending <input checked="" type="checkbox"/> Accepted <input type="checkbox"/> Withdrawn <input type="checkbox"/> Void Select	
SE	Procedure	Modifier	Units		Dates	Status		
151	OR507 - Relief Care, Daily	NA	14.00 Days per Year		5/1/2026 - 4/30/2027	Draft		
	Auth Id	Provider	Dates	Units	Rate	Pay To Provider	Review?	Status
	15		5/1/2026 - 4/7/2027	14.00	Fixed	Public Partnerships LLC FMAS	Yes	Draft
151	OR526 - Attendant Care - 1:1 Supports	NA	169.00 Hours per Month		5/1/2026 - 4/30/2027	Draft		
	Auth Id	Provider	Dates	Units	Rate	Pay To Provider	Review?	Status
	15		5/1/2026 - 4/7/2027	169.00	Fixed	Public Partnerships LLC FMAS	Yes	Draft

For more information, see the guide: **Creating and Updating a Plan of Care**