

## Training Example #1 Single Person Site

### 1. CREATE THE SITE

- Click on **“Create a Site”** under the “Home” section on the menu on the left hand side of the screen.
- Click in the “Site Name” box and enter “Single Person Site”
- Tab down to the “Effective Date” box and enter “07/01/2009” or use the calendar to select 7/1/2009
- Tab down to the “End Date” and do not change anything
- Tab down to the “CODB County” and select “Stark”
- Click on the “Save” button

### 2. ADD INDIVIDUALS TO THE SITE

- Click on **“Manage Individuals”** under the “CPT” section on the menu on the left hand side of the screen
- Click on the **“Add Individual”** link on the right hand side of the screen
- Click in the “First Name” box and enter “Charlie”
- Tab to the “Last Name” box and enter “Treepod”
- Click on the “Search” button or hit “Enter” on the keyboard
- Click the check box next to Charlie’ name
- Click on the “Add Dates to Individuals” box
- Click in the “Move In Date” box and enter “07/01/2009” or use the calendar to select 7/1/2009
- Click on the “Save Individuals and Spans” box

### 3. ADD PROVIDERS TO THE SITE

- Click on **“Manage Providers”** under the “CPT” section on the menu on the left hand side of the screen
- Click on the **“Add Provider”** link on the right hand side of the screen
- Click the “Agency” radio button
- Click in the “Agency Name” box and enter “United” and click on the “Search” button or hit “Enter” on the keyboard
- Click on the check box next to “7700143 United Disability Services, Inc.”
- Click on the “Add Spans to Selected Providers” button
- Click in the “Provider Start Date” box and enter “07/01/2009” or use the calendar to select 7/1/2009
- Click on the “Save Provider and Spans” button

- Click on the **“Add Provider”** link on the right hand side of the screen
- Click in the “MBS Contract Number” box and enter “2503213” and click on the “Search” button or hit “Enter” on the keyboard
- Click on the check box next to 2503213 Columbus Medical Equipment Inc.
- Click on the “Add Spans to Selected Providers” button
- Click in the “Provider Start Date” box and enter “07/01/2009” or use the calendar to select 7/1/2009
- Click on the “Save Provider and Spans” button
  
- Click on the **“Add Provider”** link on the right hand side of the screen
- Click in the “Last Name” box and enter “Carrothers” and click on the “Search” button or hit “Enter” on the keyboard
- Click on the check box next to “7600215 Joyce Elaine Carrothers”
- Click on the “Add Spans to Selected Providers” button
- Click in the “Provider Start Date” box and enter “07/01/2009” or use the calendar to select 7/1/2009
- Click on the “Save Provider and Spans” button
  
- Click on the **“Add Providers”** link on the right hand side of the screen
- Click in the “MBS Contract Number” box and enter “7603785” and click on the “Search” button or hit “Enter” on the keyboard
- Click on the check box next to “7603785 Midwest Innovations, LLC”
- Click on the “Add Spans to Selected Providers” button
- Click in the “Provider Start Date” box and enter “07/01/2009” or use the calendar to select 7/1/2009
- Click on the “Save Provider and Spans” button

#### **4. CREATE HPC STAFFING PATTERNS FOR THE SITE**

- Click on **“Manage HPC Staffing Patterns”** under the “CPT” section on the menu on the left hand side of the screen
- Click on the **“Add Staffing Pattern”** link on the right hand side of the screen
- Click in the “Staffing Pattern Name” box and enter “Routine Day”
- Click on the “Save” button
  
- Click on the **“Add Staffing Pattern Detail”** link on the right hand side of the screen
- Select “12” in the hours drop down list in the “Start Time” section
- Tab through to the hours drop down box in the “End Time” section
- Select “8” in the hours drop down list in the “End Time” section
- Select “United Disability Services” from the drop down list in the “HPC Provider” section
- Click in the “# Staff” box and enter “1”
- Click the check box next to Charlie' name in the “OSOC” section
- Click the “Save” button

- Click on the “**Add Staffing Pattern Detail**” link on the right hand side of the screen
- Select “8” in the hours drop down list in the “Start Time” section
- Tab through to the hours drop down box in the “End Time” section
- Select “9” in the hours drop down list in the “End Time” section
- Select “30” in the minutes drop down list in the “End Time” section
- Select “United Disability Services” from the drop down list in the “HPC Provider” section
- Click in the “# Staff” box and enter “1”
- Click the check box next to Charlie' name in the “HPC Routine” section
- Click the “Save” button
  
- Click on the “**Add Staffing Pattern Detail**” link on the right hand side of the screen
- Select “4” in the hours drop down list in the “Start Time” section
- Tab through to the AM/PM drop down box in the “Start Time” section and select “PM”
- Tab through to the hours drop down box in the “End Time” section
- Select “11” in the hours drop down list in the “End Time” section
- **\*\* NOTE: The application defaults to 11:59 p.m. so there is no overlap of times**
- Select Joyce Carrothers from the drop down list in the “HPC Provider” section
- **\*\* NOTE: The “# Staff” box is filled in with “1” and grayed out preventing entry, as this is an Individual provider**
- Click the check box next to Charlie' name in the “HPC Routine” section
- Click the “Save” button
  
- Click the “**Manage Staffing Pattern**” link in the middle of the screen
- Click on the “**Add Staffing Pattern**” link the right hand side of the screen
- Click in the “Staffing Pattern Name” box and enter “No Workshop”
- Click on the “Save” button
  
- Click on the “**Add Staffing Pattern Detail**” link on the right hand side of the screen
- Select “10” in the hours drop down list in the “Start Time” section
- Tab through to the hours drop down box in the “End Time” section
- Select “8” in the hours drop down list in the “End Time” section
- Tab through to the AM/PM drop down box in the “End Time” section and select “PM”
- Select “United Disability Services” from the drop down list in the “HPC Provider” section
- Click in the “# Staff” box and enter “1”
- Click the check box next to Charlie' name in the “HPC Routine” section
- Click the “Save” button

## **5. ADD HPC STAFFING PATTERNS TO HPC CALENDAR**

- Click on “**Manage HPC Calendar**” under the “CPT” section on the menu on the left hand side of the screen
- Click on the “**Apply Staffing Pattern to Calendar Days**” link on the right hand side of the screen
- Click on the check boxes next to Monday, Tuesday, Wednesday, Thursday, and Friday
- **\*\* Note that “Routine Day” is showing in the “Staffing Pattern Name” drop down box**
- Click on “Apply to Schedule” button

- Select “No Workshop” from the “Staffing Pattern Name” drop down box
- Click on the check boxes next to Sunday and Saturday
- Click on the “Apply to Schedule” button
  
- Click in the “Start Date” box and enter “01/01/2010” or select 01/01/2010 from the calendar
- Click in the “End Date” box and enter “12/31/2011” or select 12/31/2011 from the calendar
- Click on the “Apply to Calendar” box

## **6. CREATE ADS/NMT STAFFING PATTERNS FOR THE SITE**

- Click on “**Manage ADS/NMT Patterns**” under the “CPT” section on the menu on the left hand side of the screen
- Click on the “**Add ADS/NMT Pattern**” link on the right hand side of the screen
- Click in the “Pattern Name” box and enter “Regular Schedule”
- Click on the “Save” button
  
- Click on the “**Add ADS Detail**” link on the right hand side of the screen
- Select “Midwest Innovations LLC” from the “Provider” drop down list
- Select “Adult Day/Voc Hab Combo” from the “Service” drop down list
- Tab to the “Hours” box and enter “6.5”
- Click on the “Add” button
  
- Click on the “**Add NMT Detail**” link on the right hand side of the screen
- Select “Midwest Innovations LLC” from the “Provider” drop down list
- Tab four times to the “# of One Way Trips” box and enter “2”
- Click on the “Add” button
  
- Click on the “**Return to ADS/NMT Pattern Manager**” link on the right hand side of the screen
- Click on the “**Add ADS/NMT Pattern**” link on the right hand side of the screen
- Click in the “Pattern Name” box and enter “Voc Hab Only”
- Click on the “Save” button
  
- Click on the “**Add ADS Detail**” link on the right hand side of the screen
- Select “Midwest Innovations LLC” from the “Provider” drop down list
- Select “Vocational Habilitation” from the “Service” drop down list
- Tab to the Hours box and enter “3.5”
- Click on the “Add” button

## **7. ADD ADS/NMT STAFFING PATTERNS TO ADS/NMT CALENDAR FOR THE SITE**

- Click on **“Manage ADS/NMT Calendars”** under the “CPT” section on the menu on the left hand side of the screen
- Click on the **“Add ADS Pattern to Calendar Days”** link on the right hand side of the screen
- Click on the check boxes next to Monday, Wednesday, and Friday
- **\*\* Note that “Regular Schedule” is showing in the “Staffing Pattern Name” drop down box**
- Click on “Apply to Schedule” button
- Select “Voc Hab Only” from the “ADS Pattern Name” drop down box
- Click on the check boxes next to Tuesday and Thursday
  
- Click on the “Apply to Schedule” button
- Click in the “Start Date” box and enter “01/01/2010” or select 01/01/2010 from the calendar
- Click in the “End Date” box and enter “12/31/2011” or select 12/31/2011 from the calendar
- Click on the “Apply to Calendar” box

## **8. ADD ANY NECESSARY UNSHEDULED SERVICES TO THE SITE**

- Click on **“Manage Unscheduled Services”** under the “CPT” section on the menu on the left hand side of the screen
  
- Click on the “Equipment/Modification Services” tab
- Click on the **“Add an Undefined Rate Service”** link on the right hand side of the screen
- Select “Span (Entered on Right)” from the “Frequency Period” drop down list
- Enter “7/1/2010” as the Start Date and “12/31/2010” as the End Date
- Select “Columbus Medical Equipment” from the “Provider” drop down list
- Select “Adaptive & Assistive Equipment” from the “Service Sub Category” drop down list
- Select “Item” from the “Service Unit Type” drop down list
- Tab to “# Units” and enter “2”
- Tab to “Price Per Unit” and enter “450.00”
- Click on the “Save” button
  
- Click on the “Transportation & Other Services” tab
- Click on the **“Add Transportation/Other Service”** link on the right hand side of the screen
- Select “Month” from the “Frequency Period” drop down list
- Enter “6/15/2010” as the Start Date and “6/14/2011” as the End Date
- Select “United Disability Services, Inc.” from the “Provider” drop down list
- Select “HPC Transportation” from the “Service Sub Category” drop down list
- Select “Mile” from the “Service Unit Type” drop down list
- Select “1:1” from the “Service Ratio” drop down list
- Tab to “# Units” and enter “200”
- Click on the “Save” button

## **9. REVIEW COST PROJECTIONS FOR INDIVIDUALS IN THE SITE**

- Click on “**Manage Cost Projections**” under the “CPT” section on the menu on the left hand side of the screen
- Click on the “Get Cost Projection Details” button in the middle of the screen
  
- The total DDP costs should be \$83,666.36
- The total ADS costs should be \$26,205.60
- The total NMT cost should be \$6,024.72

## **10. FINALIZE THE COST PROJECTION FOR INDIVIDUALS IN THE SITE**

- Click the “Click to Finalize Cost Projection” button