

Training Exercise 4

FOUR PERSON COMPLEX SITE

Site Name: Fourth Example xx (*xx=assigned training number*)

Site Effective Date: 9-1-10

County: Sandusky

Move-in date/Site Effective Date: 9-1-10

Individuals and their waiver spans:

(Note that all individuals have the same move in date and you will choose your copy of the person based on the assigned training number after the name symbolized by the xx on this sheet)

Mark Bushflowerxx (9-1-10 to 8-31-11) IO

Brenda Grassrootxx (9-1-10 to 8-31-11) IO

Chris Steppingstonexx (9-1-10 to 8-31-11) IO

Mike Fencegatexx (9-1-10 to 8-31-11) IO

Providers:

Rescare /VOCA #2500387 start date 9-1-2010

Innovative Support Services #7400548 start date 9-1-2010

DRA Provider:

Rescare /VOCA - DRA start date 9-1-10 & end date 12/31/2020

STOP - Wait for Instructor

Basic info that is populated by IDS and other systems.

ODDP scores:

Mark Bushflower- 5

Brenda Grassroot- 5

Chris Steppingstone- 6

Mike Fencegate- 6

AAI scores:

Mark Bushflower- A

Brenda Grassroot - A

Chris Steppingstone - B

Mike Fencegate - A

ADDING SERVICES:

HPC: Provided by Rescare

Staffing Patterns:

"Monday-Friday" Staffing Pattern:

12:00 a.m.-6:00 a.m. Rescare – 1 staff: HPC = Mark Bushflower, Brenda Grassroot; OSOC =Chris Steppingstone, Mike Fencegate

6:00 a.m.-8:00 a.m. Rescare – 2 staff: all HPC

8:00 a.m. - 3:00 p.m. Rescare – 1 staff: HPC = Chris and Mike (Jennifer & Brenda have ADS)

3:00 p.m.-11:00 p.m. Rescare – 2 staff: all HPC

11:00 p.m.-11:59 p.m. Rescare – 1 staff: HPC = Mark Bushflower, Brenda Grassroot; OSOC = Chris Steppingstone, Mike Fencegate

"Saturday-Sunday" Staffing Pattern:

12:00 a.m.-6:00 a.m. Rescare – 1 staff: HPC =Mark Bushflower, Brenda Grassroot; OSOC = Chris Steppingstone, Mike Fencegate

Training Exercise 4

6:00 a.m.-8:00 a.m. Rescare – 1 staff: all HPC

8:00 a.m.-4:00 p.m. Rescare – 1 staff: HPC =Chris Steppingstone, Mike Fencegate

8:00 a.m.-4:00 p.m. Rescare – 2 staff: HPC =Mark Bushflower, Brenda Grassroot

4:00 p.m.-11:00 p.m. Rescare – 1 staff: all HPC

11:00 p.m.-11:59 p.m. Rescare – 1 staff: HPC =Mark Bushflower, Brenda Grassroot; OSOC =Chris Steppingstone, Mike Fencegate

"Camp Schedule" (Staffing Pattern for Summer Camp)

12:00 a.m.-6:00 a.m. Rescare – 1 staff: HPC =Mark Bushflower, Brenda Grassroot; OSOC =Chris Steppingstone, Mike Fencegate

6:00 a.m.-8:00 a.m. Rescare – 2 staff: all HPC

8:00 a.m.-5:00 p.m. ISS – 1 staff: all HPC

5:00 p.m.-11:00 p.m. Rescare – 2 staff: all HPC

11:00 p.m.-11:59 p.m. Rescare – 1 staff: HPC =Mark Bushflower, Brenda Grassroot; OSOC =Chris Steppingstone, Mike Fencegate

Applying the patterns to the HPC calendar:

- Apply the "Monday – Friday" and "Saturday – Sunday" patterns for the time period of 9/1/2010 through 8/31/2011
- Add the Camp pattern on Mon – Fri from 6-5-11 to 6-18-11 (Make note that the replace box is checked when entering the dates for the span to be applied.)

Exception Days: No HPC on these days because all individuals have natural supports remove the patterns from the HPC calendar.

- November 25, 2010 (Thanksgiving)
- December 25, 2010 (Christmas)

Adding Adult Day Waiver Services:

"Supported Employment Enclave" Schedule:

Provider - ISS

M-F 6.25 hours per day

NMT provided by ISS 2 trips per pattern day.

"Adult Day VocHab Combo" Schedule:

Provider - ISS

M-F 6.25 hours per day

NMT provided by ISS 2 trips per pattern day.

Applying the patterns to the ADS calendar:

- Apply "Supported Employment Enclave" to Mark Bushflower for the 2010 - 2011 waiver year with the except for the time periods of 12-19-10 to 1-1-11, 6-5-11 to 6-18-11, and 11/25/2010
- Apply "Adult Day VocHab Combo" to Brenda Grassroot for the 2010 - 2011 waiver year with the except for the time periods of 12-19-10 to 1-1-11, 6-5-11 to 6-18-11, and 11/25/2010

Training Exercise 4

Unscheduled HPC provided by Rescare

Mark Bushflower and Brenda Grassroot need 420 units per waiver year of Back-up HPC (day program absences) at a 1:2 ratio.

(Break this across the fiscal year by putting 350 units from 9/1/2010 - 6/30/2011 and 70 units from 7/1/2011 – 8/31/2011 or you can use the frequency of month and do 35 unit/month across the whole waiver span.)

HPC (ATN) transportation by Rescare

Mark Bushflower, Brenda Grassroot, Chris Steppingstone and Mike Fencegate need 30 miles of HPC transportation (1:4 ratio) per month for their respective waiver spans of 9/1/2010 – 8/31/2011.

Social Work:

Brenda Grassroot needs 4 hours (16 fifteen minute units) of social work per month from 9/1/10 to 8/31/11 in a 1:1 ratio provided by Rescare.

Project the costs look at the data and totals for each person and finalize for each person.

(Note the cost projection reports on the back of the exercise to help trouble shoot if your totals do not match the ones below.)

Costs should be as follows:

Bushflower:

- DDP \$65,069.24
- ADS \$8,222.40
- NMT \$9,268.80

Grassroot:

- DDP \$66,860.60
- ADS \$9,780.00
- NMT \$9,268.80

Steppingstone

- DDP \$66,068.28
- ADS \$0.00
- NMT \$0.00

Fencegate:

- DDP \$66,068.28
- ADS \$0.00
- NMT \$0.00

STOP - Wait for Instructor

Create a Version of a cost projection:

- Click on the "Manage Versions" link up at the top of the page near the "Edit Site" link.
- Click on the "Save New Version" link

Training Exercise 4

- In the pop-up window name the version and enter notes in the field
- Hit save and window will close
- Your version should be displayed on the version list

Look at reports with the Instructor:

- Click on the "Reports" link at the bottom of the left hand column
- Click on the following reports and review them with the instructor
 - "Cost Projection Details"
 - "Staffing Pattern Details"
 - "ADS Calendar"
 - "Individual Site History"
 - "HPC Scheduled vs Unscheduled"
- Note that the reports can be exported to various formats

Authorizing costs in SPA

Once you finalize the cost projections for all 4 people

- Click on the Service Payment Authorization link under SPA link on the left hand side.
- Choose the Sandusky count from the county dropdown menu (This will normally default to your county assignment associated with your username.)
- The Pending authorization box should update with the names of people who have finalized projections awaiting authorization.
- Look for the names in the Pending authorization box and select Bushflower with your number after it.
- The Cost projection box should update with all of the spans waiting for authorization for Bushflower
- Select the correct span in the cost projection Spans box
- The system should tell you that it is loading the details
- Once the details are populated then you can click the "Authorize Cost" button.
- Message will tell you that costs were authorized
- Repeat the process for the rest of your 4 people do not forget your number designation with the name.

Populating Costs in the DRA

- Click on the "DRA" link on the left hand side.
- Then select "County Board" under the "DRA".
- The screen should now display that there is an existing site cost and directions in the alert on what needs to be done with the site costs.
- Click the "Generate Site Costs" link to the right of the site cost span display.
- The sites costs will be listed with selected span highlighted yellow.
- The details for the selected span will be displayed below and show all 4 people in the site with all of the costs and hours associated with them in the grid format.
- Click the save site cost link at the bottom left corner of the details to save the cost in the DRA.
- Now the site costs can be viewed in the Providers screens
- Click on the "Providers" link under DRA

Training Exercise 4

- The site cost span is displayed
- Click on “Select” and the actuals span page will be displayed
- Note all of the Site Cost information in the header box:
 - Provider
 - Cost span dates
 - Hourly Rate
 - Average Projected Hours
 - Average Actual Hours
 - Average Projected Costs
 - Average Actual Costs
 - Total Cost
 - Used costs
 - Available costs
 - Total Hours
 - Used hours
 - Available hours
 - Estimated Span Overage Cost
 - % Overage for hours
- Click on “New Actual Span” link
- Pop-up will appear to allow you to enter the actual span dates and hours for those dates
- Enter 9/1/2010 – 9/7/2010 and 308.75 hours and “Save”
- The new actual span will be displayed and a message telling you the “Actual Span Saved” will be in red. (Note the “New MBS Billing File For Span” link for future reference.)
- Select “Individual Actuals” for the newly entered span
- The screen will now display the date grid for you to check boxes for the days within the actuals span that the individuals were present
- Click the Check “All” link right above the individual’s names.
- Click on the “Update service days/re-calculate Actuals” button
- The “Individuals Summary” section will be populated with the DBU information for the actual span.
- Note you can generate a bill file from this page for the actuals on this page
- Click the “Actual Spans” tab and see the “New MBS Billing File For Span” link – this is how to create a billing file for several actual spans at once.

Example 4 part 2

General Instructions for Making Changes

Making Changes to Services or Calendars

(No changes in composition- i.e. no move-ins or move-outs)

- Make the changes to the details
- Re-finalize cost projections for all affected by the change
- Re-authorize cost projections
- Re-submit the PAWS

Training Exercise 4

- Generate new site costs in DRA

Making Changes When an Individual Moves Out

- Create new staffing patterns without the person who is moving out and apply them after the move out date.
- Change the end dates for unscheduled services to match the move out date.
- Remove the ADS patterns from the individual's ADS calendar after the move out date.
- Re-finalize cost projections for all individuals.
- Re-authorize cost projections all individuals.
- Re-submit the PAWS.
- Generate new site costs in DRA.
- You will not be able to enter a move out date for an individual if they have any service details in the site after the move out date.

Making Changes When an Individual Moves In

- Add the individual to the site under “manage individuals.”
- Add the cost details for the individual starting with the move-in date.
- Create new staffing patterns with the new individual and apply them beginning on the move-in date.
- Add unscheduled services beginning with the move-in date
- Add ADS patterns to the ADS calendar for the new individual beginning with the move-in date.
- Re-finalize cost projections for everyone.
- Re-authorize cost projections for everyone.
- Re-submit the PAWS.
- Generate new site costs in DRA.

Example 4 Changes

In this site we are going to have Chris Steppingstone move out effective 2/28/11 and Janet Flowerbed move in effective 3/1/11.

New Individual info:

Janet Flowerbed (9-1-10 to 8-31-11) IO

DDP – 6

AAI – A

For this exercise Janet's services are the same as Chris's would have been had she not moved out.

Steps:

- Go to “Manage Individuals” and add Janet Flowerbed.
 - Search for Janet Flowerbed
 - Select her and apply a move-in date of March 1, 2011.
- Eliminate Chris Steppingstone from the staffing patterns and add Janet Flowerbed.
 - Make a copy of a staffing pattern by clicking “Copy” on the staffing pattern page and name the new copy of the pattern. You can then edit the new copy of the pattern without altering the old pattern which is used prior to the change in site.

Training Exercise 4

- Edit the details in the newly named pattern to eliminate Chris Steppingstone and add Janet Flowerbed to the details.
- Repeat these two steps for all staffing patterns that will be used on the calendar on or after 03-01-2011
- You do not need to make a copy of “Camp” as it is not applied before the move-in/move-out dates. Instead, edit the “Camp” staffing pattern and it will automatically apply to the HPC calendar.
- Apply the new patterns to the calendar for the appropriate dates
 - Apply the new patterns starting with the move-in date of March 1, 2011.
- Adult day service patterns changes
 - There are no new patterns needed for this example because neither Chris Steppingstone nor Janet Flowerbed receives ADS services.
- Unscheduled services adding/erasing.
 - Add in the unscheduled services that Janet Flowerbed needs from 3-1-2011 to 8-31-2011.
 - Eliminate any unscheduled services for Chris Steppingstone from 3-1-2011 to 8-31-2011.
 - Apply the same services that Chris received (see above) to Janet.
- Remove Chris from the site.
(A move out date cannot be entered for an individual until all of their services have been removed from days on or after their move-out date.)
 - Go to manage individuals and enter a move-out date of 2-28-2011 for Chris Steppingstone.
 - CPT will not allow the date to be applied if there are any remaining services for Chris on or after 3/1/2011.

Costs should be as follows:

Bushflower:

- DDP \$65,069.24
- ADS \$8,222.40
- NMT \$9,268.80

Grassroot:

- DDP \$66,860.60
- ADS \$9,780.00
- NMT \$9,268.80

Steppingstone

- DDP \$32,746.08
- ADS \$0.00
- NMT \$0.00

Fencegate:

- DDP \$66,068.28
- ADS \$0.00

Training Exercise 4

- NMT \$0.00

Flowerbed:

- DDP \$33,322.20
- ADS \$0.00
- NMT \$0.00

(Note the cost projection reports on the back of the exercise to help trouble shoot if your totals do not match the ones above.)

- Re-Finalize and authorize
 - Finalize the new cost projections for everyone in the site.
 - Reauthorize the new cost projections for everyone in the site
 - Go to the DRA and generate new site costs for the DRA and save them to DRA.

STOP - Wait for Instructor.

There are now two new cost spans in the County Board area of the DRA.

- The two new spans are from 9/1/2010 - 2/28/2011 and 3/1/2011 - 8/31/2011.
- Save the new site costs for these spans in chronological order (note that the old span of 9/1/2010 - 8/31/2011 disappears once you save the first new site cost span)
- Go to the Provider area of the DRA.
- Click on the alert.
- Note that the Orange box details what the provider needs to do.
- Follow the directions and hit the "Recalculate the Actuals" alert.
- Note that the Resident Actual totals are changed but not the details.

Discuss why & how the DRA breaks site costs

The DRA will break the site costs spans when one of the following happens in the site:

- The DRA provider span ends or begins
- A person's waiver span ends or begins
- A person moves in or out
- With the site begin and end date

The DRA handles these breaks in two different ways:

- When the DRA encounters a waiver end and begin date it uses a prorating formula to decide how many dollars and hours should be on each side of the break on an individual basis.
- When the DRA encounters a move-in/move-out date it applies the details only to the portion of the individual's waiver span that applies.
- When the DRA encounters a DRA span break it takes the projected costs from the calendar for those days and only prorates Unscheduled HPC when it crosses the DRA provider spans.