



ODP Announcement

Data Fix Scheduled to Adjust ISPs To Support Transition from Public Partnership, LLC to Palco, Inc.

ODP Communication Number 078-18

The mission of the Office of Developmental Programs is to support Pennsylvanians with developmental disabilities to achieve greater independence, choice and opportunity in their lives.

AUDIENCE: Vendor Fiscal/Employer Agent (VF/EA) Financial Management Services (FMS) Organizations, Common Law Employers in the VF/AE model, Administrative Entities (AEs), Supports Coordination Organizations (SCO) and Supports Coordinators (SCs)

PURPOSE: This Office of Developmental Programs (ODP) announcement is intended to communicate that a HCSIS data fix will be performed on August 30, 2018 to adjust Individual Supports Plans (ISPs) to support the transition from Public Partnership LLC (PPL) to the new statewide VF/EA FMS organization, Palco, Inc.

DISCUSSION: ODP will be performing an automated data fix to adjust service segments (i.e. split service authorizations) on all applicable FY 2018/2019 plans to account for the new VF/EA FMS organization, Palco, Inc. After the data fix and once notified that the participant has transitioned to Palco, Inc., AEs and SCOs should review each impacted ISP to determine if the data fix adjusted the plan appropriately to meet the needs of the individual. SCs/SCOs should collaborate with AEs to confirm if any additional ISP changes are required and perform critical revisions as needed.

PLEASE NOTE THE FOLLOWING INFORMATION REGARDING THE AUTOMATED DATA FIX:

- **Anticipated Data Fix Implementation Date: Thursday, August 30, 2018**
- All ISP service segments adjusted by the data fix will be authorized.

- For ISPs associated with Individuals who prefer NOT to use VF/EA FMS service delivery model, it is important that PPL associated service segments are end dated with a date prior to or including September 15, 2018. This activity should be completed before August 30, 2018. If an individual prefers not to use the VF/EA FMS service delivery model and PPL FMS service segments are NOT end-dated, then they **WILL BE** included in the automated data fix.

The data fix will create new Palco, Inc. service segments and adjust existing PPL service segments for FMS service units and service amounts. The logic to be used will only be applied to FY 2018/2019 plans and will include the following:

PPL and Palco, Inc. FMS service unit adjustments on plans:

- 30% of the total authorized units will be assigned to PPL for the period 07/01/2018 - 09/15/2018 and a new service segment will be created for Palco, Inc. where the remaining 70% of authorized units will be assigned to Palco, Inc. for the period 9/16/2018 to the actual service end date (usually 06/30/2019). All service segments impacted will be authorized.
- If utilized **PPL units** are greater than 30% of total units, then the utilized units will be assigned to PPL service line on the ISP for the period 07/01/2018 - 09/15/2018 and a new service line will be created for Palco, Inc. The new Palco Inc., service segment will contain the remaining units authorized for the period 9/16/2018 to the actual service end date (usually 06/30/2019). All service segments impacted will be authorized.
- **For example**, if a total of 100 units were authorized on the PPL service segment for the entire FY 2018/2019 and 40 units were utilized, the data fix will adjust the PPL service segment to show zero (0) units remaining and a new Palco, Inc. service segment will be created and show 60 units authorized.

PPL and Palco, Inc. FMS service amount adjustments on plans:

- 30% of the total **service** amount will be assigned to PPL for the period 07/01/2018 - 09/15/2018 and a new service segment will be created for Palco, Inc. that will be assigned the 70% remaining total service amount for the period 9/16/2018 to the actual service end date (usually 06/30/2019). All service segments impacted will be authorized.
- If the utilized **service** amount is greater than 30% of total service amount, then the utilized service amount will be assigned to PPL for the period 07/01/2018 - 09/15/2018. A new service segment will be created for Palco, Inc. that contains the remaining authorized amount for the period 9/16/2018 to the actual service end date (usually 06/30/2019). All service segments impacted will be authorized.

The data fix will create a new Palco, Inc. service segment and adjust the existing PPL service segment for **the monthly administrative fee (procedure code W7318)**. The logic to be used includes the following:

- Three (3) units will be assigned to PPL for the period 07/01/2018 - 09/30/2018.
- A new Monthly Administrative Fee service line will be created with the remaining units for Palco, Inc. (MPI 103352064 service location 0001) with the service dates as 10/01/2018 to the actual service end date (usually 06/30/2019).
- The Monthly Administrative Fee service on the plan will be placed in Pending status.

The data fix will **NOT** create new Palco, Inc. service segments or adjust existing PPL service segments on ISPs for FMS services when the following scenarios exist:

- A PPL service segment(s) exist with an end date prior to and including September 15, 2018.
- When a FY 2018/2019 plan is in any status other than Approved and services are in any status other than Authorized.
- When there is an active FY 2018/2019 Annual Plan in Draft status and an approved FY 2018/2019 plan present.
- New plan revisions will **NOT** be created by the automated data fix. The automated fix will only update existing Approved plan services.
- When the Total Units of the PPL service is only one (1) unit on the participant's FY 2018/2019 plan.
- When all the authorized units are utilized for any PPL service found on the FY 2018/2019.

The data fix will **NOT** create new Palco, Inc. service segments or adjust existing PPL service segments for **the monthly administrative fee** when the following scenarios exist:

- When the PPL monthly administrative fee has an end date before or equal to September 30, 2018.
- When a FY 2018/2019 plan is in any status other than Approved and services are in any status other than Authorized.
- When the Total Units on the service is three (3) or less.

If SCs need to adjust plans manually, please note the following:

- Manual updates to modify waiver service lines that will be associated with Palco, Inc. cannot be made until August 31, 2018 and forward. Manual updates to these service segments on the ISP from PPL to Palco, Inc. are being temporarily prevented by the system. Prior to August 31, 2018, users who attempt to associate service segments with Palco, Inc. will receive an error that will prevent them from updating these specific service segments until after the data fix. If individuals have decided not to transition to Palco, Inc. and/or services in general need to change on the ISP, users should not experience an issue as a result of this planned data fix.

- Please note when manually calculating the amount of units and dollars by FMS service code, it is recommended that 30% of the entire fiscal year totals (amount and units) remain as authorizations with PPL and 70% of the entire fiscal year totals (amount and units) should be applied to authorizations with Palco, Inc.. See ISP service detail example beginning on the next page.
- The combination of PPL and Palco, Inc. totals (amount and units) must remain equal to the totals (amount and units) that were authorized prior to the ISP adjustment.
- If SCs are doing manual adjustments **after** the data fix to the service segments that were adjusted by the system to support the transition from PPL to Palco, Inc, note that HCSIS is designed to auto approve/auto authorize ISP adjustments of this nature. If the AE would prefer to bypass auto approval/auto authorization, it is important that the SC enters a check mark in the manual review checkbox prior to plan submission so the plan is sent to the AE Dashboard for manual review by the AE.

The **ISP Approved Report** is available to view all plans which have been approved, either manually, or automatically, for the timeframe specified by the user. Plans captured on this report with a "Plan Approved By" label of "ODP Approved" indicates that a plan was automatically approved by the system.

EXAMPLE: [CURRENT ISP](#)

Name: Smith, Joe		MCI#: 123456789		Residential County: Pennsylvania			Info	
Plan Status: Approved		Changed: 09/15/2018 13:43:06		County/Joinder: Anywhere		Waiver/Program: Consolidated Waiver		Fiscal Year: 2018-2019
Select	Outcome Phrase	Service Name	Service Unit Cost	Provider Name	Total Annual Units	Service Start Date	Service End Date	Authorization Status
<input type="radio"/>	HEALTH AND SAFETY,	In-Home & Commnty Supprts (Lvl 2)	\$8.08/15 min.	PUBLIC PARTNERSHIPS LLC	1000	07/01/2018	06/30/2019	Authorized
<input type="radio"/>	HEALTH AND SAFETY	In-Home & Commnty Supprts (Lvl 3 Enh) LPN	\$19.07/15 min.	PUBLIC PARTNERSHIPS LLC	2000	07/01/2018	06/30/2019	Authorized
<input type="radio"/>	HEALTH AND SAFETY, RELAXATION	Monthly Admin Fee	N/A	PUBLIC PARTNERSHIPS LLC	12	07/01/2018	06/30/2019	Pending
Detail Screen Service and Supports								
PPL-	In-Home & Commnty Supprts (Lvl 2)			Total Amount \$8,080.00		Units- 1000		
PPL-	In-Home & Commnty Supprts (Lvl 3 Enh) LPN			Total Amount \$38,140.00		Units- 2000		
PPL-	Monthly Admin Fee			Total Annual Units 12				

EXAMPLE: TRANSITION ISP

Name: Smith, Joe		MCI#: 123456789			Residential County: Pennsylvania			Info
Plan Status: Approved	Changed: 09/15/2018 13:43:06				County/Joinder: Anywhere	Waiver/Program: Consolidated Waiver	Fiscal Year: 2018-2019	
Select	Outcome Phrase	Service Name	Service Unit Cost	Provider Name	Total Annual Units	Service Start Date	Service End Date	Authorization Status
<input checked="" type="radio"/>	HEALTH AND SAFETY,	In-Home & Commnty Supprts (Lvl 2)	\$8.08/15 min.	PUBLIC PARTNERSHIP S LLC	300	07/01/2018	09/15/2018	Authorized
<input type="radio"/>	HEALTH AND SAFETY	In-Home & Commnty Supprts (Lvl 3 Enh) LPN	\$19.07/15 min.	PUBLIC PARTNERSHIP S LLC	600	07/01/2018	09/15/2018	Authorized
<input type="radio"/>	HEALTH AND SAFETY, RELAXATION	Monthly Admin Fee	N/A	PUBLIC PARTNERSHIP S LLC	3	07/01/2018	09/30/2018	Pending
<input type="radio"/>	HEALTH AND SAFETY,	In-Home & Commnty Supprts (Lvl 2)	\$8.08/15 min.	Palco, Inc.	700	09/16/2018	06/30/2019	Authorized
<input type="radio"/>	HEALTH AND SAFETY	In-Home & Commnty Supprts (Lvl 3 Enh) LPN	\$19.07/15 min.	Palco, Inc.	1400	09/16/2018	06/30/2019	Authorized
<input type="radio"/>	HEALTH AND SAFETY, RELAXATION	Monthly Admin Fee	N/A	Palco, Inc.	9	10/01/2018	06/30/2019	Pending
<input type="radio"/>	HEALTH AND SAFETY, RELAXATION	Monthly Admin Fee	N/A	PUBLIC PARTNERSHIP S LLC	3	07/01/2018	09/30/2018	Pending

Transition ISP Example Continues On Next Page

Name: Smith, Joe		MCI#: 123456789			Residential County: Pennsylvania			Info	
Plan Status: Approved	Changed: 09/15/2018 13:43:06				County/Joinder: Anywhere	Waiver/Program: Consolidated Waiver		Fiscal Year: 2018-2019	
	HEALTH AND SAFETY,	In-Home & Commnty Supprts (Lvl 2)	\$8.08/15 min.		Palco, Inc.	700	09/16/2018	06/30/2019	
	HEALTH AND SAFETY	In-Home & Commnty Supprts (Lvl 3 Enh) LPN	\$19.07/15 min.		Palco, Inc.	1400	09/16/2018	06/30/2019	Authorized
	HEALTH AND SAFETY, RELAXATION	Monthly Admin Fee	N/A		Palco, Inc.	9	10/01/2018	06/30/2019	Pending

Detail Screen Service and Supports			
PPL-	In-Home & Commnty Supprts (Lvl 2)	Total Amount \$	2,424.00 Units 300
PPL-	In-Home & Commnty Supprts (Lvl 3 Enh) LPN	Total Amount \$	11,442.00 Units-600
PPL-	Monthly Admin Fee	Total Annual Units	3
Palco Inc. -	In-Home & Commnty Supprts (Lvl 2)	Total Amount \$	5,656.00 Units- 700
Palco Inc.-	In-Home & Commnty Supprts (Lvl 3 Enh) LPN	Total Amount \$	26,698.00 Units-1400
Palco Inc.-	Monthly Admin Fee	Total Annual Units	9

RESOURCES

Training modules for Providers and SCOs are also available on the www.myodp.org website by going to the homepage > Resources > Intellectual Disabilities > Participant Directed Services.

INQUIRIES

For questions regarding this communication contact your ODP PDS Regional Lead.