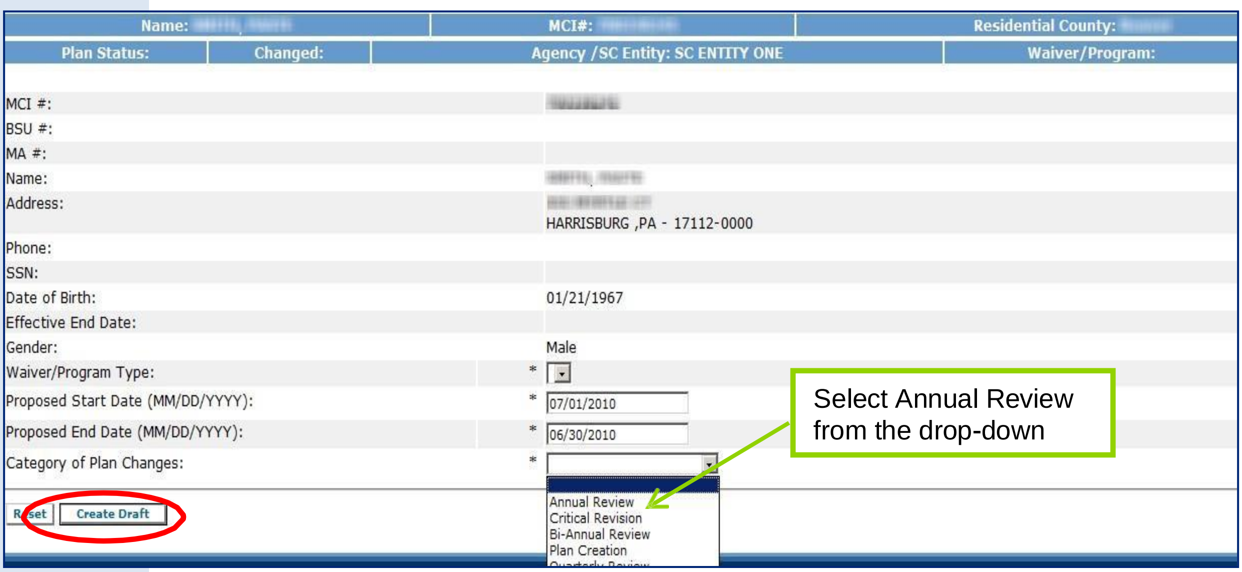
OLTL Annual Review Tip Sheet

1

Create Draft Annual Review

All users should review the following steps before performing an annual review in HCSIS

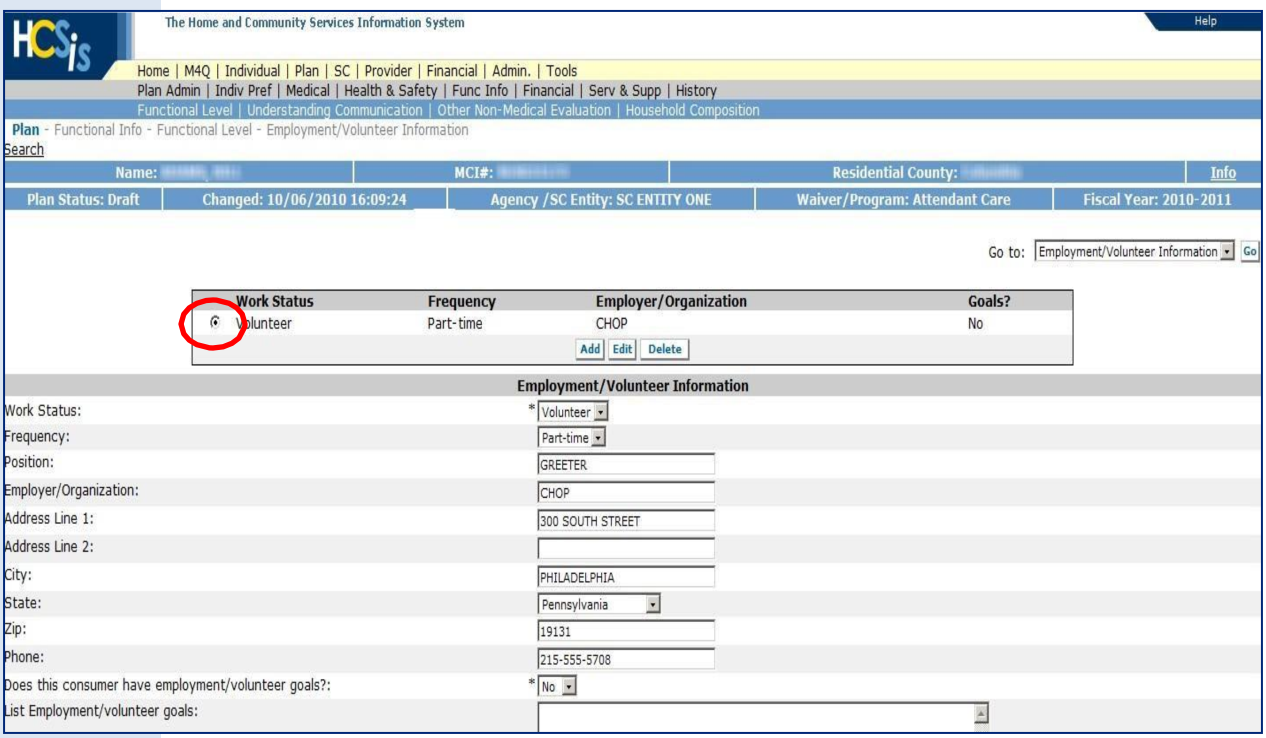
- Navigate to the *Create Draft* screen by following the menu path: ***Plan> Plan Admin> Create Draft***
- Search for the participant by Last Name or SSN. The screen will appear with the participant's name in the blue header at the top of the screen.
- Enter the following information:
  - **Waiver/Program Type** (Select the waiver/program from the drop-down list)
  - **Proposed Start Date** (Enter 07/01/20XX)
  - **Proposed End Date** (Enter 06/30/20XX)
  - **Category of Plan Changes** (Select Annual Review)
- Click [Create Draft]
- Verify the draft plan was created by checking to see if an ***Operation Successful*** message appears at the top of the screen. If you do not receive an Operation Successful message, an error has occurred and the draft plan was not created. Read the error message at the top of the screen, address the error, and click [Create Draft] again.



2 ISP Employment/Volunteer Information

Note: A participant must have employment/volunteer information in HCSIS in order to submit a draft plan. If the participant does not have employment information recorded in HCSIS, you will receive an error message when submitting the plan.

- Navigate to the *Employment/Volunteer Information* screen by following the menu path: ***Plan> Functional Information> Functional Level – Employment/Volunteer Information***
- Select Employed, Volunteer or None from the Work Status drop-down list.
- Enter the following information
  - **Frequency** (Select Fulltime or Part-time from drop-down list)
  - **Position**
  - **Employer/Organization**
  - **Address**
  - **City**
  - **State**
  - **Zip Code**
  - **Phone**
- Answer **Does this consumer have employment/volunteer goals?** (Select Yes/No from the drop-down list).
- If Yes is selected, enter goal information in the List Employment/volunteer goals text box.
- Click [Save].
- Continue to Existing Services, Details.



3 Existing Service Details

- Navigate to the *Service Details* screen by following the menu path: ***Plan> Serv & Supp> Serv Dtls***
- Note: HCSIS copies all of the exact information, including services, from the existing approved ISP into the draft Annual Review.
- Click the Select circle (or radio button) for a service to edit from the table at the top of the screen.
- Click [Edit] and the selected service's information will appear in the fields below the table.
- Highlight the appropriate outcome in the Related Outcome Phrase field.
- Enter the following information:
    - **Total Annual Units** (Update the service dates and units as appropriate to reflect the entire fiscal year)
        - Units of Service Coordination = 144
        - Units of Service = 52* Total permanent hours* 4
    - **Expected Start Date** (Set this to 7/1/20XX)
    - **Expected Stop Date** (Set this to 6/30/20XX)
- Click [Save].
- Repeat these steps for each service on the plan.

Services And Supports		
Plan Start Date:		07/01/2010
Plan End Date:		06/30/2011
Related Outcome Phrase:	*	
Service Name:		Attendant Care (Agency)-Michael Dallas
Service Procedure Code:		S5125:00:00:00:00
County Where the Service is Provided:		OMAP/OSP STATE
Service Contract Start Date:		07/01/2010
Service Contract End Date:		06/30/2011
Service Unit Cost:		$12.50/15 min.
Provider MPI #:		300357222
Provider Name:		REL SIX SEVEN OLTL PROV FIVE
Service Location Id:		0001
Provider Site:		1301 N 6TH ST HARRISBURG,PA 17102-1249
Total Annual Units:	*	10
Utilized Units:		0
Expected Start Date (MM/DD/YYYY):	*	07/01/2010
Expected Stop Date (MM/DD/YYYY):	*	06/30/2011
The service is an emergency substitute for the following service:		
Service Subtotal:		$125.00
Plan Budget Total:		$125.00
Authorization Status:		Authorized
Authorization Date And Time:		06/14/2010 07:33:10 PM
Authorization Comments:		

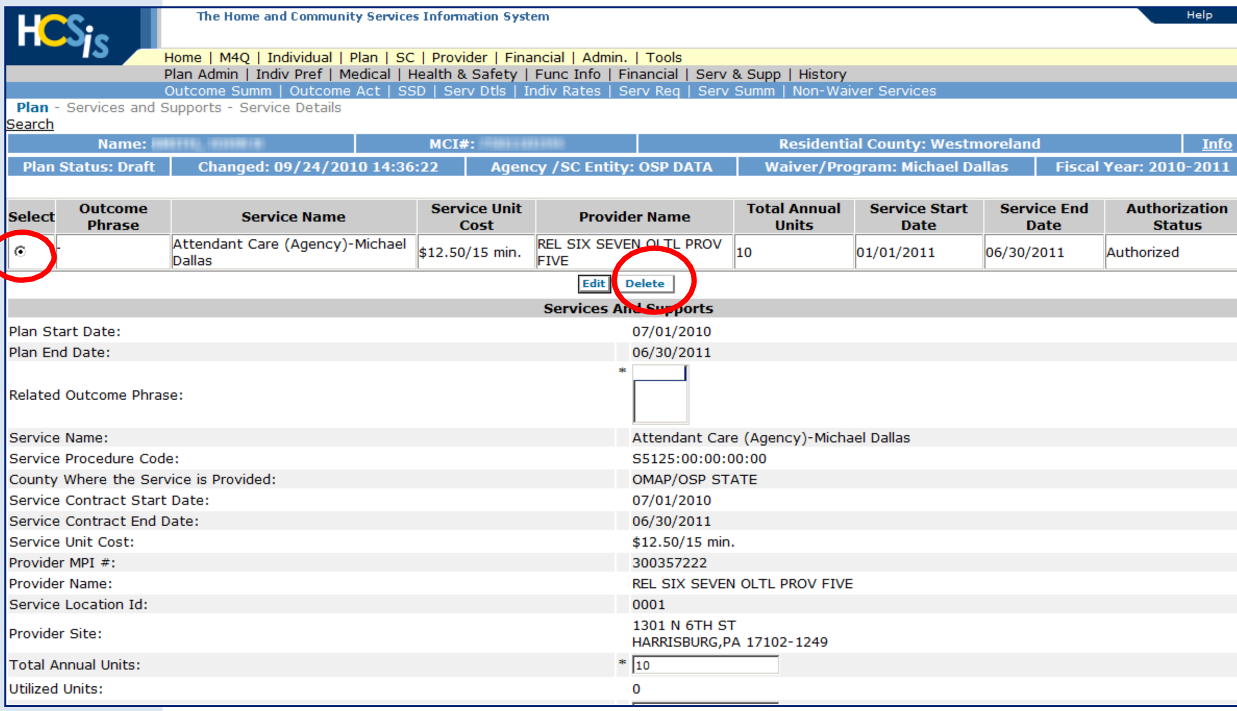
Reset Save

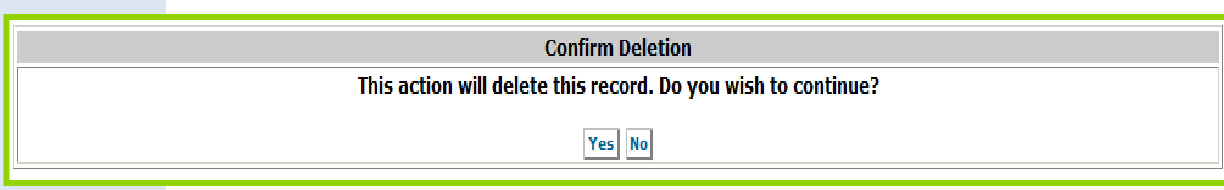
4 Deleting Old Services, Details

Note: Skip this step if you are not deleting services from the participant's plan.

Navigate to the *Service Details* screen by following the menu path: ***Plan> Serv & Supp> Serv Dtls***

- Click the **Select** circle for a service to be removed from the plan.
- Click [Delete] and a box will appear asking you to confirm the deletion.
- Click [Yes].
- Repeat these steps for each service that should be removed from the plan.





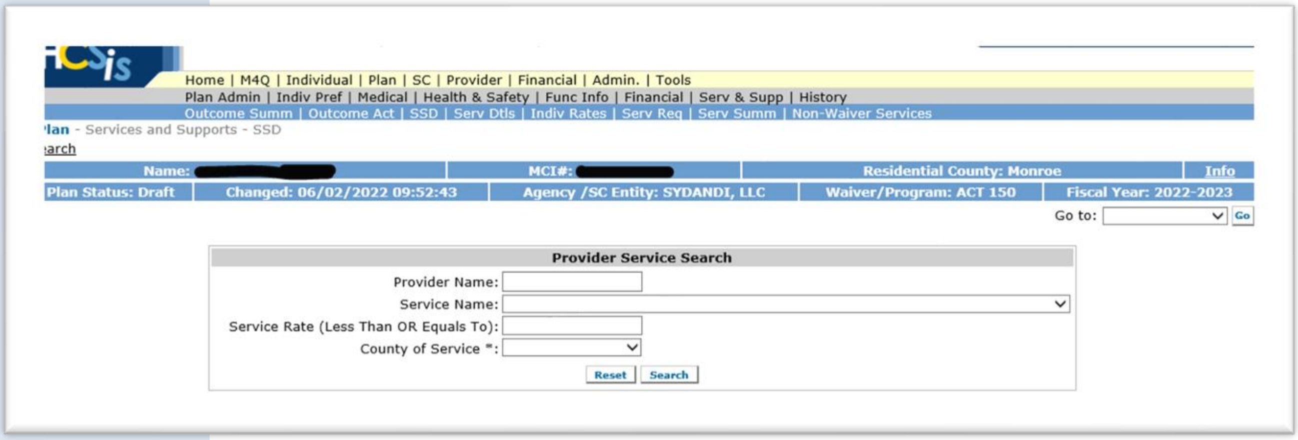
OLTL Annual Review Tip Sheet

5

Adding NEW SSD Services

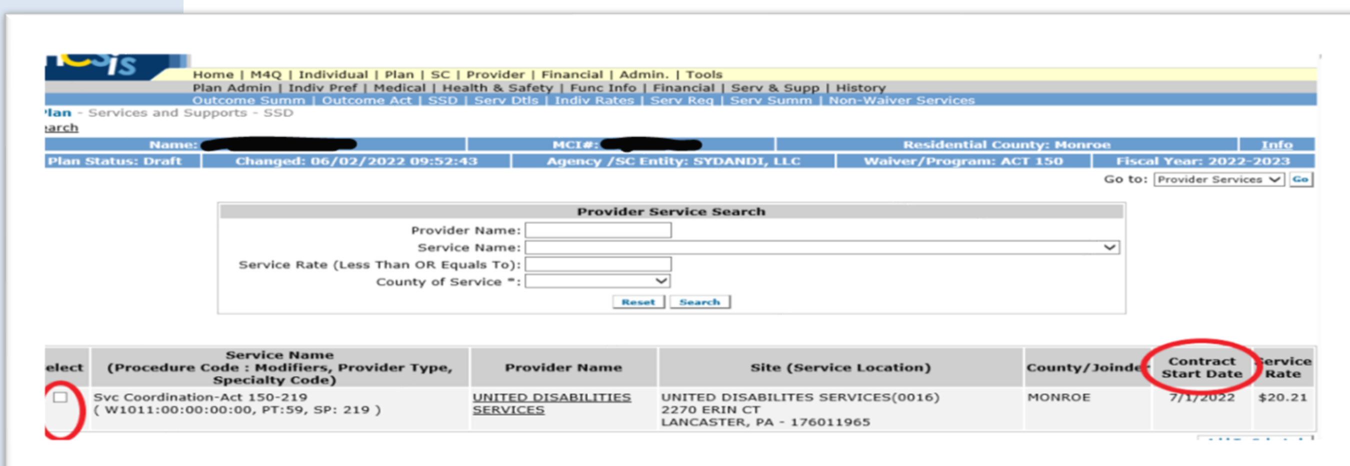
Note: Skip this step if you are not adding new services to the participant's plan.

- Navigate to the *Services and Supports Directory* (SSD) screen by following the menu path: Plan> Serv & Supp> ***SSD***
- Enter the following information into the Provider Service Search fields:
  - Provider (if known – this is not a required field)
  - County
- Click [Search].



Note: When searching for services in the SSD screen, use the Go To box to view "All" results or narrow search criteria to show fewer services on the screen

- Select the services to add to the plan by clicking the checkbox to the left of the service name(s). Be sure to reference the Contract Start Date on the SSD to ensure you are selecting a service that fits within the plan dates.
- Click [Add to Selected].
- Repeat these steps for each provider.
- If vendor services will not be added to the participant's plan, click on [Serv Dtls] in the blue menu bar at the top of the screen to go to the *Service Details* screen

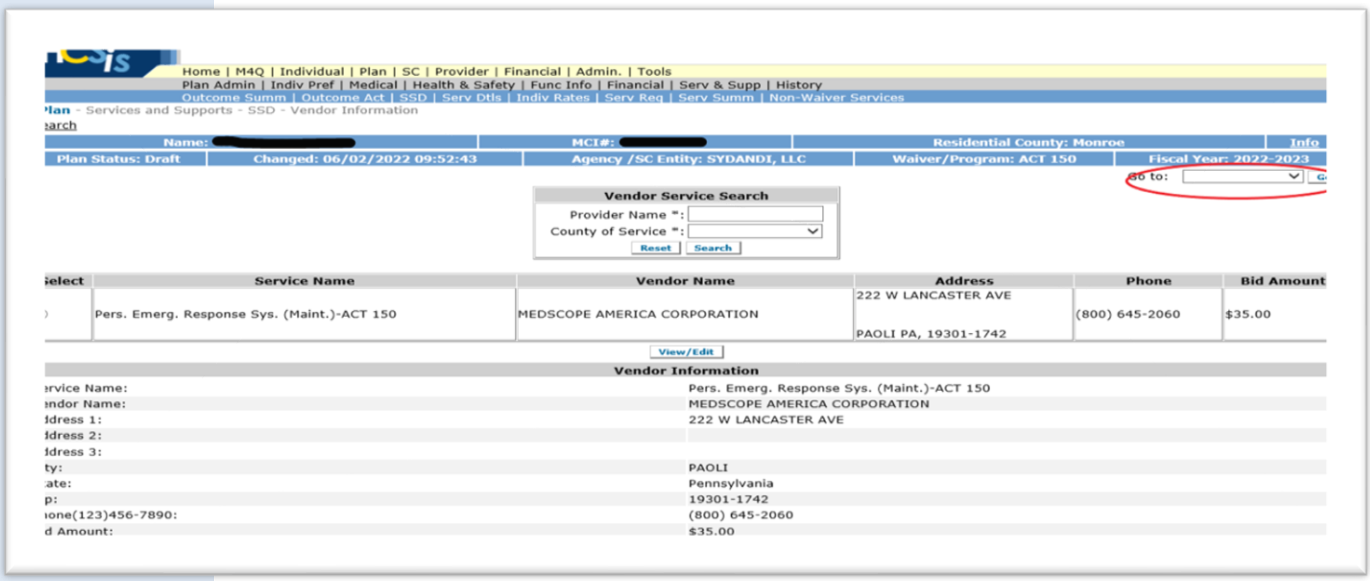


6

Adding NEW Vendor Services

Note: Skip this step if you are not adding new vendor services to the participant's plan.

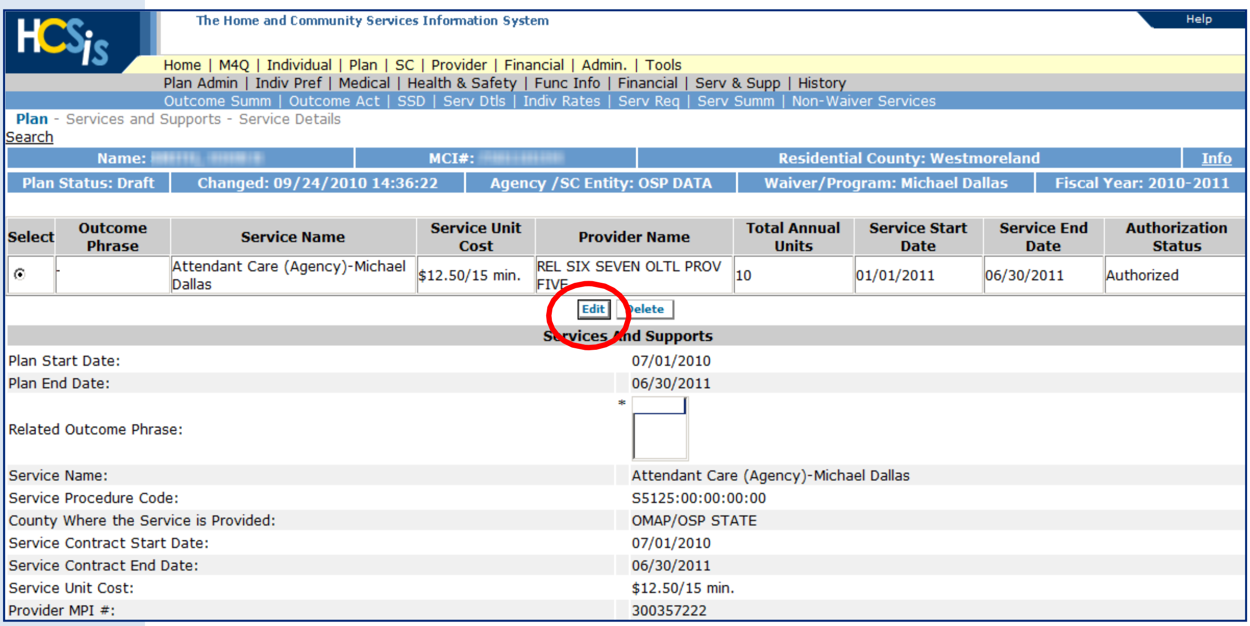
- Navigate to the *SSD* screen by following the menu path: ***Plan> Serv & Supp> SSD***
- If you just finished adding provider services to the plan, use the "Go To" drop-down list located in the upper right corner of the HCSIS window to select Vendor Services.
- Click [Go].
- If you navigated away from the SSD screen or you are logging back into HCSIS, follow the menu path above and the SSD screen will display.
- Enter the following information:
  - Provider Name (This is a required field.)
  - County of Service (This is a required field.)
- Click [Search].
- Click on the vendor service that you would like to add.
- Note: See tip sheet 6.0 Vendor Services for additional information on Vendor Services.



7 Adding Service Details for NEW Services

Note: Skip this step if you did not add new services to the participant's plan.

- Navigate to the *Service Details* screen by following the menu path: ***Plan> Serv & Supp> Serv Dtls***
- Click the Select circle (or radio button) for a new service on the left side of the table at the top of the screen.
- Click [Edit] and the selected service's information will appear in the fields below the table.
- Highlight the appropriate outcome in the Related Outcome Phrase field.
- Enter the following information:
    - Total Annual Units
        - Units of Service Coordination = 144
        - Units of Service = (52 * Total permanent hours* 4)
    - Expected Start Date (Set this to 7/1/20XX)
    - Expected Stop Date (Set this to 6/30/20XX)
- Click [Save].
- Repeat these steps for each new service.


HCSIS The Home and Community Services Information System Help

Home | M4Q | Individual | Plan | SC | Provider | Financial | Admin. | Tools
Plan Admin | Indiv Pref | Medical | Health & Safety | Func Info | Financial | Serv & Supp | History
Outcome Summ | Outcome Act | SSD | Serv Dtls | Indiv Rates | Serv Req | Serv Summ | Non-Waiver Services

Plan - Services and Supports - Service Details
Search

Name: [redacted]	MCI#: [redacted]	Residential County: Westmoreland	Info

Plan Status: Draft	Changed: 09/24/2010 14:36:22	Agency /SC Entity: OSP DATA	Waiver/Program: Michael Dallas	Fiscal Year: 2010-2011

Select	Outcome Phrase	Service Name	Service Unit Cost	Provider Name	Total Annual Units	Service Start Date	Service End Date	Authorization Status
⊙	-	Attendant Care (Agency)-Michael Dallas	$12.50/15 min.	REL SIX SEVEN OLTL PROV FIVE	10	01/01/2011	06/30/2011	Authorized

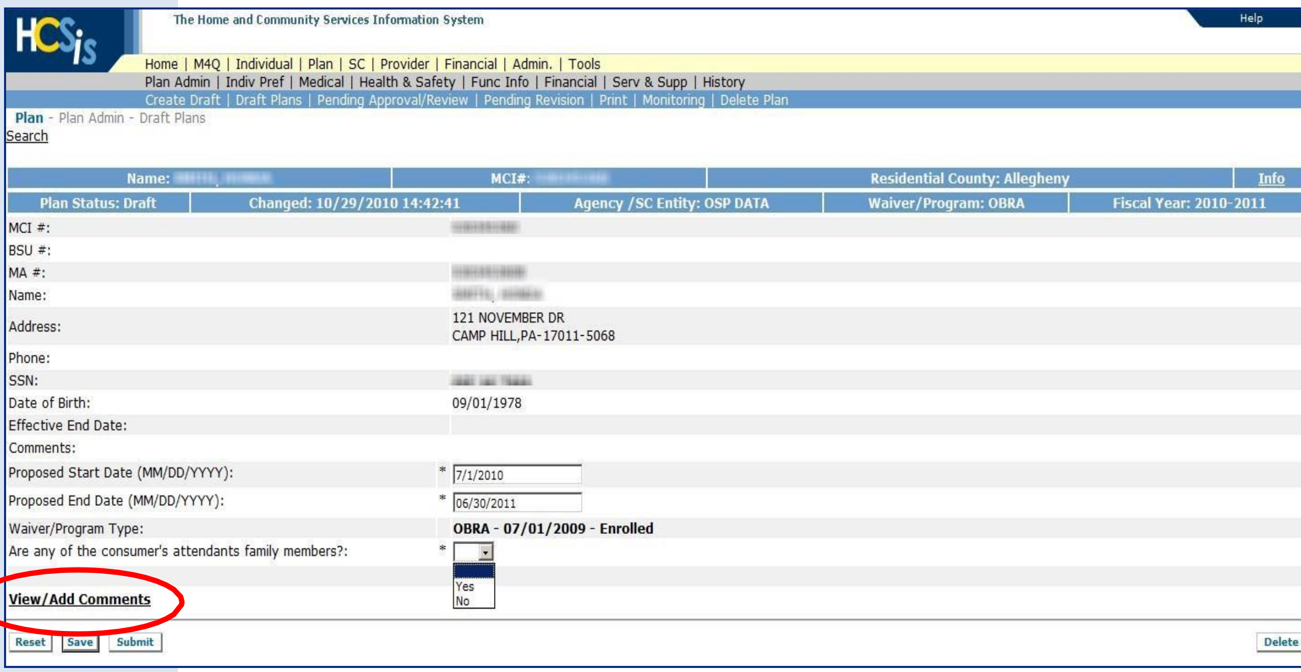
Edit Delete

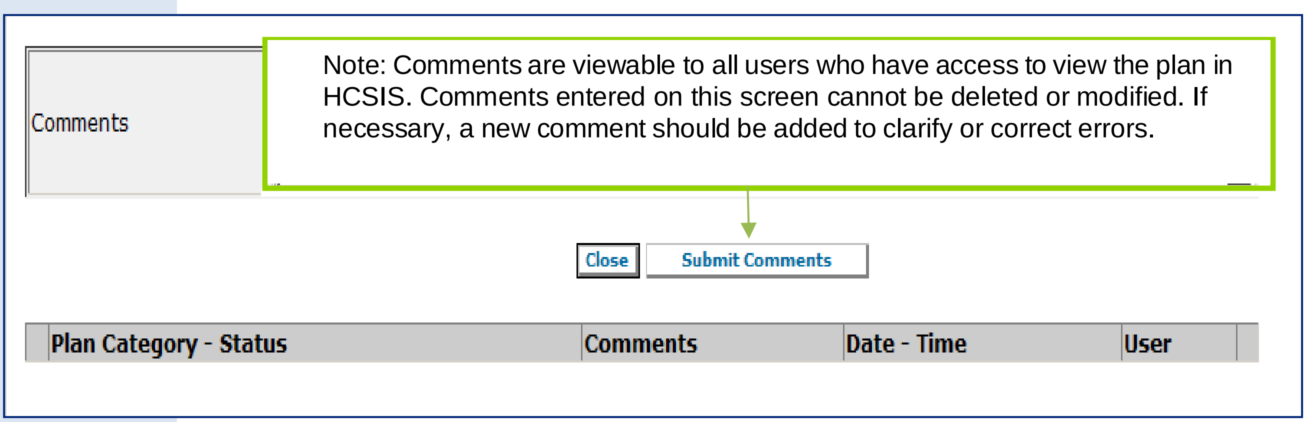
Services And Supports

Plan Start Date:	07/01/2010
Plan End Date:	06/30/2011
Related Outcome Phrase:	*
Service Name:	Attendant Care (Agency)-Michael Dallas
Service Procedure Code:	S5125:00:00:00:00
County Where the Service is Provided:	OMAP/OSP STATE
Service Contract Start Date:	07/01/2010
Service Contract End Date:	06/30/2011
Service Unit Cost:	$12.50/15 min.
Provider MPI #:	300357222

8 Submit Plan

- Navigate to the *Draft Plan* screen by following the menu path: ***Plan>Plan Admin> Draft Plans***
- Search for the participant's plan by Last Name or SSN.
- Answer "Are any of the consumer's attendants family members?" (Select Yes/No from drop down list).
- Enter any comments/details by clicking View/Add Comments. A separate window opens and allows multiple comment entries. Please see the Comment Box Requirements Tip Sheet for more information about what details should be provided here.
- Click [Submit Comments] to save comments.
- Click [Close] to return to the Draft Plans screen.
- Click [Submit] to submit the plan for review.



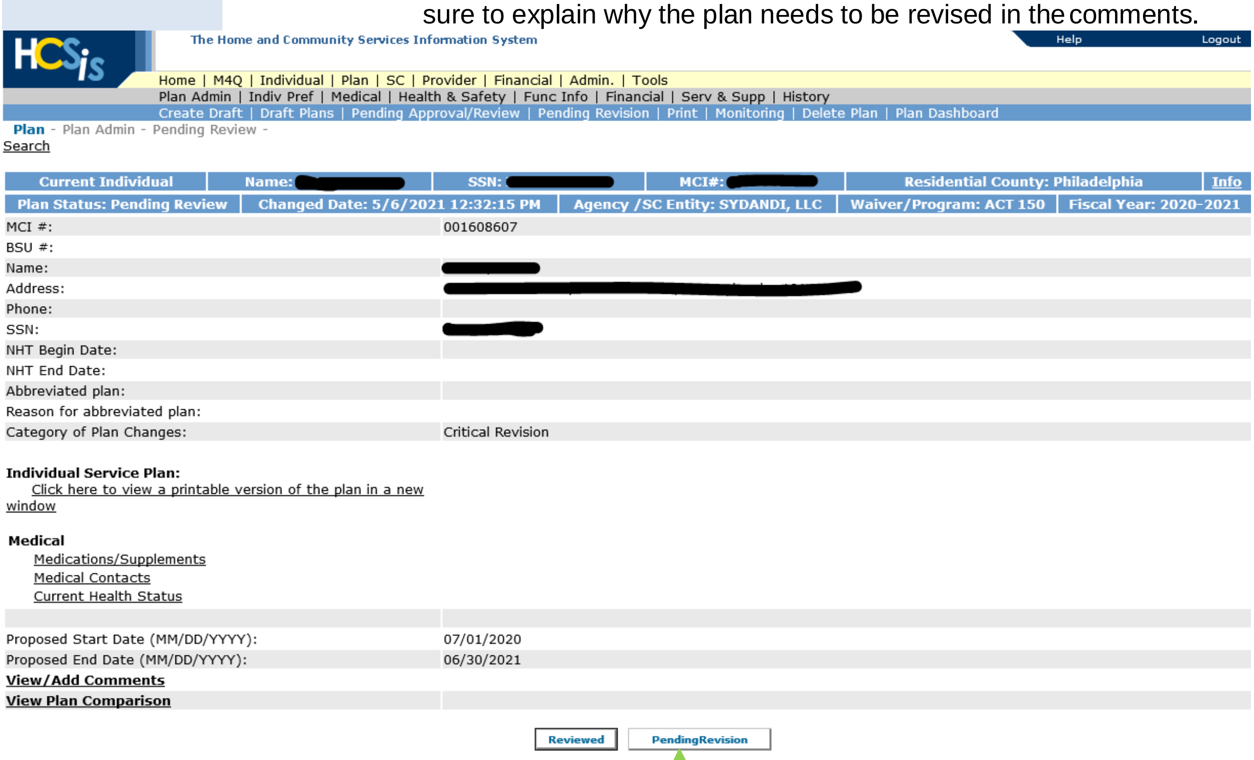


OLTL Annual Review Tip Sheet

9 Review Plan

Note: This step is performed by the SC Supervisor.

- Navigate to the Pending Review screen by following the menu path: ***Plan> Plan Admin> Pending Review/Approval***
- Search for the participant's plan by Last Name and First Name or SSN.
- Enter any comments/details by clicking View/Add Comments. A separate window opens and allows multiple comment entries. Please see the Comment Box Requirements Tip Sheet for more information about what details should be provided here.
- Click [Submit Comments] to save comments.
- Click [Close] to return to the Pending Review/Approval screen.
- Click [Reviewed] to send the plan on for approval, or click [Pending Revision] to send the plan back to the Service Coordinator for revision.
- Note: If you send the plan back to the Service Coordinator for revision, be sure to explain why the plan needs to be revised in the comments.



HCSis The Home and Community Services Information System

Help Logout

Home | M4Q | Individual | Plan | SC | Provider | Financial | Admin. | Tools

Plan Admin | Indiv Pref | Medical | Health & Safety | Func Info | Financial | Serv & Supp | History

Create Draft | Draft Plans | Pending Approval/Review | Pending Revision | Print | Monitoring | Delete Plan | Plan Dashboard

Plan - Plan Admin - Pending Review -

Search

Current Individual	Name: [redacted]	SSN: [redacted]	MCI#: [redacted]	Residential County: Philadelphia	Info
Plan Status: Pending Review	Changed Date: 5/6/2021 12:32:15 PM	Agency /SC Entity: SYDANDI, LLC	Waiver/Program: ACT 150	Fiscal Year: 2020-2021	

MCI #:	001608607
BSU #:	
Name:	[redacted]
Address:	[redacted]
Phone:	
SSN:	[redacted]
NHT Begin Date:	
NHT End Date:	
Abbreviated plan:	
Reason for abbreviated plan:	
Category of Plan Changes:	Critical Revision

Individual Service Plan:

Click here to view a printable version of the plan in a new window

Medical

Medications/Supplements

Medical Contacts

Current Health Status

Proposed Start Date (MM/DD/YYYY):	07/01/2020
Proposed End Date (MM/DD/YYYY):	06/30/2021
View/Add Comments	
View Plan Comparison	

Reviewed PendingRevision

Click [Reviewed] to send the plan on for approval, or click [Pending Revision] to send the plan back to the Service Coordinator for revision.

OLTL Annual Review Tip Sheet

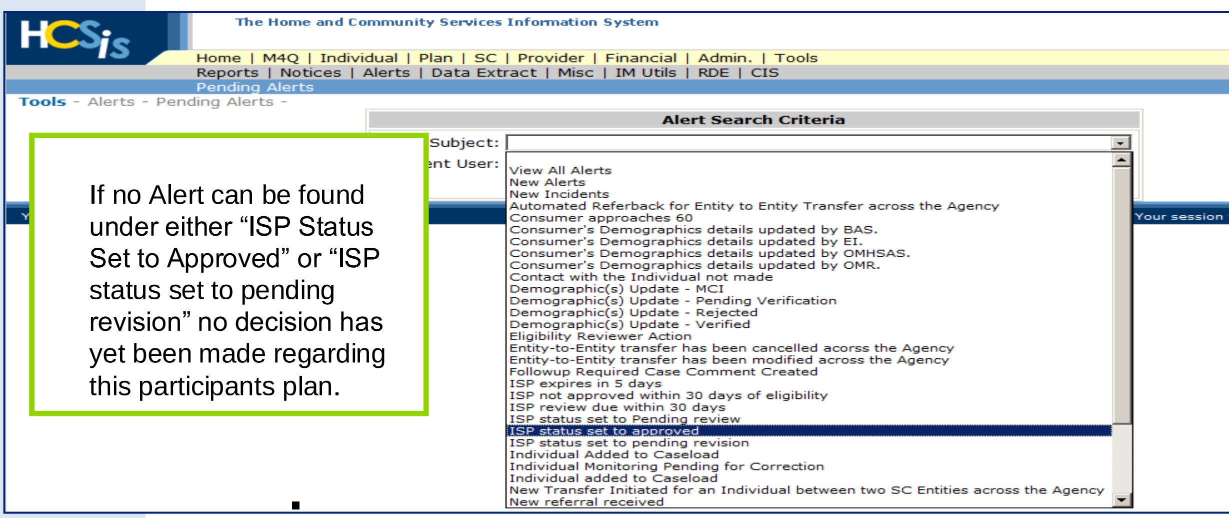
10 Approve Plan

Note: If only one participant's ISP is produced from your search criteria, HCSIS automatically directs you to their ISP without having to click on a hyperlink.

- Navigate to the *Pending Approval* screen by following the menu path: ***Plan> Plan Admin> Pending Approval/Review***
- Enter search criteria such as First Name, Last Name, SSN, Waiver/Program Type, or SC Entity and SC.
- Note: Only one of the search fields listed above is required.
- Set the search criteria field Category of Plan Changes to Annual Review.
- Click [Search].
- Find the ISP for the participant and click on the appropriate hyperlink.
- Review the participant's ISP information as needed by bringing up a read-only version of the plan by clicking on the printable version of the plan link.
- Click [Approved].

11 Review ISP Approval Alert

- Navigate to **Tools> Alerts> Pending Alerts**
- Under "Alert Search Criteria" select "ISP Status Set to Approved" as the "Subject".
- Click [Search].
- Find the Alert for the participant. The participant plan has been approved and no additional action is required.
- If no Alert can be found for the participant.
  - Under "Alert Search Criteria" select "ISP status set to pending revision" as the "Subject".
  - Click [Search].
  - Find the Alert for the participant.
  - Click on "Individual plan requires revisions."



If no Alert can be found under either "ISP Status Set to Approved" or "ISP status set to pending revision" no decision has yet been made regarding this participants plan.

12 ISP Set to Pending Revision

- Navigate to ***Plan> Plan Admin> Pending Revision***
- Click View/Add Comments to review the comments regarding why the plan was not approved.
- Click [Revise].
- Make the needed changes to the plan and resubmit

End of Tip Sheet