

# Data Fix Scheduled to Adjust Individual Support Plans (ISPs) to Support Transition from Palco, Inc. to Public Partnership, LLC

## ODP Announcement 24-018

### AUDIENCE:

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

### PURPOSE:

This communication's purpose is to inform all interested parties that rolling HCSIS data fixes will be performed **starting February 8, 2024**, to adjust ISPs to support the transition from Palco, Inc. to the new statewide VF/EA FMS organization, Public Partnership LLC (PPL).

### DISCUSSION:

ODP will begin performing rolling automated data fixes to adjust service segments (i.e. split service authorizations) on all applicable Fiscal Year (FY) 2023/2024 plans to account for the new VF/EA FMS organization, Public Partnership, LLC. After the data fix and once notified that the participant has transitioned to PPL, 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 the 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: Rolling Data Fixes to begin the week of February 5, 2024
- All ISP service segments adjusted by the data fix will be authorized.
- For ISPs associated with individuals who prefer NOT to use the VF/EA FMS service delivery model, it is important that Palco, Inc. associated service segments are end-dated with a date before or including March 9, 2024. If an individual prefers not to use the VF/EA FMS service delivery model and Palco, Inc. FMS service segments are NOT end-dated, then they **WILL BE** included in the automated data fix.

*The data fix will create new PPL service segments and adjust existing Palco, Inc. service segments for FMS service units and service amounts. The logic to be used will only be applied to FY 2023/2024 plans and will include the following:*

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

- 70% of the total authorized units will be assigned to Palco, Inc. for the period 07/01/2023 - 03/09/2024, and a new service segment will be created for PPL where the remaining 30% of authorized units will be assigned to PPL for the period 03/10/2024 to the actual service end date (usually 06/30/2024). All service segments impacted will be authorized.

- If utilized **Palco, Inc. units** are greater than 70% of total units, then the utilized units will be assigned to the Palco, Inc. service line on the ISP for the period 07/01/2023 - 03/09/2024 and a new service line will be created for PPL. The new PPL service segment will contain the remaining units authorized for the period 03/10/2024 to the actual service end date (usually 06/30/2024). All service segments impacted will be authorized.
- **For example**, if a total of 100 units were authorized on the Palco, Inc. service segment for the entire FY 2023/2024 and 70 units were utilized, the data fix will adjust the Palco, Inc. service segment to show zero (0) units remaining and a new PPL service segment will be created and show 30 units authorized.

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

- 70% of the total **service** amount will be assigned to Palco, Inc. for the period 07/01/2023 - 03/09/2024 and a new service segment will be created for Palco, Inc. that will be assigned the 30% remaining total service amount for the period 03/10/2024 to the actual service end date (usually 06/30/2024). All service segments impacted will be authorized.
- If the utilized **service** amount is greater than 70% of the total service amount, then the utilized service amount will be assigned to Palco, Inc. for the period 07/01/2023 - 03/09/2024. A new service segment will be created for PPL that contains the remaining authorized amount for the period 03/10/2024 to the actual service end date (usually 06/30/2024). All service segments impacted will be authorized.

- *The data fix will create a new PPL service segment and adjust the existing Palco, Inc. service segment for **the monthly administrative fee (procedure code W7318)**.*

*The logic to be used includes the following:*

- Nine (9) units will be assigned to Palco, Inc. for the period 07/01/2023 - 03/31/2024.
- A new Monthly Administrative Fee service line will be created with the remaining three (3) units.
  - For PPL, (PPL. MPI ID: 100833877 Service Location: 0007 with the service dates as 04/01/2024 to the actual service end date (usually 06/30/2024).
- The Monthly Administrative Fee service on the plan will be placed in Pending status.

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

- A Palco, Inc. service segment(s) exists with an end date before and including March 9, Day, 2023.
- When a FY 2023/2024 plan is in any status other than “Approved” and services are in any status other than “Authorized.”
- When there is an active FY 2023/2024 Annual Plan in “Draft” status and an approved FY 2023/2024 plan is 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 Palco, Inc. service is only one (1) unit on the participant’s FY 2023/2024 plan.
- When all the authorized units are utilized for any Palco, Inc. service found on the FY 2023/2024.

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

- When the Palco, Inc. monthly administrative fee has an end date before or equal to March 31, 2023.
- When a FY 2023/2024 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 nine (9) 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 PPL cannot be made until March 31, 2024, and forward. Manual updates to these service segments on the ISP from Palco, Inc. to PPL are being temporarily prevented by the system. Before March 31, 2024, users who attempt to associate service segments with PPL 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 PPL and/or services in

general need to change on the ISP, users should not experience an issue because of this planned data fix.

- Please note when manually calculating the number of units and dollars by FMS service code, it is recommended that 70% of the entire fiscal year totals (amount and units) remain as authorizations with Palco, Inc. and 30% of the entire fiscal year totals (amount and units) should be applied to authorizations with PPL. See the ISP service detail example beginning on the next page.
- The combination of Palco, Inc. and PPL totals (amount and units) must remain equal to the totals (amount and units) that were authorized before 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 Palco, Inc. to PPL, 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, the SC must enter a checkmark in the manual review checkbox before 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" indicate that a plan was automatically approved by the system.

**EXAMPLE: [CURRENT ISP](#)**

Name: Smith, Joe		MCI#: 123456789	Residential County: Pennsylvania					<a href="#">Info</a>
Plan Status: Approved		Changed: XX/XX/XXXX	County/Joinder: Anywhere		Waiver/Program: Consolidated Waiver		Fiscal Year: 2023-2024	
Select	Outcome Phrase	Service Name	Service Unit Cost	Provider Name	Total Annual Units	Service Start Date	Service End Date	Authorization Status
	HEALTH AND SAFETY,	In-Home & Community Supports (Lvl 2)	N/A	PALCO INC	1040	07/01/2023	06/30/2023	Authorized
	HEALTH AND SAFETY	In-Home & Community Support (Lvl3 Enh) LPN	N/A	PALCO INC	2080	07/01/2023	06/30/2023	Authorized
	HEALTH AND SAFETY, RELAXATION	Monthly Admin Fee	N/A	PALCO INC	12	07/01/2023	06/30/2023	Pending

**Detail Screen Service and Supports**

PALCO Inc. - In-Home & Community Supports (LVL 2), Total Amount: \$ 5,200.00, Units: 1040

PALCO Inc.- In-Home & Community Supports (Lvl 3 Enh) LPN, Total Amount: \$41,600, Units: 2080

PALCO Inc.- Monthly Admin Fee, Total Annual Units:12

**EXAMPLE: TRANSITION ISP**

Name: Smith, Joe		MCI#: 123456789		Residential County: Pennsylvania			Info	
Plan Status: Approved		Changed: XX/XX/XXXX		County/ Joinder: Anywhere	Waiver/Program: Consolidated Waiver	Plan Status: Approved		
Select	Outcome Phrase	Service Name	Service Unit Cost	Provider Name	Total Annual Units	Service Start Date	Service End Date	Authorization Status
	HEALTH AND SAFETY,	In- Home & Commu nity Suppor ts (Lvl 2)	N/A	PALCO INC	728	07/01/2 023	03/09/202 4	Authorized
	HEALTH AND SAFETY	In- Home & Commu	N/A	PALCO INC	1456	07/01/2 023	03/09/202 4	Authorized



		nity Suppor ts (Lvl 3 Enh) LPN						
	HEALTH AND SAFET	In- Home & Commu nity Suppor ts (Lvl 2)	N/A	PUBLIC PARTNERS HIPS LLC	312	03/10/2 024	06/30/202 4	Authorized
	HEALTH AND SAFETY	In- Home & Commu nity Suppor ts (Lvl 3 Enh) LPN	N/A	PUBLIC PARTNERS HIPS LLC	624	03/10/2 024	06/30/202 4	Authorized
	HEALTH AND SAFETY, RELAXATI ON	Monthl y Admin Fee	N/A	PUBLIC PARTNERS HIPS LLC	3	04/01/2 024	06/30/202 4	Pending

	HEALTH AND SAFETY, RELAXATION	Monthly Admin Fee	N/A	PALCO INC	9	07/01/2023	03/31/2024	Pending
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**Detail Screen Service and Supports**

Palco Inc. - In-Home & Community Supports (Lvl 2), Total Amount \$ 3,000.00, Units- 728

Palco Inc.-In-Home & Community Supports (Lvl 3 Enh) LPN, Total Amount \$ 24,000.00, Units-1456

Palco Inc.-Monthly Admin Fee, Total Annual Units: 9

PPL- In-Home & Community Supports (Lvl 2), Total Amount \$ 2,200, Units- 312

PPL- In-Home & Community Supports (Lvl 3 Enh) LPN, Total Amount \$ 17,600, Units-624

PPL- Monthly Admin Fee, Total Annual Units 3

**CONTACT:**

Questions about this communication should be directed to the appropriate Office of Developmental Programs Participant Directed Services Regional Lead.