

Fiscal Year (FY) 2024-2025 Individual Support Plan (ISP) Renewal Guidance

ODP Announcement 24-037

AUDIENCE:

Administrative Entities (AEs)
Supports Coordination Organizations (SCOs)
Supports Coordinators (SCs)
All Providers of Consolidated, Community Living or Person/Family Directed Support Waivers or Base-Funded Services
Other Interested Parties

Note: This Communication does not apply to Adult Autism Waiver (AAW) Providers

PURPOSE:

This Office of Developmental Program (ODP) communication will provide guidance for the FY 2024-2025 renewal period. The following topical areas will be addressed in this communication:

- Leap Year to Non-Leap Year
- Guidance for Updating FY 2024-2025 Renewal Plans with Partial Year Service Segments
- FY 2024-2025 Waiver Rate Load/Rate changes
- Variance Process for Established Service Requirements
- NG5 and Residential Rate Exception NEA process
- Remote Supports
- Reserve to Encumbrance
- Resources

DISCUSSION:

This communication is intended to provide guidance to all stakeholders who participate in the FY 2024-2025 renewal ISP process.

LEAP YEAR TO NON-LEAP YEAR

Since FY 2023-2024 was a leap year with 366 days, FY 2024-2025 ISPs must be adjusted to ensure the units and dollar amounts reflect a 365-day fiscal year period versus a 366-day fiscal year period, where applicable.

GUIDANCE FOR UPDATING FY 2024-2025 RENEWAL PLANS WITH PARTIAL YEAR SERVICE SEGMENTS (EXAMPLE PALCO TO PPL TRANSITION, STATION MD ANNUALIZATION)

When a FY Renewal is created in HCSIS, all current services for the 2023-2024 fiscal year are copied over to the 2024-2025 FY Renewal plan. However, when two date unit/segments exist, only the second date/unit segment pre-populates into the draft FY renewal. In this case, 2024-2025 FY renewals may require service units and start date to be modified by the SCO to reflect the level of support the ISP Team agrees will meet the assessed needs of the individual for fiscal year 2024-2025 before submitting for approval. For participant directed services, the SCO should ensure the Total Amount accurately reflects any adjustments to Total Annual Units that are made for FY 2024-2025. Specifically, services segments associated with PPL and STATIONMD will need annualized for FY2024-2025 and start date corrected to reflect 7/1/2024.

See the resource *ODP-ID/A: SC100I Supports Coordination > Chapter 17: Fiscal Year Renewal: ISP - v8.0 9/21/13* in the LMS for information on how to perform a FY Renewal.

FY 2024-2025 WAIVER RATE LOAD AND RATE CHANGES -HCSIS, CONTRACTS AND SERVICES AND SUPPORTS DIRECTORY (SSD)

Fiscal Year 2024-2025 rates were loaded to HCSIS on March 31, 2024, and the HCSIS FY 2024-2025 contract creation batch job began creating 2024-2025 contracts on April 8, 2024. The majority of FY renewals created after April 8, 2024, will show as real contracts with services authorized. If a FY renewal was created before the contract creation batch job ran on April 8, 2024, service contracts on the FY renewal will be in a provisional on hold (POH) status until the POH to real batch job is run on April 26, 2024. Services on these FY Renewals may need to be Pre-Authorized, after the contract status is updated to real.

If a rate fails to load into the FY 2024-2025 FY Renewal plan, please contact <mailto:ra-ratesetting@pa.gov> mailbox.

If the enacted FY24/25 budget includes funding for a rate increase, it is anticipated that new rates would be effective July 1, 2024, and critical revisions to plans may be necessary. Further communication will be forthcoming.

When a new service offering is added to a provider's service location, a contract is created for FY 2024-2025 by the overnight "Contract Creation" batch job. If a service contract was created before the "Contract Creation" batch job's start date of April 8, 2024, the contract may contain the FY 2023-2024 rate and be in provisional status. These contracts will be updated with the FY 2024-2025 rate once the overnight "provisional to real" job is run automatically. The "Provisional on Hold" batch job is anticipated to begin running overnight on April 26, 2024, and will continue running until all provisional on hold contracts are converted to real. This batch job runs daily overnight and converts provisional contracts to real contracts if a FY 2024-2025 rate exists in PROMISe. If the provisional contracts were converted to real, then users will see the FY 2024-2025 rate reflected in the SSD, and the FY renewal plan will reflect the FY 2024-2025 rate for services pre-authorized on the plan.

If a FY 2024-2025 service is missing in the SSD but existed in the SSD for FY 2023-2024, then a contract was not created. This could happen for the following reasons:

1. If the FY 2024-2025 renewal is created while a FY 2023-2024 plan is in draft status (contact AE) or,
2. The qualified provider chose not to offer the service in FY 2024-2025 for a particular county or the provider is not qualified to render the service in the upcoming fiscal year or,
3. If the FY 2024-2025 rate does not exist in PROMISe or a contract needs to be manually created. For this specific scenario, e-mail the rate setting mailbox: ra-ratesetting@pa.gov.

If none of the scenarios above are true for your situation, contact the HCSIS helpdesk by phone (1-866-444-1264) or email (c-hhcsishd@pa.gov). Then request that a TFS ticket is opened, explain your issue, provide them with a Master Client Identifier (MCI) number, provider Master Provider Identifier (MPI) number, service location code and procedure code, to enable them to perform a root cause analysis.

VARIANCE PROCESS FOR ESTABLISHED SERVICE REQUIREMENTS

For services subject to the Variance Process, AEs should only authorize services on the 2024-2025 FY Renewal through the currently approved end date. **AEs should also note that there are no P/FDS Cap Exceptions for FY 2024-2025.**



NG5 AND RESIDENTIAL RATE EXCEPTION NEA PROCESS

Existing exceptional residential rates (also referred to as Needs Exception Allowance or NEA rates-procedure codes W9057 and W9057 HI) are end-dated on June 30, 2024. A new NEA with recent expense information will need to be submitted to obtain an exceptional rate for FY 24/25. The provider should submit a new NEA request by May 15, 2024, to ensure no disruption in authorized services. Refer to ODP Announcement 23-083 for further information regarding requirements and request process for NG5 assignment and the new NEA process.

REMOTE SUPPORTS

Refer to communication 24-037

WHEN TO CREATE FY 2024-2025 ISPS

ODP recommends the following schedule for your fiscal year activities based on timeframe of activities occurring. In consultation with the applicable AE, the SCO may decide to organize their workload based on preference.

SERVICE COMPOSITION IN PLAN	ACTIVITIES OCCURRING	WHEN TO BEGIN
SC Services Only		Now
Base services	County allocation must be loaded first	4/26/24
Base services funded with Base dollars <u>but use waiver rates</u>	This activity is dependent on the FY 2024-2025 rate load which occurred on March 31, 2024.	4/26/24
P/FDS, Consolidated and Community Living Waivers	This activity is dependent on the FY 2024-2025 rate load which occurred on March 31, 2024.	4/26/24
Note: The ISP Readiness Report will begin running on 4/29/24 to 8/9/24, Monday – Saturdays.		

R2E: RESERVE TO ENCUMBRANCE AE/COUNTY ACTION: *Please note that the following actions are contingent upon ODP entry of the projected allocation which is anticipated to occur on May 13, 2024.*

A. Preparation tasks before running the year end R2E process

1. Run the Provider Service Status Report (contract types) for FY 2024-2025 and Provisional On-Hold Contracts: ***Tools --> Reports --> Reports Request***
2. Run the Provider Service Status Report for FY 2024-2025, Real Contracts: ***Tools --> Reports --> Reports Request***
3. Run the Projected Plan Budget Amount Exceeded Report for FY 2024-2025: ***Tools --> Reports --> Reports Request***
4. Review the base allocation amount by accessing the **Funding Level** screen. To make changes, navigate to the **Non-Service Encumbrance, Overbooking and Revenue Adjustment** screens.
5. Run the County Funding Level Report for the upcoming FY and all Funding Streams: ***Tools --> Reports --> Reports Request***
6. Run R2E after:
 - ODP communicates the R2E batch has been released
 - There are no incorrect rates for real contracts in the upcoming FY
 - Providers have service authorizations and can begin providing services

B. Enter the Projected Plan Budget (PPB) for base ISPs

1. Use the last year's (FY 2023-2024) PPB amounts to populate the PPB amounts for FY 2024-2025. This task can be accomplished by doing one of the following:
 - a. The county user can use the **View / Update Budget Amount By Individual** option from the **Budget Management Menu** screen to enter the PPB amount for one individual at a time - or –



- b. The county user can use the **Populate Future Fiscal Year Projected Plan Budget Amounts** option to auto-populate future fiscal year (target fiscal year) PPB amounts for all the individuals within their scope using existing data from the previous fiscal year (source fiscal year).
2. If the user entered the PPB amounts by copying over the prior year's funding **before ODP entered the FY 2024-2025 funding streams**, the FY 2023-2024 funding stream(s) would have been selected. Once the AE runs the Reserves to Encumbrance (R2E), the funding stream(s) will automatically be replaced by the corresponding funding stream applicable for FY 2024-2025. The request to copy over the PPB amounts is processed overnight. The next day, the **Populate Future Fiscal Year Projected Plan Budget Amounts Report** is made available on the **Reports Inbox** screen.
3. If manually entering the PPB amounts **after ODP entered the FY 2024-2025 funding streams**, select the "HUMAN SERVICE DEVELOPMENT FUND - Waiver Ineligible" funding stream.
 - a. **NOTE:** R2E process may be run many times, however it must be run at least once AFTER 6/30 and BEFORE providers submit claims.

RESOURCES:

For information related to special considerations, please contact the ODP Regional Program Office assigned to your region.

For questions related to the participant-directed services (PDS rate table or calculator), please contact your ODP Regional Financial Management Services (FMS)/PDS Lead.

See the resource *ODP-ID/A: SC100I Supports Coordination > Chapter 17: Fiscal Year Renewal: ISP - v8.0 9/21/13* in the LMS for information on how to perform a FY Renewal and directions on how to remove services (page 10) from a fiscal year renewal ISP.

See the R2E process resource in LMS for additional information. HCSIS > LMS > FM Guidebook and Supporting Materials > "Year End R2E Process Checklist v2.0 06/17/10"