



Fiscal Year (FY) 2026-2027 Individual Support Plan (ISP) Renewal Guidance

ODP Announcement 26-050

AUDIENCE:

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

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

PURPOSE:

This Office of Developmental Program (ODP) announcement provides technical guidance to stakeholders who participate in the FY 2026-2027 ISP renewal process.

The following topical areas are addressed in this communication:

1. Guidance for Updating FY 2026-2027 Renewal Plans
2. FY 2026-2027 Waiver Rate Load
3. Supports Coordination Billing Changes
4. Variance Process for Established Service Requirements
5. NG5 and Residential Rate Exception NEA process
6. Data Clean Up Efforts
7. When to Create a FY2026-2027 ISPs
8. Reserve to Encumbrance (R2E)
9. Resources



DISCUSSION:

1. Guidance For Updating FY 2026-2027 Renewal Plans

When a FY Renewal is created in Home and Community Services Information System (HCSIS), all current services for the 2025-2026 fiscal year are copied over to the 2026-2027 FY Renewal plan. In this case, 2026-2027 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 2026-2027 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 2026-2027.

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.

2. FY 2026-2027 Waiver Rate Load – HCSIS, Contracts, and Services and Supports Directory (SSD)

Fiscal Year 2026-2027 rates were loaded to PROMISe on March 30, 2026, and the HCSIS FY 2026-2027 contract creation batch job began creating 2026-2027 contracts on April 3, 2026. Most FY renewals created after April 3, 2026, will show as real contracts with services authorized. If a FY renewal was created before the contract creation batch job ran on April 3, 2026, 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 24, 2026. 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 2026-2027 FY Renewal plan, please contact the ratesetting@pa.gov mailbox.

When a new service offering is added to a provider's service location, a contract is



created for FY 2026-2027 by the overnight “Contract Creation” batch job. If a service contract was created before the “Contract Creation” batch job’s start date of April 3, 2026, the contract may contain the FY 2025-2026 rate and be in provisional status. These contracts will be updated with the FY 2026-2027 rate once the overnight “Provisional on Hold” job is run automatically. The “Provisional on Hold” batch job is anticipated to begin running overnight on April 24, 2026, 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 2026-2027 rate exists in PROMISe. If the provisional contracts were converted to real, then users will see the FY 2026-2027 rate reflected in the Services and Supports Directory (SSD), and the FY renewal plan will reflect the FY 2026-2027 rate for services pre-authorized on the plan.

If a FY 2026-2027 service is missing in the SSD but existed in the SSD for FY 2025-2026, then a contract was not created. This could happen for the following reasons:

- If the FY 2026-2027 renewal is created while a FY 2025-2026 plan is in draft status (contact AE) or,
- The qualified provider chose not to offer the service in FY 2026-2027 for a particular county or the provider is not qualified to render the service in the upcoming fiscal year or,
- If the FY 2026-2027 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 the provider entered an End Date of 6/30/2026 or earlier when selecting the service in HCSIS. In these instances, ODP still loads the rate, however the rate will not flow into HCSIS or the SSD until the end date is removed or the service is re-selected for 7/1/2026 start date. ODP advises providers to leave the end date blank when desiring to continue offering the service year-to



year.

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.

3. Supports Coordination Billing Changes

Changes to Supports Coordination Billing associated with Performance-Based Contracting will be delayed until **01/01/2027**. Additional information will be available prior to implementation.

Supports Coordination will continue to use existing procedure codes and rates.

Any FY Renewal plan for individuals enrolled in an ID/A already completed prior to publication will need to be adjusted to add the correct Supports Coordination service.

4. Variance Process for Established Service Requirements

For services subject to the Variance Process, AEs should only authorize services on the 2026-2027 FY Renewal through the currently approved end date.

5. NG5 and Residential Rate Exception (NEA) Process

For all currently approved NEAs, a new NEA with recent expense information will need to be submitted to obtain an exceptional rate for FY 2026-2027. The provider should submit a new NEA request by **May 15, 2026**, 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 NEA process.



Beginning July 1, 2026, ODP will request from residential providers financial documentation and substantiation of the reported expenditures to substantiate the whole-house / ID/A individual portion of mixed-funding houses as part of the NEA 2026 renewal process.

6. Data Clean Up Efforts

Current and accurate data in HCSIS should always be a priority for all HCSIS users. Please make sure to review demographics, contacts, Behavior Support Plans and Restrictive Plan indicators.

7. When to Create FY 2026-2027 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	Now
Base services funded with Base dollars <u>but use waiver rates</u>	This activity is dependent on the FY 2026-2027 rate load which occurred on March 30, 2026.	Now
P/FDS, Consolidated and Community Living Waivers	This activity is dependent on the FY 2026-2027 rate load which occurred on March 30, 2026.	Now
Note: The ISP Readiness Report will begin running on 4/27/26 to 8/7/26, Monday – Saturdays. Daily activity will end at 7 PM.		



8. Reserve to Encumbrance (R2E): 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 30, 2026**.*

A. Preparation tasks before running the year end R2E process

1. Run the Provider Service Status Report (contract types) for FY 2026-2027 and Provisional On-Hold Contracts:
Tools --> Reports --> Reports Request
2. Run the Provider Service Status Report for FY 2026-2027, Real Contracts:
Tools --> Reports --> Reports Request
3. Run the Projected Plan Budget Amount Exceeded Report for FY 2026-2027:
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 last year's (FY 2025-2026) PPB amounts to populate the PPB amounts for FY 2026-2027. 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 2026-2027 funding streams**, the FY 2025-2026 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 2026-2027. 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 2026-2027 funding streams**, select the "HUMAN SERVICE DEVELOPMENT FUND - Waiver Ineligible" funding stream.

NOTE: R2E process may be run many times, however it must be run at least once AFTER 6/30 and BEFORE providers submit claims.



9. Resources

The following links provide additional information to assist in successfully completing the ISP renewal process:

- [Forms](#)
- [HCSIS LMS for Job Aids and Tip Sheets](#)
- [SCO PBC FAQ](#)

See the resource *ODP-ID/A: SC100I Supports Coordination > Chapter 17: Fiscal Year Renewal: ISP - v8.0 9/21/13* in the Learning Management System (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”.

CONTACT:

For information related to special considerations or for other questions about the ISP renewal process, please contact your respective ODP Regional Program Office.