

OPI Module 4

Service Plannir



Order of Completing the Three Sections of CAPS



1. Complete the CAPS assessment & resulting SPL
2. Complete Client Details:
 - For the **OPI Program**, one diagnosis is required in Client Details.
3. Complete the Service Plan

CAPS Service Plan: The Three Service Plan Segments



The Service Benefit Segment: Used to authorize a Benefit type and a Benefit date range.

The Hours Segment: Used to select and authorize hours to be used in the service plan.

The Service Plan Segment: Used to assign providers and hours to those providers, for a specific date range.

CAPS Service Plan: The Three Service Plan Segments



Next, let's get oriented to the different segments of the Service Planning screen and its segments and command buttons:

Service Benefit

Used to authorize a benefit category and a date range that includes a begin date, and an end date that defaults to the end of the CAPS period.

Benefit Eligibility and Service Planning

Assmt Date: 04/03/2014 Valid until: 04/30/2015

Benefits  Ben Act

Service Category/Benefit	Begin Date	End Date	Status
OPI	05/01/2014	04/30/2015	Pending
OPI	04/03/2014	04/30/2015	Invalid

Hours Segments

Hours #	Begin Date	End Date	Status	Alwd	Excp	View Dtl
1	05/01/2014	04/30/2015	Pending	20	0	Hrs Act

Plans For OPI Benefit (Read Only)

Plan #	Begin Date	End Date	Status
1	05/01/2014	04/30/2015	Pending

Services For Plan #1 Pln Act

Row #	Services	Provider Name	Begin Date	End Date	Invalid Entry
1	In-Home Care (HCW) Hou		05/01/2014	04/30/2015	<input type="checkbox"/>

Provider Search **Needs Association** **View/Assign Hours** **Provider Detail**

Hours Segment

Used to select and approve allowed hours for the service plan.

Also used to select exception hours above the allowed hours.

Benefit Eligibility and Service Planning

Assmt Date: 04/03/2014 Valid until: 04/30/2015

Benefits Ben Act

Service Category/Benefit	Begin Date	End Date	Status
OPI	05/01/2014	04/30/2015	Approved
OPI	04/03/2014	04/30/2015	Invalid

Hours Segments 

Hours #	Begin Date	End Date	Status	Alwd	Excp	View Dtl
1	05/01/2014	04/30/2015	Approved	20	0	Hrs Act

Plans For OPI Benefit (Read Only)

Plan #	Begin Date	End Date	Status
1	05/01/2014	04/30/2015	Approved

Services For Plan #1 Pln Act

Row #	Services	Provider Name	Begin Date	End Date	Invalid Entry
1	In-Home Care (HCW) Hou		05/01/2014	04/30/2015	<input type="checkbox"/>

Provider Search Needs Association View/Assign Hours Provider Detail

Service Plan Segment

Used to assign providers for a specific date range and acknowledge natural supports.

Approved hours are assigned to providers and a task list is created in this segment.

Benefit Eligibility and Service Planning

Assmt Date: 04/03/2014 Valid until: 04/30/2015

 **Benefits** Ben Act

Service Category/Benefit	Begin Date	End Date	Status
OPI	05/01/2014	04/30/2015	Approved
OPI	04/03/2014	04/30/2015	Invalid

Hours Segments

Hours #	Begin Date	End Date	Status	Alwd	Excp	View Dtl
1	05/01/2014	04/30/2015	Approved	20	0	Hrs Act

Plans For OPI Benefit (Read Only)

Plan #	Begin Date	End Date	Status
1	05/01/2014	04/30/2015	Approved

Services For Plan #1 Pln Act

Row #	Services	Provider Name	Begin Date	End Date	Invalid Entry
1	In-Home Care (HCW) Hou		05/01/2014	04/30/2015	<input type="checkbox"/>

Provider Search Needs Association View/Assign Hours Provider Detail

Here are the three “Action Buttons.”

- Benefit Action
- Hours Action
- Plan Action

Benefit Eligibility and Service Planning

Assmt Date: 04/03/2014 Valid until: 04/30/2015

Benefits ➔ Ben Act

Service Category/Benefit	Begin Date	End Date	Status
OPI	05/01/2014	04/30/2015	Approved
OPI	04/03/2014	04/30/2015	Invalid

Hours Segments

Hours #	Begin Date	End Date	Status	Alwd	Excp	View Dtl
1	05/01/2014	04/30/2015	Approved	20	0	➔ Hrs Act

Plans For OPI Benefit (Read Only)

Plan #	Begin Date	End Date	Status
1	05/01/2014	04/30/2015	Approved

Services For Plan #1 ➔ Pln Act

Row #	Services	Provider Name	Begin Date	End Date	Invalid Entry
1	In-Home Care (HCW) Hou		05/01/2014	04/30/2015	<input type="checkbox"/>

Provider Search Needs Association View/Assign Hours Provider Detail

The Service Plan is complete when all segments are in Approved status. Unless approved they remain in Pending status.

Benefit Eligibility and Service Planning

Assmt Date: 04/03/2014 Valid until: 04/30/2015

Benefits Ben Act

Service Category/Benefit	Begin Date	End Date	Status
OPI	05/01/2014	04/30/2015	Approved
OPI	04/03/2014	04/30/2015	Invalid

Hours Segments

Hours #	Begin Date	End Date	Status	Alwd	Excp	View Dtl
1	05/01/2014	04/30/2015	Approved	20	0	Hrs Act

Plans For OPI Benefit (Read Only)

Plan #	Begin Date	End Date	Status
1	05/01/2014	04/30/2015	Approved

Services For Plan #1 Pln Act

Row #	Services	Provider Name	Begin Date	End Date	Invalid Entry
1	In-Home Care (HCW) Hou		05/01/2014	04/30/2015	<input type="checkbox"/>

Provider Search Needs Association View/Assign Hours Provider Detail

Basic Navigation:



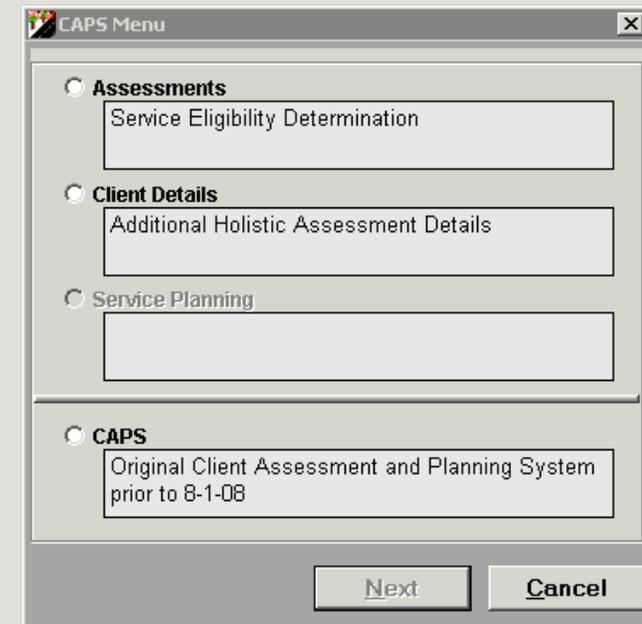
Next, let's open
CAPS Service Planning

Basic Navigation



The CAPS 'book' icon  (located on the OACCESS toolbar) brings up the CAPS Menu for:

1. The Assessment Program
2. Client Details
3. Service Planning



CAPS Menu

Assessments
Service Eligibility Determination

Client Details
Additional Holistic Assessment Details

Service Planning

CAPS
Original Client Assessment and Planning System prior to 8-1-08

Next Cancel

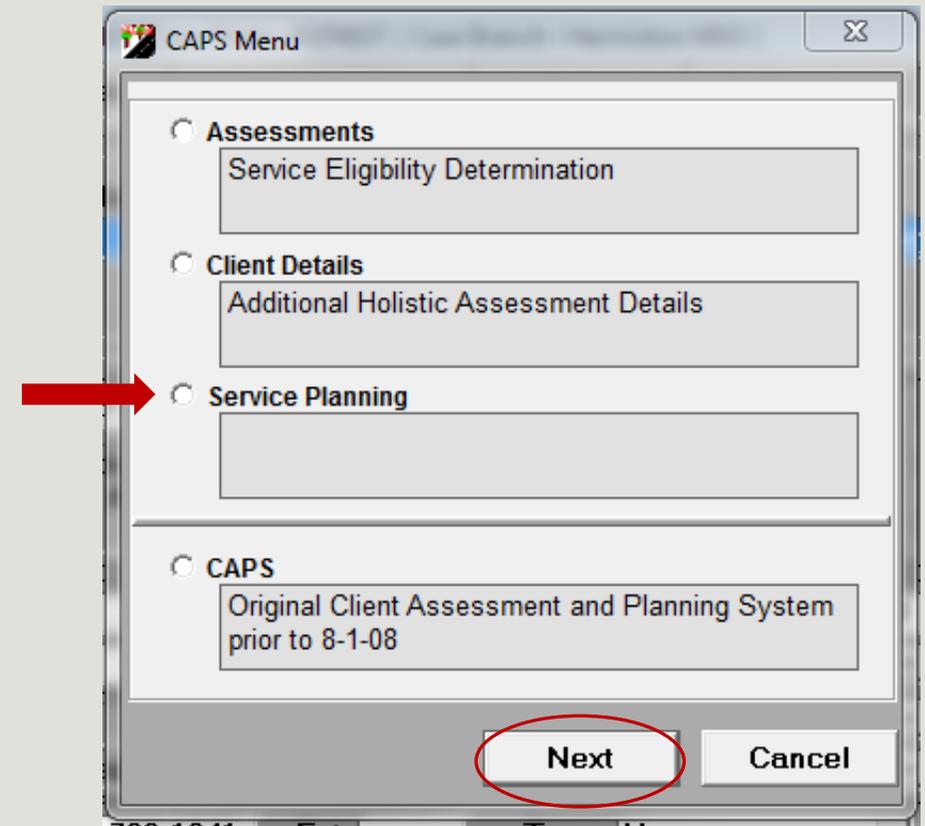
Launching a New Assessment



Click on the CAPS Book  icon from the toolbar.

Select “**Service Planning**” from the CAPS Menu.

Click, “Next.”



Service Benefit

1. To select a service benefit first select the most recent completed CAPS assessment from the drop down list under the heading: “Select Assessment”

Case for ALICE K CRANBERRY (Case Branch : Hermiston MSO)

Benefit Eligibility and Service Planning

None Selected

Benefits Ben Act

Service Category/Benefit	Begin Date	End Date	Status
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Hours Segments

Hours #	Begin Date	End Date	Status	Alwd	Excp
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View Dtl

Hrs Act

Plans (Read Only)

Plan #	Begin Date	End Date	Status
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Services Pln Act

Row #	Services	Provider Name	Begin Date	End Date	Invalid Entry
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Referrals

Plan Summary

Model

Provider Search Needs Association View/Assign Hours Provider Detail

2. The Service Category line will be highlighted blue. Use the drop down list to select service category type **OPI**. This will be the only category option for an OPI assessment.

Case for ALICE K CRANBERRY (Case Branch : Hermiston MSO)

Benefit Eligibility and Service Planning

Assmt Date: 02/12/2014 Valid until: 02/28/2015

Benefits Ben Act

Service Category/Benefit	Begin Date	End Date	Status
<input type="text" value="00/00/0000"/>	00/00/0000	02/28/2015	Pending

Hours Hrs Act

Hours #	Begin Date	End Date	Status	Alwd	Excp
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Plans (Read Only)

Plan #	Begin Date	End Date	Status
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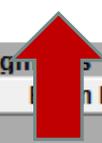
Select Assessment
04/01/2014 OPI (Comp) ▼

Assessment Type:
Title XIX

Review Date:
02/28/2015

Status:
Completed

Assessment by:
MF TRAINING ID, MF TR



3. Next enter a **Begin Date**. Note the **End Date** has auto-filled to match the end of the CAPS period (Valid Until date).

You now have a **Pending Service Benefit**.

Benefit Eligibility and Service Planning

Assmt Date: 04/01/2014 Valid until: 04/30/2015

Benefits Ben Act

Service Category/Benefit	Begin Date	End Date	Status
OPI	04/01/2014	04/30/2015	

Two red arrows point upwards to the 'Begin Date' and 'End Date' columns of the table row.

CAPS Service Plan: Service Benefit Dates



Benefit Begin Date: The Begin date is the date when authorized services begin.

Service Benefit End Dates default to the expiration date of the current CAPS Assessment. End dates cannot expand beyond the “Valid Until” expiration date of the Assessment.

You will find the CAPS
“Assessment Date”
and CAPS “Valid
Until” dates are found
at the top of the
Service Planning
Screen for reference.

Benefit Eligibility and Service Planning

Assmt Date: 04/01/2014 Valid until: 04/30/2015

Benefits Ben Act

Service Category/Benefit	Begin Date	End Date	Status
OPI	04/01/2014	04/30/2015	-----



Ending the Service Benefit

Note: Service Benefit Dates should provide seamless coverage for the entire CAPS period (from the CAPS begin date or review date, to an end date a year later).

There is no need to end a benefit for OPI, unless:

- The case is closed (perhaps due to eligibility changes)
- Death of the individual

There are times a CM has inadvertently ended a service benefit. The strategy is to add a second benefit line to carry on a seamless date range with both lines.

Benefit Eligibility and Service Planning

Assmt Date: 10/13/2014 Valid until: 10/31/2015

Benefits Ben Act

Service Category/Benefit	Begin Date	End Date	Status
OPI	11/01/2014	10/31/2015	Pending
OPI	10/14/2014	10/31/2014	Ended

Hours Segments

Hours #	Begin Date	End Date	Status	Alwd	Excp
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[View Dtl](#)
[Hrs Act](#)

Add a second Benefit line by clicking on the “**New Record**” button. A new benefit line will appear in blue, above the previous line. The previous line status will either be Approved or Ended; and the new line will be in Pending status.

Benefit Eligibility and Service Planning

Assmt Date: 10/13/2014 Valid until: 10/31/2015

Benefits

Service Category/Benefit	Begin Date	End Date	Status
OPI	11/01/2014	10/31/2015	Pending
OPI	10/14/2014	10/31/2014	Ended

Hours Segments

Hours #	Begin Date	End Date	Status	Alwd	Excp
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Approve the new line using the Benefit Action button and your benefit is good to go.

Remember, it is not necessary to end the Service benefit when changes are made to the service plan. The plan may change many times but the Benefit remains the same.

Benefit Eligibility and Service Planning

Assmt Date: 10/13/2014 Valid until: 10/31/2015

Benefits Ben Act

Service Category/Benefit	Begin Date	End Date	Status
OPI	11/01/2014	10/31/2015	Pending
OPI	10/14/2014	10/31/2014	Ended

Hours Segments

Hours #	Begin Date	End Date	Status	Alwd	Excp
---------	------------	----------	--------	------	------

View Dtl
Hrs Act

In the event you accidentally add a Benefit line, you will not be able to erase it. The solution is to **Invalidate** the line. Do this by filling in the dates (non-specific) and using the **Benefit Action Button** invalidate the line as shown. Click OK.

Benefit Actions

Assessment Begin Date 10/13/2014		Valid Until 10/31/2015	
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OPI Pending 11/01/2014 10/31/2015

Benefit Action:

- Approve Benefit
- End Benefit, Hours, and Plan and Create a New Benefit
Current End: 00/00/0000 New Begin: 00/00/0000 New End: 10/31/2015
- End Benefit, Hours, and Plan
Current End: 00/00/0000
- Invalidate Benefit, Hours, and Plans**



CAPS Service Plan: The Hours Segment



The Hours Segment is a component of Service Planning. In this segment it is possible to view and approve:

- **The Assessment Hours** – Hours based on the CAPS assessment results for this particular consumer.
- **The Allowed Hours** – Hours selected by the case manager to carry over to the Service Plan.
- **The Exception Hours** – Additional hours added beyond assessed hours, through a specific exceptions process.

To begin the **Hours Segment**, click on the Hours begin date box and a new line will be highlighted blue. Enter a begin date that corresponds with the Service Benefit Begin date.



Next click on the “**View Dtl**” (Detail) button.

Benefit Eligibility and Service Planning

Assmt Date: 04/03/2014 Valid until: 04/30/2015

Benefits Ben Act

Service Category/Benefit	Begin Date	End Date	Status
OPI	05/01/2014	04/30/2015	Approved
OPI	04/03/2014	04/30/2015	Invalid

Hours Segments

Hours #	Begin Date	End Date	Status	Alwd	Excp	View Dtl
1	05/01/2014	04/30/2015	Approved	20	0	View Dtl

(Read Only)

Plans For OPI Benefit Pln Act

Plan #	Begin Date	End Date	Status
1	05/01/2014	04/30/2015	Approved

Services For Plan #1

Row #	Services	Provider Name	Begin Date	End Date	Invalid Entry
1	In-Home Care (HCW) Hou		05/01/2014	04/30/2015	<input type="checkbox"/>

Provider Search Needs Association View/Assign Hours Provider Detail



You are now looking at the detail page of the Hours Segment.

The **Assessment Hours** column lists the hours determined by the CAPS assessment for each category of the assessment.

Hours Authorization Segment

In Home Hours Status: Pending Begin Date: 05/01/2014 End Date: 04/30/2015

Type	Need	Assist level	Asmt Hrs	Alwd Hrs	Rem Hrs	Excp Hrs	Reason
ADL	Dressing/Grooming	Minimal	5	5	0	0	
	Eating	Minimal	5	5	0	0	
I/ADL	Housekeeping	Substantial	10	10	0	0	



	ADL Min	ADL Sub	ADL Full	IADL	24 Hour
Total Allowed Hours	10	0	0	10	0
Total Exception Hours	0	0	0	0	0
Total Authorized Hours	10	0	0	10	0

Approved Date: 00/00/0000 Created Date: 06/16/2014 Last Modified Date: 06/16/2014
Approved By: Created By: hstrng4 Last Modified By: hstrng4

OK Cancel

The **Allowed Hours** column will be empty until filled by the CM. If full hours are to be given, the CM can only allow up to the maximum number in the Assessment Hours column. We will not discuss Exception hours in this training, but Excp Hrs are listed in their own column.

Hours Authorization Segment

In Home Hours Status: Pending Begin Date: 05/01/2014 End Date: 04/30/2015

Type	Need	Assist level	Asmt Hrs	Alwd Hrs	Rem Hrs	Excp Hrs	Reason
ADL	Dressing/Grooming	Minimal	5	5	0	0	
	Eating	Minimal	5	5	0	0	
I/ADL	Housekeeping	Substantial	10	10	0	0	



	ADL Min	ADL Sub	ADL Full	IADL	24 Hour
Total Allowed Hours	10	0	0	10	0
Total Exception Hours	0	0	0	0	0
Total Authorized Hours	10	0	0	10	0

Approved Date: 00/00/0000 Created Date: 06/16/2014 Last Modified Date: 06/16/2014
Approved By: Created By: hstrng4 Last Modified By: hstrng4

OK Cancel

If you are not assigning all of the **Assessment Hours** in the **Allowed Hours** column the **“Reason”** column line will turn white and you will have to select a reason for not assigning hours before moving on. On the next page you will find a list of reasons given in the drop down list.

Hours Authorization Segment

In Home Hours Status: Pending Begin Date: 08/01/2014 End Date: 07/31/2015

Type	Need	Assist level	Asmt Hrs	Alwd Hrs	Rem Hrs	Excp Hrs	Reason
ADL	Bath/Personal Hygiene	Minimal	10	10	0	0	
I/ADL	Housekeeping	Substantial	10	10	0	0	
	Shopping	Full	6	0	6	0	Not available



	ADL Min	ADL Sub	ADL Full	IADL	24 Hour
Total Allowed Hours	10	0	0	10	0
Total Exception Hours	0	0	0	0	0
Total Authorized Hours	10	0	0	10	0

Reason:

- CM Determination
- Declined
- Declined due to pay-in
- Natural support
- Not Available
- Provided by other Agency (or program)

When assigning hours remember your AAA Branch limits, and Program limits.

Hours Authorization Segment

In Home Hours Status: Pending Begin Date: 08/01/2014 End Date: 07/31/2015

Type	Need	Assist level	Asmt Hrs	Alwd Hrs	Rem Hrs	Excp Hrs	Reason
ADL	Bath/Personal Hygiene	Minimal	10	10	0	0	
I/ADL	Housekeeping	Substantial	10	10	0	0	
	Shopping	Full	6	0	6	0	Not available



	ADL Min	ADL Sub	ADL Full	IADL	24 Hour
Total Allowed Hours	10	0	0	10	0
Total Exception Hours	0	0	0	0	0
Total Authorized Hours	10	0	0	10	0

When you have finished authorizing hours, the totals will be listed in the chart on the bottom half of the page.

To exit this page and return to the Service Planning page, click **“OK”**

Hours Authorization Segment

In Home Hours Status: Pending Begin Date: 05/01/2014 End Date: 04/30/2015

Type	Need	Assist level	Asmt Hrs	Alwd Hrs	Rem Hrs	Excp Hrs	Reason
ADL	Dressing/Grooming	Minimal	5	5	0	0	▼
	Eating	Minimal	5	5	0	0	▼
I/ADL	Housekeeping	Substantial	10	10	0	0	▼

	ADL Min	ADL Sub	ADL Full	IADL	24 Hour
Total Allowed Hours	10	0	0	10	0
Total Exception Hours	0	0	0	0	0
Total Authorized Hours	10	0	0	10	0

Approved Date: 00/00/0000 Created Date: 06/16/2014 Last Modified Date: 06/16/2014
Approved By: Created By: hstrng4 Last Modified By: hstrng4

OK Cancel



The total of **Allowed Hours (Authorized)** selected by the CM in the detail page, carry over to the Service Planning page in the Hours Segment.

At this point the selected hours are still in **Pending** status.

Benefit Eligibility and Service Planning

Assmt Date: 04/03/2014 Valid until: 04/30/2015

Benefits Ben Act

Service Category/Benefit	Begin Date	End Date	Status
OPI	04/03/2014	04/30/2015	Invalid
OPI	05/01/2014	04/30/2015	Pending

Hours Segments

Hours #	Begin Date	End Date	Status	Alwd	Excp	View Dtl
1	05/01/2014	04/30/2015	Pending	20	0	Hrs Act

Plans (Read Only)

Plan #	Begin Date	End Date	Status
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Services Pln Act

Row #	Services	Provider Name	Begin Date	End Date	Invalid Entry
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Provider Search Needs Association View/Assign Hours Provider Detail

To begin the **Service Plan Segment**, click on the Services box and a new line will be highlighted blue.

Click on the **Add a Record** button each time you need additional rows (lines). Rows will be numbered.

Each row will need a provider and a begin date selected.

Benefit Eligibility and Service Planning

Assmt Date: 04/03/2014 Valid until: 04/30/2015

Benefits Ben Act

Service Category/Benefit	Begin Date	End Date	Status
OPI	04/03/2014	04/30/2015	Invalid
OPI	05/01/2014	04/30/2015	Pending

Hours Segments

Hours #	Begin Date	End Date	Status	Alwd	Excp	View Dtl
1	05/01/2014	04/30/2015	Pending	10	0	Hrs Act

Plans For OPI Benefit (Read Only)

Plan #	Begin Date	End Date	Status
1	00/00/0000	04/30/2015	Pending

Services For Plan #1 Pln Act

Row #	Services	Provider Name	Begin Date	End Date	Invalid Entry
1				04/30/2015	<input type="checkbox"/>

Provider Search Needs Association View/Assign Hours Provider Detail

To select a provider, click on the blue field below the Services column. A drop down list will appear:

- Adult Day services
- Home Delivered Meals
- In-Home Care (Agency)
- In-Home Care (HCW) Hourly
- Misc. OPI Services
- Natural Support

Benefit Eligibility and Service Planning

Assmt Date: 04/03/2014 Valid until: 04/30/2015

Benefits Ben Act

Service Category/Benefit	Begin Date	End Date	Status
OPI	04/03/2014	04/30/2015	Invalid
OPI	05/01/2014	04/30/2015	Pending

Hours Segments

Hours #	Begin Date	End Date	Status	Alwd	Excp	View Dtl
1	05/01/2014	04/30/2015	Pending	10	0	Hrs Act

Plans For OPI Benefit (Read Only)

Plan #	Begin Date	End Date	Status
1	00/00/0000	04/30/2015	Pending

Services For Plan #1 Pln Act

Row #	Services	Provider Name	Begin Date	End Date	Invalid Entry
1				04/30/2015	<input type="checkbox"/>

Provider Search Needs Association View/Assign Hours Provider Detail

Once you have selected a provider type, click on the “**Provider Search**” button.

A pop-up box will appear and offer two options:

- Find Provider
- Use Placeholder (TBD)

Select “Find Provider” and “OK” to begin a search.

The screenshot shows a software application window titled "Case for" with a menu bar (File, Edit, Select, Status, Transfer, View, Mainframe, Windows, Help) and a toolbar. The main window displays a form for "Select Assessment" with the value "04/03/2014 OPI (Comp)". Below this are fields for "Assessment Type" (OPI), "Review Date" (04/30/2015), "Status" (Completed), and "Assessment by" (MF TRAINING ID, MF TR). A "Referrals" button is visible. A "Provider Search" dialog box is overlaid on the main window, containing two radio buttons: "Find Provider" (selected) and "Use Placeholder (TBD)". Below the radio buttons are "OK" and "Cancel" buttons. A red arrow points from the "Provider Search" button in the main window to the dialog box. The main window also displays a table for "Hours Segments" and a table for "Plans For OPI Benefit".

Begin Date	End Date	Status
04/03/2014	04/30/2015	Invalid
05/01/2014	04/30/2015	Pending

Hours #	Begin Date	End Date	Status	Alwd	Excp
1	05/01/2014	04/30/2015	Pending	10	0

Plan #	Begin Date	End Date	Status
1	00/00/0000	04/30/2015	Pending

Row #	Services	Provider Name	Begin Date	End Date	Invalid Entry
1	In-Home Care (HCW) Hou			04/30/2015	<input type="checkbox"/>

You can begin your provider (HCW) search by entering...

- A Provider number
- A first and last name
- A city
- A Soc. Sec. number

If you are looking for a caregiver Agency, enter the provider number or the name of the business in the business box.

Click the **“Search”** button.

Provider Search

Search

SSN/TIN: OMAP/MMIS Prov Nbr: 000000

Last Name: DOE First: JANE City:

Business: Type: In-Home Care (CEP)

Sounds Like: Active Providers All Providers

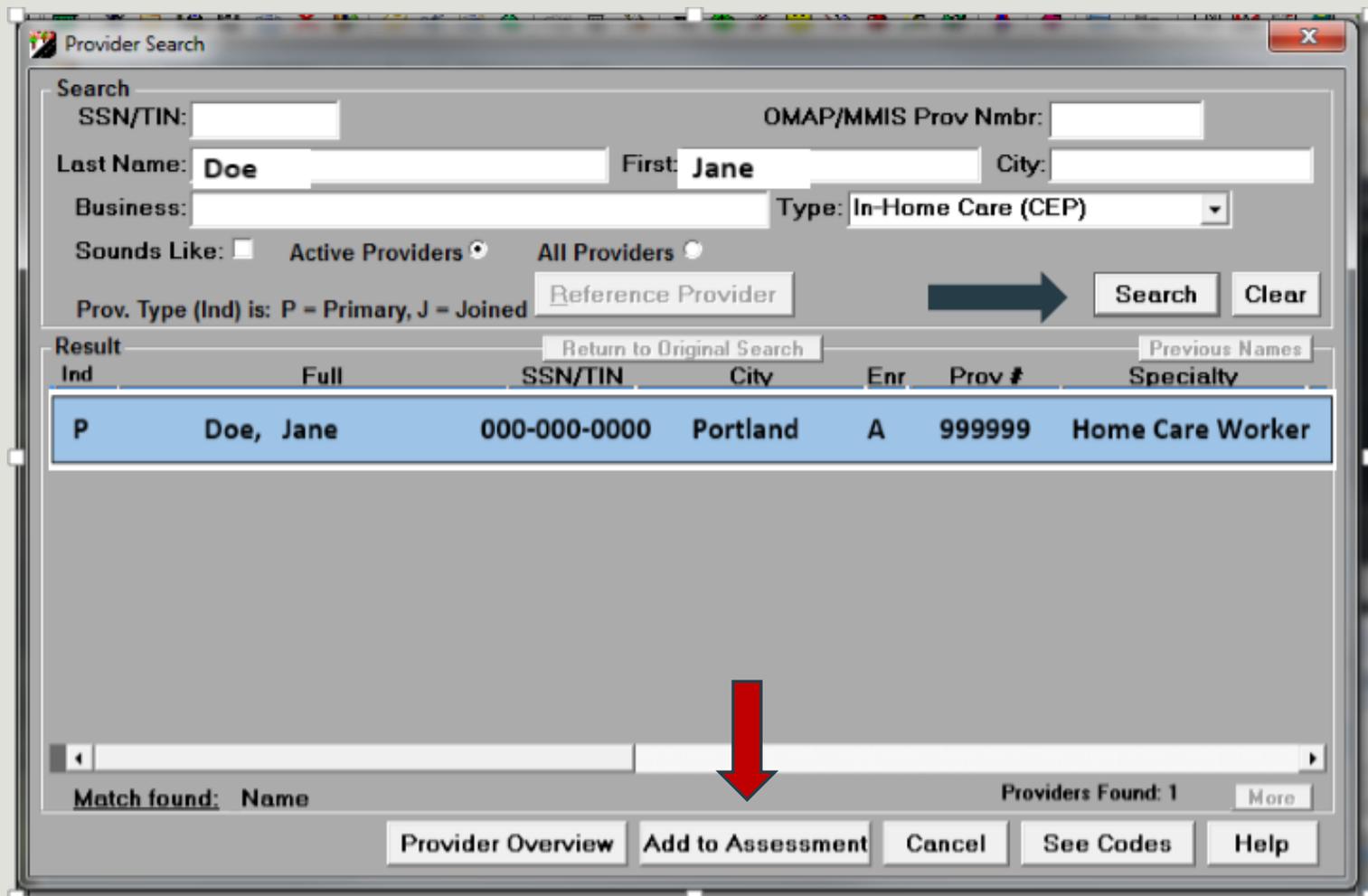
Prov. Type (Ind) is: P = Primary, J = Joined

Return to Original Search

Ind	Full	SSN/TIN	City	Enr	Prov #	Specialty
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A person, a list of people or an Agency list will appear to match your search.

Click on the selected provider and the line will highlight blue. Next, click the **“Add to Assessment”** button to attach this provider to the service plan. The selected provider will appear on the service plan row.



The screenshot shows a 'Provider Search' window with the following search criteria:

- SSN/TIN: [Empty]
- OMAP/MMIS Prov Nbr: [Empty]
- Last Name: Doe
- First: Jane
- City: [Empty]
- Business: [Empty]
- Type: In-Home Care (CEP)
- Search filters: Sounds Like (unchecked), Active Providers (selected), All Providers (unchecked)
- Prov. Type (Ind) is: P = Primary, J = Joined
- Buttons: Reference Provider, Search, Clear

The search results are displayed in a table:

Ind	Full	SSN/TIN	City	Enr	Prov #	Specialty
P	Doe, Jane	000-000-0000	Portland	A	999999	Home Care Worker

At the bottom of the window, there is a 'Match found: Name' field, a 'Providers Found: 1' indicator, and a 'More' button. A red arrow points to the 'Add to Assessment' button in the bottom right corner.

Now the selected provider has been added to the plan. Enter a **Begin Date** for this provider. The **End Date** will default to the end date of the Service Benefit (the expiration date of the CAPS assessment).

The screenshot shows a software interface with a sidebar on the left and a main content area on the right. The sidebar contains the following elements:

- A label "Assessment by:" followed by a text input field containing "MF TRAINING ID, MF TR".
- A button labeled "Referrals".
- A button labeled "Plan Summary".
- A button labeled "Model".

The main content area contains a table with the following data:

Plan #	Begin Date	End Date	Status
1	05/01/2014	04/30/2015	Pending

Below this table is a section titled "Services For Plan #1" with a "Pln Act" button on the right. This section contains another table:

Row #	Services	Provider Name	Begin Date	End Date	Invalid Entry
1	In-Home Care (HCW) Hou		05/01/2014	04/30/2015	<input type="checkbox"/>

At the bottom of the main content area, there are four buttons: "Provider Search", "Needs Association", "View/Assign Hours", and "Provider Detail". A red arrow points from the "Begin Date" cell in the top table to the "Begin Date" cell in the bottom table.

To add a second provider or a second line (some Agencies require two lines because the service rate is different for PC Personal Care, and HK Housekeeping) click on the **“Add a Record”** button, and a new blue highlighted line will appear.

Assessment by:
MF TRAINING ID, MF TR

Referrals

Plan Summary

Model

Plan #	Begin Date	End Date	Status
1	05/01/2014	04/30/2015	Pending

Services For Plan #1 Pln Act

Row #	Services	Provider Name	Begin Date	End Date	Invalid Entry
1	In-Home Care (HCW) Hou		05/01/2014	04/30/2015	<input type="checkbox"/>

Provider Search Needs Association View/Assign Hours Provider Detail

After selecting the worker and entering a begin date – move from left to right along the bottom of the **Service Plan** and complete the functions of each button.

The screenshot displays a software interface with a 'Provider Needs Association' dialog box open over a 'Service Plan' table. The dialog box shows the provider name '(In-Home Care (CEP))' and lists selected needs: Dressing, Eating, Housekeeping, and Laundry, each with an 'Assist' status. The 'Unselected Needs' list is empty. The 'Service Plan' table below has one row selected, showing 'In-Home Care (HCW) Hou' with a begin date of 05/01/2014 and an end date of 04/30/2015. A red arrow points from the text on the left to the 'Needs Association' button at the bottom of the interface.

Service Plan Table:

Row #	Services	Provider Name	Begin Date	End Date	Invalid Entry
1	In-Home Care (HCW) Hou		05/01/2014	04/30/2015	<input type="checkbox"/>

Provider Needs Association Dialog:

Provider Name: (In-Home Care (CEP))

Unselected Needs: (Empty)

Selected Needs:

Dressing	Assist
Eating	Assist
Housekeeping	Assist
Laundry	Assist

Buttons: Referrals, Plan Summary, Model, Provider Search, Needs Association, View/Assign Hours, Provider Detail, OK, Cancel.

Click on **Needs Association** and a Provider Needs Association box will open as shown. All of the client's assessed needs will be listed by default in the right column.

The screenshot displays a software interface for managing provider needs. A dialog box titled "Provider Needs Association" is open, showing the provider name "(In-Home Care (CEP))". The dialog is divided into two sections: "Unselected Needs" (currently empty) and "Selected Needs". The "Selected Needs" section lists four items: Dressing, Eating, Housekeeping, and Laundry, each with the action "Assist" listed next to it. At the bottom of the dialog are "OK" and "Cancel" buttons. In the background, a table lists services for a provider. The "Needs Association" button at the bottom of the main window is highlighted with a red arrow.

Row #	Services	Provider Name	Begin Date	End Date	Invalid Entry
1	In-Home Care (HCW) Hou		05/01/2014	04/30/2015	<input type="checkbox"/>

Buttons at the bottom of the main window: Provider Search, **Needs Association**, View/Assign Hours, Provider Detail

The purpose of this function is to define which client needs will be met by this provider.

Un-select the needs the provider will not be providing. The remaining selected needs will populate the Task List and View/Assign hours screen.

. Below the table are buttons: Provider Search, Needs Association, View/Assign Hours, Provider Detail. A red arrow points to the 'Needs Association' button."/>

Case for [Case Branch: Hermiton MSO]

Provider Needs Association

Provider Name: (In-Home Care (CEP))

Unselected Needs

Selected Needs

Dressing	Assist
Eating	Assist
Housekeeping	Assist
Laundry	Assist

OK Cancel

Row #	Services	Provider Name	Begin Date	End Date	Invalid Entry
1	In-Home Care (HCW) Hou	(In-Home Care (CEP))	05/01/2014	04/30/2015	<input type="checkbox"/>

Referrals

Plan Summary

Model

Provider Search Needs Association View/Assign Hours Provider Detail

In this example the HCW on the highlighted line will meet the needs of: dressing, eating, housekeeping, and laundry.

To un-select a need double click on a need or drag a need from the right column to the left. Do this for each worker.

Case for [Case Branch: Hermiton MSO]

Provider Needs Association

Provider Name: (In-Home Care (CEP))

Unselected Needs

Selected Needs

Dressing	Assist
Eating	Assist
Housekeeping	Assist
Laundry	Assist

OK Cancel

Row #	Services	Provider Name	Begin Date	End Date	Invalid Entry
1	In-Home Care (HCW) Hou	(In-Home Care (CEP))	05/01/2014	04/30/2015	<input type="checkbox"/>

Referrals

Plan Summary

Model

Provider Search Needs Association View/Assign Hours Provider Detail



Next move to the **View/Assign Hours** button.

This will allow you to assign hours to HCWs or to Agency providers. You will be assigning hours for the provider highlighted in blue. If there are multiple providers, you will need to do this for each line.

The screenshot shows a software interface with a sidebar on the left and a main content area on the right. The sidebar contains the following elements:

- Assessment by:** MF TRAINING ID, MF TR
- Referrals** button
- Plan Summary** button
- Model** button

The main content area features a table with the following data:

Plan #	Begin Date	End Date	Status
1	05/01/2014	04/30/2015	Pending

Below this table is a section titled "Services For Plan #1" with a "Pln Act" button. It contains a table with the following data:

Row #	Services	Provider Name	Begin Date	End Date	Invalid Entry
1	In-Home Care (HCW) Hou		05/01/2014	04/30/2015	<input type="checkbox"/>

At the bottom of the main content area, there are four buttons: "Provider Search", "Needs Association", "View/Assign Hours", and "Provider Detail". A red arrow points to the "View/Assign Hours" button.

View/Assign Hours will show you all the **Assessed** hours.

You will also see the **Allowed** hours determined by the CM.

And the **Authorized** hours for this plan.

Assignment of In-Home Hours

In Home Hours Status: Pending Begin Date: 05/01/2014 End Date: 04/30/2015

Type	Need	Assist level	Asmt Hrs	Alwd Hrs	Rem Hrs	Excp Hrs	Reason
ADL	Dressing/Grooming	Minimal	5	5	0	0	
	Eating	Minimal	5	5	0	0	
I/ADL	Housekeeping	Substantial	10	10	0	0	

Hours Assignment (All hours must be assigned in 1 hour increments)

	ADL Min	ADL Sub	ADL Full	IADL	24 Hour
Total Allowed Hours	10	0	0	10	0
Total Exception Hours	0	0	0	0	0
Total Authorized Hours	10	0	0	10	0
Total Hours Assigned	10	0	0	10	0
P HCW Name	10	0	0	10	0

Clear Assigned Hours Show Me What's Left OK Cancel



Types of Hours

Assessed Hours - Hours based on the CAPS assessment for this individual. Each assessed need is given hours based on rule.

Allowed Hours – Hours the Case Manager has approved based on client needs and available natural supports. Hours must be less than or equal to the Assessed hours.

Exception Hours - additional hours over and above the Assessed Hours requested to meet needs not met by Assessed Hours (not in our example).



Types of Hours

Authorized Hours – The hours available for use in the Service Plan (this could include exception hours, if approved)

Example: Allowed Hours + Exception Hours = Authorized Hours.

Example: 20 Allowed hours + 0 Exception hours = 20 Authorized Hours. Most often for OPI, Allowed Hours = Authorized Hours.

It is rare to find AAA's that utilize Exception hours for OPI.

Assign hours to the provider by entering the number of selected hours on the provider's row.

Once Hours have been assigned to the provider or multiple providers, click "OK."

You are finished assigning hours.

Assignment of In-Home Hours

Status: Pending Begin Date: 05/01/2014 End Date: 04/30/2015

Type	Need	Assist level	Asmt Hrs	Alwd Hrs	Rem Hrs	Excp Hrs	Reason
ADL	Dressing/Grooming	Minimal	5	5	0	0	
	Eating	Minimal	5	5	0	0	
I/ADL	Housekeeping	Substantial	10	10	0	0	

Hours Assignment (All hours must be assigned in 1 hour increments)

	ADL Min	ADL Sub	ADL Full	IADL	24 Hour
Total Allowed Hours	10	0	0	10	0
Total Exception Hours	0	0	0	0	0
Total Authorized Hours	10	0	0	10	0
Total Hours Assigned	10	0	0	10	0
P HCW Name	10	0	0	10	0

Buttons: Clear Assigned Hours Show Me What's Left **OK** Cancel

If you are unsure you have assigned all the hours to multiple providers on different lines, you can use the **“Show Me What’s Left”** button. An pop-up box will appear that will show you if there are any hours that were left unassigned.

Assignment of In-Home Hours

In Home Hours Status: Pending Begin Date: 05/01/2014 End Date: 04/30/2015

Type	Need	Assist level	Asmt Hrs	Alwd Hrs	Rem Hrs	Excp Hrs	Reason
ADL	Dressing/Grooming	Minimal	5	5	0	0	
	Eating	Minimal	5	5	0	0	
I/ADL	Housekeeping	Substantial	10	10	0	0	

Hours Assignment (All hours must be assigned in 1 hour increments)

	ADL Min	ADL Sub	ADL Full	IADL	24 Hour
Total Allowed Hours	10	0	0	10	0
Total Exception Hours	0	0	0	0	0
Total Authorized Hours	10	0	0	10	0
Total Hours Assigned	10	0	0	10	0
P HCW Name	10	0	0	10	0

Clear Assigned Hours Show Me What's Left OK Cancel



Adding a Natural Support

1. Click on the “Add a Record” button.
2. Select “Natural Support” from the drop down list.
3. Click on the “Provider Search” button and select a Natural Support.

Note: There must be a contact with a N.S. role.

Plans For OPI Benefit (Read Only)

Plan #	Begin Date	End Date	Status
1	04/03/2014	04/30/2015	Pending

Services For Plan #1 PIn Act

Row #	Services	Provider Name	Begin Date	End Date	Invalid Entry
1	In-Home Care (HCW) Hou		04/03/2014	04/30/2015	<input type="checkbox"/>
2	Natural Support		04/03/2014	04/30/2015	<input type="checkbox"/>

Provider Search Needs Association View/Assign Hours Provider Detail

In this example, name boxes are blank, but selected names will show on the actual program.

The Contacts list is found on the Client page “**Contacts Tab.**”
Each contact has a role or roles. Add the role of **Natural Support** to the appropriate person or people. Once there is a NS Contact they will show up when you are doing a NS search in Service Planning.



Next we will show the function of the “**Provider Detail**” button.

The screenshot displays a software interface with a sidebar on the left and a main content area on the right. The sidebar contains the following elements:

- Assessment by:** MF TRAINING ID, MF TR
- Referrals** button
- Plan Summary** button
- Model** button

The main content area features a table with the following data:

Plan #	Begin Date	End Date	Status
1	05/01/2014	04/30/2015	Pending

Below this table is a section titled "Services For Plan #1" with a "Pln Act" button. It contains a table with the following data:

Row #	Services	Provider Name	Begin Date	End Date	Invalid Entry
1	In-Home Care (HCW) Hou		05/01/2014	04/30/2015	<input type="checkbox"/>

At the bottom of the main content area, there are four buttons: "Provider Search", "Needs Association", "View/Assign Hours", and "Provider Detail". A red arrow points to the "Provider Detail" button.

Use the “**Provider Detail**” button for each HCW or Agency line.
First click on the line you want to work on, it will be highlighted blue.
Using this button you will be able to enter information for the Form 546N,
determine the billing schedule, transportation miles, and approve a Task List.

The screenshot displays a software interface with a sidebar on the left and a main content area. The sidebar contains the following elements:

- Assessment by:** MF TRAINING ID, MF TR
- Referrals** button
- Plan Summary** button
- Model** button

The main content area features a table with the following data:

Plan #	Begin Date	End Date	Status
1	05/01/2014	04/30/2015	Pending

Below this table is a section titled "Services For Plan #1" with a "Pln Act" button. It contains a table with the following data:

Row #	Services	Provider Name	Begin Date	End Date	Invalid Entry
1	In-Home Care (HCW) Hou		05/01/2014	04/30/2015	<input type="checkbox"/>

At the bottom of the main content area, there are four buttons: "Provider Search", "Needs Association", "View/Assign Hours", and "Provider Detail". A red arrow points to the "Provider Detail" button.

A **Provider Detail** window will open up

This window gives provider information:

- Provider number
- Name
- Address
- Phone
- Dates assigned in the Service Plan

Provider Detail

Provider Nbr: Class:

Provider Name:

Addr Line1:

Addr Line2:

City State Zip:

Tel Nbr:

Fax Nbr:

Dates

Start Date:

End Date:

514 Details 546 Details 595 Details

OK

Next click 546 Details

A **546 Details** window will open up.

This window allows:

- Mileage authorization
- Billing schedule
- Remarks

Billing once or twice a month.

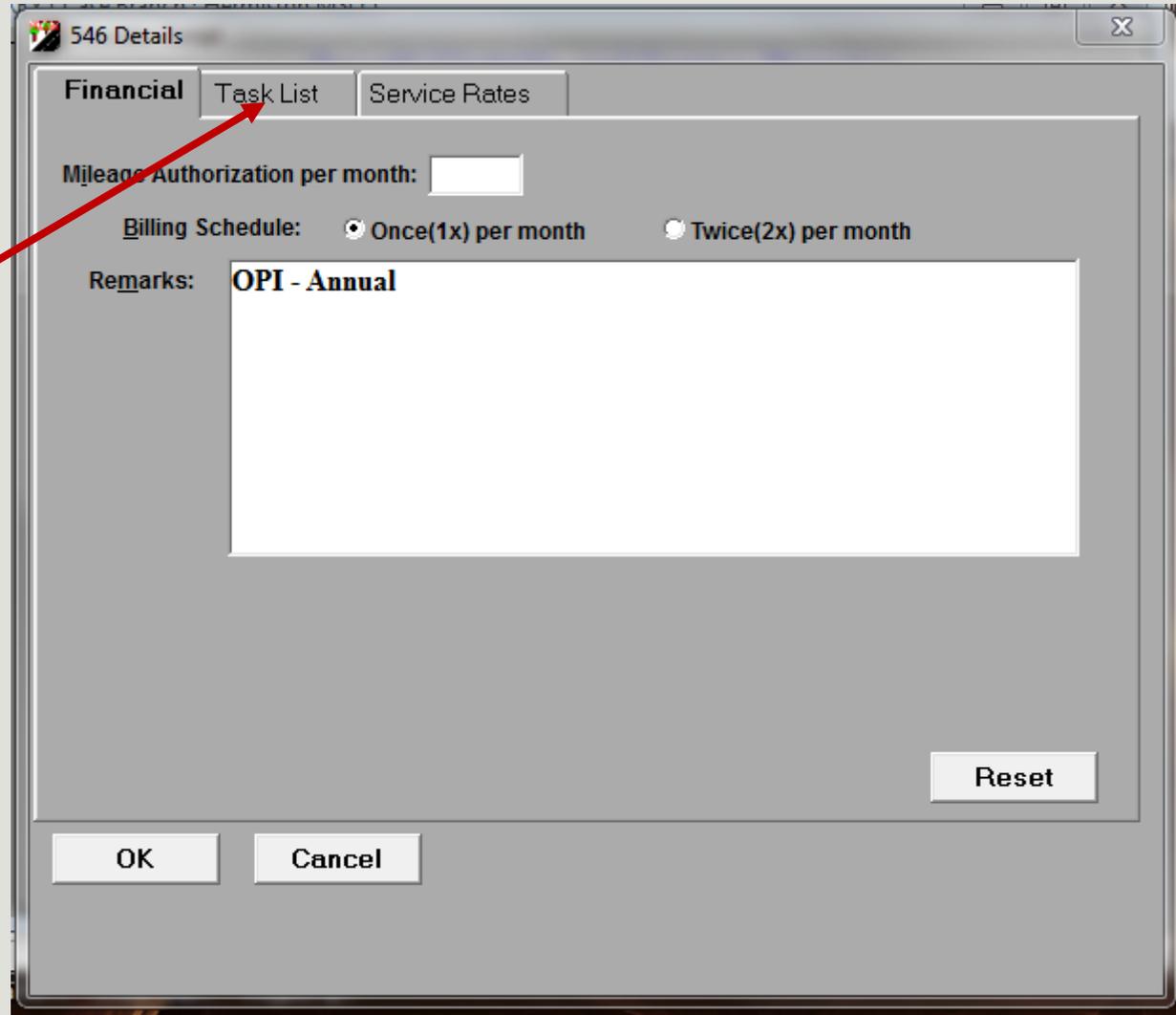
Transportation miles.

The screenshot shows a window titled "546 Details" with three tabs: "Financial", "Task List", and "Service Rates". The "Financial" tab is active. It contains the following elements:

- A text input field labeled "Mileage Authorization per month:" with a red arrow pointing to it from the text "Transportation miles." on the left.
- A "Billing Schedule:" section with two radio buttons: "Once (1x) per month" (which is selected) and "Twice(2x) per month". A red arrow points from the text "Billing once or twice a month." on the left to the "Once (1x) per month" radio button.
- A "Remarks:" text area containing the text "OPI Annual".
- A "Reset" button located at the bottom right of the main form area.
- "OK" and "Cancel" buttons at the bottom of the window.

The Task List

First click on the Task List tab.



Task List:

Next check the boxes of the selected tasks in each category. There will be a slide bar on the right to view all the tasks. If there is no slide bar, then you are viewing all the assessed tasks.

546 Details

Financial **Task List** Service Rates

Toileting

- Assist with using bedpan
- Urinal
- Commode
- Wiping/Cleansing afterward
- Cleaning assistive devices
- Adjusting clothing before/after
- Getting to/from the toilet

Click here to verify you have reviewed and authorized the Task List items.

Remarks:

Reset

OK Cancel

Task List:

After you are done selecting specific tasks, click this box to verify you are authorizing those tasks.

3. Add any remarks that you want to appear on the 598 Task List Form.

4. Click, "OK"

546 Details

Financial **Task List** Service Rates

Toileting

- Assist with using bedpan
- Urinal
- Commode
- Wiping/Cleansing afterward
- Cleaning assistive devices
- Adjusting clothing before/after
- Getting to/from the toilet

Click here to verify you have reviewed and authorized the Task List items.

Remarks:

Reset

OK Cancel

Repeat this process for each HCW, on cases with multiple HCWs assigned in the Service Plan.

You are now ready to approve the Service Planning segments. They are currently in “**Pending**” status.

Benefit Eligibility and Service Planning

Assmt Date: 04/03/2014 Valid until: 04/30/2015

Benefits Ben Act

Service Category/Benefit	Begin Date	End Date	Status
OPI	05/01/2014	04/30/2015	Pending
OPI	04/03/2014	04/30/2015	Invalid

Hours Segments

Hours #	Begin Date	End Date	Status	Alwd	Excp
1	05/01/2014	04/30/2015	Pending		0

Plans For OPI Benefit (Read Only)

Plan #	Begin Date	End Date	Status
1	05/01/2014	04/30/2015	Pending

Services For Plan #1 Pln Act

Row #	Services	Provider Name	Begin Date	End Date	Invalid Entry
1	In-Home Care (HCW) Hou		05/01/2014	04/30/2015	<input type="checkbox"/>

Provider Search Needs Association View/Assign Hours Provider Detail

1. Begin at the top with the “**Benefit Action**” button. A new window will appear. Select: “Approve Benefit”

2. Next move to the “**Hours Action**” button. Select: “Approve Hours.”

3. Next move to the “**Plan Action**” button. Select: “Approve Plan.”

Benefit Eligibility and Service Planning

Assmt Date: 04/03/2014 Valid until: 04/30/2015

Benefits Ben Act

Service Category/Benefit	Begin Date	End Date	Status
OPI	05/01/2014	04/30/2015	Pending
OPI	04/03/2014	04/30/2015	Invalid

Hours Segments

Hours #	Begin Date	End Date	Status	Alwd	Excp	View Dtl
1	05/01/2014	04/30/2015	Pending	10	0	Hrs Act

Plans For OPI Benefit (Read Only)

Plan #	Begin Date	End Date	Status
1	05/01/2014	04/30/2015	Pending

Services For Plan #1 Pln Act

Row #	Services	Provider Name	Begin Date	End Date	Invalid Entry
1	In-Home Care (HCW) Hou		05/01/2014	04/30/2015	<input type="checkbox"/>

Provider Search Needs Association View/Assign Hours Provider Detail

The Service Plan is complete when all segments are in “Approved” status. You are now ready to print forms and narrate approval.

Benefit Eligibility and Service Planning

Assmt Date: 04/03/2014 Valid until: 04/30/2015

Benefits Ben Act

Service Category/Benefit	Begin Date	End Date	Status
OPI	05/01/2014	04/30/2015	Approved
OPI	04/03/2014	04/30/2015	Invalid

Hours Segments

Hours #	Begin Date	End Date	Status	Alwd	Excp	View Dtl
1	05/01/2014	04/30/2015	Approved	20	0	Hrs Act

Plans For OPI Benefit (Read Only)

Plan #	Begin Date	End Date	Status
1	05/01/2014	04/30/2015	Approved

Services For Plan #1 Pln Act

Row #	Services	Provider Name	Begin Date	End Date	Invalid Entry
1	In-Home Care (HCW) Hou		05/01/2014	04/30/2015	<input type="checkbox"/>

Provider Search Needs Association View/Assign Hours Provider Detail



A Completed Service Plan

Once the Service Planning is complete and approved, it is possible to print:

- Form 546 - CAPS In-Home Service Plan
- Form 598 - Task List
- Form 4105 – HCW Notice of Authorization and Services

Please refer to the training on OPI Forms & Fees, available on the SUA website, for a full discussion on forms.

Hours Authorization Segment

In Home Hours Status: Pending Begin Date: 01/21/2015 End Date: 01/31/2016

Type	Need	Assist level	Asmt Hrs	Alwd Hrs	Rem Hrs	Excp Hrs	Reason
ADL	Bath/Personal Hygiene	Minimal	10	1	9	0	CM Determination
	Bowel/Bladder	Minimal	10	0	10	0	

Some CMs wonder about what to do in Service Planning for one-time services that are offered through the OPI Program, such as chore services or technology, etc.

- In those cases we would need to approve the **Hours Segment**, as previously shown, and assign one hour (because the system will not allow a Service Plan without at least one hour in a completed Hours segment).

Row #	Services	Provider Name	Begin Date	End Date	Invalid Entry
1	Misc OPI Services	TO BE SELECTED	01/21/2015	01/21/2015	<input type="checkbox"/>

Provider Search Needs Association View/Assign Hours Provider Detail

- Then we would create a **Service Plan** and select **Misc OPI Services**, from the drop down list as shown above. We do the normal **Provider Search** for that line and would select “**Placeholder, To Be Selected.**” Under the **Begin Date** we would enter the date the one-time service was authorized.

Services For Plan #1						Pln Act
Row #	Services	Provider Name	Begin Date	End Date	Invalid Entry	
1	Misc OPI Services	TO BE SELECTED	01/21/2015	01/21/2015	<input type="checkbox"/>	

- You will need to address the **Provider Detail** button prior to approval of the Service Plan. To do that you would assign at least one task on the task list (even if no HCWs are to be assigned to the case) and check the “**verify**” button. Then you would be able to approve the Service Plan, using the Plan Action button.
- Be sure to **Narrate** and explain what the **Misc. OPI Services** are, who is providing the service, the cost of the service, and why the individual is eligible for that service under you Area Plan.

Row #	Services	Provider Name	Begin Date	End Date	Invalid Entry
1	Misc OPI Services	TO BE SELECTED	01/21/2015	01/21/2015	<input type="checkbox"/>

Provider Search Needs Association View/Assign Hours Provider Detail

- Having a Service Plan approved for a One-Time service, allows the OPI assessment to remain active and avoids the scenario of the OPI CAPS assessment becoming “Invalid” due to lack of a benefit & plan.
- Please remember, one-time services under OPI do require a CAPS assessment, appropriate SPL result, and the individual must meet all eligibility requirements.

CAPS Service Planning



END

Address questions to the State Unit on Aging

Thank You!