

# Chapter 19 – Part A

## Plan of Care – HCBS/FE

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**Important**      The required fields referenced in this chapter refer to system-required fields. These fields are required in order for the form to be saved in approved status.

                         The information that is required due to policy may be different from those that are system required.

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# The Plan of Care

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**Introduction** There are three ways to open the Plan of Care, through an Assessment form (UAI), directly from Person Forms or from the MMIS Workload page. The process of entering the information is the same.

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**Important** There should be only **ONE** active HCBS/FE Funded Plan of Care for a customer. The Assessment that has the greatest detail is the one that takes precedence.

**Example:**

In January a customer has an UAI Assessment and the Plan of Care reflects HCBS/FE services.

In June a UAI Re-Assessment for the same customer is completed. At that time, the June Plan of Care takes precedence. Therefore, all of the services in the January Plan of Care will need to be manually terminated as of June 30 and the services re-entered on the new June Assessment Plan of Care with a start date of July 1.

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**KAMIS II Changes** There are four navigational tabs in the Plan of Care. A Customer page, two types of data entry pages and a print view page.

It is possible to delete a service line item that has been deleted in the MMIS System or a non-HCBS funded line if a payment has not been processed. The service line item will be retained on the previous Plan of Care versions for history.

There has been a column added in the Plan of Care table. The Processed Status Column.

New  
Existing  
Modified  
Existing – Error  
Modified – Error

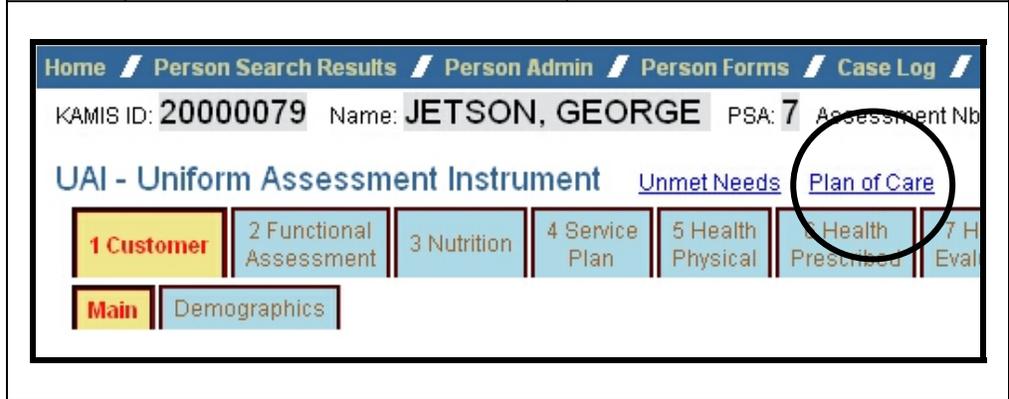
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# Accessing the Plan of Care Through an Assessment Form

**Introduction** This section explains how to access the Plan of Care through an Assessment Form Window.

**How To** Follow the steps in the table below to access the Plan of Care.

Step	Action	Result
1.	Data enter the Assessment information as appropriate.	Customer Assessment form is displayed.
2.	Change form Status to Approve. Click on the <b>Save</b> button.	Assessment Form saved.
3.	In the Navigational Panel, click on the <b>Plan of Care</b> Link.	Plan of Care will open in a new window.



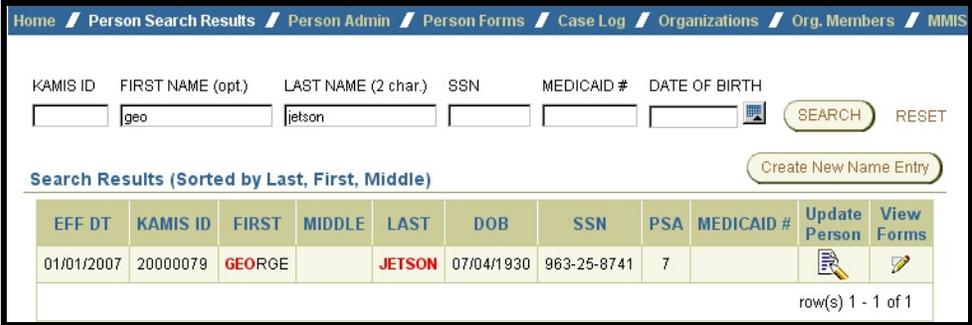
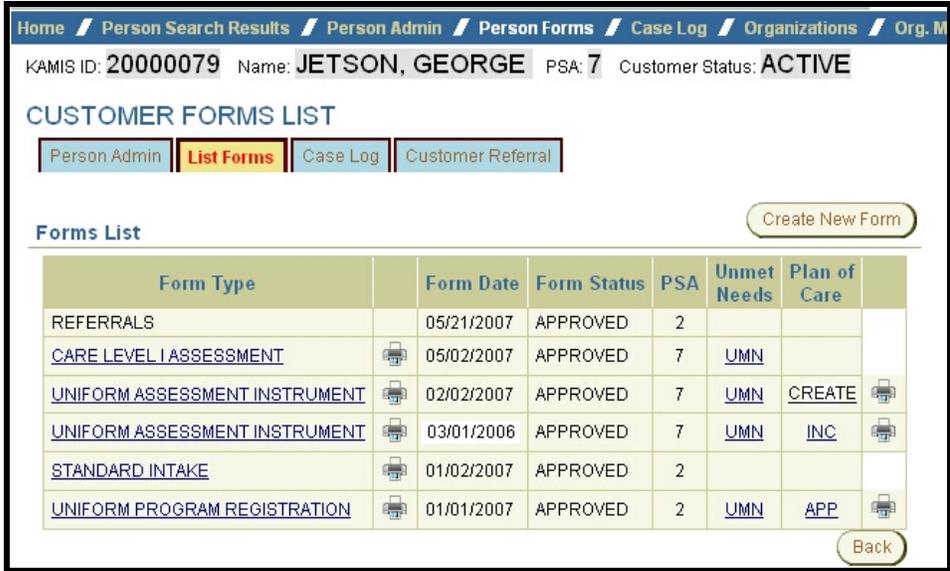
# Accessing the Plan of Care Through Person Forms Listing

## Introduction

This section explains how to access the Plan of Care through the Person Forms page.

## How To

Follow the steps in the table below to access the Plan of Care.

Step	Action	Result
1.	Search for Customer in the normal process.	Customer is displayed.
		
2.	In the Search Results table, in the appropriate customer row, single click on the <b>View Forms</b> icon.	List of all forms associated to the customer will be displayed.
		



## Accessing the Plan of Care Through Person Forms Listing, Continued

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### How To (continued)

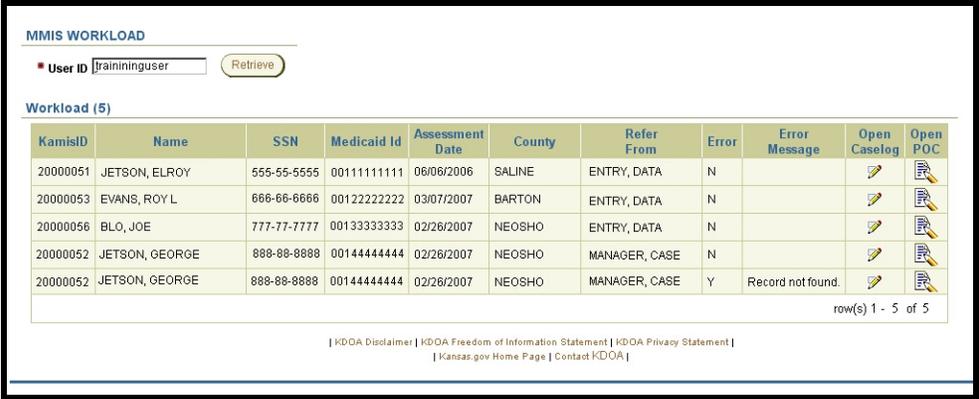
Step	Action	Result
3.	<p>In the Forms List table, in the appropriate forms row, single click on the <b>POC Status Link</b>.</p> <p><b>Status Abbreviations:</b> <u>CREATE</u> – New <u>INC</u> – Incomplete / Work in Progress <u>APP</u> – KAMIS Approved</p>	Plan of Care form opens in a new window.

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# Accessing the Plan of Care Through the KAMIS Workload Page

**Introduction** This section explains how to access the Plan of Care through the KAMIS Workload page.

**How To** Follow the steps in the table below to access the Plan of Care.

Step	Action	Result																																																																		
1.	On the Home page, click on MMIS Workload under the Administration Region.	The Workload Window is displayed.																																																																		
2.	Type the <b>User ID</b> then click on the <b>Retrieve</b> button.	Workload table is displayed.																																																																		
 <p>The screenshot shows the 'MMIS WORKLOAD' interface. At the top, there is a 'User ID' field containing 'jraininuser' and a 'Retrieve' button. Below this, a table titled 'Workload (5)' is displayed. The table has columns for KamisID, Name, SSN, Medicaid Id, Assessment Date, County, Refer From, Error, Error Message, Open Case Log, and Open POC. The data rows are as follows:</p> <table border="1"> <thead> <tr> <th>KamisID</th> <th>Name</th> <th>SSN</th> <th>Medicaid Id</th> <th>Assessment Date</th> <th>County</th> <th>Refer From</th> <th>Error</th> <th>Error Message</th> <th>Open Case Log</th> <th>Open POC</th> </tr> </thead> <tbody> <tr> <td>20000051</td> <td>JETSON, ELROY</td> <td>555-55-5555</td> <td>001111111111</td> <td>06/06/2006</td> <td>SALINE</td> <td>ENTRY, DATA</td> <td>N</td> <td></td> <td></td> <td></td> </tr> <tr> <td>20000053</td> <td>EVANS, ROY L</td> <td>666-66-6666</td> <td>001222222222</td> <td>03/07/2007</td> <td>BARTON</td> <td>ENTRY, DATA</td> <td>N</td> <td></td> <td></td> <td></td> </tr> <tr> <td>20000056</td> <td>BLO, JOE</td> <td>777-77-7777</td> <td>001333333333</td> <td>02/26/2007</td> <td>NEOSHO</td> <td>ENTRY, DATA</td> <td>N</td> <td></td> <td></td> <td></td> </tr> <tr> <td>20000052</td> <td>JETSON, GEORGE</td> <td>888-88-8888</td> <td>001444444444</td> <td>02/26/2007</td> <td>NEOSHO</td> <td>MANAGER, CASE</td> <td>N</td> <td></td> <td></td> <td></td> </tr> <tr> <td>20000052</td> <td>JETSON, GEORGE</td> <td>888-88-8888</td> <td>001444444444</td> <td>02/26/2007</td> <td>NEOSHO</td> <td>MANAGER, CASE</td> <td>Y</td> <td>Record not found.</td> <td></td> <td></td> </tr> </tbody> </table> <p>row(s) 1 - 5 of 5</p> <p style="font-size: small; text-align: center;"> <a href="#">] KDOA Disclaimer</a>   <a href="#">] KDOA Freedom of Information Statement</a>   <a href="#">] KDOA Privacy Statement</a>   <a href="#">] Kansas.gov Home Page</a>   <a href="#">] Contact KDOA</a> </p>			KamisID	Name	SSN	Medicaid Id	Assessment Date	County	Refer From	Error	Error Message	Open Case Log	Open POC	20000051	JETSON, ELROY	555-55-5555	001111111111	06/06/2006	SALINE	ENTRY, DATA	N				20000053	EVANS, ROY L	666-66-6666	001222222222	03/07/2007	BARTON	ENTRY, DATA	N				20000056	BLO, JOE	777-77-7777	001333333333	02/26/2007	NEOSHO	ENTRY, DATA	N				20000052	JETSON, GEORGE	888-88-8888	001444444444	02/26/2007	NEOSHO	MANAGER, CASE	N				20000052	JETSON, GEORGE	888-88-8888	001444444444	02/26/2007	NEOSHO	MANAGER, CASE	Y	Record not found.		
KamisID	Name	SSN	Medicaid Id	Assessment Date	County	Refer From	Error	Error Message	Open Case Log	Open POC																																																										
20000051	JETSON, ELROY	555-55-5555	001111111111	06/06/2006	SALINE	ENTRY, DATA	N																																																													
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20000052	JETSON, GEORGE	888-88-8888	001444444444	02/26/2007	NEOSHO	MANAGER, CASE	Y	Record not found.																																																												
3.	Press the <b>Open POC</b> icon.	Plan of Care form opens in a new window.																																																																		

# New Plan of Care

## Introduction

The Plan of Care form has now been separated into three sections and each section has been placed into navigational tabs, Customer Information, Line Items and Data Entry. There are links to other functions, such as the Assessment, Unmet Needs and the Customer Case log.

## New Plan of Care Page

When accessing a new Plan of Care only the Customer Navigation tab is available until the Plan of Care is saved. Once saved, the other navigational tabs will display.

The screenshot shows a web browser window with the following content:

- Title bar:** POC - JETSON, GEORGE - UAI - 01/31/2007 - 10882283511555990672 05/29/2007 09:16:53 - Microsoft Internet Explorer
- Page Header:** KAMIS II User Test Ver 2.810 2007/05/29@09:16:53 Aging State.Ks.US New Window  
Welcome: Training User [07] Logged in at: 2007/05/29@08:38:50 CITRIX
- Form Content:**
  - KAMIS ID: 20000079 Name: JETSON, GEORGE Primary PSA: 7 Assessment Date: 01/31/2007
  - POC - PLAN OF CARE [Assessment | Unmet Needs | Caselog]
  - Customer Information** (highlighted as a navigational tab)
  - Customer: JETSON, GEORGE Address: 102 SKYPAD APARTMENTS County: SN  
SSN: [963258741] Medicaid#: [00101297388] Phone#: 7852964987  
Emergency Contact: JETSON, JUDY Relationship: DAUGHTER Phone: 785-296-4987
  - Person's Original Effective Date: 01/01/2007
  - Assessment Type: UNIFORM ASSESSMENT INSTRUMENT
  - Assessment Date: 01/31/2007 Reassessment Due Date: 01/30/2008
  - POC Version: 1 POC Status: INCOMPLETE - FOLLOW-UP NEEDED
  - SRS Office: [TOPEKA SRS AREA OFFICE, 3069]
  - Case Mgr: [SPACELY, COSMO, SPACE NEEDS]
  - Deinst/Divert: [DEINSTITUTIONALIZED]
  - MMIS Self Directed: [No]
  - Refer From: [ZIMMERMAN, DEBY - KS DEPT. ON AGING]
  - Refer To: [VIATOR, YVONNE - KS DEPT. ON AGING]
  - Effective Date: [01/31/2007]
  - Action Buttons: [Save] [EDS Inquiry]
- Footer:** [KDOA Disclaimer | KDOA Freedom of Information Statement | KDOA Privacy Statement] [Kansas.gov Home Page | Contact KDOA]

Title bar. (Indicates the Customer and the type of assessment and date.)

Closes the Plan of Care Window

Assessment Information

Navigational Tab

Informational Data (Required for HCBS/FE funded POC)

Action Buttons

*Continued on next page*

# Customer Information Navigation Tab

## CUSTOMER INFORMATION NAVIGATION TAB

Links to other forms

Customer & Assessment Information

POC Status & Version Number

Plan of Care Effective Date (Defaults to the Assessment Date)

KAMIS ID: 50000176 Name: JETSON, GEORGE Primary PSA: 7 Assessment Date: 02/02/2007 Medicaid#: 00101297388

[POC - PLAN OF CARE](#) [Assessment](#) [Unmet Needs](#) [Caselog](#)

**Customer Information** | [Line Items](#) | [Data Entry](#) | [Print View](#)

Customer JETSON, GEORGE Address County

SSN 963258741 Medicaid# 00101297388 Phone#

Emergency Contact JETSON, JANE Relationship SPOUSE Phone 785-296-6459

Person's Original Effective Date 01/01/2007

Assessment Type UNIFORM ASSESSMENT INSTRUMENT

Assessment Date 02/02/2007 Reassessment Due Date 02/01/2008

POC Version 5 POC Status APPROVED

SRS Office LAWRENCE SRS AREA OFFICE, 3066

Case Mgr SPACELY, COSMO - SPACE NEEDS II

Deinst/Divert DIVERTED

MMIS Self Directed No

Refer From

Refer To

\* Effective Date 02/02/2007 Termination Date

[Save](#) [EDS Inquiry](#)

Created by HTMLDB\_PUBLIC\_U on 05/27/2007 16:38:10 Changed by HTMLDB\_PUBLIC\_U on 05/28/2007 15:23:00

Special Features

The Medicaid Beneficiary number can be changed.

# Line Items Navigation Tab

## LINE ITEMS NAVIGATION TAB

**Filters**  
(Displays only selected lines)

Links to other forms

Plan of Care Version and Status Heading

Service Line Items  
(All lines will be displayed)

KAMIS ID: 50000176 Name: JETSON, GEORGE Primary PSA: 7 Assessment Date: 02/02/2007 Medicaid#: 00101297388

**POC - PLAN OF CARE** Assessment Unmet Needs Caselog

Customer Information **Line Items** Data Entry Print View

POC Version 4 ... \* POC Status APPROVED  All  Active  Open HCBS  Open Non-HCBS

Changed by HTMLDB\_PUBLIC\_U on 05/27/2007 16:35:58

Show MMIS Update

P S A	Service	S D	Funding	S C A	D I S	Provider	U n i t s	P e r	TTL Units Mo.	Start Date	End Date	D s c o g	S t r	E r r	MMIS Save Date	C o s t	C- p a y	Mo. Cost	Processed
7	ASMT	N	MEDADM	0	N	ECKAAA-AN	10	YEAR	10	02/02/07	02/05/07	14				10	0	100	EXISTING
7	ACCC	N	HCBS/FE	0	N	GENERIC ACCC PROVIDER	1	MO	0	03/01/07			A		05/03/07	392	0	392	EXISTING
7	ATCR1X	N	HCBS/FE	0	N	ASSISTED HEALTHCARE	20	WEEK	100	03/01/07	04/30/07	27	A		05/27/07	3.18	0	318	EXISTING
7	HMEL		OAA3C2	0		GARNETT SR CTR	6	WEEK	30	07/01/07	10/01/07					3.84	0	115.2	EXISTING
7	ATCR1X	N	HCBS/FE	0	N	ASSISTED HEALTHCARE	20	WEEK	100	05/01/07			P	Y	05/27/07	3.18	56.42	318	EXISTING

row(s) 1 - 5 of 5

Liability not equal to month amount in Client Obligation  
01/01/2007 - 12/31/2299

Save All POC info EDS Inquiry  Monthly Cost

Refer From KDDA, SUPPORT - KS DEPT. ON AGING Refer To ZIMMERMAN, DEBY - KS DEPT. ON AGING

Action Buttons  
(Will perform the action stated on the button)

MMIS Error Message

### Special Features

The Line Items Page is a viewable area that shows all the service line items in data entry order. There are several actions buttons and filter features on the Line Items Page.

Action Button	Action
<b>Create New POC Version</b>	Will create a version of the Plan of Care where additions and modifications can be made.
<b>Radio Buttons – All, Active, Open HCBS, Open Non-HCBS</b>	<p><b>All</b> – Will display all service line items on the POC</p> <p><b>Active</b> – Will display only those service line items that are currently active as of the current system date. T will not show services that have ended prior to the current date, or any services that will start in the future.</p> <p><b>Open HCBS</b> – Will display all open HCBS funded service line items.</p> <p><b>Open Non-HCBS</b> – Will display all open Non-HCBS funded service line items.</p>

Continued on next page

## Line Items Navigation Tab, Continued

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### Special Features (continued)

<b>Action Button</b>	<b>Action</b>
<b>Save All POC Info</b>	Will save all changes to the POC to the database. Once saved (even in Work in Progress status) only some information will be able to be changed.

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# Data Entry Navigation Tab

## DATA ENTRY NAVIGATION TAB

KAMIS ID: 50000176 Name: JETSON, GEORGE Primary PSA: 7 Assessment Date: 02/02/2007 Medicaid#: 00101297388

POC - PLAN OF CARE [Assessment](#) [Unmet Needs](#) [Caselog](#)

Customer Information | **Line Items** | Data Entry | Print/View

\* POC Version: 4 ... \* POC Status: INCOMPLETE - FOLLOW-UP NEEDED  All  Active  Open HCBS  Open Non-HCBS

Save All POC info | EDS Inquiry | Monthly Cost

Refer From: KDOA, SUPPORT - KS DEPT. ON AGING Refer To: ZIMMERMAN, DEBY - KS DEPT. ON AGING

#	P	Service	S	Funding	S	D	Provider	U	P	TTL	Start	End	D	S	E	MMIS	Co	Op	Mo	Processed
1	7	ASMT	N	MEDADM	0	N	ECKAAA-AN	10	YEAR	10	02/02/07	02/05/07	14				10	0	100	EXISTING
2	7	ACCC	N	HCBS/FE	0	N	GENERIC ACCC PROVIDER	1	MO	0	03/01/07			P		05/03/07	392	0	392	EXISTING
3	7	ATCR1X	N	HCBS/FE	0	N	ASSISTED HEALTHCARE	20	WEEK	100	03/01/07			P		05/03/07	3.18	0	318	EXISTING
4	7	HMEL		DAA3C2	0		GARNETT SR CTR	6	WEEK	30	07/01/07	10/01/07					3.84	0	115.2	EXISTING

Line#	Service	Self Directed	Funding	Provider	Units	Freq.	Units Mo.	End Date	Dischg. Code	Copay	Delete
3	ATCR1X	No	HCBS/FE	ASSISTED HEALTHCARE 100020810B Tdt	20	WEEK	100			0	<input type="checkbox"/>

Cancel

Add/Modify Line(s)

Search:  \* Service:

Self Directed:  Search:  \* Funding:

Disaster:  Search:  \* Provider:

\* Units:  \* Frequency:  \* Total Units Monthly:

\* Start Date:  End Date:  Discharge Code:

\* Unit Cost:  SCA Cust. Resp. %:  Customer Obligation Copay:  Monthly Cost:

Service Line Items

Modify Service Line Item Data Entry Fields

New Service Line Item Data Entry Fields

### Special Features

The Data Entry Navigation Tab has viewable areas that show all the service line items in data entry order, a modification area and a new service line data entry area.

The idea behind this navigation tab is to give the ability to data enter a modification of a service line item and a new service line at the same time being able to use the service table for reference. There are several actions buttons and filter features on the page.

*Continued on next page*

## Data Entry Navigation Tab, Continued

Action Button	Action
<b>Create New POC Version</b>	Will create a version of the Plan of Care where additions and modifications can be made.
<b>Radio Buttons</b> – All, Active, Open HCBS, Open Non-HCBS	<p><b>All</b> – Will display all service line items on the POC</p> <p><b>Active</b> – Will display only those service line items that are currently active as of the current system date. T will not show services that have ended prior to the current date, or any services that will start in the future.</p> <p><b>Open HCBS</b> – Will display all open HCBS funded service line items.</p> <p><b>Open Non-HCBS</b> – Will display all open Non-HCBS funded service line items.</p>
<b>Add / Modify Line(s)</b>	Once the service line item is modified or completed, this button will add the modified information or new line item to the table.
<b>Save All POC Info</b>	Will save all changes to the POC to the database. Once saved (even in Work in Progress status) only some information will be able to be changed.

# Print View Navigation Tab

## PRINT VIEW NAVIGATION TAB

(Will open in a separate window)



Kansas Department on Aging - Plan of Care  
DEVELOPMENT Viewed on: 05/28/2007 04:40:00 PM by: DEBYZIMMERMAN



← Print page link icon

---

**Plan of Care**

Customer **JETSON, GEORGE** Address **101 SKYPAD APARTMENTS County SN SHAWNEE ORBIT CITY, KS 66601-1111**

SSN **963258741** Medicaid#  Phone# **7852964987**

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KAMIS ID: **50000176** PSA: **7** Persons Original Effective Date: **01/01/2007**  
 Assessment Type: **164 - UNIFORM ASSESSMENT INSTRUMENT** Status: **160 - APPROVED**  
 Assessment Date: **02/02/2007** Reassessment Due Date: **02/01/2008**  
 Version: **5** Status: **160 - APPROVED** Eff Dt: **02/02/2007** Trm Dt:

SEQ	PSA	Svc Code	Self Brct	Fndng Src	SCA Pct	Dstr	Provider	Unit (s)	Per	Ttl Units Mo.	Start Date	End Date	Dischrg Code	MMIS Upd	MMIS Save Date	Cost of Unit	Cstmr Oblgtn CoPay	Monthly Cost
1	7	ASMT	N	MEDADM	0	N	ECKAAA-AN Eff: 01/01/1997	10	YEAR	10	02/02/2007	02/05/2007	14			10 Eff: 03/01/2001	0	100
2	7	ACCC	N	HCBS/FE	0	N	GENERIC ACCC PROVIDER 100000000A Eff: 01/01/1997	1	MO	0	03/01/2007			A	05/27/2007	392 Eff: 01/01/2005	0	392
3	7	ATCRIX	N	HCBS/FE	0	N	ASSISTED HEALTHCARE 100020810B Eff: 01/01/1997	20	WEEK	100	03/01/2007	04/30/2007	ZZ	A	05/27/2007	3.18 Eff: 01/01/2004	0	318
4	7	HMEL		OAA3CZ	0		GARNETT SR CTR Eff: 01/01/1997	6	WEEK	30	07/01/2007	10/01/2007				3.84 Eff: 11/01/2003	0	115.2
5	7	ATCRIX	N	HCBS/FE	0	N	ASSISTED HEALTHCARE 100020810B Eff: 01/01/1997	20	WEEK	100	05/01/2007			A	05/27/2007	3.18 Eff: 01/01/2004	0	318

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SRS NAME: **LAWRENCE SRS AREA OFFICE**  
 Case Mgr Name: **SPACELY, COSMO G.**  
 Deinst/Divert: **1330** Self Directed: **N**  
 Refer from: **NO NAME ON FILE** Refer to: **NO NAME ON FILE**  
 Add user: **HTMLDB\_PUBLIC\_U** Add dt: **05/27/2007 16:38:10** Mod User: **HTMLDB\_PUBLIC\_U** Mod dt: **05/28/2007 16:39:56**

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Options  
 Display Latest POC Only  Yes  No

Option Radio Buttons –  
 (Select to display the late POC version or all POC versions)

### Special Features

Toggle button as to how much of the Plan of Care will be displayed to print.

- “Yes” will display only the latest POC Version.
- “No” will display all of the POC Versions.

# EDS Inquiry

**Introduction** The Plan of Care contains an EDS Inquiry button. This button when clicked will connect to EDS and display the most current MMIS Prior Authorization (PA) information for the customer.

## EDS INQUIRY – CUSTOMER NAVIGATION TAB

(Will open in a separate window)

General Customer Information

Total Monthly Cost

EDS Inquiry - Customer
EDS Inquiry - Services and Customer Obligation

Beneficiary ID	Last Name	First Name	MI	Date of Birth	Gender	PA Number
<input type="text" value=""/>	<input type="text" value="JETSON"/>	<input type="text" value="GEORGE"/>	<input type="text" value=""/>	<input type="text" value="01/22/1929"/>	<input type="text" value="F"/>	<input type="text" value="302007147001"/>
Agency Code	Agency Phone	Reviewer Name				
<input type="text" value="A90700"/>	<input type="text" value="7852427200 x"/>	<input type="text" value="DEBYZIMM"/>				
Case Manager	Case Manager Name	Case Manager Phone				
<input type="text" value="50000041"/>	<input type="text" value=""/>	<input type="text" value=""/>				
Level Of Care	Living Arrangement	Divert	Delinstitutionalized	EDS PA#		
<input type="text" value="180"/>	<input type="text" value="HC"/>	<input type="text" value="Dv"/>	<input type="text" value=""/>	<input type="text" value="2027073"/>		

**Total Monthly Cost**

Month	Amount
03/2007	710
04/2007	710
05/2007	710
06/2007	710
07/2007	710
08/2007	710
09/2007	710
10/2007	710
11/2007	710
12/2007	710

**Waiver Information**

Waiver Indicator	Criteria
SELF-DIRECTED CARE?	N
	1 - 1

**Customer Eligibility**

Waiver	Effective Date	End Date
HCBS Frail Elderly	08/26/1998	11/30/1998
HCBS Frail Elderly	06/11/2006	02/28/2007
HCBS Frail Elderly	06/06/2006	06/10/2006
HCBS Frail Elderly	02/01/2000	06/05/2006
Low-income Medicare Beneficiary - Dual	08/01/1997	07/31/1998
TITLE XIX (MEDICAID)	08/01/1998	11/30/1998
TITLE XIX (MEDICAID)	02/01/2000	02/28/2007
		1 - 7

Waiver Information

Customer Eligibility Dates  
(New in KAMIS II)

*Continued on next page*

Developed 05/29/2007

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# EDS Inquiry, Continued

## EDS INQUIRY – SERVICES AND CUSTOMER OBLIGATION NAVIGATION TAB

Service Line Item Information

EDS Inquiry - Customer
EDS Inquiry - Services and Customer Obligation

**PA Line Items**

Line Item	Service	Authorized Start Date	Authorized End Date	Authorized Units	Authorized Amount	Service Provider	Pricing Method
A	ACCC	03/01/2007	12/31/2299	0	392	100000000	A 4
B	S5130	05/01/2007	12/31/2299	100	318	100020810	B 1
B	S5130	03/01/2007	04/30/2007	100	318	100020810	B 1

**EDS/KAMIS Service IDs Legend**

EDS SERVICE ID	KAMIS SERVICE ID
ACCC	ACCC
S5101	MADCX
S5125	ATCR2X
S5125 UD	ATCRUD
S5130	ATCR1X
S5151	MRESPX
S5160	PEMRIX
S5161	PERMX
S5185	MEDRX
S5190	MAWMX
T1001	NUEVX
T2025	MASCX
T2029	ASTEX

**Customer Obligation from KAECSES**

Effective Date	End Date	Amount
01/01/2007	12/31/2299	237
11/01/2006	12/31/2006	206
10/01/2006	10/31/2006	98.05
01/01/2006	09/30/2006	206
12/01/2005	12/31/2005	169
01/01/2005	11/30/2005	168
03/01/2004	12/31/2004	145
02/01/2004	02/29/2004	295
01/01/2004	01/31/2004	295
12/01/2003	12/31/2003	277
07/01/2003	11/30/2003	127
02/01/2003	06/30/2003	198
01/01/2003	01/31/2003	125
01/01/2002	12/31/2002	114

**Customer Obligation Provider Information**

Service Provider	Effective Date	End Date	Amount
200347720 A	02/01/2007	12/31/2299	237
200347720 A	01/01/2007	01/31/2007	237
200347720 A	11/01/2006	12/31/2006	206
100408910 A	10/01/2006	10/31/2006	98.05
100408910 A	07/01/2006	09/30/2006	206
100408910 A	04/01/2006	06/30/2006	206
100408910 A	03/01/2006	03/01/2006	206
100408910 A	02/01/2006	02/28/2006	206
100374000 B	01/01/2006	01/07/2006	206
100374000 B	12/01/2005	12/31/2005	169
100374000 B	07/01/2005	11/30/2005	168
100374000 B	06/01/2005	06/30/2005	168
100374000 B	05/01/2005	05/31/2005	168
100374000 B	04/01/2005	04/30/2005	168

Service ID's (EDS vs. KAMIS)

Customer Obligation Amounts

Provider responsible for obtaining the Customer Obligation

Developed 05/29/2007

19A - 15

## EDS Inquiry, Continued

### New Plan of Care and EDS Inquiry

It is highly important to double check the information as it exists in the MMIS System. When the POC Effective Date (the assessment date) is entered on a new POC, and when the user clicks on the EDS Inquiry button, KAMIS will query for any Prior Authorization (PA) existing in MMIS with a start date after the POC Effective date.

Since a current PA should not exist with a start date past the new assessment date, a message within the EDS Inquiry window will be displayed.

EDS Inquiry Screen Panel 1 - Microsoft Internet Explorer

KAMIS II User Test Ver 2.810 2007/05/29@14:47:16 Aging.State.Ks.US New Window  
Welcome: Training User [07] Logged in at: 2007/05/29@14:46:32 CITRIX

EDS Inquiry - Customer EDS Inquiry - Services and Customer Obligation

Beneficiary ID Last Name First Name MI Date of Birth Gender PA Number

Agency Code Agency Phone Reviewer Name

Case Manager Case Manager Name Case Manager Phone

Level Of Care Living Arrangement Divert/Delinstitutionalized EDS PA#

Total Monthly Cost Waiver Information Customer Eligibility  
no data found no data found no data found

ERROR: No customer obligation returned from EDS for medicaid# 00101259912

# Total Monthly Cost Button

## Introduction

The Total Monthly Cost button when clicked will add all services for the month entered and display the total of the services.

## Monthly Cost Input Window

**NOTE:** It is possible to print this page by clicking on the printer icon.

## How to

Follow the steps in the table below to calculate the monthly cost for an HCBS/FE Plan of Care.

Step	Action	Result
1.	Select the month from the drop down listing	The current month is the default.
2.	Type in the year (four digits)	
3.	Click on the Recalculate Cost	Total Cost will display.  The customer obligation will not be subtracted from this total.  If there are several service line items with blank end dates, KAMIS will include those items in the monthly cost total.

# Starting a New Plan of Care

## Introduction

The following sections will address adding a new Plan of Care in KAMIS. If the Plan of Care is associated with a Re-Assessment, the Plan of Care associated with the prior Assessment will need to be terminated / closed prior to starting the new Plan of Care.

## How to

Follow the steps in the table below to create a new Plan of Care.

Step	Action	Result
1.	Open the <b>Plan of Care</b> .	Customer Information Page will be displayed.

The screenshot shows a web browser window titled "POC - JETSON, GEORGE - UAI - 01/31/2007 - 10882283511555990672 05/29/2007 09:16:53 - Microsoft Internet Explorer". The page content includes:

- KAMIS IT** logo and user information: "User Test Ver 2.810 2007/05/29@09:16:53 Aging.State.Ks.US New Window Welcome: Training User [07] Logged in at: 2007/05/29@08:38:50 CITRIX"
- KAMIS ID: 20000079 Name: JETSON, GEORGE Primary PSA: 7 Assessment Date: 01/31/2007
- POC - PLAN OF CARE with links for Assessment, Unmet Needs, and CaseLog.
- Customer Information** section:
  - Customer: JETSON, GEORGE Address: 102 SKYPAD APARTMENTS County: SN
  - SSN: 963258741 Medicaid#: [ ] Phone#: 7852964987
  - Emergency Contact: JETSON, JUDY Relationship: DAUGHTER Phone: 785-296-4987
- Person's Original Effective Date: 01/01/2007
- Assessment Type: UNIFORM ASSESSMENT INSTRUMENT
- Assessment Date: 01/31/2007 Reassessment Due Date: 01/30/2008
- POC Version 1 POC Status: INCOMPLETE - FOLLOW-UP NEEDED
- Form fields for SRS Office, Case Mgr, Deinst/Divert, MMIS Self Directed, Refer From, and Refer To.
- Effective Date: 01/31/2007
- Buttons: Save, EDS Inquiry

## Entering Information in the Customer Page

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**Introduction** The information displayed in this section is concerning the customers' personal information. The information is entered previously in Person Administration. Also, other information is also included on this navigation tab that is required in the MMIS System, such as the SRS Office and the Case Manager.

---

**Important** The Social Security Number and Medicaid Beneficiary Number are required for HCBS/FE Services. If one or both of these numbers are absent, they may be entered directly in the Plan of Care page. When saved successfully, the information will be updated in Person Administration or in the Assessment form associated with the Plan of Care.

---

**KAMIS II Change** If the Medicaid Beneficiary Number has been entered into KAMIS previously, the number will populate in the correct field in the assessment. Therefore, the number will display in the new Plan of Care.

Also, if the Medicaid Beneficiary Number is incorrect or has been changed by the MMIS System, the number can now change instead of calling the KDOA Helpdesk.

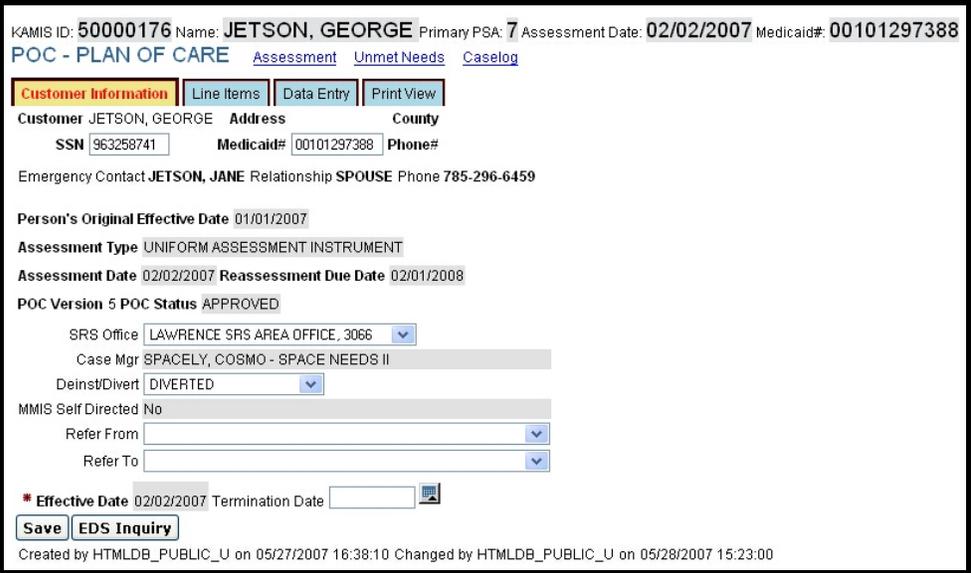
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*Continued on next page*

## Entering Information in the Customer Page, Continued

### How To

Follow the steps in the table below to enter information into the Customer Section of the Plan of Care.

Step	Action	Result
1.	Click on the <b>Customer Information Navigation Tab</b> to make it active.	
 <p>KAMIS ID: 50000176 Name: JETSON, GEORGE Primary PSA: 7 Assessment Date: 02/02/2007 Medicaid#: 00101297388  <b>POC - PLAN OF CARE</b> <a href="#">Assessment</a> <a href="#">Unmet Needs</a> <a href="#">Caselog</a>  <b>Customer Information</b>   <a href="#">Line Items</a>   <a href="#">Data Entry</a>   <a href="#">Print View</a>  Customer JETSON, GEORGE Address County  SSN 963258741 Medicaid# 00101297388 Phone#  Emergency Contact JETSON, JANE Relationship SPOUSE Phone 785-296-6459  Person's Original Effective Date 01/01/2007  Assessment Type UNIFORM ASSESSMENT INSTRUMENT  Assessment Date 02/02/2007 Reassessment Due Date 02/01/2008  POC Version 5 POC Status APPROVED  SRS Office LAWRENCE SRS AREA OFFICE, 3066  Case Mgr SPACELY, COSMO - SPACE NEEDS II  Deinst/Divert DIVERTED  MMIS Self Directed No  Refer From  Refer To  * Effective Date 02/02/2007 Termination Date  Save EDS Inquiry  Created by HTMLDB_PUBLIC_U on 05/27/2007 16:38:10 Changed by HTMLDB_PUBLIC_U on 05/28/2007 15:23:00</p>		
2.	Enter <b>Social Security Number</b> , if needed.	This area will be available only if the information is absent.
3.	Enter <b>Medicaid Number</b>	This area will be available only if the information is absent.
4.	Select <b>SRS Office</b> from the drop down box.	
5.	Select <b>Case Manager</b> from the drop down box.	

*Continued on next page*

## Entering Information in the Customer Page, Continued

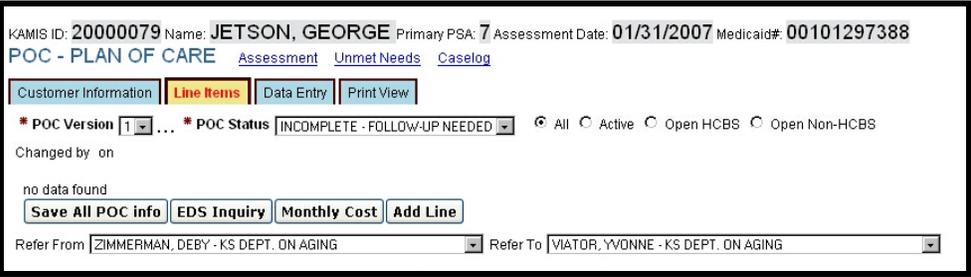
### How To (continued)

Step	Action	Result
6.	Select the appropriate answer in the <b>Deinst./Divert</b> drop down box.	<p>Deinst. = Deinstitutionalized This field is selected for customers that have been in an institution (Nursing Home) within the past 6 months.</p> <p>Divert. = Diverted This field is selected for customers that have not been in an institution (Nursing Home) within the past 6 months.</p>
7.	<b>MMIS Self-Directed Indicator.</b> This is display field that reflects the entry on the service line items.	Required Field but auto-populates. Default is "no".
8.	Select the <b>Refer From</b>	Must be the person data entering this Plan of Care.
9.	Select the <b>Refer To</b>	This would be the person that would be approving the Plan of Care. (KDOA Approver)
10.	Enter the <b>Plan of Care Effective Date.</b>	This defaults to the assessment date.
11.	Click on the <b>Save</b> button.	The Plan of Care is created. All other Navigational tabs are displayed.
12.	Click on either the Line Items or Data Entry Navigation Tab.	Information fields will be displayed.

# Entering Service Line Items – Line Items Navigation Tab

**Introduction** There are two options to data entering the service line items on the Plan of Care. It is personal preference as to which navigational tab to use. The following will describe how to use the Line Item Navigation tab.

**How To** Follow the steps in the table below to enter data into a new Plan of Care in KAMIS using the Line Items Navigation Tab.

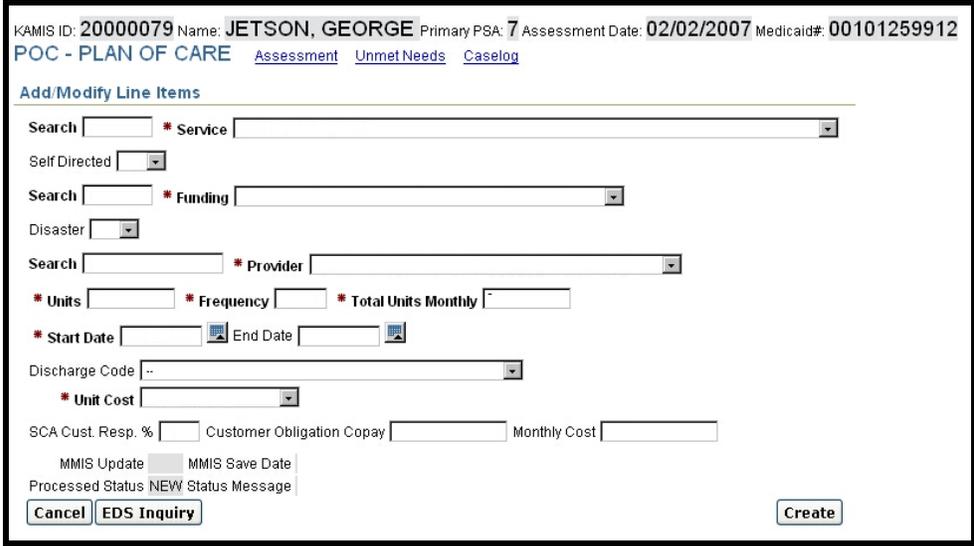
Step	Action	Result
1.	Click on the Line Items Navigation Tab.	Makes the tab active.
		
2.	Click on <b>EDS Inquiry</b> Button.	A separate window will be displayed. Since this is a new Plan of Care there should not be information displayed. A message will be displayed.
		
3.	Close the EDS Inquiry window.	Plan of Care will be visible.

**Note:** If the EDS Inquiry displays MMIS information, contact the KDOA Help Desk to have the PA Reference Number reviewed and possibility deleted from the KAMIS Database.

*Continued on next page*

# Entering Service Line Items – Line Items Navigation Tab, Continued

## How To (continued)

Step	Action	Result
4.	Click on the <b>Add line</b> button.	Add / Modify line items page is displayed.
		
5.	<b>Service Code</b> – Either search or select the appropriate service from the drop down dialog box.	The complete service title and unit standards are displayed.

### ACCC Service Line

Entry of an ACCC Service line item will be required on all HCBS/FE funded KAMIS Plans of Cares. This service line will be entered once per Plan of Care. On a new POC in KAMIS, the Service could be entered as the second line in the POC after the ASMT line.

Provider: (Generic ACCC Provider – ID #100000000A)

Pricing has been established for this service for all AAA's.

Start Date: The same start date as the other services. First of the Month following the current date.

End Date: Blank

*Continued on next page*

## Entering Service Line Items – Line Items Navigation Tab, Continued

### ACCC Service Line (continued)

Step	Action	Result
6.	<b>Self-Direct</b> – Select Y or N	Required Field.
7.	<b>Funding Source</b> – Either search or select the appropriate funding from the drop down dialog box.	Only the sources associated with the service will be displayed.
8.	<b>Disaster</b> – Select Y or N	
9.	<b>Provider</b> – Select the appropriate Provider from the drop down dialog box.	Only the providers that provide the service/funding combination selected will be displayed.

**Note:** Once a Funding Source is selected, the Provider drop down dialog box may not display any entries. This will indicate that there are currently no providers available for this Service/Funding Combination.

There may not be a provider for that combination entered into KAMIS. If the information selected is correct then the Service Provided pricing needs to be entered into KAMIS. See the appropriate Chapter for detailed instructions.

If you select a provider in the Provider drop down list box then click on either the Service Code or Funding Source columns, the Provider will be set back to blank. This is due to the application re-querying the database to find the Provider(s) and/or Funding combination for that service.

Step	Action	Result
10.	<b>Units</b> - Enter the number of units.	Required
11.	<b>Frequency</b> - Enter the Frequency of the Service.	Required  This information is not transferred to the Medicaid System.
12.	<b>Total Units Monthly</b> - Enter the number of total units.	Required
13.	<b>Start and End Date</b> - Enter the date the services are to start.	See note below.

*Continued on next page*

# Entering Service Line Items – Line Items Navigation Tab, Continued

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## ACCC Service Line (continued)

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**Dates of Service** Due to the interface between two systems, special attention is needed regarding dates of service. Below are several explanations on how to data enter specific situations.

---

**End Dates** End dates for service line items can be entered for the current or a future month or left blank. An end date left blank in KAMIS will represent an on-going service date in MMIS. An on-going service end date in MMIS is represented by 12/31/2299.

---

**Initial UAI:**

This is a UAI were the customer is new to the HBCS/FE system.

Services will not be able to start with a date prior to the effective date the SRS ES worker enters into the system. This date can now be confirmed on the EDS Inquiry page. For this example, it is assumed that the services will have a start date in the middle of the month.

**Example:**

UAI Dated: 02/07/2007

Service dates would be entered in the Plan of Care as follows:

<b><u>Start Date</u></b>	<b><u>End Date</u></b>	
02/07/2007	02/28/2007	Prorate the units for the appropriate days.
03/01/2007	Blank	Units would be full amount and on going.

---

*Continued on next page*

# Entering Service Line Items – Line Items Navigation Tab, Continued

## End Dates (continued)

Step	Action	Result								
14.	MMIS Update - System Generated.	Below are the codes that will be displayed in this field:								
	<table border="1"> <thead> <tr> <th>MMIS Update Code</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>"N"</td> <td>Indicates New – The line item has not yet been submitted and saved in KAMIS.</td> </tr> <tr> <td>"P"</td> <td>Indicates Pending – The line item has been saved successfully in KAMIS and has been referred to the KDOA Approver.</td> </tr> <tr> <td>"A"</td> <td>Indicates Approved – The line item has been transferred, saved and approved successfully in the Prior Authorization System in ICMMS.</td> </tr> </tbody> </table>		MMIS Update Code	Description	"N"	Indicates New – The line item has not yet been submitted and saved in KAMIS.	"P"	Indicates Pending – The line item has been saved successfully in KAMIS and has been referred to the KDOA Approver.	"A"	Indicates Approved – The line item has been transferred, saved and approved successfully in the Prior Authorization System in ICMMS.
MMIS Update Code	Description									
"N"	Indicates New – The line item has not yet been submitted and saved in KAMIS.									
"P"	Indicates Pending – The line item has been saved successfully in KAMIS and has been referred to the KDOA Approver.									
"A"	Indicates Approved – The line item has been transferred, saved and approved successfully in the Prior Authorization System in ICMMS.									
15.	<b>MMIS Save Date</b> - System Generated	Will be the date the transaction was completed.								
16.	<b>Discharge Code</b> - Enter if appropriate.	Required if the Service has an end date entered. A short explanation is listed in the discharge code drop down dialog box or see the Appendix for the listing of Discharge Codes.								
17.	<b>Cost of Unit</b> - Select the appropriate cost from drop down dialog box.	Populated by the System per Provider Service.								

**Note:** If you select a price in the Cost of Unit drop down list box that is not listed first and then click on either the Funding Source or Provider columns, the unit price will be set back to the first entry in the listing. This is due to the application re-querying the database to find the Provider(s) and/or Funding combination for that service.

*Continued on next page*

# Entering Service Line Items – Line Items Navigation Tab, Continued

## End Dates (continued)

Step	Action	Result
18.	<b>Customer Obligation Co-Pay</b> - Enter the Obligation if applicable.	This is a required field if there is a Customer Obligation in the Medicaid System. An edit will be done to compare the amounts. See EDS Inquiry to verify the amounts.
19.	<b>Monthly Cost</b> - Calculated by the System.	The calculation is: Total Units Monthly multiplied by the Cost of Unit.

KAMIS ID: 20000079 Name: JETSON, GEORGE Primary PSA: 7 Assessment Date: 02/02/2007 Medicaid#: 00101259912  
 POC - PLAN OF CARE [Assessment](#) [Unmet Needs](#) [Caselog](#)

**Add/Modify Line Items**

Search  \* Service ACCC - ACCC - 1 UNIT

Self Directed

Search  \* Funding HCBS/FE - HOME COMMUNITY BASED SERVICES - FRAIL EL

Disaster

Search  \* Provider GENERIC ACCC PROVIDER 100000000A Edt 01/01/97 T dt

\* Units  \* Frequency YEAR \* Total Units Monthly

\* Start Date  End Date

Discharge Code

\* Unit Cost

SCA Cust. Resp. %  Customer Obligation Copay  Monthly Cost

MMIS Update  MMIS Save Date

Processed Status NEW Status Message

*Continued on next page*

# Entering Service Line Items – Line Items Navigation Tab, Continued

## End Dates (continued)

Step	Action	Result
20.	Click on the <b>Create</b> button.	The page will return to the Line Items Navigation Tab with the new service line item added to the table. The processed column will indicate “new”.

KAMIS ID: 20000079 Name: JETSON, GEORGE Primary PSA: 7 Assessment Date: 02/02/2007 Medicaid#: 00101259912  
**POC - PLAN OF CARE** [Assessment](#) [Unmet Needs](#) [CaseLog](#)

Customer Information | **Line Items** | Data Entry | Print View

POC Version: 22 ... POC Status: INCOMPLETE - FOLLOW-UP NEEDED  All  Active  Open HCBS  Open Non-HCBS  
 Changed by HTMLDB\_PUBLIC\_U on 05/22/2007 09:18:45

PSA	Service	SD	Funding	SDI	Provider	Units	Per	TTL Units Mo.	Start Date	End Date	Disorg.	Sts	Err	MMIS Save Date	Cost	Comp	Mo. Cost	Processed
7	ACCC	N	HCBS/FE	0	N	GENERIC ACCC PROVIDER	1	YEAR	0	03/01/07					392	0	392	NEW

row(s) 1 - 1 of 1

Save All POC info | EDS Inquiry | Monthly Cost | Add Line

Refer From: KDOA, SUPPORT - KS DEPT. ON AGING Refer To: VIATOR, YVONNE - KS DEPT. ON AGING

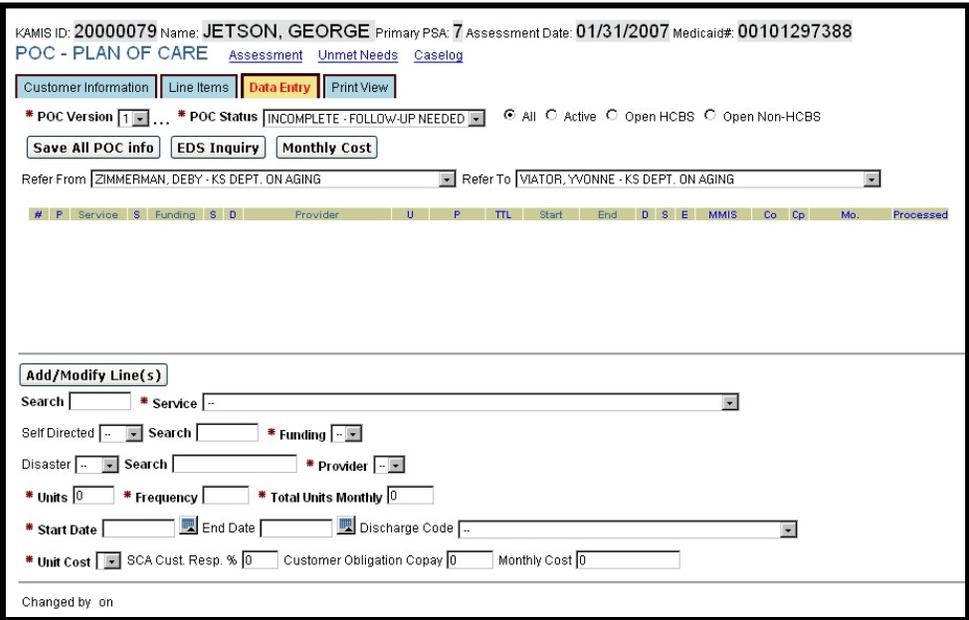
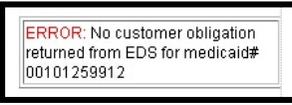
# Entering Service Line Items – Data Entry Navigation Tab

## Introduction

There are two options to data entering the service line items on the Plan of Care. It is personal preference as to which navigation tab to use. The following will describe how to use the Data Entry Navigation Tab.

## How To

Follow the steps in the table below to enter data into a new Plan of Care in KAMIS using the Data Entry Navigation Tab.

Step	Action	Result
1.	Click on the Data Entry Navigation Tab.	Makes the tab active.
		
2.	Click on <b>EDS Inquiry</b> Button.	A separate window will be displayed. Since this is a new Plan of Care there should not be information displayed. A message will be displayed.
		

*Continued on next page*

## Entering Service Line Items – Data Entry Navigation Tab, Continued

### How To (continued)

Step	Action	Result
3.	Close the EDS Inquiry window.	Plan of Care will be visible.

**Note:** If the EDS Inquiry displays MMIS information, contact the KDOA Help Desk to have the PA Reference Number reviewed and possibility deleted from the KAMIS Database.

Step	Action	Result
4.	The data entry fields are available at the bottom of the page. Begin entering the data.	
5.	<b>Service Code</b> – Either search or select the appropriate service from the drop down dialog box.	The complete service title and unit standards are displayed.

### ACCC Service Line

Entry of an ACCC Service line item will be required on all HCBS/FE funded KAMIS Plans of Cares. This service line will be entered once per Plan of Care. On a new POC in KAMIS, the Service could be entered as the second line in the POC after the ASMT line.

Provider: (Generic ACCC Provider – ID #100000000A)

Pricing has been established for this service for all AAA's.

Start Date: The same start date as the other services. First of the Month following the current date.

End Date: Blank

Step	Action	Result
6.	<b>Self-Direct</b> – Select Y or N	Required Field.
7.	<b>Funding Source</b> – Either search or select the appropriate funding from the drop down dialog box.	Only the sources associated with the service will be displayed.
8.	<b>Disaster</b> – Select Y or N	

*Continued on next page*

## Entering Service Line Items – Data Entry Navigation Tab, Continued

### ACCC Service Line (continued)

Step	Action	Result
9.	<b>Provider</b> – Select the appropriate Provider from the drop down dialog box.	Only the providers that provide the service/funding combination selected will be displayed.

**Note:** Once a Funding Source is selected, the Provider drop down dialog box may not display any entries. This will indicate that there are currently no providers available for this Service/Funding Combination.

There may not be a provider for that combination entered into KAMIS. If the information selected is correct then the Service Provided pricing needs to be entered into KAMIS. See the appropriate Chapter for detailed instructions.

If you select a provider in the Provider drop down list box then click on either the Service Code or Funding Source columns, the Provider will be set back to blank. This is due to the application re-querying the database to find the Provider(s) and/or Funding combination for that service.

Step	Action	Result
10.	<b>Units</b> - Enter the number of units.	Required
11.	<b>Frequency</b> - Enter the Frequency of the Service.	Required  This information is not transferred to the Medicaid System.
12.	<b>Total Units Monthly</b> - Enter the number of total units.	Required
13.	<b>Start and End Date</b> - Enter the date the services are to start.	See note below.

**Dates of Service** Due to the interface between two systems, special attention is needed regarding dates of service. Below are several explanations on how to data enter specific situations.

*Continued on next page*

# Entering Service Line Items – Data Entry Navigation Tab, Continued

**End Dates** End dates for service line items can be entered for the current or a future month or left blank. An end date left blank in KAMIS will represent an on-going service date in MMIS. An on-going service end date in MMIS is represented by 12/31/2299.

**Initial UAI:**

This is a UAI were the customer is new to the HBCS/FE system.

Services will not be able to start with a date prior to the effective date the SRS ES worker enters into the system. This date can now be confirmed on the EDS Inquiry page. For this example, it is assumed that the services will have a start date in the middle of the month.

**Example:**

UAI Dated: 02/07/2007

Service dates would be entered in the Plan of Care as follows:

<b><u>Start Date</u></b>	<b><u>End Date</u></b>	
02/07/2007	02/28/2007	Prorate the units for the appropriate days.
03/01/2007	Blank	Units would be full amount and on going.

<b>Step</b>	<b>Action</b>	<b>Result</b>								
14.	MMIS Update - System Generated.	Below are the codes that will be displayed in this field:								
	<table border="1"> <thead> <tr> <th><b>MMIS Update Code</b></th> <th><b>Description</b></th> </tr> </thead> <tbody> <tr> <td>"N"</td> <td>Indicates New – The line item has not yet been submitted and saved in KAMIS.</td> </tr> <tr> <td>"P"</td> <td>Indicates Pending – The line item has been saved successfully in KAMIS and has been referred to the KDOA Approver.</td> </tr> <tr> <td>"A"</td> <td>Indicates Approved – The line item has been transferred, saved and approved successfully in the Prior Authorization System in MMIS.</td> </tr> </tbody> </table>	<b>MMIS Update Code</b>	<b>Description</b>	"N"	Indicates New – The line item has not yet been submitted and saved in KAMIS.	"P"	Indicates Pending – The line item has been saved successfully in KAMIS and has been referred to the KDOA Approver.	"A"	Indicates Approved – The line item has been transferred, saved and approved successfully in the Prior Authorization System in MMIS.	
<b>MMIS Update Code</b>	<b>Description</b>									
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*Continued on next page*

## Entering Service Line Items – Data Entry Navigation Tab, Continued

### How to (continued)

Step	Action	Result
15.	<b>MMIS Save Date</b> - System Generated	Will be the date the transaction was completed.
16.	<b>Discharge Code</b> - Enter if appropriate.	Required if the Service has an end date entered. A short explanation is listed in the discharge code drop down dialog box or see the Appendix for the listing of Discharge Codes.
17.	<b>Cost of Unit</b> - Select the appropriate cost from drop down dialog box.	Populated by the System per Provider Service.

**Note:** If you select a price in the Cost of Unit drop down list box that is not listed first and then click on either the Funding Source or Provider columns, the unit price will be set back to the first entry in the listing. This is due to the application re-querying the database to find the Provider(s) and/or Funding combination for that service.

Step	Action	Result
18.	<b>Customer Obligation Co-Pay</b> - Enter the Obligation if applicable.	This is a required field if there is a Customer Obligation in the Medicaid System. An edit will be done to compare the amounts. See EDS Inquiry to verify the amounts.

*Continued on next page*

# Entering Service Line Items – Data Entry Navigation Tab, Continued

## How to (continued)

Step	Action	Result
19.	<b>Monthly Cost</b> - Calculated by the System.	The calculation is: Total Units Monthly multiplied by the Cost of Unit.

KAMIS ID: 20000079 Name: JETSON, GEORGE Primary PSA: 7 Assessment Date: 02/02/2007 Medicaid#: 00101259912  
 POC - PLAN OF CARE [Assessment](#) [Unmet Needs](#) [Caselog](#)

Customer Information | **Line Items** | **Data Entry** | Print View

\* POC Version: 22 \* POC Status: INCOMPLETE - FOLLOW-UP NEEDED  All  Active  Open HCBS  Open Non-HCBS

**Save All POC info** **EDS Inquiry** **Monthly Cost**

Refer From: KDDA, SUPPORT - KS DEPT. ON AGING Refer To: VIATOR, YVDNNE - KS DEPT. ON AGING

#	P	Service	S	Funding	S	D	Provider	U	P	TTL	Start	End	D	S	E	MMIS	Co	Op	Mo	Processed

---

**Add/Modify Line(s)**

Search: ac \* Service: ACCC - ACCC - 1 UNIT

Self Directed: No Search: \* Funding: HCBS/FE - HOME COMMUNITY BASED SERVICES - FRAIL EL

Disaster: No Search: \* Provider: GENERIC ACCC PROVIDER 100000000A Edt 01/01/97 Tdt

\* Units: 1 \* Frequency: YEAR \* Total Units Monthly: 0

\* Start Date: 03/01/2007 End Date: Discharge Code: ..

\* Unit Cost: 392 Edt 01/01/05 Tdt SCA Cust. Resp. %: 0 Customer Obligation Copay: 0 Monthly Cost: 392

*Continued on next page*

# Entering Service Line Items – Data Entry Navigation Tab, Continued

How to (continued)

Step	Action	Result
20.	Click on the <b>Add / Modify Line(s)</b> button.	The new service line item is added to the table. The processed column will indicate “new”.

KAMIS ID: 20000079 Name: JETSON, GEORGE Primary PSA: 7 Assessment Date: 02/02/2007 Medicaid#: 00101259912

POC - PLAN OF CARE [Assessment](#) [Unmet Needs](#) [CaseLog](#)

Customer Information | Line Items | **Data Entry** | Print View

POC Version 22 ... 
  POC Status INCOMPLETE - FOLLOW-UP NEEDED 
  All 
  Active 
  Open HCBS 
  Open Non-HCBS

Refer From: KDOA, SUPPORT - KS DEPT. ON AGING Refer To: VIATOR, YVONNE - KS DEPT. ON AGING

#	P	Service	S	Funding	S	D	Provider	U	P	TTL	Start	End	D	S	E	MMIS	Co	Op	Mo.	Processed
1	7	ACCC	N	HCBS/FE	0	N	GENERIC ACCC PROVIDER	1	YEAR	0	03/01/07						392	0	392	NEW

**Add/Modify Line(s)**

Search  \* Service

Self Directed  Search  \* Funding

Disaster  Search  \* Provider

Units 0 
  Frequency 
 Total Units Monthly 0

Start Date  End Date  Discharge Code

Unit Cost  SCA Cust. Resp. % 0 Customer Obligation Copay 0 Monthly Cost 0

# Saving a Plan of Care

## Introduction

In KAMIS the Plan of Care must be in an Approved Status for the Services to be registered within KAMIS Only.

Approval on the Plan of Care form does not indicate approval in the Medicaid System. Approval of the services in the Medicaid Information System (MMIS) is accomplished when the KDOA Approver initiates the transfer of data to MMIS. This is indicated by an “A” in the MMIS Status column and a transaction date in the MMIS Update column.

## How To

Follow the steps in the table below to save a Plan of Care.

Step	Action	Result
1.	Change <b>POC Status</b> to <b>Approved</b> .	
2.	Press the <b>Save All POC Info</b> button.	<p>The Plan of Care will save. Four items will occur</p> <ul style="list-style-type: none"> <li>• The status area will turn gray in color</li> <li>• A successful save message displayed in the heading area.</li> <li>• “Existing” will display in the processed column.</li> <li>• The Plan of Care will appear in the Workload of the person listed in the “Refer To” field.</li> </ul>

KAMIS ID: 20000079 Name: JETSON, GEORGE Primary PSA: 7 Assessment Date: 02/02/2007 Medicaid#: 00101259912

POC - PLAN OF CARE [Assessment](#) [Unmet Needs](#) [Caselog](#)

Customer Information | Line Items | **Data Entry** | Print View

\* POC Version: 22 ... \* POC Status: APPROVED  All  Active  Open HCBS  Open Non-HCBS [Create New POC Version](#)

[Save All POC info](#) [EDS Inquiry](#) [Monthly Cost](#)

Refer From: KDOA, SUPPORT - KS DEPT. ON AGING Refer To: VIATOR, YVONNE - KS DEPT. ON AGING

Rows Processed: 1 Rows Errors: 0

#	P	Service	S	Funding	S	D	Provider	U	P	TTL	Start	End	D	S	E	MMIS	Co	Dp	Mo.	Processed
1	7	ACCC	N	HCBS/FE	0	N	GENERIC ACCC PROVIDER	1	YEAR	0	03/01/07				P	06/03/07	392	0	392	EXISTING

# Modifying a Plan of Care

**Introduction** Once services are entered into the Plan of Care and saved as Approved in KAMIS, changes can only be made by creating a new version of the existing Plan of Care.

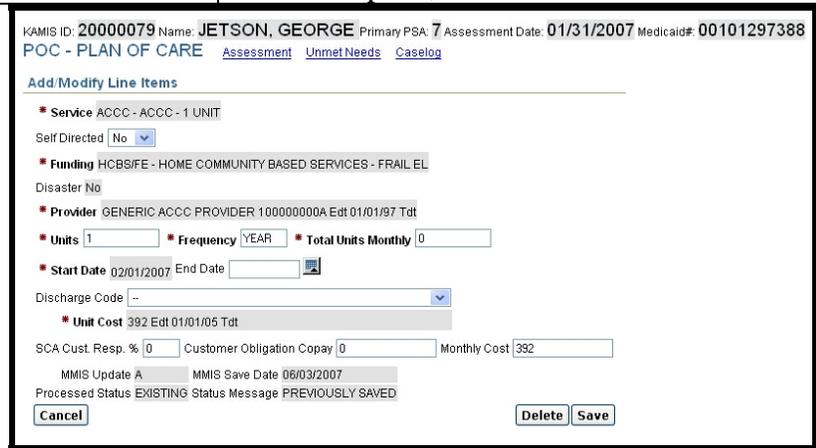
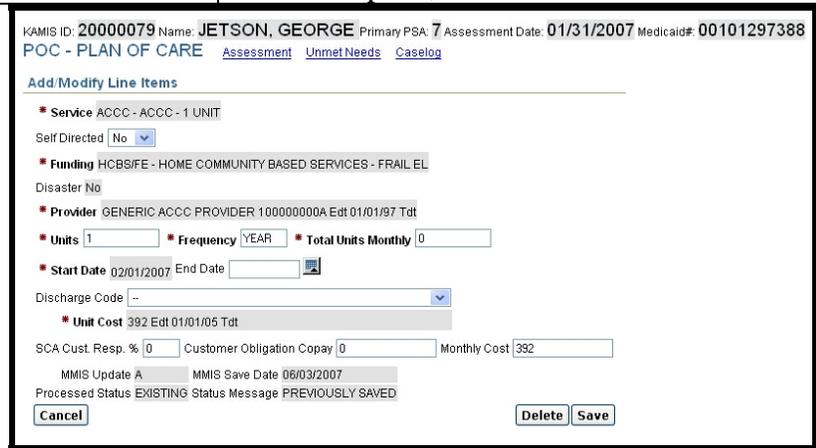
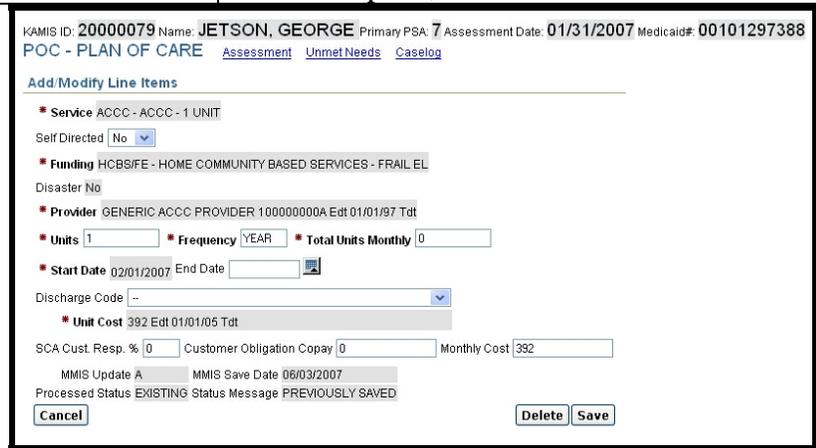
**How To** Follow the steps in the table below to create a new version of the Plan of Care in order to modify a service line item.

Step	Action	Result
1.	Open existing Plan of Care. Click on either the Line Items or Data Entry Navigation tab.	Makes the tab active.
2.	Click on the <b>Create New POC</b> button.	New version will be created with action buttons displayed. The page will return back to the Customer Information Page to reset the data.
3.	Click back to the Navigation tab of choice.	Page is displayed.
4.	Click on the <b>EDS Inquiry</b> link.	A separate window will be displayed. Compare services and obligation amounts.
5.	Close the EDS window.	EDS Inquiry Screen will close. POC will be available for data entry.
6.	Select the <b>Refer From</b>	Must be the person data entering this Plan of Care.
7.	Select the <b>Refer To</b>	This would be the person that would be approving the Plan of Care. (KDOA Approver)
8.	In the Service Table locate the service line that will be modified.	

*Continued on next page*

# Modifying a Plan of Care, Continued

## How To (continued)

Step	Action	Result										
9.	Select the line for modification by clicking on the service code (ACCC, ATCR2X, etc.) link.	Line will become editable according to the navigational tab.										
	<table border="1"> <thead> <tr> <th data-bbox="570 604 786 678">Navigation Tab</th> <th data-bbox="786 604 1386 678">Action</th> </tr> </thead> <tbody> <tr> <td data-bbox="570 678 786 751">Line Items</td> <td data-bbox="786 678 1386 751">The Add / Modify Page will be displayed. When complete, click on the <b>Save</b> button.</td> </tr> <tr> <td colspan="2" data-bbox="570 751 1386 1199">  </td> </tr> <tr> <td data-bbox="570 1199 786 1314">Data Entry</td> <td data-bbox="786 1199 1386 1314">The modify regions will be displayed. When complete, click on the <b>Add/Modify Line(s)</b> button.</td> </tr> <tr> <td colspan="2" data-bbox="570 1314 1386 1444">  </td> </tr> </tbody> </table>	Navigation Tab	Action	Line Items	The Add / Modify Page will be displayed. When complete, click on the <b>Save</b> button.			Data Entry	The modify regions will be displayed. When complete, click on the <b>Add/Modify Line(s)</b> button.			
Navigation Tab	Action											
Line Items	The Add / Modify Page will be displayed. When complete, click on the <b>Save</b> button.											
												
Data Entry	The modify regions will be displayed. When complete, click on the <b>Add/Modify Line(s)</b> button.											
												

Continued on next page

## Modifying a Plan of Care, Continued

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### How To (continued)

Step	Action	Result								
10.	Only certain fields are editable	Fields editable:								
	<table border="1"> <tr> <td data-bbox="565 533 964 611">Case Manager – On Customer Information Page</td> <td data-bbox="980 533 1386 642">MMIS Self-Direct Indicator – On Customer Information Page.</td> </tr> <tr> <td data-bbox="565 648 964 680">Units</td> <td data-bbox="980 648 1386 680">End Date</td> </tr> <tr> <td data-bbox="565 686 964 718">Frequency</td> <td data-bbox="980 686 1386 718">Discharge Code</td> </tr> <tr> <td data-bbox="565 724 964 756">Total Units Monthly</td> <td data-bbox="980 724 1386 756">Customer Obligation Copay</td> </tr> </table>	Case Manager – On Customer Information Page	MMIS Self-Direct Indicator – On Customer Information Page.	Units	End Date	Frequency	Discharge Code	Total Units Monthly	Customer Obligation Copay	
Case Manager – On Customer Information Page	MMIS Self-Direct Indicator – On Customer Information Page.									
Units	End Date									
Frequency	Discharge Code									
Total Units Monthly	Customer Obligation Copay									
11.	Click on <b>Add/Modify Line(s)</b> or the <b>Save</b> button when the changes are complete.	The modified information will be added to the line item in the table.								
12.	Change <b>POC Status</b> to <b>Approved</b> .									
13.	Press the <b>Save All POC Info</b> button.	Will save the Plan of Care and refer it to the person in the Refer To field.								

---

# Line Deletion in MMIS Through KAMIS

## Introduction

It is the MMIS System policy that if a line should not be reflected in the PA then the line should be permanently deleted. However, the service line item will remain in KAMIS for a history trail.

With KAMIS II it will be possible to delete a service line item that has been deleted in the MMIS System or a non-HCBS funded line if a payment has not been processed.

## How To

Follow the steps in the table below to change a service line item in KAMIS so that upon approval the line will be deleted in the MMIS System.

Step	Action	Result						
1.	Open existing Plan of Care.							
2.	Click on the <b>EDS Inquiry</b> link.	Ensure that the services are in the system before proceeding						
	<table border="1"> <thead> <tr> <th>Service Line</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>Present</td> <td>Go to the next Step.</td> </tr> <tr> <td>Not Present</td> <td>Entry does not need to be done. Can not delete a line that is not reflected in the system.</td> </tr> </tbody> </table>	Service Line	Action	Present	Go to the next Step.	Not Present	Entry does not need to be done. Can not delete a line that is not reflected in the system.	
Service Line	Action							
Present	Go to the next Step.							
Not Present	Entry does not need to be done. Can not delete a line that is not reflected in the system.							
3.	Close the EDS window.	EDS Inquiry Screen will close. POC will be available for data entry.						
4.	Follow the instructions on how to modify a Plan of Care.	In the previous section						
5.	In the Total Units Monthly field of the service line item to be deleted type <b>-1</b> .							
6.	Change the <b>End Date</b> to match the start date.	This will end the services both in KAMIS and the MMIS System.						
7.	<b>Tab</b> to the end of the window.	-1 will appear in the customer obligation (if there had been a customer obligation previously entered) and total monthly cost fields.						

*Continued on next page*

## Line Deletion in MMIS Through KAMIS, Continued

---

### How To (continued)

<b>Step</b>	<b>Action</b>	<b>Result</b>
14.	Click on <b>Add/Modify Line(s)</b> or the <b>Save</b> button when the changes are complete.	The modified information will be added to the line item in the table.
15.	Change <b>POC Status</b> to <b>Approved</b> .	
16.	Press the <b>Save All POC Info</b> button.	Will save the Plan of Care and refer it to the person in the Refer To field.

---

# Line Deletion in KAMIS

---

## Introduction

With KAMIS II it will be possible to delete a service line item that has been deleted in the MMIS System or a non-HCBS funded line if a payment has not been processed. The service line item will be retained on the previous Plan of Care versions for history.

---

## How To

Follow the steps in the table below to change a service line item in KAMIS so that upon approval the line will be deleted from the current Plan of Care version.

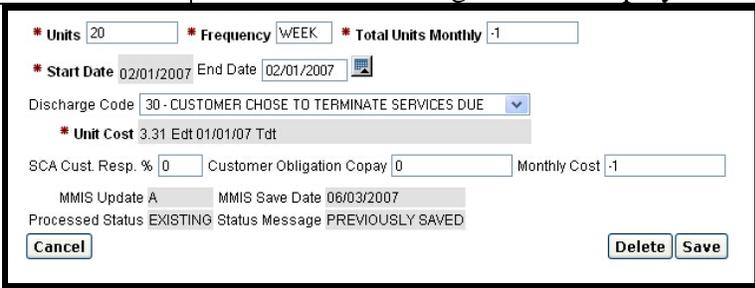
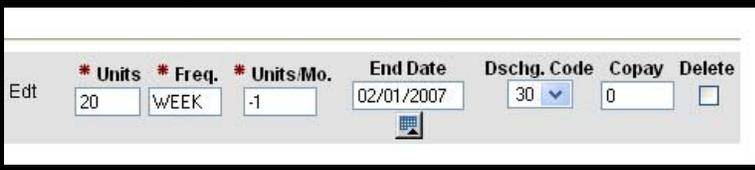
Step	Action	Result
1.	Open existing Plan of Care. Click on either the Line Items or Data Entry Navigation tab.	Makes the tab active.
2.	Click on the <b>Create New POC</b> button.	New version will be created with action buttons displayed. The page will return back to the Customer Information tab to reset the data.
3.	Click back to the Navigation tab of choice.	Page is displayed.
4.	It is not necessary to enter the Refer From or Refer To fields.	

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*Continued on next page*

# Line Deletion in KAMIS, Continued

## How To (continued)

Step	Action	Result																																																												
5.	Click on the <b>service code</b> (ACCC, ATCR2X, etc.) of the service line item to modify.	See description below																																																												
	<table border="1"> <thead> <tr> <th>Navigation Tab</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>Line Items</td> <td>Click on the <b>Delete</b> button. A delete confirmation message will be displayed.</td> </tr> </tbody> </table>  <table border="1"> <thead> <tr> <th>Data Entry</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td></td> <td>Click on the <b>Delete</b> check box. Then click on the <b>Add/Modify Line(s)</b> button.</td> </tr> </tbody> </table> 	Navigation Tab	Action	Line Items	Click on the <b>Delete</b> button. A delete confirmation message will be displayed.	Data Entry	Action		Click on the <b>Delete</b> check box. Then click on the <b>Add/Modify Line(s)</b> button.																																																					
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Line Items	Click on the <b>Delete</b> button. A delete confirmation message will be displayed.																																																													
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	Click on the <b>Delete</b> check box. Then click on the <b>Add/Modify Line(s)</b> button.																																																													
6.	The modified information will be added to the line item in the table.	The Processed column will indicate delete.																																																												
	<table border="1"> <thead> <tr> <th>PSA</th> <th>Service</th> <th>SD</th> <th>Funding</th> <th>SCA</th> <th>DIS</th> <th>Provider</th> <th>Units</th> <th>Per</th> <th>TTL</th> <th>Start</th> <th>End</th> <th>Dis</th> <th>St</th> <th>ES</th> <th>MMIS</th> <th>C</th> <th>C</th> <th>Mo</th> <th>Processed</th> </tr> </thead> <tbody> <tr> <td>7</td> <td>ACCC</td> <td>N</td> <td>HCBS/FE</td> <td>0</td> <td>N</td> <td>GENERIC ACCC PROVIDER</td> <td>1</td> <td>YEAR</td> <td>0</td> <td>02/01/07</td> <td>01/31/08</td> <td>31</td> <td>A</td> <td></td> <td>06/03/07</td> <td>392</td> <td>0</td> <td>392</td> <td>EXISTING</td> </tr> <tr> <td>7</td> <td>ATCR1X</td> <td>N</td> <td>HCBS/FE</td> <td>0</td> <td></td> <td>EXCELCARE HEALTH SERVICES</td> <td>20</td> <td>WEEK</td> <td>-1</td> <td>02/01/07</td> <td>02/01/07</td> <td>30</td> <td>A</td> <td></td> <td>06/03/07</td> <td>3.31</td> <td>0</td> <td>-1</td> <td>DELETE</td> </tr> </tbody> </table> <p style="text-align: right;">row(s) 1 - 2 of 2</p> <p>Save All POC info   EDS Inquiry   Monthly Cost   Add Line</p>	PSA	Service	SD	Funding	SCA	DIS	Provider	Units	Per	TTL	Start	End	Dis	St	ES	MMIS	C	C	Mo	Processed	7	ACCC	N	HCBS/FE	0	N	GENERIC ACCC PROVIDER	1	YEAR	0	02/01/07	01/31/08	31	A		06/03/07	392	0	392	EXISTING	7	ATCR1X	N	HCBS/FE	0		EXCELCARE HEALTH SERVICES	20	WEEK	-1	02/01/07	02/01/07	30	A		06/03/07	3.31	0	-1	DELETE	
PSA	Service	SD	Funding	SCA	DIS	Provider	Units	Per	TTL	Start	End	Dis	St	ES	MMIS	C	C	Mo	Processed																																											
7	ACCC	N	HCBS/FE	0	N	GENERIC ACCC PROVIDER	1	YEAR	0	02/01/07	01/31/08	31	A		06/03/07	392	0	392	EXISTING																																											
7	ATCR1X	N	HCBS/FE	0		EXCELCARE HEALTH SERVICES	20	WEEK	-1	02/01/07	02/01/07	30	A		06/03/07	3.31	0	-1	DELETE																																											
7.	Change <b>POC Status</b> to <b>Approved</b> .																																																													
8.	Press the <b>Save All POC Info</b> button.	Will save the Plan of Care and the line will be deleted from the Plan of Care version.																																																												

# Closing a Plan of Care – Reassessment

---

**Introduction** Anytime a Plan of Care is closed the Person Status check procedure will be implemented. If the Plan of Care is being closed due to a reassessment the persons status does not need to be changed. Therefore, the following actions will need to be completed.

---

**Note** There has been a new discharge code “31” implemented for use when closing a Plan of Care due to a reassessment.

---

**Data Entry Examples** The Services in the Medicaid System are on going until ended. Therefore, the start date for services in the new Plan of Care will take effect the first day of the month following the current month. This is due to the possibility of claims being paid on the current (old) POC.

**Old POC Example:**

Current Date: 02/07/2007

UAI Dated: 03/22/2006

Services are manually terminated in the Plan of Care with an effective date of 02/28/2007. Then the service dates would be entered in the new Plan of Care as follows:

<u>Start Date</u>	<u>Current End Date</u>	<u>New End Date</u>
04/01/2006	(blank)	02/28/2007

**New POC Example:**

Current Date: 02/07/2007

UAI Dated: 02/05/2007

Services dates would be entered in the new Plan of Care as follows:

<u>Start Date</u>	<u>End Date</u>
03/01/2007	(blank)

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## Closing a Plan of Care – Reassessment, Continued

### How to

Follow the steps in the table below to close service line items.

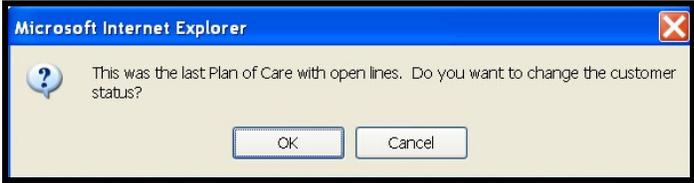
Step	Action	Result
1.	Open existing Plan of Care.	
2.	On the Line Item Page, select the <b>Create New POC</b> button.	New version will be created with action buttons displayed.
3.	Click on the EDS Inquiry link.	Ensure that the services are in the system before proceeding
4.	Close the EDS window.	EDS Inquiry Screen will close. POC will be available for data entry.
5.	In the Service Line Item table locate all open service lines that will be closed.	Follow the instructions on how to modify a Plan of Care.
<p><b>Hint:</b> Use the Open HCBS radio button for ease of viewing only the open service line items.</p>		
6.	Change the <b>End Date</b> on all open service line items.	This will close the services both in KAMIS and the MMIS System.
7.	<b>Discharge Code</b> – A code <b>must</b> be selected on ALL lines.	
8.	Click on <b>Add/Modify Line(s)</b> or the <b>Save</b> button when the changes are complete.	The modified information will be added to the line item in the table.
9.	Continue until all service line items have been closed.	
10.	Change <b>POC Status</b> to <b>Approved</b> .	

*Continued on next page*

## Closing a Plan of Care – Reassessment, Continued

---

### How to (continued)

Step	Action	Result
11.	Press the <b>Save All POC Info</b> button.	Message will display stating that this is the last Plan of Care open and does the customers status needs to be changed.
		
12.	Since this Plan of Care is being closed for a reassessment, click on <b>Cancel</b> .	Will continue to save the Plan of Care and refer it to the person in the Refer To field.

---

# Closing a Plan of Care – Person Status Inactive or Deceased

---

## Introduction

If the Plan of Care is being closed due to the person becoming inactive, (i.e. cannot be located) or due to the person's death, the person's status does need to be changed.

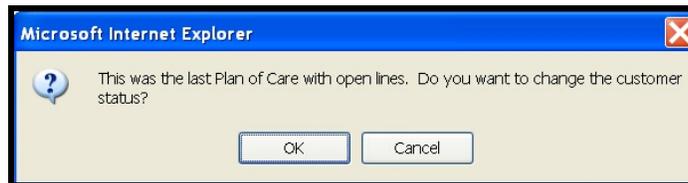
In KAMIS II there is only one way to change the person status, through Person Administration. However, once all the service line items are closed on the all assessment Plan of Care, a message will display regarding the change of the person's status. When answered "Ok" the page will forward to Person Administration.

---

## How to

Use the following steps when the service line items need to be adjusted or pro-rated.

Step	Action	Result
1.	Open existing Plan of Care.	
2.	On the Line Item Page, select the <b>Create New POC</b> button.	New version will be created with action buttons displayed.
3.	Close all open service lines items.	Follow the instructions on how to modify a Plan of Care.
4.	Change <b>POC Status</b> to <b>Approved</b> .	
5.	Press the <b>Save All POC Info</b> button.	Message will display stating that this is the last Plan of Care open and does the customers status needs to be changed.



*Continued on next page*

## Closing a Plan of Care – Person Status Inactive or Deceased, Continued

---

### How to (continued)

Step	Action	Result
6.	Since this Plan of Care is being closed due to the person becoming inactive or deceased, click on <b>OK</b> .	Will continue to save the Plan of Care and refer it to the person in the Refer To field.  In addition the page will be forwarded to the Person Administration page.  See Chapter 6 – Person Administrations for instructions on changing a person status.

---