

Chapter 19a – Plan of Care

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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.

The Plan of Care (POC)

Introduction

The Plan of Care, or POC, contains the planned services to be provided for a customer. The Plan of Care is used by the Service Provided (225) billing process to populate the Service Provided form.

There are two ways to open the Plan of Care: through the assessment form associated with the POC (UAI, UPR, etc.), or directly from the Customer Forms Listing.

Important

There should be only **one** active Plan of Care for a customer. Once a new assessment is done, services for that assessment's timeframe should be entered on a new POC on the new assessment, and services on the old assessment should be ended with the appropriate end date.

Example:

On January 4, a customer has a UAI assessment done, and a Plan of Care entered. The re-assessment date is January 3 of the following year.

On June 20, another UAI is completed due to a significant change in the customer's situation (home, health, etc.), and a new Plan of Care is created. The June POC takes precedence, and all services in the January POC will need to be manually closed, with an end date no later than the start date of the new POC.

Plan of Care Overview

There are four navigational tabs in the Plan of Care: **Customer Information**, **Line Items Entry**, **Multi Line Items Entry** (two data entry formats that perform the same function), and a **Print View** page.

The line items entry pages are where the service lines are entered – the funding/service combination, provider, unit information, and start/end dates of the service are all found here. There is also a 'Processed' column that displays the status of the service line.

Processed Status

The 'Processed' column in the POC service line entry table provides the status of each service line. The status is dependent on whether the Plan of Care has been saved or not.

The following statuses appear when a service line is added or updated, but prior to the POC itself being saved:

- **New** – The line item has been added to the POC table
- **Modified** – An existing line item has been modified
- **Deleted** – An existing line item has been marked for deletion.

A service line can be changed or deleted if a payment has not been processed for that line. Deleted service lines will be retained on the previous Plan of Care versions for history purposes.

Continued on next page

The Plan of Care (POC), continued

**Processed
Status**
(continued)

When the 'Save All POC info' button is used to save the whole Plan of Care, the above statuses will change to either:

- **Existing** – The line item has been successfully saved to the database

or, if the line cannot be saved due to the new data entered causing a conflict with the existing information, the appropriate Error status will display:

- **New – Error** – Indicates that the attempt to add the new line caused an error
- **Modified – Error** – Indicates that the modification made to the line item caused an error
- **Deleted – Error** – Indicates that the attempt to delete the line item caused an error.

If you open a previously successfully saved Plan of Care and see the following Processed status:

- **Existing – Error**

this indicates that an existing line item that was previously saved is no longer valid due to a change that has occurred in KAMIS since the line item was saved. (Examples: Assessment date changed, price or provider terminated, etc.)

Fixing service lines is covered later in this chapter.

Accessing the Plan of Care Through an Assessment Form

Introduction

This section explains how to access the Plan of Care from a link in an Assessment. The Plan of Care link is only available when the assessment is in Approved status.

How To

Follow the steps in the table below to access the Plan of Care from within an assessment.

Step	Action	Result
1.	Create/save a new assessment, or open an existing assessment.	Customer Assessment form displays.
2.	If the assessment is not in Approved status, it must be saved as Approved before continuing.	The form displays in read-only status, and the Plan of Care link displays above the navigation menu bar.
3.	Click on the Plan of Care link.	A Plan of Care form opens in a new window.

KAMIS ID: 5722184 Name: JETSON, GEORGE Customer Status: ACTIVE [More Person Info...](#)
 Orgs: Primary: JAYHAWK AREA AGENCY ON AGING No Secondary
 (ISD: as JOBAUER, PSA 4.) Note that MCOs are in PERSON_PSA, not -MCO; fix if/when MCOs pulled from _PSA.

Uniform Program Registration (UPR) - Version 4
 Assessment Nbr: 1506474 [Plan of Care](#)

Main 401 Demographics 402 Modified Diet and Nutrition Risks 403 Participant Status and Signature 405 Print View 400

Req Form Information

- * CME: 4 - JAYHAWK AREA AGENCY ON AGING
- * Form Status: APPROVED
- * Reviewer: HULIGAN, PEGGY - 10882 JAYHAWK AREA AGENCY ON AGING
- Reviewer Phone:
- * Registration Date: 12/14/2016
- Re-assessment Due Date: 12/13/2017

Added By JOBAUER on 02/09/2017 11:05:58 Changed By KMSDBA on 02/09/2017 11:10:08
Req Indicates required for Approval

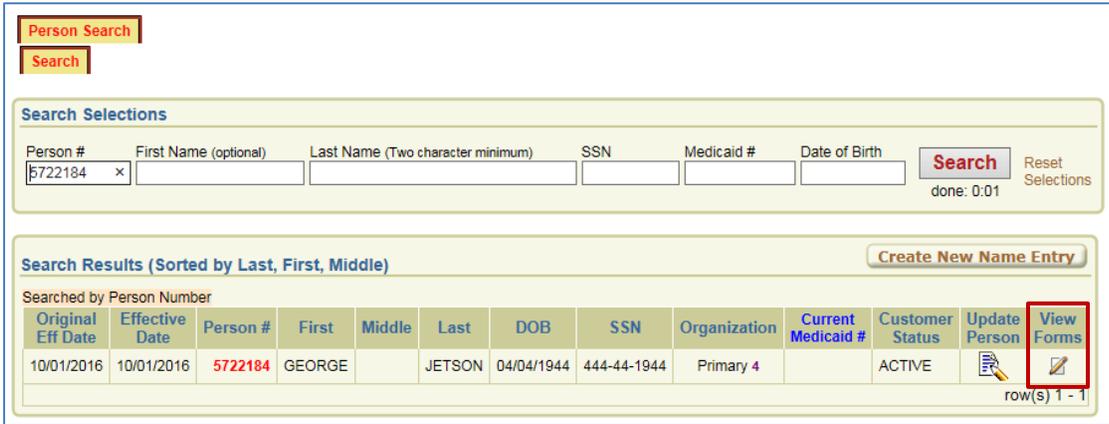
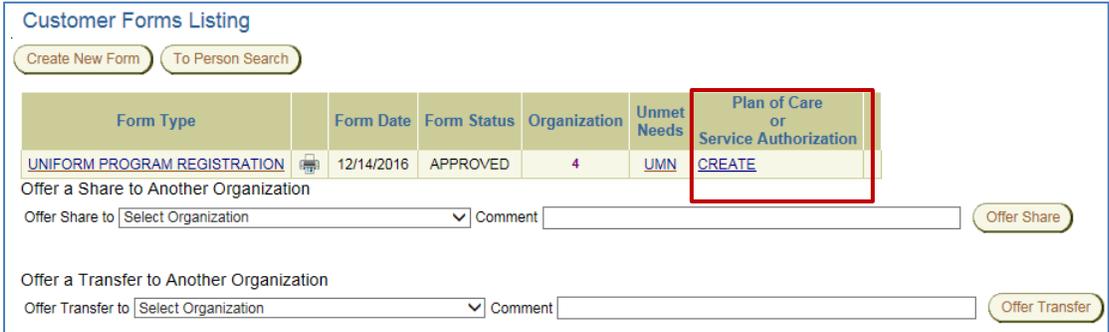
Accessing the Plan of Care Through the Customer Forms Listing

Introduction

This section explains how to access the Plan of Care through the Customer Forms Listing. The Plan of Care link is only available from the forms list when the assessment is in Approved status.

How To

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

Step	Action	Result
1.	Use Person Search to display the customer Search Results.	Customer Search Results display.
2.	In the Search Results table, click on the View Forms icon.	The Customer Forms Listing for the customer displays.
 <p>The screenshot shows the 'Person Search' interface. At the top, there are 'Person Search' and 'Search' buttons. Below is a 'Search Selections' section with input fields for Person # (5722184), First Name, Last Name, SSN, Medicaid #, and Date of Birth. A 'Search' button and 'Reset Selections' link are present. Below that is the 'Search Results (Sorted by Last, First, Middle)' section, which includes a 'Create New Name Entry' button and a table of results. The table has columns: Original Eff Date, Effective Date, Person #, First, Middle, Last, DOB, SSN, Organization, Current Medicaid #, Customer Status, Update Person, and View Forms. The first row shows results for Person # 5722184, GEORGE JETSON, DOB 04/04/1944, SSN 444-44-1944, Organization Primary 4, and Customer Status ACTIVE. The 'View Forms' icon in the last column is highlighted with a red box.</p>		
 <p>The screenshot shows the 'Customer Forms Listing' interface. At the top, there are 'Create New Form' and 'To Person Search' buttons. Below is a table with columns: Form Type, Form Date, Form Status, Organization, Unmet Needs, and Plan of Care or Service Authorization. The first row shows 'UNIFORM PROGRAM REGISTRATION' with Form Date 12/14/2016, Form Status APPROVED, Organization 4, and Unmet Needs UMN. The 'Plan of Care or Service Authorization' column contains a 'CREATE' link, which is highlighted with a red box. Below the table are sections for 'Offer a Share to Another Organization' and 'Offer a Transfer to Another Organization', each with a dropdown menu for 'Select Organization', a 'Comment' field, and an 'Offer Share' or 'Offer Transfer' button.</p>		
3.	In the <i>Plan of Care or Service Authorization</i> column, click on the POC link associated with the assessment: <u>CREATE</u> – The POC does not yet exist; click on this link to open a new, blank form. <u>INCOMPLETE</u> – The POC has been created and saved, but is not in Approved status yet. <u>APPROVED</u> –The POC is Approved and services can be billed as needed.	The Plan of Care opens in a new window.

New Plan of Care

Introduction The Plan of Care form is comprised of four tabs: Customer Information, Line Items Entry, Multi Line Items Entry, and Print View. The different features on each tab are described in the following pages.

New Plan of Care Limitations When creating a new Plan of Care, only the Customer Information navigation tab can be updated. Once the Customer Information page is saved, then the line entry tabs can be updated.

Customer Information The only editable part of the Customer Information page is the POC Status. All other information is obtained from the customer's Person Admin record, and the Assessment that the POC is associated with.

CUSTOMER INFORMATION Tab

Customer Information

Assessment number (unique for all KAMIS forms)

Navigation Tabs

Expandable Region for Emergency Contact Information

Link to assessment, customer's case log, and proper closure of the POC

Assessment-specific information

KAMIS ID: 5722184 **Name:** JETSON, GEORGE **Customer Status:** ACTIVE [More Person Info...](#)
Orgs: Primary: JAYHAWK AREA AGENCY ON AGING **No Secondary**

Plan of Care
Assessment Nbr: 1506474 [Assessment](#) [Caselog](#) [Unlock & Close](#)

Customer Information Tab | Line Items Entry | Multi Line Items Entry | Print

Emergency Contacts

Assessment Type: UNIFORM PROGRAM REGISTRATION
Assessment Date: 12/14/2016 **Reassessment Due Date:** 12/13/2017
POC Version: 1 **POC Status:** INCOMPLETE - FOLLOW-UP NEEDED
Effective Date: 12/14/2016

Save

Line Items Entry Navigation Tab

LINE ITEMS ENTRY Navigation Tab

Plan of Care
 Assessment Nbr: **1453417** [Assessment](#) [Caselog](#) [Unlock & Close](#)

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

Changed by _____ on 03/17/2016 10:46:10

#	Organization	Service	Self Direct	Funding	SCA %	Provider	Units	Freq	Total MO Units	Start Date	End Date	Dischrg Code	Unit Cost	Oblig.	MO Cost	Processed
1	4	CMEL		OAA3C1	0	TOPEKA HY-VEE CHAMPSS	7	wk	35	02/10/16	02/09/17		8.07	0	282.45	EXISTING
2	4	CMEL		OAA3C1	0	DILLONS CHAMPSS	7	wk	35	02/10/16	02/09/17		8.07	0	282.45	EXISTING

Case Manager NO NAME ON FILE

Plan of Care
 Assessment Nbr: **1241371** [Assessment](#) [Caselog](#) [Unlock & Close](#)

Add/Modify Line Items

Search * Service

Self Directed

Search * Funding

Search * Provider

* Units * Frequency * Total Units Monthly

* Start Date End Date

Discharge Code

* Unit Cost

SCA Cust. Resp. % Customer Obligation Copay Monthly Cost

Service Comment

Processed Status **NEW** Status Message

Features

The Line Items Entry page shows all service line items in descending order of entry (the most recent line entered is at the top.)

The Add/Modify Line Items page temporarily displays in place of the original Service Line table when adding a line to or changing a line in a Plan of Care. Adding/modifying entries are covered later in this chapter.

Continued on next page

Line Items Entry Navigation Tab, continued

Features

Continued

Feature	Action or Purpose														
Assessment link	Opens the assessment that this Plan of Care is associated with. The assessment will display in the original KAMIS window/tab from which the POC was launched.														
Caselog link	Opens the customer's caselog. The caselog will display in the original KAMIS window/tab from which the POC was launched.														
Unlock & Close link	Unlocks and closes the POC window, allowing another user to open and potentially edit it. If the POC is not closed using this link, it may remain locked for up to 15 minutes and any user that tries to open it while it is locked can only see a print view of the POC.														
POC Version (#)	Displays the current version number of the POC. To see previous versions (history) select a different number from the drop-down list.														
POC Status	The status of the Plan of Care:														
<table border="1"> <thead> <tr> <th>Status</th> <th>Use</th> </tr> </thead> <tbody> <tr> <td>WORK IN PROGRESS</td> <td>Not used*</td> </tr> <tr> <td>SUBMIT FOR APPROVAL</td> <td>Not used*</td> </tr> <tr> <td>APPROVED</td> <td>POC is complete and services can be billed</td> </tr> <tr> <td>ABORTED</td> <td>POC was created, later determined to not be needed, or POC entered in error (wrong customer, etc.)</td> </tr> <tr> <td>INCOMPLETE – FOLLOW-UP NEEDED</td> <td>POC is being worked – services can be added, deleted, or changed</td> </tr> <tr> <td>DENIED</td> <td>Not used*</td> </tr> </tbody> </table>		Status	Use	WORK IN PROGRESS	Not used*	SUBMIT FOR APPROVAL	Not used*	APPROVED	POC is complete and services can be billed	ABORTED	POC was created, later determined to not be needed, or POC entered in error (wrong customer, etc.)	INCOMPLETE – FOLLOW-UP NEEDED	POC is being worked – services can be added, deleted, or changed	DENIED	Not used*
Status	Use														
WORK IN PROGRESS	Not used*														
SUBMIT FOR APPROVAL	Not used*														
APPROVED	POC is complete and services can be billed														
ABORTED	POC was created, later determined to not be needed, or POC entered in error (wrong customer, etc.)														
INCOMPLETE – FOLLOW-UP NEEDED	POC is being worked – services can be added, deleted, or changed														
DENIED	Not used*														
*Used for waiver services on a similar form (Service Authorization)															
Create New POC Version	Displays only when POC Status is 'Approved.' Creates a new version of the Plan of Care so changes can be made.														
Radio Buttons – All, Active, Open HCBS, Open Non-HCBS	<p>All – Will display all service line items on the POC</p> <p>Active – Will display only those service line items that are currently active as of the current system date. Does not show services that have ended prior to the current date, or any services with a future start date.</p> <p>Open HCBS – No longer used.</p> <p>Open Non-HCBS – No longer used.</p>														
Save All POC Info	Saves all changes made in the POC to the database. Once saved (even in 'Incomplete - Follow-up Needed' status) only some information can be changed.														

Multi Line Items Entry Navigation Tab

MULTI LINE ITEMS ENTRY Navigation Tab

Plan of Care
 Assessment Nbr: 1241371 [Assessment](#) [Caselog](#) [Unlock & Close](#)

Customer Information Tab 501 | Line Items Entry 502 | **Multi Line Items Entry 508** | Print View

* POC Version 1 ... * POC Status INCOMPLETE - FOLLOW-UP NEEDED * All Active Open HCBS Open Non-HCBS

[Save All POC info](#)

#	Org	Service	SD	Funding	SCA	Provider	Units	Freq	MO TTL	Start	End	Dischrg	Unit Cst	Oblig	MO Cost	Processed
1	9	CMEL		OAA3C1	0	SUNSHINE INN	5	WK	25	03/24/15	03/23/16		1.1	0	27.5	NEW
2	9	CMEL		OAA3C1	0	HOLTON SR CTR	5	WK	25	03/24/15	03/23/16		1.1	0	27.5	NEW

Add & Save Line(s)

Search * Service -- Reset

Self Directed -- Search * Funding --

Search * Provider --

* Units * Frequency * Total Units Monthly

* Start Date End Date Discharge Code --

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

Service Comment

Unique Features on the Multi Line Items Entry Tab

In addition to the previously described features on the Line Items Entry page, the Multi Line Items Entry page includes these additional features:

- A data entry area for new services, located below the service line item table. This same-page data entry area is provided for those who prefer to reference the existing service line table when adding new service lines.
- The line number column (#) in the service line table provides a link to the POC Service Line Billing Detail page.

Print View Navigation Tab

PRINT VIEW Navigation Tab

(Opens in a separate window)



Kansas Department for Aging and Disability Services
Plan of Care
Viewed on: 06/27/2016 03:38:04 PM by:



Plan of Care

Customer L: Address : County **SN SHAWNEE**
TOPEKA, KS 66614

SSN: Medicaid#: Phone# **785.**

KAMIS ID: Organization: **4 Persons** Original Effective Date: **05/18/2001**
 Assessment #: Type: **166 - UNIFORM PROGRAM REGISTRATION** Status: **160 - APPROVED**
 Assessment Date: **02/10/2016** Reassessment Due Date: **02/09/2017**
 Version: **1** Status: **160 - APPROVED** Eff Dt: **02/10/2016** Trm Dt:

SEQ	Organization	Srvc Code	Self Dret	Fndng Sre	SCA Pct	Provider	Unit(s)	Per	TU Units Mo.	Start Date	End Date	Dschrg Code	MMIS Updt	MMIS Save Date	Cost of Unit	Cstmr Oblgtn /CoPay	Monthly Cost
1	4	CMEL		OAA3C1	0	TOPEKA HY-VEE CHAMPSS Eff_07/01/2011	7 wk	35	35	02/10/2016	02/09/2017				8.07 Eff_10/01/2015	0	282.45
2	4	CMEL		OAA3C1	0	DILLONS CHAMPSS Eff_10/01/2012	7 wk	35	35	02/10/2016	02/09/2017				8.07 Eff_10/01/2015	0	282.45

SRS NAME:
 Case Mgr Name: **NO NAME ON FILE**
 Deinst/Divert: Self Directed:
 Refer from: **NO NAME ON FILE** Refer to: **NO NAME ON FILE**
 Add user: Add dt: **03/17/2016 10:42:35** Mod User: Mod dt: **03/17/2016 10:46:10**

Options

Display Latest POC Only Yes No

Special Features

Display Latest POC radio buttons

- “Yes” displays only the latest POC Version.
- “No” displays all versions of the POC.

Print the POC - To print the page, use the printer icon at the top of the page to launch the browser print menu. Print landscape for best results.

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 reassessment, the Plan of Care associated with the prior assessment should be closed out 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.	Click on the Plan of Care link within the assessment OR Click on the Create link associated with the assessment on the Customer Forms Listing .	A new window* opens containing the Plan of Care, and the Customer Information Tab displays. *Plans of Care open in a separate, smaller window, even if your browser is set up for tabbed browsing.

KAMIS ID: **5722184** Name: **JETSON, GEORGE** Customer Status: **ACTIVE** [More Person Info...](#)
 Orgs: Primary: **JAYHAWK AREA AGENCY ON AGING** No Secondary

Plan of Care
 Assessment Nbr: **1506475** [Assessment](#) [Caselog](#) [Unlock & Close](#)

Customer Information Tab | [Line Items Entry](#) | [Multi Line Items Entry](#) | [Print View](#)

☛ **Emergency Contacts**

Assessment Type **ABBREVIATED UNIFORM ASSESSMENT INSTRUMENT**
 Assessment Date **01/05/2017** Reassessment Due Date **01/04/2018**
 POC Version **1** POC Status **INCOMPLETE - FOLLOW-UP NEEDED** ▼
 Effective Date **01/05/2017**

Save

Saving the Customer Information Page

Introduction

The information displayed on the Customer Information page comes from the customer's person record in Person Administration, and from the assessment form from which the Plan of Care is created.

Contents

Refer to the table below for a description of the Plan of Care fields specific to the Customer Information tab/page. Unless otherwise noted, all fields are auto-filled using information from the assessment associated with the Plan of Care.

Field	Use/Purpose
Assessment Nbr	The unique system-assigned number assigned to the associated assessment.
Assessment Type	The type of assessment associated with this Plan of Care.
Assessment Date	The date of the assessment associated with this Plan of Care.
Reassessment Due Date	The reassessment due date of the assessment associated with this Plan of Care. It is auto-calculated to be one year minus one day from the assessment date.
POC Version	This number defaults to '1' on a new Plan of Care. For each new version of the POC created, this number increases by one.
POC Status	Defaults to 'INCOMPLETE – FOLLOW-UP NEEDED' on creation. Status changes are saved on the line entry pages, with the changed status reflected here.
Effective Date	The effective date of the Plan of Care – defaults to the assessment date. As new versions are created, the effective date reflects the new version date.
Save button	Saves the Customer Information page, which enables the line entry pages so they can be updated.

Plan of Care
 Assessment Nbr: **1506475** [Assessment](#) [Caselog](#) [Unlock & Close](#)

Customer Information Tab | [Line Items Entry](#) | [Multi Line Items Entry](#) | [Print View](#)

➤ **Emergency Contacts**

Assessment Type ABBREVIATED UNIFORM ASSESSMENT INSTRUMENT
Assessment Date 01/05/2017 **Reassessment Due Date** 01/04/2018
POC Version 1 **POC Status** INCOMPLETE - FOLLOW-UP NEEDED ▼
Effective Date 01/05/2017

Continued on next page

Saving the Customer Information Page, continued

Save the Page

Follow the steps in the table below to save the page and continue to the line entry pages.

Step	Action	Result
1.	Click on the Save button located below the auto-filled fields.	<ul style="list-style-type: none"> 'Successfully saved' message and date/time stamp displays at the top of the POC A name and date/time stamp displays at the bottom, indicating who created the POC, and when it was created.

The screenshot displays the KAMIS II system interface. At the top, a green banner contains the text: "POC Line Items successfully saved" and "02/10/2017 11:08:48 AM". Below this, the user information is shown: "KAMIS ID: 5722184 Name: JETSON, GEORGE Customer Status: ACTIVE". The main content area is titled "Plan of Care" and includes the "Assessment Nbr: 1506475". There are several tabs: "Customer Information Tab" (highlighted in red), "Line Items Entry", "Multi Line Items Entry", and "Print View". Below the tabs, there is a section for "Emergency Contacts" and "Assessment Type ABBREVIATED UNIFORM ASSESSMENT INSTRUMENT". The "Assessment Date" is 01/05/2017 and the "Reassessment Due Date" is 01/04/2018. The "POC Version" is 1 and the "POC Status" is "INCOMPLETE - FOLLOW-UP NEEDED". The "Effective Date" is 01/05/2017. At the bottom, there is a "Save" button and a red-bordered box containing the text: "Created by TESTUSER2 on 02/10/2017 11:17:50 Changed by TESTUSER2 on 02/10/2017 11:17:50".

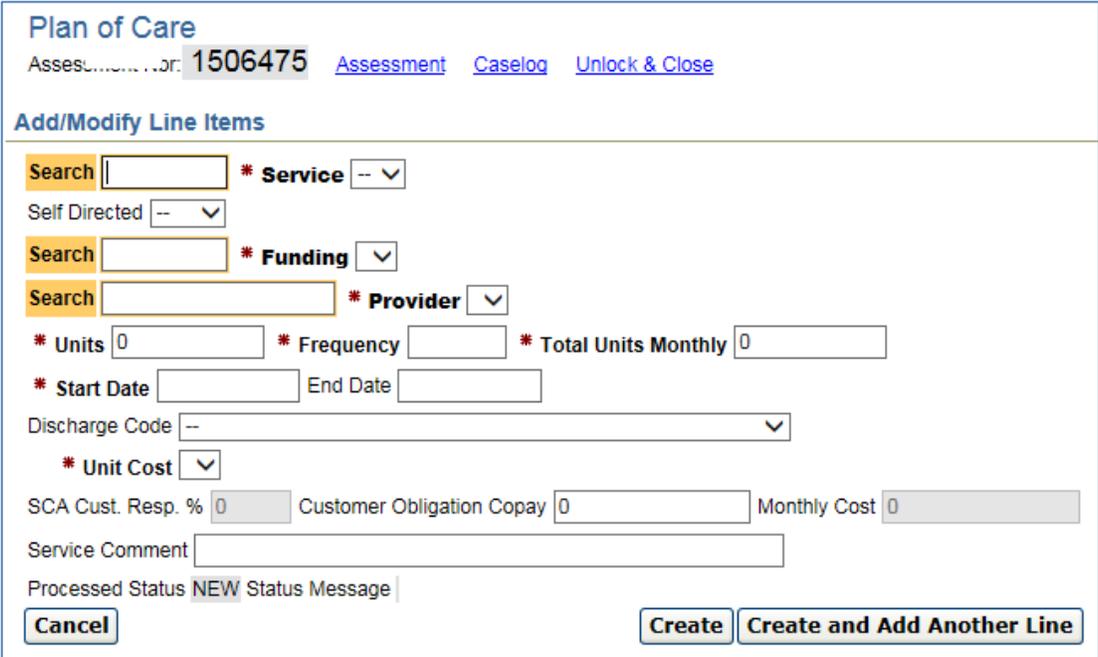
Entering Services – Line Items Entry Navigation Tab

Introduction

There are two options for data entering the service line items on the Plan of Care. It is personal preference as to which navigational tab to use. This section provides the steps for data entering services using the **Line Items Entry** navigation tab. The next part of this chapter covers the *Multi Line Items Entry* navigational tab.

How To

Follow the steps in the table below to enter services into a new Plan of Care using the **Line Items Entry** navigation tab.

Step	Action	Result/Purpose
1.	Click on the Line Items Entry navigation tab.	The tab color changes to yellow, indicating it is the active tab.
 <p>The screenshot shows the 'Plan of Care' header with Assessment Nbr: 1506475. Below the header are four tabs: 'Customer Information Tab', 'Line Items Entry' (highlighted in yellow), 'Multi Line Items Entry', and 'Print View'. There are also dropdown menus for 'POC Version' (set to 1) and 'POC Status' (set to INCOMPLETE - FOLLOW-UP NEEDED), and radio buttons for 'All', 'Active', 'Open HCBS', and 'Open Non-HCBS'. A 'Save All POC info' and 'Add Line' button are visible at the bottom.</p>		
2.	Click on the Add line button.	Add / Modify Line Items page displays.
 <p>The screenshot shows the 'Add/Modify Line Items' form. It includes search fields for Service, Funding, and Provider. There are input fields for Units (0), Frequency, Total Units Monthly (0), Start Date, and End Date. A Discharge Code dropdown is set to '--'. There is a Unit Cost dropdown. At the bottom, there are input fields for SCA Cust. Resp. % (0), Customer Obligation Copay (0), and Monthly Cost (0), along with a Service Comment field. The 'Processed Status' is 'NEW' and there is a 'Status Message' field. 'Cancel', 'Create', and 'Create and Add Another Line' buttons are at the bottom.</p>		

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Entering Services – Line Items Entry Navigation Tab, continued

How To

Continued

Step	Action	Result/Purpose
3.	Service – Enter either a partial or the complete service code in the Search box and press Enter .	Required. The Service drop-down list populates with all entries that match the search entry, and includes the service description and unit standards. The more complete the search term, the smaller, but limited, the drop-down list.
4.	Self-Directed – Select Y or N	Not required. Indicator for if the service was self-directed or not.
5.	Funding – Select the appropriate funding from the drop-down list. Using the Search field is optional.	Required. The Funding drop-down list is automatically populated once the Service is selected. Only funding sources associated with the selected service will display.
6.	Provider – Select the appropriate Provider from the drop-down list. Using the Search field is optional.	Required. The Provider drop-down list is automatically populated once the Service and Funding selections are made. Only providers that provide the service/funding combination selected will display.
	If you select a provider in the Provider drop down list, but then change the Service or Funding entries, the Provider will be set back to blank (--). This happens because the application is re-querying the database to find the Provider(s) for the new service/funding selected.	

Important Note: Once the Service and Funding are selected, if the Provider drop-down list does not populate, this indicates that this service/funding combination is not set up for a Provider.

If once a Provider is selected, but the Unit Cost does not populate, this indicates that pricing is not set up for this Provider's Service/Funding combination.

For information on entering service/funding and pricing, refer to the *KAMIS II User Manual, Chapter 24 – Provider Service*.

Continued on next page

Entering Services – Line Items Entry Navigation Tab, continued

How To

Continued

Step	Action	Result/Purpose
7.	Units - Enter the number of units.	Required. The units should be calculated based on the unit standard displayed with the selected Service.
8.	Frequency - Enter the Frequency of the Service.	Required. The time period for which the units are consumed/used. Abbreviate as desired.
9.	Total Units Monthly - Enter the number of total units.	Required. Number is determined by units and frequency entries.
10.	Start Date - Enter the date the services are to start.	Required. The start date cannot be prior to the assessment date. <i>Exception: HMEL services can be started up to 12 days prior to the assessment date.</i>
11.	End Date – Enter the date the services are to end, if known at the time of data entry.	Not required. The end date cannot be after the reassessment due date.
<p>Examples of how to use units/frequency/total based on unit standards:</p> <div data-bbox="469 877 1500 1218" style="border: 1px solid black; padding: 5px;"> <p>Add/Modify Line Items</p> <p>Search <input type="text"/> * Service ASMT - ASSESSMENT-COMPREHENSIVE - <u>15 MINUTES</u></p> <p>Self Directed -- <input type="text"/></p> <p>Search <input type="text"/> * Funding SCA - SENIOR CARE ACT <input type="text"/></p> <p>Search <input type="text"/> * Provider NORTHEAST KANSAS AAA 100258920B Edt 01/01/97 Tdt <input type="text"/></p> <p>* Units <u>2</u> * Frequency <u>YR</u> * Total Units Monthly <u>2</u></p> <p>* Start Date 03/24/2015 End Date 03/24/2015</p> <p>Discharge Code 14 - ONE TIME SERVICE DELIVERED, INCLUDING AS <input type="text"/></p> </div> <ul style="list-style-type: none"> • The assessment is done once a year, and it took 30 minutes (15 minutes per unit x 2 units) • The Start Date and End Date are the same date, because the service was provided over the course of a single day. So even though the 'Total Units Monthly' is 2, the duration of the service is only one day, so only one month will be counted. • Frequency could also be 'once' or 'one time' – whatever user's preference is. 		

Continued on next page

Entering Services – Line Items Entry Navigation Tab, continued

How To

Continued

Step	Action	Result
11.	<p>Examples of how to use units/frequency/total based on unit standards (cont'd):</p> <div data-bbox="451 373 1495 751" style="border: 1px solid black; padding: 5px;"> <p>Add/Modify Line Items</p> <p>Search <input type="text" value="cmel"/> * Service <input type="text" value="CMEL - CONGREGATE MEALS - 1 MEAL"/> ▼</p> <p>Self Directed <input type="text" value="--"/> ▼</p> <p>Search <input type="text"/> * Funding <input type="text" value="OAA3C1 - OLDER AMERICANS ACT - TITLE III-C1"/> ▼</p> <p>Search <input type="text"/> * Provider <input type="text" value="SUNSHINE INN Edt 01/01/97 Tdt"/> ▼</p> <p>* Units <input type="text" value="5"/> * Frequency <input type="text" value="WK"/> * Total Units Monthly <input type="text" value="25"/></p> <p>* Start Date <input type="text" value="03/24/2015"/> End Date <input type="text" value="03/23/2016"/></p> <p>Discharge Code <input type="text" value="--"/> ▼</p> </div> <ul style="list-style-type: none"> In this example the unit standard is one meal, so the number of 'Units' here means how many meals. Here the CMEL service is being planned for 5 meals per week x 5 weeks = 25 units (meals) per month To account for months with more than four weeks, the total units is calculated on five weeks. Remember, this is <i>planned</i> services; the actual amount used is determined when the services are billed. Services can be billed for more or less than the 25 entered here. 	
12.	<p>Discharge Code - Enter if appropriate.</p>	<p>Required if the Service is ending and the POC is being closed out. A short explanation of the code is listed in the discharge code drop-down list.</p> <p>A complete listing of the Discharge Codes can be found as a stand-alone PDF at the KDADS Provider Information website located at http://www.kdads.ks.gov/provider-home/forms under 'Older Americans Act / Senior Care Act'</p>
13.	<p>Unit Cost - Select the appropriate cost from the drop- down list.</p> <div data-bbox="451 1518 883 1570" style="border: 1px solid black; padding: 2px;"> <p>* Unit Cost <input type="text" value="1.1 Edt 10/01/03 Tdt"/> ▼</p> </div> <p>1.1 = unit cost Edt = Effective Date 10/01/03 = date this cost is effective Tdt = Term Date (blank=not terminated)</p>	<p>Required. Populated by KAMIS II Provider Service entries.</p> <p>Take care to select the correct unit cost if more than one is available in the drop-down list.</p>

Note: If you select a price in the Cost of Unit drop down list box that is not listed first and then go back and click on either the Funding or Provider entries, 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 update the fields based on the changes made.

Continued on next page

Entering Services – Line Items Entry Navigation Tab, continued

How To

Continued

Step	Action	Result
14.	Customer Obligation Copay	This field (for SCA funding) is auto-calculated based on the SCA Cust. Resp. % .
15.	Monthly Cost	Auto-calculated: Total Units Monthly multiplied by the Unit Cost minus any Customer Obligation Copay .
16.	Click on the Create button.	The page will return to the Line Items Entry navigation tab with the new service line item added to the table. The Processed column will indicate "NEW".

Plan of Care
 Assessment Nbr: **1483143** [Assessment](#) [Caselog](#) [Unlock & Close](#)

Add/Modify Line Items

Search * Service

Self Directed

Search * Funding

Search * Provider

* Units * Frequency * Total Units Monthly

* Start Date End Date

Discharge Code

* Unit Cost

SCA Cust. Resp. % Customer Obligation Copay Monthly Cost

Service Comment

Processed Status Status Message

Plan of Care
 Assessment Nbr: **1483143** [Assessment](#) [Caselog](#) [Unlock & Close](#)

* POC Version * POC Status All Active Open HCBS Open Non-HCBS

Changed by JOBAUER on 06/28/2016 08:52:29

#	Organization	Service	Self Direct	Funding	SCA %	Provider	Units	Freq	Total MO Units	Start Date	End Date	Dischrg Code	Unit Cost	Oblig.	MO Cost	Processed
1	9	CMEL		OAA3C1	0	SUNSHINE INN	5	wk	25	06/23/16	06/22/17		1.1	0	27.5	NEW

Case Manager NO NAME ON FILE

IMPORTANT! At this point, the Plan of Care has *not* been saved yet. If you unlock & close the POC now the above service line will not be saved. Saving the POC is covered after the next section (Multi Line Items Entry)

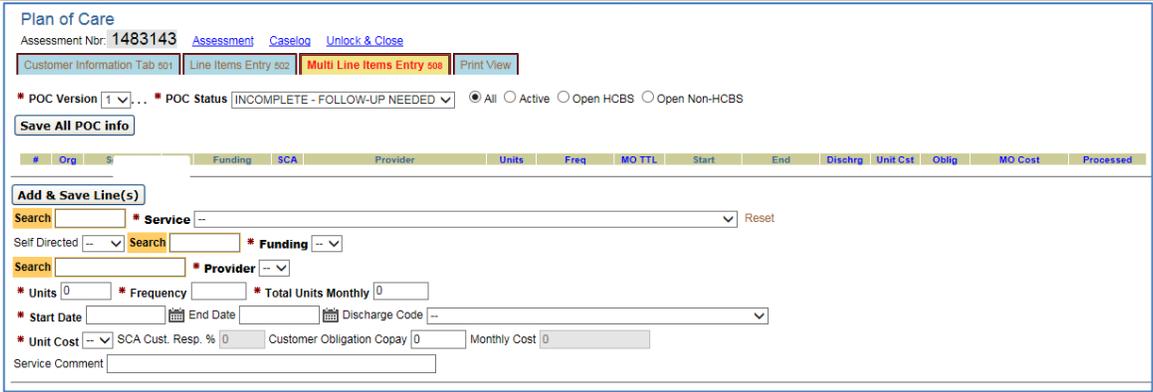
Entering Services – Multi Line Items Entry Navigation Tab

Introduction

The second option for data entering service line items on the Plan of Care is to use the **Multi Line Items Entry** navigation tab. This page's layout leaves the existing service line table on the same page as the new line entry region, so the table can be referenced during data entry. This section provides the steps for entering services using the **Multi Line Items Entry** navigation tab.

How To

Follow the steps in the table below to enter services into a new Plan of Care using the **Multi Line Items Entry** navigation tab.

Step	Action	Result
1.	Click on the Multi Line Items Entry navigation tab.	The tab color changes to yellow, indicating it is the active tab.
		
<p>The service line entry region is available at the bottom of the page. Begin entering the data.</p>		
2.	Service – Enter a partial or complete service code in the Search box and press Enter .	Required. The Service drop-down list populates with all entries that match the search entry, and includes the service description and unit standards. The more complete the search term, the smaller, and limited, the drop-down list.
3.	Self-Directed – Select Y or N	Not required. Indicator for if the service was self-directed or not.
4.	Funding – Select the appropriate funding from the drop down list. Using the Search field is optional.	Required. The Funding drop-down list is auto-populated once the Service is selected. Only funding sources associated with the selected service will display.
5.	Provider – Select the appropriate Provider from the drop down list. Using the Search field is optional.	Required. The Provider drop-down list is automatically populated once the Service and Funding selections are made. Only providers that provide the service/funding combination selected will display.
<p>If you select a provider in the Provider drop down list, but then change the Service or Funding entries, the Provider will be set back to blank (--). This happens because the application is re-querying the database to find the Provider(s) for the new service/funding selected.</p>		

Continued on next page

Entering Services – Multi Line Items Entry Navigation Tab, continued

How To

Continued

Important Note: Once the Service and Funding are selected, if the Provider drop-down list does not populate, this indicates that this service/funding combination is not set up for a Provider.

If once a Provider is selected, and the Unit Cost does not populate, this indicates that pricing is not set up for this Provider's Service/Funding combination.

For information on entering service/funding and pricing, refer to the *KAMIS II User Manual, Chapter 24 – Provider Service*.

Step	Action	Result
6.	Units - Enter the number of units.	Required. The units should be calculated based on the unit standard displayed with the selected service in the Service drop-down list.
7.	Frequency - Enter the Frequency of the Service.	Required. Frequency should be determined based on how the units are entered.
8.	Total Units Monthly - Enter the number of total units.	Required. Number determined by units and frequency entries.
9.	Start Date - Enter the date or use the date picker to select the date the services are to start.	Required. The start date cannot be prior to the assessment date. <i>Exception: HMEL services can be started up to 12 days prior to the assessment date.</i>
10.	End Date - Enter the date or use the date picker to select the date the services are to end, if known at the time of data entry.	Not required. The end date cannot be after the reassessment due date.

Example 1 of how to use units/frequency/total based on unit standards:

Service: ASMT – 15 minutes/unit

Add & Save Line(s)

Search * Service ASMT - ASSESSMENT-COMPREHENSIVE - 15 MINUTES

Self Directed Search * Funding SCA - SENIOR CARE ACT

Search * Provider NORTHEAST KANSAS AAA 100258920B Edt 01/01/97 Tdt

* Units * Frequency YR * Total Units Monthly

* Start Date End Date Discharge Code 14 - ONE TIME SERVICE DELIVERED, INCLUDING AS

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

Service Comment

- The assessment is done once a year, and it took 30 minutes (15 minutes per unit x 2 units)
- The Start Date and End Date are the same date, because the service was provided over the course of a single day. So even though the 'Total Units Monthly' is 2, the duration of the service is only one day, so only one month will be counted.
- Frequency could also be 'once' or 'one time' – whatever user's preference is.

Continued on next page

Entering Services – Multi Line Items Entry Navigation Tab, continued

How To

Continued

Step	Action	Result
10.	Continued	
<p>Example 2 of how to use units/frequency/total based on unit standards: Service: CMEL – 1 meal/unit</p> <div data-bbox="370 443 1474 730" style="border: 1px solid black; padding: 5px;"> <p>Add & Save Line(s)</p> <p>Search <input type="text" value="cmel"/> * Service <input type="text" value="CMEL - CONGREGATE MEALS - 1 MEAL"/> <input type="button" value="Reset"/></p> <p>Self Directed <input type="text" value="--"/> Search <input type="text"/> * Funding <input type="text" value="OAA3C1 - OLDER AMERICANS ACT - TITLE III-C1"/></p> <p>Search <input type="text"/> * Provider <input type="text" value="TOPEKA HY-VEE CHAMPSS Edt 07/01/11 Tdt"/></p> <p>* Units <input type="text" value="5"/> * Frequency <input type="text" value="WK"/> * Total Units Monthly <input type="text" value="25"/></p> <p>* Start Date <input type="text" value="12/14/2016"/> <input type="button" value="Calendar"/> End Date <input type="text" value="12/13/2017"/> <input type="button" value="Calendar"/> Discharge Code <input type="text" value="--"/></p> <p>* Unit Cost <input type="text" value="8.07 Edt 10/01/15 Tdt"/> SCA Cust. Resp. % <input type="text" value="0"/> Customer Obligation Copay <input type="text" value="0"/> Monthly Cost <input type="text" value="201.75"/></p> <p>Service Comment <input type="text"/></p> </div> <ul style="list-style-type: none"> In this example the unit standard is one meal, so the number of 'Units' here means how many meals. Here the CMEL service is being planned for 5 meals per week x 5 weeks = 25 units (meals) per month <p>To account for months with more than four weeks, the total units is calculated on five weeks. Remember, this is <i>planned</i> services; the actual amount used is determined when the services are billed. Services can be billed for more or less than the 25 entered here.</p>		
11.	Discharge Code - Enter if appropriate.	<p>Required if the Service is ending and the POC is being closed out. A short explanation of the code is listed in the discharge code drop down list.</p> <p>A complete listing of the Discharge Codes can be found in PDF format at http://www.kdads.ks.gov/provider-home/forms under 'Older Americans Act / Senior Care Act'</p>
12.	<p>Unit Cost - Select the appropriate cost from the drop- down list.</p> <div data-bbox="451 1417 885 1474" style="border: 1px solid black; padding: 2px;"> <p>* Unit Cost <input type="text" value="1.1 Edt 10/01/03 Tdt"/></p> </div> <p>1.1 = Unit cost of this item Edt = Effective Date 10/01/03 = effective date of this cost Tdt = Term Date (blank=not terminated)</p>	<p>Required. Populated by KAMIS II Provider Service entries.</p> <p>Take care to select the correct unit cost if more than one is available in the drop-down list.</p>

Note: If you select a price in the Unit Cost drop down list box that is not listed first and then go back and click on either the Funding or Provider entries, 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 update the fields based on the changes made.

Continued on next page

Entering Services – Multi Line Items Entry Navigation Tab, continued

Continued

Step	Action	Result
13.	Customer Obligation Copay	This field (for SCA funding) is auto-calculated based on the SCA Cust. Resp. % .
14.	Monthly Cost	Auto-calculated: Total Units Monthly multiplied by the Unit Cost minus any Customer Obligation Copay .
15.	Click on the Add & Save Line(s) button.	The page will return to the Multi Line Items Entry navigation tab with the new service line item added to the table. The Processed column will indicate "NEW".

Plan of Care
Assessment Nbr: 1483143 [Assessment](#) [Caselog](#) [Unlock & Close](#)

Customer Information Tab [s01](#) | Line Items Entry [s02](#) | **Multi Line Items Entry [s03](#)** | [Print View](#)

POC Version: 1 | POC Status: INCOMPLETE - FOLLOW-UP NEEDED | All Active Open HCBS Open Non-HCBS

[Save All POC info](#)

#	Org	Service	SD	Funding	SCA	Provider	Units	Freq	MO TTL	Start	End	Dischrg	Unit Cst	Oblig	MO Cost	Processed
1	9	CMEL		CAA3C1	0	SUNSHINE INN	5	WK	25	06/23/16	06/22/17		1.1	0	27.5	NEW

Add & Save Line(s)

Search: [cmel] * Service: CMEL - CONGREGATE MEALS - 1 MEAL | Reset

Self Directed: -- | Search: [] * Funding: OAA3C1 - OLDER AMERICANS ACT - TITLE III-C1 |

Search: [] * Provider: SUNSHINE INN Edt: 01/01/97 Tdt: |

* Units: 5 * Frequency: WK * Total Units Monthly: 25

* Start Date: 06/23/2016 | End Date: 06/22/2017 | Discharge Code: --

* Unit Cost: 1.1 Edt: 10/01/03 Tdt: | SCA Cust. Resp. %: 0 | Customer Obligation Copay: 0 | Monthly Cost: 27.5

Service Comment: []

Important – READ!

The previous sections provided instructions for entering a new service line. DO NOT unlock & close the Plan of Care at this time. If you do, the new service lines will *not* be saved and they will have to be re-entered when the POC is opened again. The following section provides the instructions for saving the POC and its newly entered lines.

Saving a Plan of Care

Introduction

A Plan of Care (POC) must be saved in at least **Incomplete – Follow-up Needed** status so the entered services are not lost when the POC is closed. However, the service lines will not necessarily be available to many of the KAMIS functions that interact with the POC.

The Plan of Care must be saved in **Approved** status for the services within to appear in many KAMIS functions, including but not limited to some KAMIS Reports, Service Provided (225), and Mass Update. Once a POC is saved as Approved, it cannot be modified unless a new version is created. Modifying a POC is covered later in this chapter.

How To

Follow the steps in the table below to save a Plan of Care. A POC does not have to be saved in Incomplete status first – the status can be saved as Approved immediately after the service lines are entered, as long as the POC entry is complete. If you save a POC in Approved status before it is complete, a new POC version will have to be created to finish it.

NOT SAVED – Closing POC will delete the 'NEW' lines																																																															
Step	Action										Result																																																				
1.	<p>New service lines have been added to the POC, but the POC has not yet been saved.</p> <p>Note: The Processed column displays 'NEW' which is the indicator this POC is NOT saved, regardless of the POC Status shown.</p>										<p>If the POC is closed (<u>Unlock & Close link</u> or the Window close [X] button) at this time the service lines will be deleted and the next time the POC is opened, the service lines will be gone.</p>																																																				
<p>* POC Version [1]... * POC Status [INCOMPLETE - FOLLOW-UP NEEDED] <input checked="" type="radio"/> All <input type="radio"/> Active <input type="radio"/> Open HCBS <input type="radio"/> Open Non-HCBS Changed by TESTUSER2 on 02/10/2017 11:17:50</p> <table border="1"> <thead> <tr> <th>#</th> <th>Organization</th> <th>Service</th> <th>Self Direct</th> <th>Funding</th> <th>SCA %</th> <th>Provider</th> <th>Units</th> <th>Freq</th> <th>Total MO Units</th> <th>Start Date</th> <th>End Date</th> <th>Dischrg Code</th> <th>Unit Cost</th> <th>Oblig.</th> <th>MO Cost</th> <th>Processed</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>4</td> <td>ASMT</td> <td></td> <td>OAA3B</td> <td>100</td> <td>JAYHAWK AREA AGENCY ON AGING</td> <td>2</td> <td>YR</td> <td>2</td> <td>01/05/17</td> <td>01/05/17</td> <td>14</td> <td>19.92</td> <td>0</td> <td>39.84</td> <td>NEW</td> </tr> <tr> <td>2</td> <td>4</td> <td>HMEL</td> <td></td> <td>OAA3C2</td> <td>100</td> <td>TOPEKA MOW</td> <td>5</td> <td>WK</td> <td>25</td> <td>01/05/17</td> <td>01/04/18</td> <td></td> <td>7.35</td> <td>0</td> <td>183.75</td> <td>NEW</td> </tr> </tbody> </table> <p>Save All POC info</p>													#	Organization	Service	Self Direct	Funding	SCA %	Provider	Units	Freq	Total MO Units	Start Date	End Date	Dischrg Code	Unit Cost	Oblig.	MO Cost	Processed	1	4	ASMT		OAA3B	100	JAYHAWK AREA AGENCY ON AGING	2	YR	2	01/05/17	01/05/17	14	19.92	0	39.84	NEW	2	4	HMEL		OAA3C2	100	TOPEKA MOW	5	WK	25	01/05/17	01/04/18		7.35	0	183.75	NEW
#	Organization	Service	Self Direct	Funding	SCA %	Provider	Units	Freq	Total MO Units	Start Date	End Date	Dischrg Code	Unit Cost	Oblig.	MO Cost	Processed																																															
1	4	ASMT		OAA3B	100	JAYHAWK AREA AGENCY ON AGING	2	YR	2	01/05/17	01/05/17	14	19.92	0	39.84	NEW																																															
2	4	HMEL		OAA3C2	100	TOPEKA MOW	5	WK	25	01/05/17	01/04/18		7.35	0	183.75	NEW																																															
Save as INCOMPLETE – FOLLOW-UP NEEDED																																																															
Step	Action										Result																																																				
2.	<p>With the POC Status still set to 'Incomplete – Follow-up Needed,' click on the Save All POC info button.</p>										<ul style="list-style-type: none"> A 'successful save' message displays at the top of the POC page The Processed column changes from "NEW" to "EXISTING" The POC can be closed and re-opened and the service lines will remain with the POC. 																																																				
<p>* POC Version [1]... * POC Status [INCOMPLETE - FOLLOW-UP NEEDED] <input checked="" type="radio"/> All <input type="radio"/> Active <input type="radio"/> Open HCBS <input type="radio"/> Open Non-HCBS Changed by TESTUSER2 on 02/10/2017 12:01:29</p> <p>Rows Processed [2] Rows Errors [0]</p> <table border="1"> <thead> <tr> <th>#</th> <th>Organization</th> <th>Service</th> <th>Self Direct</th> <th>Funding</th> <th>SCA %</th> <th>Provider</th> <th>Units</th> <th>Freq</th> <th>Total MO Units</th> <th>Start Date</th> <th>End Date</th> <th>Dischrg Code</th> <th>Unit Cost</th> <th>Oblig.</th> <th>MO Cost</th> <th>Processed</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>4</td> <td>ASMT</td> <td></td> <td>OAA3B</td> <td>100</td> <td>JAYHAWK AREA AGENCY ON AGING</td> <td>2</td> <td>YR</td> <td>2</td> <td>01/05/17</td> <td>01/05/17</td> <td>14</td> <td>19.92</td> <td>0</td> <td>39.84</td> <td>EXISTING</td> </tr> <tr> <td>2</td> <td>4</td> <td>HMEL</td> <td></td> <td>OAA3C2</td> <td>100</td> <td>TOPEKA MOW</td> <td>5</td> <td>WK</td> <td>25</td> <td>01/05/17</td> <td>01/04/18</td> <td></td> <td>7.35</td> <td>0</td> <td>183.75</td> <td>EXISTING</td> </tr> </tbody> </table> <p>Save All POC info</p>													#	Organization	Service	Self Direct	Funding	SCA %	Provider	Units	Freq	Total MO Units	Start Date	End Date	Dischrg Code	Unit Cost	Oblig.	MO Cost	Processed	1	4	ASMT		OAA3B	100	JAYHAWK AREA AGENCY ON AGING	2	YR	2	01/05/17	01/05/17	14	19.92	0	39.84	EXISTING	2	4	HMEL		OAA3C2	100	TOPEKA MOW	5	WK	25	01/05/17	01/04/18		7.35	0	183.75	EXISTING
#	Organization	Service	Self Direct	Funding	SCA %	Provider	Units	Freq	Total MO Units	Start Date	End Date	Dischrg Code	Unit Cost	Oblig.	MO Cost	Processed																																															
1	4	ASMT		OAA3B	100	JAYHAWK AREA AGENCY ON AGING	2	YR	2	01/05/17	01/05/17	14	19.92	0	39.84	EXISTING																																															
2	4	HMEL		OAA3C2	100	TOPEKA MOW	5	WK	25	01/05/17	01/04/18		7.35	0	183.75	EXISTING																																															

Continued on next page

Saving a Plan of Care, continued

How To

continued

Save as APPROVED		
Step	Action	Result
3.	Change the POC Status to 'Approved' and click on the Save All POC Info button.	<ul style="list-style-type: none"> A 'successful save' message displays at the top of the POC page The Processed column stays as "EXISTING" The POC Status now says 'APPROVED' and the field is read only The services can be accessed by other KAMIS functions.



POC Line Items successfully saved
 02/10/2017 12:01:30 PM

KAMIS ID: 5722184 Name: JETSON, GEORGE Customer Status: ACTIVE [More Person Info...](#)
 Orgs: Primary: JAYHAWK AREA AGENCY ON AGING No Secondary

Plan of Care
 Assessment Nbr: 1506475 [Assessment](#) [Caselog](#) [Unlock & Close](#)

Customer Information Tab | **Line Items Entry** | Multi Line Items Entry | Print View

* POC Version 1 | * POC Status **APPROVED** | All Active Open HCBS Open Non-HCBS

Create New Poc Version

Changed by TESTUSER2 on 02/10/2017 12:03:46

Rows Processed 2 Rows Errors 0

#	Organization	Service	Self Direct	Funding	SCA %	Provider	Units	Freq	Total MO Units	Start Date	End Date	Dischrg Code	Unit Cost	Oblig.	MO Cost	Processed
1	4	ASMT		OAA3B	100	JAYHAWK AREA AGENCY ON AGING	2	YR	2	01/05/17	01/05/17	14	19.92	0	39.84	EXISTING
2	4	HMEL		OAA3C2	100	TOPEKA MOW	5	WK	25	01/05/17	01/04/18		7.35	0	183.75	EXISTING

Save All POC info

Unlock & Close a Plan of Care

Introduction

When a Plan of Care is opened, KAMIS locks the processes for that POC so only the user that opened the POC first can make changes to it. If anyone else opens the same POC, it will open in 'Print View' and the additional user trying to access the POC will not be able to make changes to it.

To make the POC available for editing again after closing the POC window, a special **Unlock & Close** link must be used to close it.

How To

Follow the steps in the table below to unlock and close a Plan of Care.

Step	Action	Result
1.	Make sure you have saved the POC using the Save All POC info button.	If you do not save the POC before closing, any service lines that do not have an 'EXISTING' Processed status will be lost.
2.	Click on the Unlock & Close link located above the POC navigation tabs.	The POC processes are unlocked and the POC window closes.

KAMIS ID: 5722184 Name: JETSON, GEORGE Customer Status: ACTIVE [More Person Info...](#)
 Orgs: Primary: JAYHAWK AREA AGENCY ON AGING No Secondary

Plan of Care
 Assessment Nbr: 1506475 [Assessment](#) [Caseload](#) [Unlock & Close](#)

Customer Information Tab [Line Items Entry](#) [Multi Line Items Entry](#) [Print View](#)

POC Version: 1 POC Status: APPROVED All Active Open HCBS Open Non-HCBS

Create New POC Version

Changed by TESTUSER2 on 02/10/2017 12:03:46

Rows Processed: 2 Rows Errors: 0

#	Organization	Service	Self Direct	Funding	SCA %	Provider	Units	Freq	Total MO Units	Start Date	End Date	Dischrg Code	Unit Cost	Oblig.	MO Cost	Processed
1	4	ASMT		OAA3B	100	JAYHAWK AREA AGENCY ON AGING	2	YR	2	01/05/17	01/05/17	14	19.92	0	39.84	EXISTING
2	4	HMEL		OAA3C2	100	TOPEKA MOW	5	WK	25	01/05/17	01/04/18		7.35	0	183.75	EXISTING

[Save All POC info](#)

Locked POC

A Plan of Care may be locked if:

- another user already has the POC opened, or
- the POC was closed using the browser's window close [X] button. It may remain locked for up to 15 minutes before the locked status times out and it returns to an editable state.

Plan of Care Print View:



Kansas Department for Aging and Disability Services
 Plan of Care
 Viewed on: 02/10/2017 12:06:18 PM by:



Plan of Care
 Customer: JETSON, GEORGE Address: 444 11TH CR County: SN SHAWNEE
 TOPEKA, KS 66666-4444
 SSN: 444441944 Medicaid#: Phone#: 7854444444

KAMIS ID: 5722184 Organization: 4 Persons Original Effective Date: 10/01/2016
 Assessment # 1506475 Type: 165 - ABBREVIATED UNIFORM ASSESSMENT INSTRUMENT Status: 160 - APPROVED
 Assessment Date: 01/05/2017 Reassessment Due Date: 01/04/2018
 Version: 1 Status: 160 - APPROVED Eff Dt: 01/05/2017 Trm Dt:

SEQ	Organization	Svc Code	Self Dirct	Fndng Src	SCA Pct	Provider	Unit(s)	Per Trk Mo	Start Date	End Date	Dischrg Code	MMS Updt	MMS Save Date	Cost of Unit	Costm Origin /CoPay	Monthly Cost
1	4	ASMT		OAA3B	100	JAYHAWK AREA AGENCY ON AGING 100260580B Eff: 01/01/1997	2	YR	2	01/05/2017	01/05/2017	14		19.92 Eff: 10/01/2015	0	39.84
2	4	HMEL		OAA3C2	100	TOPEKA MOW Eff: 01/01/1997	5	WK	25	01/05/2017	01/04/2018			7.35 Eff: 10/01/2015	0	183.75

SRS NAME:
 Case Mgr Name: NO NAME ON FILE
 Deinst/Divert: Self Directed:
 Refer from: NO NAME ON FILE Refer to: NO NAME ON FILE
 Add user: TESTUSER2 Add dt: 02/10/2017 11:17:50 Mod User: TESTUSER2 Mod dt: 02/10/2017 12:03:46

Modifying a Plan of Care

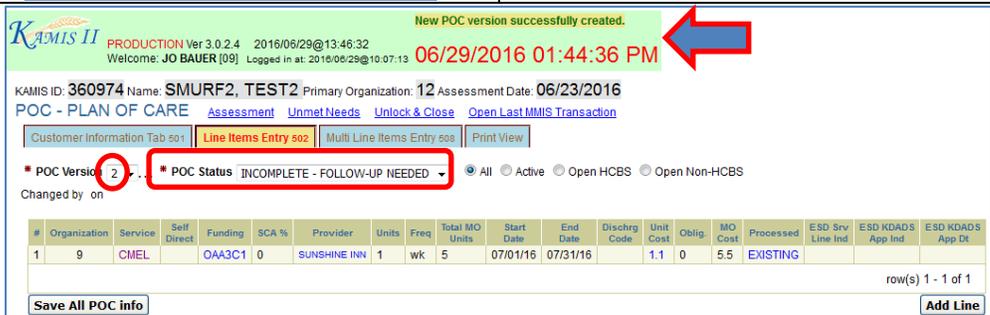
Introduction

When a Plan of Care is saved in Approved status, the approved version can no longer be modified. Changes can only be made by creating a new version of the approved Plan of Care, which puts it back to 'Incomplete' status.

Not all fields can be modified. Depending on the modifications needed, the line may have to be deleted and re-entered with the new information.

How To

Follow the steps in the table below to create a new version of the Plan of Care so it can be modified.

Step	Action	Result
1.	Open an existing, approved Plan of Care. Click on either the Line Items Entry or Multi Line Items Entry navigation tab.	Makes the tab active, reflected by the color change to yellow.
	 <p>The screenshot shows the 'Plan of Care' interface for Assessment Nbr. 1483143. The 'Line Items Entry' tab is active. A red box highlights the 'Create New POC Version' button. Other visible elements include the POC Status (APPROVED), a table with one row of data, and a 'Save All POC info' button.</p>	
2.	Click on the Create New POC Version button.	A message will display confirming the new POC version is to be created.
3.	Click on the OK button.	<ul style="list-style-type: none"> New version of POC displays New POC version message displays Status changes to 'INCOMPLETE – FOLLOW-UP NEEDED' POC Version number increases by one POC can be updated
	 <p>The screenshot shows the 'Plan of Care' interface after the new version is created. A green message bar at the top states 'New POC version successfully created.' with a timestamp of 06/29/2016 01:44:36 PM. The POC Status is now 'INCOMPLETE - FOLLOW-UP NEEDED', highlighted with a red box. The POC Version number is now 2. A red arrow points to the timestamp. The table below shows the same data as the previous screenshot, but with an 'Add Line' button at the bottom right.</p>	

Continued on next page

Modifying a Plan of Care, continued

How To

Continued

Step	Action	Result																																
4.	Click on the Service code link for the line to be modified (CMEL, APCR, HMKR, etc.)	The Add/Modify edit page or region displays for the selected service line.																																
<div style="border: 1px solid black; padding: 10px; margin-bottom: 10px;"> <p>Plan of Care</p> <p>Assessment Nbr: 1483143 Assessment Caselog Unlock & Close</p> <p>Customer Information Tab 501 Line Items Entry 502 Multi Line Items Entry 503 Print View</p> <p>* POC Version 2 ... * POC Status INCOMPLETE - FOLLOW-UP NEEDED <input checked="" type="radio"/> All <input type="radio"/> Active <input type="radio"/> Open HCBS <input type="radio"/> Open</p> <p>Changed by on</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>#</th> <th>Organization</th> <th>Service</th> <th>Self Direct</th> <th>Funding</th> <th>SCA %</th> <th>Provider</th> <th>Units</th> <th>Freq</th> <th>Total MO Units</th> <th>Start Date</th> <th>End Date</th> <th>Dischrg Code</th> <th>Unit Cos</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>9</td> <td style="border: 2px solid red;">CMEL</td> <td></td> <td>OAA3C1</td> <td>0</td> <td>SUNSHINE INN</td> <td>1</td> <td>wk</td> <td>5</td> <td>07/01/16</td> <td>07/31/16</td> <td></td> <td>1.1</td> </tr> </tbody> </table> <p>Save All POC info</p> <p>Case Manager NO NAME ON FILE</p> </div> <table border="1" style="width: 100%; border-collapse: collapse; margin-bottom: 10px;"> <thead> <tr> <th data-bbox="472 835 773 871">Navigation Tab</th> <th data-bbox="773 835 1490 871">Action</th> </tr> </thead> <tbody> <tr> <td data-bbox="472 871 773 907">Line Items Entry</td> <td data-bbox="773 871 1490 907">The Add/Modify Line Items page displays.</td> </tr> </tbody> </table> <div style="border: 1px solid black; padding: 10px;"> <p>Plan of Care</p> <p>Assessment Nbr: 1483143 Assessment Caselog Unlock & Close</p> <p>Add/Modify Line Items</p> <p>* Service CMEL - CONGREGATE MEALS - 1 MEAL</p> <p>Self Directed</p> <p>* Funding OAA3C1 - OLDER AMERICANS ACT - TITLE III-C1</p> <p>* Provider SUNSHINE INN Edt 01/01/97 Tdt</p> <p>* Units 1 * Frequency wk * Total Units Monthly 5</p> <p>* Start Date 07/01/2016 End Date 07/31/2016</p> <p>Discharge Code --</p> <p>* Unit Cost 1.1 Edt 10/01/03 Tdt</p> <p>SCA Cust. Resp. % 0 Customer Obligation Copay 0 Monthly Cost 5.5</p> <p>Service Comment</p> <p>Processed Status EXISTING Status Message PREVIOUSLY SAVED</p> <p>Cancel Delete Save</p> </div>			#	Organization	Service	Self Direct	Funding	SCA %	Provider	Units	Freq	Total MO Units	Start Date	End Date	Dischrg Code	Unit Cos	1	9	CMEL		OAA3C1	0	SUNSHINE INN	1	wk	5	07/01/16	07/31/16		1.1	Navigation Tab	Action	Line Items Entry	The Add/Modify Line Items page displays.
#	Organization	Service	Self Direct	Funding	SCA %	Provider	Units	Freq	Total MO Units	Start Date	End Date	Dischrg Code	Unit Cos																					
1	9	CMEL		OAA3C1	0	SUNSHINE INN	1	wk	5	07/01/16	07/31/16		1.1																					
Navigation Tab	Action																																	
Line Items Entry	The Add/Modify Line Items page displays.																																	

Continued on next page

Modifying a Plan of Care, continued

How To

Continued

Step	Action	Result				
4.	<p><i>Continued</i></p> <table border="1"> <thead> <tr> <th>Navigation Tab</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>Multi Line Items Entry</td> <td>The modify region displays.</td> </tr> </tbody> </table>	Navigation Tab	Action	Multi Line Items Entry	The modify region displays.	
Navigation Tab	Action					
Multi Line Items Entry	The modify region displays.					
	<p>Editable Fields -</p> <p>Once a Plan of Care has been saved in 'Incomplete' status, only a limited number of the fields can be modified:</p> <ul style="list-style-type: none"> ◇ Start Date ◇ Discharge Code ◇ End Date ◇ Service Comment <p>If any of the other fields need to be edited, the service line must be deleted and re-entered with the correct information. Deleting a service line is covered later in this chapter.</p>					
5.	Make the desired changes to any of the editable fields.	Fields are updated with new information.				
6.	Click on the Save button or the Add & Save Line(s) button when the changes are complete. (The button label depends on which data entry page is being used.)	<ul style="list-style-type: none"> • The service line table updates with the modified information. • The <i>Processed</i> status changes to 'MODIFIED' 				
7.	Repeat 4-6 to change any other service lines in the table.	The service line table updates.				
8.	Change the POC Status to APPROVED.					
9.	Click the Save All POC Info button.	<ul style="list-style-type: none"> • The POC is saved in Approved status • A successful save message displays at the top of the POC • The <i>Processed</i> status changes to 'EXISTING' • The service lines are accessible by other KAMIS processes. 				

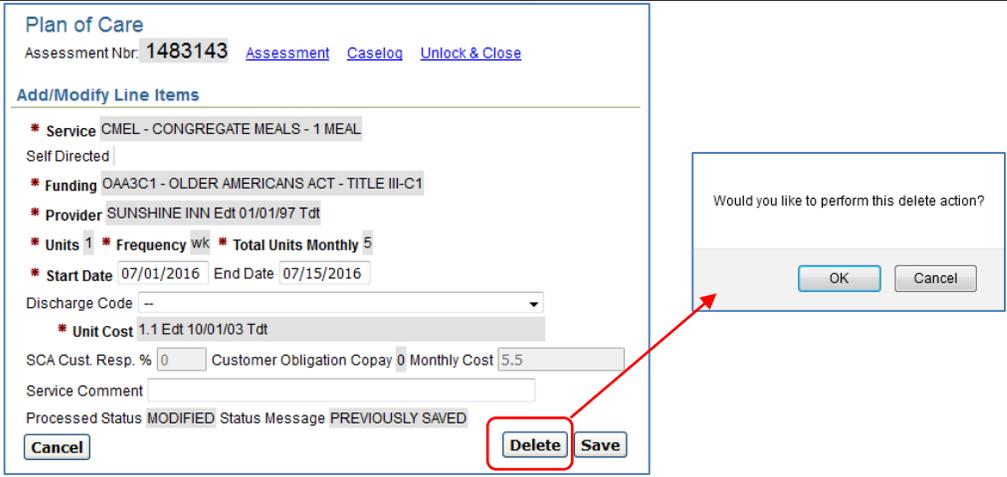
Deleting a Service Line

Introduction

A service line can be deleted from a Plan of Care as long as a payment has not been processed on that line. The service line is retained for history on the previous versions of the POC.

How To

Follow the steps in the table below to delete a service lane and save the deletion on the current Plan of Care version.

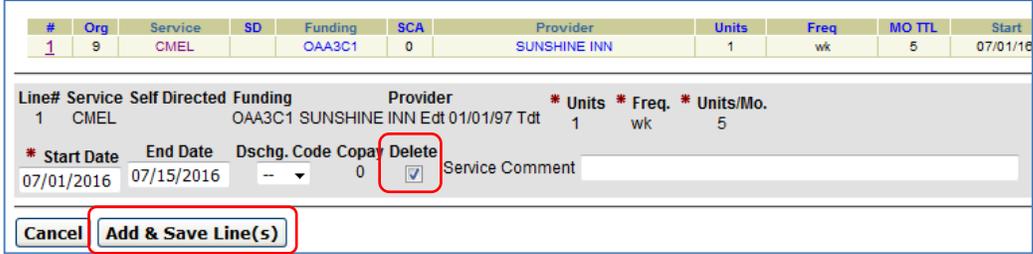
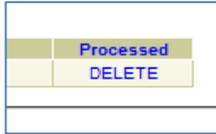
Step	Action	Result
1.	Open the existing Plan of Care. Click on either the Line Items Entry or Multi Line Items Entry navigation tab.	Makes the tab active.
2.	If the POC is in Approved status, click on the Create New POC Version button. Note: If the POC is still in Incomplete status, skip to step 3.	<ul style="list-style-type: none"> • New version of POC is created • POC Version number increases by 1 • Service code links become active
3.	Click on the service code link for the line to be deleted and continue with the appropriate steps below for the page you are on.	The Add/Modify Line Items or line modify region displays.
Line Items Entry navigation tab		
4a.	Click on the Delete button	A confirmation message box displays asking if you would like to perform the delete action.
		
5a.	Click on OK	The service line remains in the service line table, but the Processed status changes to 'DELETE'

Continued on next page

Deleting a Service Line, continued

How To

Continued

Step	Action	Result
Multi Line Items Entry navigation tab		
4b.	Click on the Delete checkbox	Checkmark appears.
		
5b.	Click on the Add & Save Line(s) button	The service line remains in the service line table, but the Processed status changes to 'DELETE'
		
6.	Repeat steps 3-5 for any additional lines to be deleted.	
	Note: If deleting a line in order to replace it with a new line with corrected information, add the new line to the POC before continuing with the next step.	
7.	Change the POC Status to 'APPROVED'	
8.	Click on the Save All POC info button.	<ul style="list-style-type: none"> • The POC is saved in Approved status • A successful save message displays at the top of the POC • The deleted lines are removed from the service line table. • The deleted lines remain on previous versions of the POC for history purposes. • Any new lines' status will change to 'EXISTING'

Continued on next page

Deleting a Service Line, continued

Delete a Line Workflow

The images below show how the POC service line table looks through each part of the line deletion process. The images here are from the Line Items Entry navigation tab; the Multi Line Items Entry service line table will have the same information, just the slightly different layout:

POC Ver. 2 – Approved Status

* POC Version 2 * POC Status APPROVED All Active Open HCBS Open Non-HCBS

Changed by KMSDBA on 06/30/2016 13:12:44

#	Organization	Service	Self Direct	Funding	SCA %	Provider	Units	Freq	Total MO Units	Start Date	End Date	Dischrg Code	Unit Cost	Oblig.	MO Cost	Processed	ESD Srv Line Ind	ESD KDADS App Ind	ESD A
1	9	CMEL		OAA3C1	0	SUNSHINE INN	1	wk	5	07/01/16	07/15/16		1.1	0	5.5	EXISTING			
2	9	CMEL		OAA3C1	0	SENECA NUTR	5	wk	25	07/01/16	06/22/17		1.1	0	27.5	EXISTING			

row(s) 1 - 2

Save All POC info

POC Ver. 3 – Before Line is Deleted

* POC Version 3 * POC Status INCOMPLETE - FOLLOW-UP NEEDED All Active Open HCBS Open Non-HCBS

Changed by on

#	Organization	Service	Self Direct	Funding	SCA %	Provider	Units	Freq	Total MO Units	Start Date	End Date	Dischrg Code	Unit Cost	Oblig.	MO Cost	Processed	ESD Srv Line Ind	ESD KDADS App Ind	ESD A
1	9	CMEL		OAA3C1	0	SUNSHINE INN	1	wk	5	07/01/16	07/15/16		1.1	0	5.5	EXISTING			
2	9	CMEL		OAA3C1	0	SENECA NUTR	5	wk	25	07/01/16	06/22/17		1.1	0	27.5	EXISTING			

row(s) 1 - 2

Save All POC info

POC Ver. 3 - After Line is Deleted – POC info not yet saved

* POC Version 3 * POC Status INCOMPLETE - FOLLOW-UP NEEDED All Active Open HCBS Open Non-HCBS

Changed by on

#	Organization	Service	Self Direct	Funding	SCA %	Provider	Units	Freq	Total MO Units	Start Date	End Date	Dischrg Code	Unit Cost	Oblig.	MO Cost	Processed	ESD Srv Line Ind	ESD KDADS App Ind	ESD A
1	9	CMEL		OAA3C1	0	SUNSHINE INN	1	wk	5	07/01/16	07/15/16		1.1	0	5.5	DELETE			
2	9	CMEL		OAA3C1	0	SENECA NUTR	5	wk	25	07/01/16	06/22/17		1.1	0	27.5	EXISTING			

row(s) 1 - 2

Save All POC info

If the POC is closed at this point, when it is re-opened line 1 will remain, and the Processed column will be back to 'EXISTING'

POC Ver. 3 - After POC info is saved

The deleted line is gone

* POC Version 3 * POC Status INCOMPLETE - FOLLOW-UP NEEDED All Active Open HCBS Open Non-HCBS

Changed by JOBAUER on 06/30/2016 13:16:30

Rows Processed 1 Rows Errors 0

#	Organization	Service	Self Direct	Funding	SCA %	Provider	Units	Freq	Total MO Units	Start Date	End Date	Dischrg Code	Unit Cost	Oblig.	MO Cost	Processed	ESD Srv Line Ind	ESD KDADS App Ind	ESD A
2	9	CMEL		OAA3C1	0	SENECA NUTR	5	wk	25	07/01/16	06/22/17		1.1	0	27.5	EXISTING			

row(s) 1 - 2

Save All POC info

POC Ver. 2 - Previous Version of POC showing history

The deleted line is still here

* POC Version 2 * POC Status APPROVED All Active Open HCBS Open Non-HCBS

Changed by JOBAUER on 06/30/2016 13:16:30

Rows Processed 1 Rows Errors 0

#	Organization	Service	Self Direct	Funding	SCA %	Provider	Units	Freq	Total MO Units	Start Date	End Date	Dischrg Code	Unit Cost	Oblig.	MO Cost	Processed	ESD Srv Line Ind	ESD KDADS App Ind	ESD A
1	9	CMEL		OAA3C1	0	SUNSHINE INN	1	wk	5	07/01/16	07/15/16		1.1	0	5.5	EXISTING			
2	9	CMEL		OAA3C1	0	SENECA NUTR	5	wk	25	07/01/16	06/22/17		1.1	0	27.5	EXISTING			

row(s) 1 - 2

Save All POC info

Closing a Plan of Care – Reassessment

Introduction

When a customer with an existing Plan of Care gets reassessed, the POC on the old assessment must be closed out, and all services as of the reassessment date are then entered on the new assessment's POC.

To close out a POC, all service lines must have an end date and a discharge code. If the POC is being closed due to a change in customer status (moved out of service area, or is deceased, for example), KAMIS gives the option of changing the customer status when the POC is saved in Approved status. If the POC is being closed because of a reassessment, however, the customer will remain active, and the steps below will close the POC, leaving the customer active for the reassessment and new POC.

How to

Follow the steps in the table below to close service line items on an Approved Plan of Care, and to leave the customer in Active status.

Step	Action	Result
1.	Open the Plan of Care to be closed out.	The POC window opens.
2.	Click on the desired items entry tab.	The selected tab turns yellow and the page displays.
3.	Click on the Create New POC Version button.	<ul style="list-style-type: none"> A new POC version is created in 'Incomplete...' status The POC Version number increases by one The POC is editable
4.	In the Service Line Item table click on the service code link of the line to be closed.	The service line editor displays.

Line Items Entry tab:

#	Organization	Service	Self Direct	Funding	SCA %	Provider	Units	Freq	Total MO Units	Start Date	End Date	Dischrg Code	Unit Cost	Obl
2	9	CMEL		OAA3C1	0	SENECA NUTR	5	wk	25	07/01/16	07/31/16	5	1.1	0

Plan of Care
 Assessment Nbr: **1483143** [Assessment](#) [Caselog](#) [Unlock & Close](#)

Add/Modify Line Items

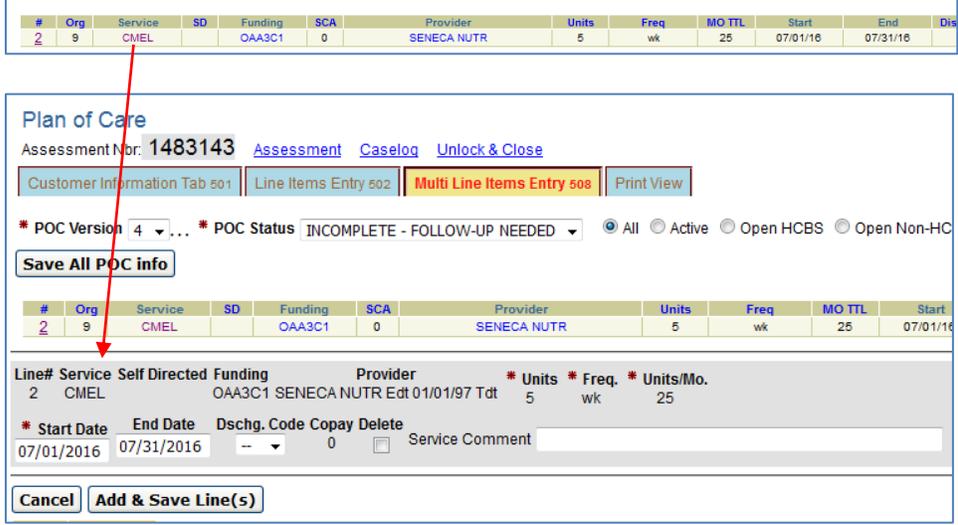
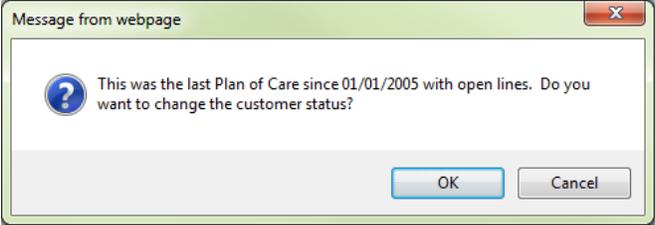
- * Service **CMEL - CONGREGATE MEALS - 1 MEAL**
- Self Directed
- * Funding **OAA3C1 - OLDER AMERICANS ACT - TITLE III-C1**
- * Provider **SENECA NUTR** Edt 01/01/97 Tdt
- * Units **5** * Frequency **wk** * Total Units Monthly **25**
- * Start Date **07/01/2016** End Date **07/31/2016**
- Discharge Code **--**
- * Unit Cost **1.1** Edt 10/01/03 Tdt
- SCA Cust. Resp. % **0** Customer Obligation Copay **0** Monthly Cost **27.5**
- Service Comment
- Processed Status **EXISTING** Status Message **PREVIOUSLY SAVED**

Continued on next page

Closing a Plan of Care – Reassessment, continued

How to

Continued

Step	Action	Result
	<p>Multi Line Items Entry tab:</p>  <p>The screenshot shows a 'Multi Line Items Entry' tab with a table of service lines. The table has columns: #, Org, Service, SD, Funding, SCA, Provider, Units, Freq, MO TTL, Start, End, Dis. The first row is highlighted with a red arrow pointing to the 'End Date' field (07/31/2016). Below the table is a 'Plan of Care' section with 'Assessment Nbr: 1483143' and tabs for 'Customer Information Tab 501', 'Line Items Entry 502', 'Multi Line Items Entry 508', and 'Print View'. There are dropdown menus for 'POC Version' (4) and 'POC Status' (INCOMPLETE - FOLLOW-UP NEEDED), and radio buttons for 'All', 'Active', 'Open HCBS', and 'Open Non-HC'. A 'Save All POC info' button is visible. Below this is another table with columns: Line#, Service, Self Directed, Funding, Provider, Units, Freq, Units/Mo. The first row is highlighted. At the bottom, there are fields for 'Start Date' (07/01/2016), 'End Date' (07/31/2016), 'Dschg. Code' (--), 'Copay' (0), and 'Delete' (checkbox). There are 'Cancel' and 'Add & Save Line(s)' buttons.</p>	
5.	Enter the service line end date in the End Date field. Note: Enter numbers only; the '/' appears automatically.	Required. The date cannot be after the associated assessment's reassessment due date.
6.	Type '31' or select Discharge Code '31' from the drop-down list.	Required. These instructions are for closing the POC due to a reassessment, so 31 is the appropriate code.
7.	Click on the Save button (Line Items Entry) or the Add & Save Line(s) button (Multi Line Items Entry) to save the changes.	<ul style="list-style-type: none"> The service line item table is updated The <i>Processed</i> status changes to 'MODIFIED'
8.	Repeat steps 4-7 for each service line in the POC.	All service lines must have an end date <i>and</i> discharge code for the POC to be considered closed.
9.	Change the POC Status to Approved.	
10.	Click the Save All POC info button.	Message displays referencing the POC being the last one with open lines, and if the customer status should change.
	 <p>The screenshot shows a 'Message from webpage' dialog box with a question mark icon. The text inside says: 'This was the last Plan of Care since 01/01/2005 with open lines. Do you want to change the customer status?'. There are 'OK' and 'Cancel' buttons at the bottom.</p>	

Continued on next page

Closing a Plan of Care – Reassessment, continued

How to

Continued

Step	Action	Result
11.	Since this Plan of Care is being closed for a reassessment, click on Cancel .	The POC still saves in Approved status, but the process to change the customer status in Person Administration is canceled.
12.	Click the Unlock & Close link to exit out of the POC.	The POC is unlocked and the POC window closes.

Closing a Plan of Care – Change Person Status

Introduction

If a customer with an active Plan of Care dies, or is no longer an active customer in the service area, the Plan of Care needs to be closed out, and the customer's status changed. In this scenario, the process to close out a POC is slightly different. The end dates and discharge codes must still be entered for every line in the POC. However, upon Approving the POC, the customer status will also be updated as part of the process.

In KAMIS there is only one place the customer status can be changed: in Person Administration. So, to close out the last open POC for a customer, the lines are updated with the end date and discharge code, as with a reassessment. However now the process automatically takes the user to Person Administration, where the customer status can be changed to either *Inactive* or *Deceased*.

Customer Statuses

Status	Definition
Active	The customer is newly created or is an existing customer with a current assessment or other KAMIS form.
Inactive	The customer does not have a current assessment or intake with the Primary or Secondary organization, and is not receiving services.
Deceased	The customer has died.

How to

Follow the steps in the table below to close service line items on an Approved Plan of Care, and to change the customer's status to Inactive or Deceased.

Step	Action	Result
1.	Open the Plan of Care to be closed out.	The POC window opens.
2.	Click on the desired items entry tab.	The selected tab is yellow and the page displays.
3.	Click on the Create New POC Version button.	<ul style="list-style-type: none">• A new POC version is created in 'Incomplete...' status• The POC Version number increases by one• The POC is editable
4.	In the Service Line Item table click on the service code link of the line to be closed.	The service line editor displays.

Continued on next page

Closing a Plan of Care – Change Person Status, continued

How to

Continued

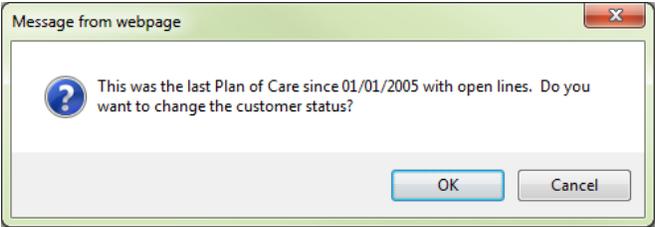
Step	Action	Result																																																
	<p>Line Items Entry tab:</p> <table border="1"> <thead> <tr> <th>#</th> <th>Organization</th> <th>Service</th> <th>Self Direct</th> <th>Funding</th> <th>SCA %</th> <th>Provider</th> <th>Units</th> <th>Freq</th> <th>Total MO Units</th> <th>Start Date</th> <th>End Date</th> <th>Dischrg Code</th> <th>Unit Cost</th> <th>Obl</th> </tr> </thead> <tbody> <tr> <td>2</td> <td>9</td> <td>CMEL</td> <td></td> <td>OAA3C1</td> <td>0</td> <td>SENECA NUTR</td> <td>5</td> <td>wk</td> <td>25</td> <td>07/01/16</td> <td>07/31/16</td> <td>5</td> <td>1.1</td> <td>0</td> </tr> </tbody> </table> <p>↓</p> <div style="border: 1px solid black; padding: 5px;"> <p>Plan of Care Assessment Nbr: 1483143 Assessment Caselog Unlock & Close</p> <p>Add/Modify Line Items</p> <ul style="list-style-type: none"> * Service CMEL - CONGREGATE MEALS - 1 MEAL Self Directed * Funding OAA3C1 - OLDER AMERICANS ACT - TITLE III-C1 * Provider SENECA NUTR Edt 01/01/97 Tdt * Units 5 * Frequency wk * Total Units Monthly 25 * Start Date 07/01/2016 End Date 07/31/2016 Discharge Code -- * Unit Cost 1.1 Edt 10/01/03 Tdt SCA Cust. Resp. % 0 Customer Obligation Copay 0 Monthly Cost 27.5 Service Comment Processed Status EXISTING Status Message PREVIOUSLY SAVED <p><input type="button" value="Cancel"/> <input type="button" value="Delete"/> <input type="button" value="Save"/></p> </div>	#	Organization	Service	Self Direct	Funding	SCA %	Provider	Units	Freq	Total MO Units	Start Date	End Date	Dischrg Code	Unit Cost	Obl	2	9	CMEL		OAA3C1	0	SENECA NUTR	5	wk	25	07/01/16	07/31/16	5	1.1	0																			
#	Organization	Service	Self Direct	Funding	SCA %	Provider	Units	Freq	Total MO Units	Start Date	End Date	Dischrg Code	Unit Cost	Obl																																				
2	9	CMEL		OAA3C1	0	SENECA NUTR	5	wk	25	07/01/16	07/31/16	5	1.1	0																																				
	<p>Multi Line Items Entry tab:</p> <table border="1"> <thead> <tr> <th>#</th> <th>Org</th> <th>Service</th> <th>SD</th> <th>Funding</th> <th>SCA</th> <th>Provider</th> <th>Units</th> <th>Freq</th> <th>MO TTL</th> <th>Start</th> <th>End</th> <th>Dis</th> </tr> </thead> <tbody> <tr> <td>2</td> <td>9</td> <td>CMEL</td> <td></td> <td>OAA3C1</td> <td>0</td> <td>SENECA NUTR</td> <td>5</td> <td>wk</td> <td>25</td> <td>07/01/16</td> <td>07/31/16</td> <td></td> </tr> </tbody> </table> <p>↓</p> <div style="border: 1px solid black; padding: 5px;"> <p>Plan of Care Assessment Nbr: 1483143 Assessment Caselog Unlock & Close</p> <p>Customer Information Tab 501 Line Items Entry 502 Multi Line Items Entry 508 Print View</p> <p>* POC Version 4 * POC Status INCOMPLETE - FOLLOW-UP NEEDED <input checked="" type="radio"/> All <input type="radio"/> Active <input type="radio"/> Open HCBS <input type="radio"/> Open Non-HC</p> <p><input type="button" value="Save All POC info"/></p> <table border="1"> <thead> <tr> <th>#</th> <th>Org</th> <th>Service</th> <th>SD</th> <th>Funding</th> <th>SCA</th> <th>Provider</th> <th>Units</th> <th>Freq</th> <th>MO TTL</th> <th>Start</th> </tr> </thead> <tbody> <tr> <td>2</td> <td>9</td> <td>CMEL</td> <td></td> <td>OAA3C1</td> <td>0</td> <td>SENECA NUTR</td> <td>5</td> <td>wk</td> <td>25</td> <td>07/01/16</td> </tr> </tbody> </table> <p>Line# Service Self Directed Funding Provider * Units * Freq. * Units/Mo. 2 CMEL OAA3C1 SENECA NUTR Edt 01/01/97 Tdt 5 wk 25</p> <p>* Start Date End Date Dschg. Code Copay Delete 07/01/2016 07/31/2016 -- 0 <input type="checkbox"/> Service Comment</p> <p><input type="button" value="Cancel"/> <input type="button" value="Add & Save Line(s)"/></p> </div>	#	Org	Service	SD	Funding	SCA	Provider	Units	Freq	MO TTL	Start	End	Dis	2	9	CMEL		OAA3C1	0	SENECA NUTR	5	wk	25	07/01/16	07/31/16		#	Org	Service	SD	Funding	SCA	Provider	Units	Freq	MO TTL	Start	2	9	CMEL		OAA3C1	0	SENECA NUTR	5	wk	25	07/01/16	
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5.	<p>Enter the service line end date in the End Date field. Note: Enter numbers only; the '/' appears automatically.</p>	<p>Required. The date cannot be after the associated assessment's reassessment due date.</p>																																																

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Closing a Plan of Care – Change Person Status, continued

How to

Continued

Step	Action	Result
6.	Type or select the appropriate Discharge Code from the drop-down list. Note: The complete list of Discharge Codes can be found on the KDADS Provider Information website at (http://www.kdads.ks.gov/provider-home/forms) under the Older Americans Act / Senior Care Act heading.	Required.
7.	Click on the Save button (Line Items Entry) or the Add & Save Line(s) button (Multi Line Items Entry) to save the changes.	<ul style="list-style-type: none"> The service line item table is updated The Processed column changes to 'MODIFIED'
8.	Repeat steps 4-7 for each service line in the POC.	All service lines must have an end date and discharge code for the POC to be considered closed.
9.	Change the POC Status to Approved.	
10.	Click the Save All POC info button.	Message displays referencing the POC being the last one with open lines, and if the customer status should change.
		
11.	Since this Plan of Care is being closed due to a change in customer status, click on OK .	<ul style="list-style-type: none"> The POC saves in Approved status The POC window closes The customer's Person Admin/Home page displays
12.	Change the customer's Person Status. 	Refer to <i>Chapter 6 - Person Administration</i> in the KAMIS User Manual for instructions on changing customer status.

POC Service Line Billing Detail

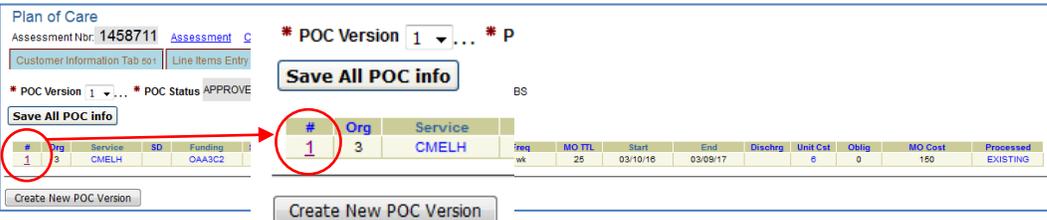
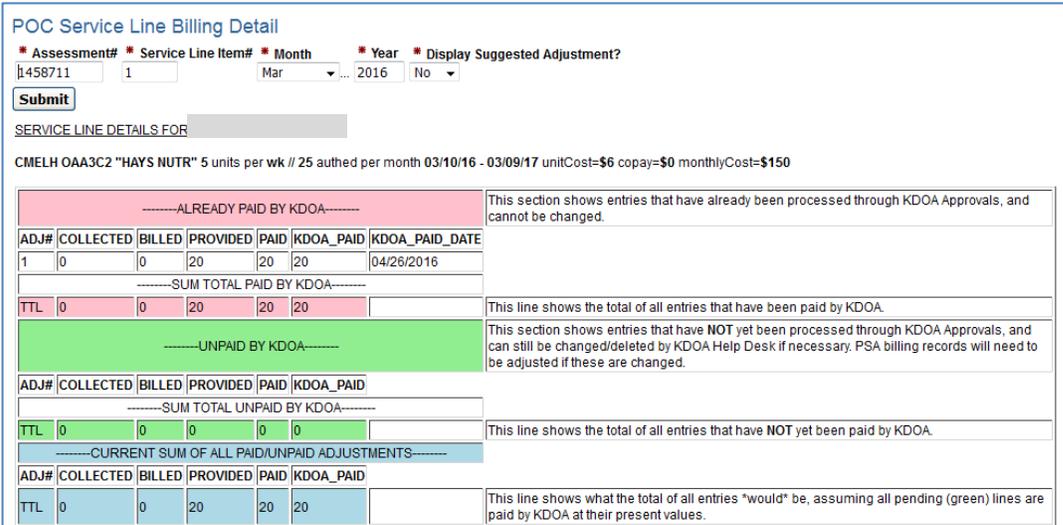
Introduction

If a POC service line has already been billed via KAMIS's Service Provided (225) process, or the organization that entered the line item has already been paid by KDADS for the service, the line may not be not editable.

To determine whether a service line has been billed or KDADS-paid, use the *POC Service Line Billing Detail* feature. It is accessible only from the Multi Line Items Entry page of the POC.

How To

Follow the steps in the table below to open the POC Service Line Billing Detail window for a specific line item entry in a plan of care.

Step	Action	Result																					
1.	Open the <i>Plan of Care</i> via the Customer Forms Listing or from within the POC's associated assessment.	The POC window opens.																					
2.	Click on the Multi Line Items Entry tab.	The tab turns yellow, indicating it is the active tab. The POC service line entry table displays.																					
	 <p>The screenshot shows the 'Plan of Care' window for Assessment Nbr: 1458711. The 'Multi Line Items Entry' tab is selected. A table displays service line items, with the first item (Line # 1, Org 3, Service CMELH) circled in red. A red arrow points from the 'Save All POC info' button to the circled line item.</p>																						
3.	Click on the line number link for the service to be checked.	The <i>POC Service Line Billing Detail</i> page displays.																					
	 <p>The screenshot shows the 'POC Service Line Billing Detail' page for Assessment# 1458711, Service Line Item# 1, Month Mar, Year 2016. It displays a table of payments and adjustments:</p> <table border="1"> <thead> <tr> <th>ADJ#</th> <th>COLLECTED</th> <th>BILLED</th> <th>PROVIDED</th> <th>PAID</th> <th>KDOA_PAID</th> <th>KDOA_PAID_DATE</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>0</td> <td>0</td> <td>20</td> <td>20</td> <td>20</td> <td>04/26/2016</td> </tr> <tr> <td>TTL</td> <td>0</td> <td>0</td> <td>20</td> <td>20</td> <td>20</td> <td></td> </tr> </tbody> </table> <p>Additional sections include 'UNPAID BY KDOA' (all zeros) and 'CURRENT SUM OF ALL PAID/UNPAID ADJUSTMENTS' (all zeros).</p>		ADJ#	COLLECTED	BILLED	PROVIDED	PAID	KDOA_PAID	KDOA_PAID_DATE	1	0	0	20	20	20	04/26/2016	TTL	0	0	20	20	20	
ADJ#	COLLECTED	BILLED	PROVIDED	PAID	KDOA_PAID	KDOA_PAID_DATE																	
1	0	0	20	20	20	04/26/2016																	
TTL	0	0	20	20	20																		

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POC Service Line Billing Detail, continued

Billing Detail Regions

There are three regions in the POC Service Line Billing Detail window. This table explains each region, and how the entry affects the ability to edit the service line in the POC.

Region	Definition	Line Editable?
ALREADY PAID BY KDOA	This is the number of units KDADS paid from the green region, and the date KDADS processed the payment.	If this region has an entry, the service line item is NOT editable in the POC.
UNPAID BY KDOA	This is the number of units billed with the <i>Service Provided (225)</i> process, and any adjustments that have been made via the <i>Supplemental Billing</i> process.	If any units billed are removed via Supplemental Billing (negative units), and KDADS removes the service provided records from the KAMIS database, the line can be edited. Contact the KDADS Help Desk for assistance.
CURRENT SUM OF ALL PAID/ UNPAID ADJUSTMENTS	This is the sum of all entries found in the Unpaid by KDOA (green) region. If KDADS pays all entries from the green region, these entries will match the pink entries, and the green entries will be removed.	If no units are billed yet (0's displayed) then the line can be edited without KDADS Help Desk intervention.) Otherwise, see the UNPAID BY KDOA (pink) row above.

Example 1 – Units Have Been Paid by KDADS

The CMEL line cannot be changed because KDADS has already paid the service units for April 2016. However, it is possible, depending on billing detail after April, that the services could be ended and a new service line added for CMEL, effectively changing the line item entry details from May going forward.

POC Service Line Billing Detail

* Assessment# 1467193 * Service Line Item# 1 * Month Apr * Year 2016 * Display Suggested Adjustment? No

Submit

SERVICE LINE DETAILS FOR _____

CMEL OAA3C1 "HIGHLAND PARK" 7 units per w // 35 authed per month 04/27/16 - 04/26/17 unitCost=\$7.77 copay=\$0 monthlyCost=\$271.95

-----ALREADY PAID BY KDOA-----						
ADJ#	COLLECTED	BILLED	PROVIDED	PAID	KDOA_PAID	KDOA_PAID_DATE
1	0	0	20	20	20	05/26/2016
-----SUM TOTAL PAID BY KDOA-----						
TTL	0	0	20	20	20	

This section shows entries that have already been processed through KDOA Approvals, and cannot be changed.

This line shows the total of all entries that have been paid by KDOA.

-----UNPAID BY KDOA-----						
ADJ#	COLLECTED	BILLED	PROVIDED	PAID	KDOA_PAID	
-----SUM TOTAL UNPAID BY KDOA-----						
TTL	0	0	0	0	0	

This section shows entries that have **NOT** yet been processed through KDOA Approvals, and can still be changed/deleted by KDOA Help Desk if necessary. FSA billing records will need to be adjusted if these are changed.

This line shows the total of all entries that have **NOT** yet been paid by KDOA.

-----CURRENT SUM OF ALL PAID/UNPAID ADJUSTMENTS-----						
ADJ#	COLLECTED	BILLED	PROVIDED	PAID	KDOA_PAID	
TTL	0	0	20	20	20	

This line shows what the total of all entries *would* be, assuming all pending (green) lines are paid by KDOA at their present values.

Continued on next page

POC Service Line Billing Detail, continued

Example 2 – Units Have Been Billed [Service Provided (225)]

This CMEL line, as is, cannot be changed because the units have been billed via the Service Provided (225) process for June 2016. However, the units can still be backed out using the Supplemental Billing process, and with assistance from KDADS to remove the billing entry from the KAMIS database, the line *would* then be editable. Contact the KDADS Help Desk for assistance with this process.

POC Service Line Billing Detail

* Assessment# 1467193 * Service Line Item# 1 * Month Jun * Year 2016 * Display Suggested Adjustment? No

Submit

SERVICE LINE DETAILS FOR _____

CMEL OAA3C1 "HIGHLAND PARK" 7 units per w // 35 authed per month 04/27/16 - 04/26/17 unitCost=\$7.77 copay=\$0 monthlyCost=\$271.95

-----ALREADY PAID BY KDOA-----						
ADJ#	COLLECTED	BILLED	PROVIDED	PAID	KDOA_PAID	KDOA_PAID_DATE
-----SUM TOTAL PAID BY KDOA-----						
TTL	0	0	0	0	0	
-----UNPAID BY KDOA-----						
ADJ#	COLLECTED	BILLED	PROVIDED	PAID	KDOA_PAID	
1	0	0	21	21		
-----SUM TOTAL UNPAID BY KDOA-----						
TTL	0	0	21	21	0	
-----CURRENT SUM OF ALL PAID/UNPAID ADJUSTMENTS-----						
ADJ#	COLLECTED	BILLED	PROVIDED	PAID	KDOA_PAID	
TTL	0	0	21	21	0	

* If these units were removed using Supplemental Billing, an additional line would display here showing -21 for the 'Provided' and 'Paid' columns.

Example 3 – Units Have NOT Been Billed

The CMEL line can be updated for any entries for July 2016 and beyond (as long as no future months have been billed/paid) because the units for that timeframe have not been billed yet via the Service Provided (225) process.

POC Service Line Billing Detail

* Assessment# 1467193 * Service Line Item# 1 * Month Jul * Year 2016 * Display Suggested Adjustment? No

Submit

SERVICE LINE DETAILS FOR _____

CMEL OAA3C1 "HIGHLAND PARK" 7 units per w // 35 authed per month 04/27/16 - 04/26/17 unitCost=\$7.77 copay=\$0 monthlyCost=\$271.95

-----ALREADY PAID BY KDOA-----						
ADJ#	COLLECTED	BILLED	PROVIDED	PAID	KDOA_PAID	KDOA_PAID_DATE
-----SUM TOTAL PAID BY KDOA-----						
TTL	0	0	0	0	0	
-----UNPAID BY KDOA-----						
ADJ#	COLLECTED	BILLED	PROVIDED	PAID	KDOA_PAID	
TTL	0	0	0	0	0	
-----CURRENT SUM OF ALL PAID/UNPAID ADJUSTMENTS-----						
ADJ#	COLLECTED	BILLED	PROVIDED	PAID	KDOA_PAID	
TTL	0	0	0	0	0	

Service Line Error Messages

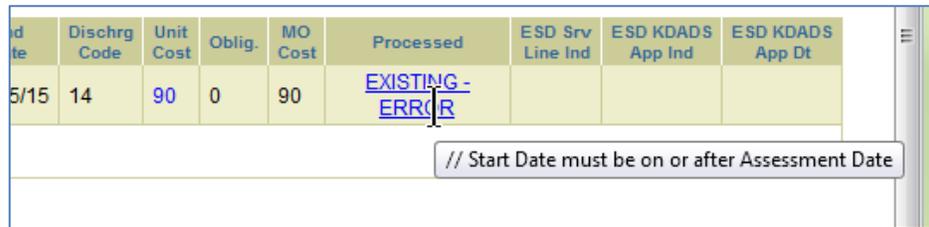
Introduction

Sometimes when a Plan of Care service line is saved, an error occurs. The error prevents the service line from saving to the POC, and unless the error is corrected, the line will not remain on the POC after it is closed. In some cases, an Approved Plan of Care (i.e. it did not have errors when it was first approved) can have an error appear on it, and the issue causing the error must be resolved before the Plan of Care can be approved again, have services billed, or for the service line to show up in reports.

The 'Processed' column in the service line item table indicates when there is an error. The column will still display the processed status, but it will be followed by 'ERROR.'

Important Note

To get more information on why a service line has an error, hover your mouse pointer over the Processed column entry showing 'ERROR' and an explanation of the error will display.



The screenshot shows a table with the following columns: Id, Dischrg Code, Unit Cost, Oblig., MO Cost, Processed, ESD Srv Line Ind, ESD KDADS App Ind, and ESD KDADS App Dt. The 'Processed' column contains the text 'EXISTING - ERROR'. A tooltip is displayed over the 'ERROR' part of the text, containing the message: '// Start Date must be on or after Assessment Date'.

Id	Dischrg Code	Unit Cost	Oblig.	MO Cost	Processed	ESD Srv Line Ind	ESD KDADS App Ind	ESD KDADS App Dt
5/15	14	90	0	90	EXISTING - ERROR			

Examples

Example 1:

An Approved Plan of Care contains a service line with 'EXISTING – ERROR' in the Processed column. At some time after the POC was saved in Approved status, one of the services in the POC has had a price change. The existing end date on the service line now extends beyond the termination date of the old price.

Hover over the 'EXISTING – ERROR' message to see the detail message that explains that the end date on the service line is after the unit cost term date of the price used on this line.

Example 2:

An assessment date is entered incorrectly on a UAI; the Plan of Care is created with service end dates matching the reassessment due date. The assessment date is corrected to an earlier date, and the reassessment due date is adjusted accordingly. The end dates on the POC now extend beyond the reassessment due date.

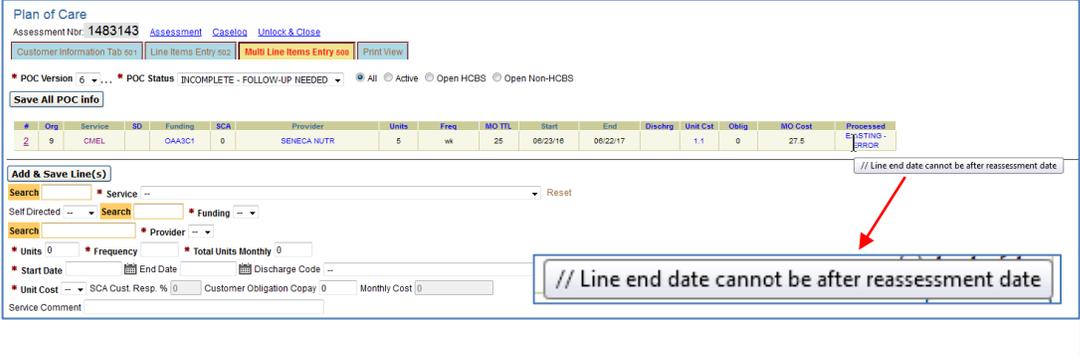
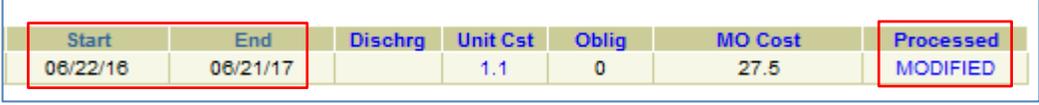
Hover over the 'EXISTING – ERROR' message to see the detail message that explains that the end date cannot be past the reassessment date.

Continued on next page

Service Line Error Messages, continued

How To

Follow the steps in the table below to fix an error on a Plan of Care service line. These instructions use the Multi Line Items Entry page to make the corrections.

Step	Action	Result
1.	Open the Plan of Care.	POC window displays.
2.	Click on the desired Items Entry tab to display the service line items table.	<ul style="list-style-type: none"> Selected tab color changes to yellow Service line items table displays
3.	Hover the mouse pointer over the error message in the Processed column.	Description of what caused the error displays.
	 <p>The screenshot shows the 'Multi Line Items Entry' page for a Plan of Care with Assessment Nbr. 1483143. The status is 'INCOMPLETE - FOLLOW-UP NEEDED'. A table lists service line items, with the first item (ID 2) having a 'Processed' status of 'EXISTING - ERROR'. A red arrow points to a tooltip that says '// Line end date cannot be after reassessment date'.</p>	
	(Skip step 4 below if the POC is already in 'Incomplete – Follow-up needed' status)	
4.	If the POC is in Approved status, create a new POC version.	<ul style="list-style-type: none"> POC Status changes to 'INCOMPLETE...' POC Version number increases by one Service code links are active
5.	Click on the service code link of the service line with the error.	The service line displays in the edit region of the POC window.
6.	Make the necessary change(s) to fix the error.	This may involve just editing the line, or deleting the line and adding a new line.
7.	Save the change(s).	<ul style="list-style-type: none"> The service line is updated The Processed status is updated
	 <p>The screenshot shows a table with columns: Start, End, Dischrg, Unit Cst, Oblig, MO Cost, and Processed. The 'Start' date is 06/22/16 and the 'End' date is 06/21/17. The 'Processed' column shows 'MODIFIED'.</p> <ul style="list-style-type: none"> In this example, the Start and End dates have been updated to reflect the new assessment/reassessment dates. The Processed column shows the line has been modified. 	
8.	Repeat steps 5-7 for other lines as needed.	
9.	Change the POC Status to 'Approved.'	
10.	Click on the Save All POC info button.	<ul style="list-style-type: none"> The POC saves in Approved status The Processed entry changes to 'EXISTING' The services cannot be edited

Refer to earlier sections in this chapter if needed - *Modifying a Plan of Care, Deleting a Service Line, Saving a Plan of Care, and/or Entering Service Line Items.*