

# Chapter 19 – Part B

## 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.

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# The Plan of Care

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

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

**Example:**

On January 4, a customer has an UAI Assessment and the Plan of Care. The Re-assessment date is January 3.

On June 20, another UAI for the same customer is completed. At that time, the June Plan of Care takes precedence. Therefore, all of the services in the January Plan of Care will need to be manually closed.

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

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

There has been a column added in the Plan of Care table. The Processed Status Column. The following are the status descriptions:

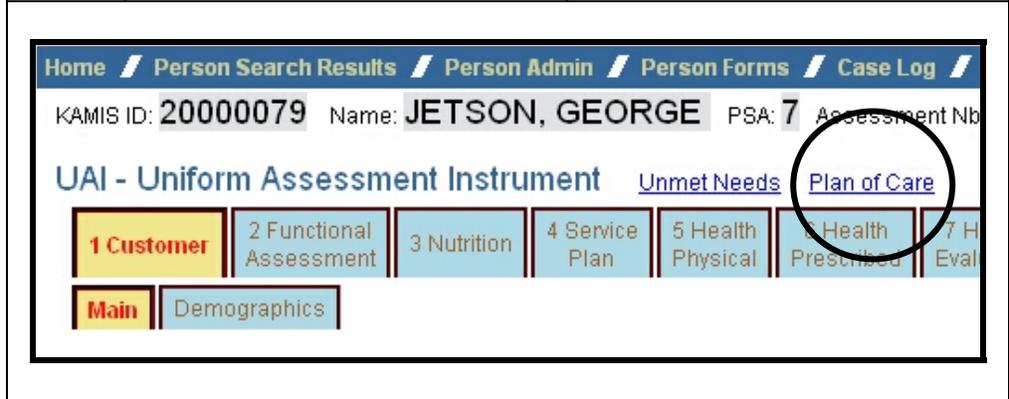
- **New** – The line item has just been added to the table but not saved to the database.
  - **Existing** – The line item has been saved to the database.
  - **Modified** – The line has just been modified but not saved to the database.
  - **Existing – Error** – This status will indicate that at one time the line item was saved to the database, however, during that point in time to the present something in KAMIS has changed to cause an error. The detail is shown by placing the mouse pointer over the column status. (example: The unit cost has changed)
  - **Modified – Error** – This status will indicate that the modification to the line item caused an error. The detail is shown by placing the mouse pointer over the column status.
-

# Accessing the Plan of Care Through an Assessment Form

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

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

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



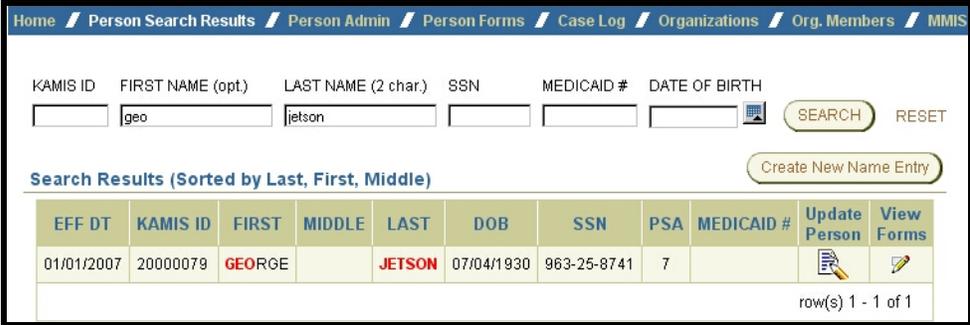
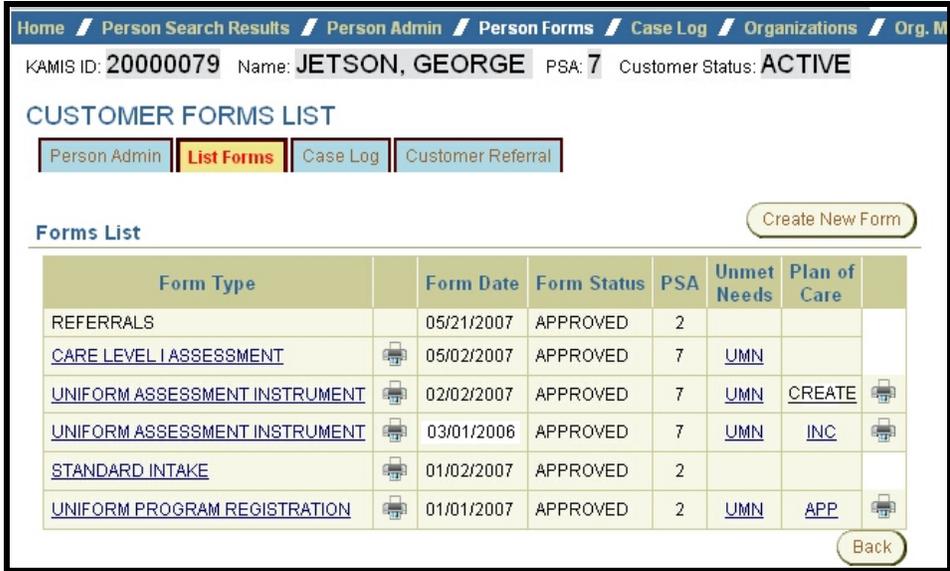
# Accessing the Plan of Care Through Person Forms Listing

## Introduction

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

## How To

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

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



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

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### How To (continued)

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

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# New Plan of Care

## Introduction

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

## New Plan of Care Page

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

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

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

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

Closes the Plan of Care Window

Assessment Information

Navigational Tab

Informational Data (Required for HCBS/FE funded POC)

Action Buttons

Continued on next page

# Customer Information Navigation Tab

## CUSTOMER INFORMATION NAVIGATION TAB

Links to other forms

Customer & Assessment Information

POC Status & Version Number

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

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

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

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

Customer JETSON, GEORGE Address County  
SSN 963258741 Medicaid# 00101297388 Phone#  
Emergency Contact JETSON, JANE Relationship SPOUSE Phone 785-296-6459

Person's Original Effective Date 01/01/2007  
Assessment Type UNIFORM ASSESSMENT INSTRUMENT  
Assessment Date 02/02/2007 Reassessment Due Date 02/01/2008

POC Version 5 POC Status APPROVED

SRS Office LAWRENCE SRS AREA OFFICE, 3066  
Case Mgr SPACELY, COSMO - SPACE NEEDS II  
Deinst/Divert DIVERTED  
MMIS Self Directed No  
Refer From  
Refer To

\* Effective Date 02/02/2007 Termination Date

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

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

Assessment Information

Medicaid Required Fields

The EDS Inquiry Button applies only to HBS/FE funded Plans of Care.

# Line Items Navigation Tab

## LINE ITEMS NAVIGATION TAB

**Filters**  
(Displays only selected lines)

Links to other forms

Plan of Care Version and Status Heading

Service Line Items  
(All lines will be displayed)

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

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

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

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

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

Show MMIS Update

P S A	Service	S D	Funding	S C A	D I S	Provider	U n i t s	P e r	TTL Units Mo.	Start Date	End Date	D s c o g	S t r	E r r	MMIS Save Date	C o s t	C- p a y	Mo. Cost	Processed
7	ASMT	N	MEDADM	0	N	ECKAAA-AN	10	YEAR	10	02/02/07	02/05/07	14				10	0	100	EXISTING
7	ACCC	N	HCBS/FE	0	N	GENERIC ACCC PROVIDER	1	MO	0	03/01/07			A		05/03/07	392	0	392	EXISTING
7	ATOR1X	N	HCBS/FE	0	N	ASSISTED HEALTHCARE	20	WEEK	100	03/01/07	04/30/07	27	A		05/27/07	3.18	0	318	EXISTING
7	HMEL		OAA3C2	0		GARNETT SR CTR	6	WEEK	30	07/01/07	10/01/07					3.84	0	115.2	EXISTING
7	ATOR1X	N	HCBS/FE	0	N	ASSISTED HEALTHCARE	20	WEEK	100	05/01/07			P	Y	05/27/07	3.18	56.42	318	EXISTING

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

row(s) 1 - 5 of 5

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

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

**MMIS Error Message**

### Special Features

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

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

Continued on next page

## Line Items Navigation Tab, Continued

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### Special Features (continued)

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

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The EDS Inquiry, Monthly Cost, Update MMIS Buttons and the Refer To and From fields applies only to HBS/FE funded Plans of Care.

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# Data Entry Navigation Tab

## DATA ENTRY NAVIGATION TAB

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

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

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

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

Save All POC info | EDS Inquiry | Monthly Cost

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

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

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

Cancel

Add/Modify Line(s)

Search:  \* Service:

Self Directed:  Search:  \* Funding:

Disaster:  Search:  \* Provider:

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

\* Start Date:  End Date:  Discharge Code:

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

Service Line Items

Modify Service Line Item Data Entry Fields

New Service Line Item Data Entry Fields

### Special Features

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

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

*Continued on next page*

## Data Entry Navigation Tab, Continued

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

The EDS Inquiry, Monthly Cost, Update MMIS Buttons and the Refer To and From fields applies only to HBS/FE funded Plans of Care.

# Print View Navigation Tab

## PRINT VIEW NAVIGATION TAB

(Will open in a separate window)



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



← Print page link icon

**Plan of Care**

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

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

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

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

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

Options  
 Display Latest POC Only  Yes  No

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

### Special Features

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

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

# Starting a New Plan of Care

## Introduction

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

## How to

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

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

POC - JETSON, GEORGE - UAI - 01/31/2007 - 10882283511555990672 05/29/2007 09:16:53 - Microsoft Internet Explorer

**KAMIS IT** User Test Ver 2.810 2007/05/29@09:16:53 Aging.State.Ks.US New Window  
Welcome: Training User [07] Logged in at: 2007/05/29@08:38:50 CITRIX

KAMIS ID: 20000079 Name: JETSON, GEORGE Primary PSA: 7 Assessment Date: 01/31/2007  
[POC - PLAN OF CARE](#) [Assessment](#) [Unmet Needs](#) [CaseLog](#)

**Customer Information**

Customer: JETSON, GEORGE Address: 102 SKYPAD APARTMENTS County: SN  
 SSN: 963258741 Medicaid#: Phone#: 7852964987  
 Emergency Contact: JETSON, JUDY Relationship: DAUGHTER Phone: 785-296-4987

Person's Original Effective Date: 01/01/2007  
 Assessment Type: UNIFORM ASSESSMENT INSTRUMENT  
 Assessment Date: 01/31/2007 Reassessment Due Date: 01/30/2008  
 POC Version 1 POC Status: INCOMPLETE - FOLLOW-UP NEEDED

SRS Office: [Dropdown]  
 Case Mgr: [Dropdown]  
 Deinst/Divert: [Dropdown]  
 MMS Self Directed: [Dropdown]  
 Refer From: [Dropdown]  
 Refer To: [Dropdown]

\* Effective Date: 01/31/2007 [Calendar Icon]  
 [Save] [EDS Inquiry]

# Entering Information in the Customer Page

## Introduction

The information displayed in this section is concerning the customers' personal information. The information is entered previously in Person Administration.

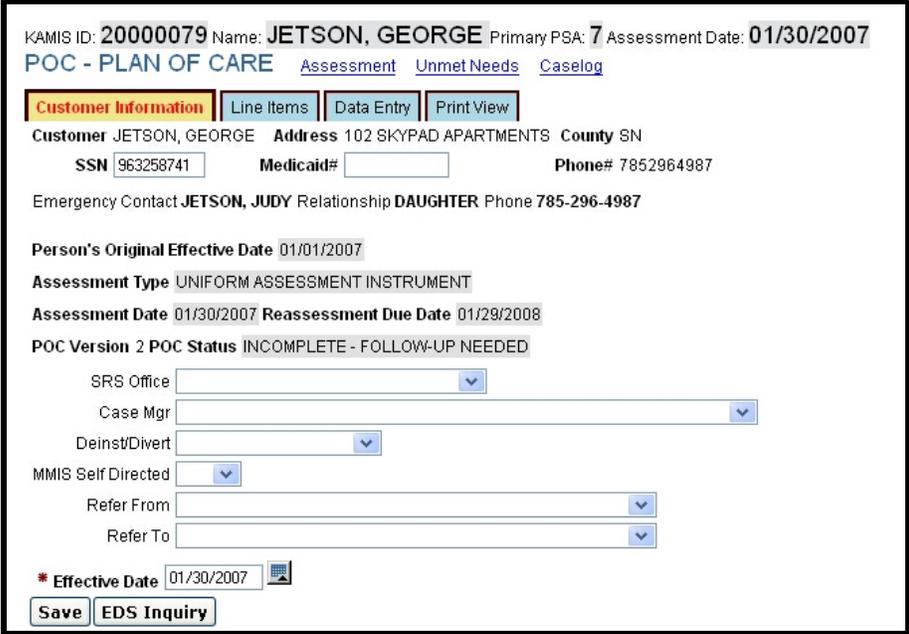
## KAMIS II Change

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

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

## How To

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

Step	Action	Result
1.	Click on the <b>Customer Information Navigation Tab</b> to make it active.	
 <p>The screenshot shows a web interface for customer information. At the top, it displays 'KAMIS ID: 20000079 Name: JETSON, GEORGE Primary PSA: 7 Assessment Date: 01/30/2007'. Below this is a navigation bar with tabs: 'Customer Information' (highlighted in orange), 'Line Items', 'Data Entry', and 'Print View'. The main content area shows:         <ul style="list-style-type: none"> <li>Customer: JETSON, GEORGE Address: 102 SKYPAD APARTMENTS County: SN</li> <li>SSN: 963258741 Medicaid#: [empty] Phone#: 7852964987</li> <li>Emergency Contact: JETSON, JUDY Relationship: DAUGHTER Phone: 785-296-4987</li> <li>Person's Original Effective Date: 01/01/2007</li> <li>Assessment Type: UNIFORM ASSESSMENT INSTRUMENT</li> <li>Assessment Date: 01/30/2007 Reassessment Due Date: 01/29/2008</li> <li>POC Version: 2 POC Status: INCOMPLETE - FOLLOW-UP NEEDED</li> <li>Fields for SRS Office, Case Mgr, Deinst/Divert, MMIS Self Directed, Refer From, and Refer To, each with a dropdown arrow.</li> <li>* Effective Date: 01/30/2007 with a calendar icon.</li> <li>Buttons for 'Save' and 'EDS Inquiry' at the bottom.</li> </ul> </p>		

*Continued on next page*

## Entering Information in the Customer Page, Continued

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### How To (continued)

<b>Step</b>	<b>Action</b>	<b>Result</b>
2.	Enter <b>Social Security Number</b> , if needed.	This area will be available only if the information is absent.
3.	Enter the <b>Plan of Care Effective Date</b> .	This defaults to the assessment date.
4.	Click on the <b>Save</b> button.	The Plan of Care is created. All other Navigational tabs are displayed.
5.	Click on either the Line Items or Data Entry Navigation Tab.	Information fields will be displayed.

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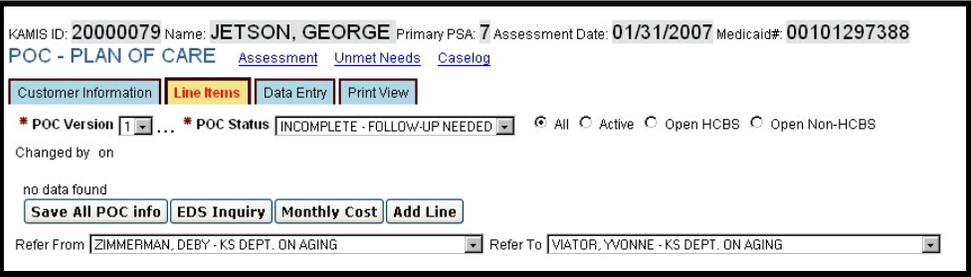
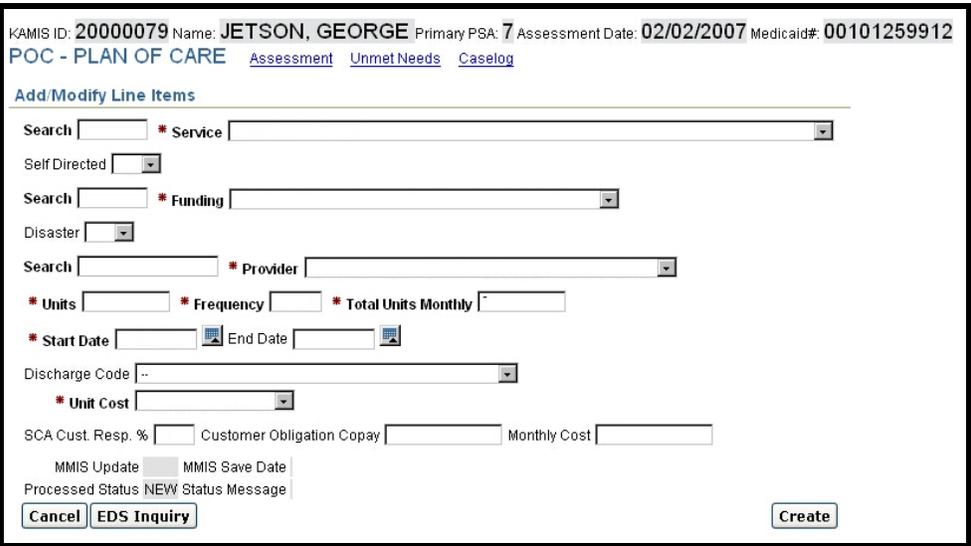
# Entering Service Line Items – Line Items Navigation Tab

## Introduction

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

## How To

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

Step	Action	Result
1.	Click on the Line Items Navigation Tab.	Makes the tab active.
 <p>KAMIS ID: 20000079 Name: JETSON, GEORGE Primary PSA: 7 Assessment Date: 01/31/2007 Medicaid#: 00101297388  <b>POC - PLAN OF CARE</b> <a href="#">Assessment</a> <a href="#">Unmet Needs</a> <a href="#">Caselog</a>  Customer Information   <b>Line Items</b>   Data Entry   Print View  * 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 on  no data found  Save All POC info EDS Inquiry Monthly Cost Add Line  Refer From ZIMMERMAN, DEBY - KS DEPT. ON AGING Refer To VIATOR, YVONNE - KS DEPT. ON AGING</p>		
2.	Click on the Add line button.	Add / Modify line items page is displayed.
 <p>KAMIS ID: 20000079 Name: JETSON, GEORGE Primary PSA: 7 Assessment Date: 02/02/2007 Medicaid#: 00101259912  <b>POC - PLAN OF CARE</b> <a href="#">Assessment</a> <a href="#">Unmet Needs</a> <a href="#">Caselog</a>  Add/Modify Line Items  Search <input type="text"/> * Service <input type="text"/>  Self Directed <input type="text"/>  Search <input type="text"/> * Funding <input type="text"/>  Disaster <input type="text"/>  Search <input type="text"/> * Provider <input type="text"/>  * Units <input type="text"/> * Frequency <input type="text"/> * Total Units Monthly <input type="text"/>  * Start Date <input type="text"/> End Date <input type="text"/>  Discharge Code <input type="text"/>  * Unit Cost <input type="text"/>  SCA Cust. Resp. % <input type="text"/> Customer Obligation Copay <input type="text"/> Monthly Cost <input type="text"/>  MMIS Update <input type="text"/> MMIS Save Date <input type="text"/>  Processed Status NEW Status Message <input type="text"/>  Cancel EDS Inquiry Create</p>		

*Continued on next page*

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

### How To (continued)

Step	Action	Result
3.	<b>Service Code</b> – Either search or select the appropriate service from the drop down dialog box.	The complete service title and unit standards are displayed.
4.	<b>Self-Direct</b> – Select Y or N	HCBS/FE Required Field.
5.	<b>Funding Source</b> – Either search or select the appropriate funding from the drop down dialog box.	Only the sources associated with the service will be displayed.
6.	<b>Disaster</b> – Select Y or N	
7.	<b>Provider</b> – Select the appropriate Provider from the drop down dialog box.	Only the providers that provide the service/funding combination selected will be displayed.

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

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

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

Step	Action	Result
8.	<b>Units</b> - Enter the number of units.	Required
9.	<b>Frequency</b> - Enter the Frequency of the Service.	Required
10.	<b>Total Units Monthly</b> - Enter the number of total units.	Required
11.	<b>Start and End Date</b> - Enter the date the services are to start and end.	Required

*Continued on next page*

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

---

### How To (continued)

Step	Action	Result
12.	MMIS Update - System Generated.	For HCBS/FE.
13.	MMIS Save Date - System Generated	For HCBS/FE.
14.	<b>Discharge Code</b> - Enter if appropriate.	Required if the Service is ending. A short explanation is listed in the discharge code drop down dialog box or see the Appendix for the listing of Discharge Codes.
15.	<b>Cost of Unit</b> - Select the appropriate cost from drop down dialog box.	Populated by the System per Provider Service.

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

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*Continued on next page*

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

Step	Action	Result
16.	<b>Customer Obligation Co-Pay</b>	This field is system generated according to the SCA Percentage.
17.	<b>Monthly Cost - Calculated by the System.</b>	The calculation is: Total Units Monthly multiplied by the Cost of Unit minus any Customer Obligation Co-Pay.

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

**Add/Modify Line Items**

Search  \* Service ACCC - ACCC - 1 UNIT

Self Directed

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

Disaster

Search  \* Provider GENERIC ACCC PROVIDER 10000000A Edt 01/01/97 Tdt

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

\* Start Date 03/01/2007 End Date

Discharge Code

\* Unit Cost 392 Edt 01/01/05 Tdt

SCA Cust. Resp. %  Customer Obligation Copay  Monthly Cost

MMIS Update  MMIS Save Date

Processed Status NEW Status Message

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

KAMIS ID: 20000079 Name: JETSON, GEORGE Primary PSA: 7 Assessment Date: 01/30/2007  
 POC - PLAN OF CARE [Assessment](#) [Unmet Needs](#) [Caselog](#)

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

\* POC Version 2 \* POC Status INCOMPLETE - FOLLOW-UP NEEDED  All  Active  Open HCBS  Open Non-HCBS

Changed by HTMLDB\_PUBLIC\_U on 06/03/2007 23:09:27

PSA	Service	SD	Funding	SCA	Dis	Provider	Units	Per	TTL	Start	End	Dis	ES	MMIS	Co	Co	Mo.	Processed
							ts	er	Units	Date	Date	cg	tr	Save	st	pa	Cost	
7	ASMT		SCA	0	N	EAST CENTRAL AAA	2	YEAR	2	01/30/07	02/02/07	14			40	0	80	EXISTING
7	HMKR		SCA	20	N	COMMUNITY CARE CONNECTION	20	WEEK	100	02/01/07	01/29/08				13.35	267	1068	EXISTING
7	ATCR		SCA	20	N	COMMUNITY CARE CONNECTION	20	WEEK	100	02/01/07	01/29/08				14.1	282	1410	NEW

row(s) 1 - 3 of 3

Refer From  Refer To

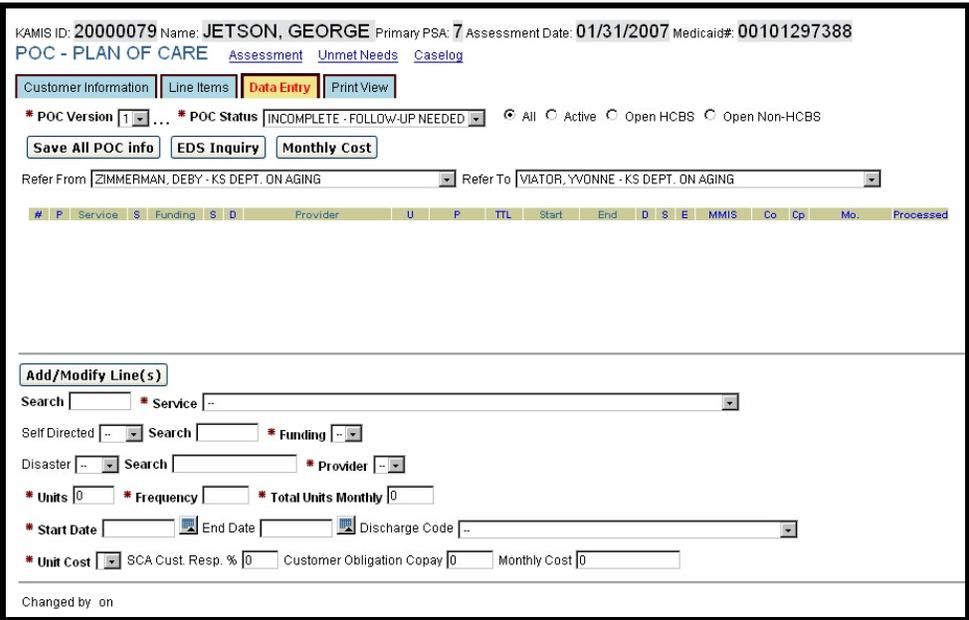
# Entering Service Line Items – Data Entry Navigation Tab

## Introduction

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

## How To

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

Step	Action	Result
1.	Click on the Data Entry Navigation Tab.	Makes the tab active.
		
4.	The data entry fields are available at the bottom of the page. Begin entering the data.	
5.	<b>Service Code</b> – Either search or select the appropriate service from the drop down dialog box.	The complete service title and unit standards are displayed.
6.	<b>Self-Direct</b> – Select Y or N	Required Field for HCBS.
7.	<b>Funding Source</b> – Either search or select the appropriate funding from the drop down dialog box.	Only the sources associated with the service will be displayed.

*Continued on next page*

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

### How To (continued)

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

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

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

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

Step	Action	Result
10.	<b>Units</b> - Enter the number of units.	Required
11.	<b>Frequency</b> - Enter the Frequency of the Service.	Required
12.	<b>Total Units Monthly</b> - Enter the number of total units.	Required
13.	<b>Start and End Date</b> - Enter the date the services are to start and end.	Required
14.	MMIS Update - System Generated.	For HCBS/FE.
15.	MMIS Save Date - System Generated	For HCBS/FE.

*Continued on next page*

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

### How To (continued)

Step	Action	Result
16.	<b>Discharge Code</b> - Enter if appropriate.	Required if the Service is ending. A short explanation is listed in the discharge code drop down dialog box or see the Appendix for the listing of Discharge Codes.
17.	<b>Cost of Unit</b> - Select the appropriate cost from drop down dialog box.	Populated by the System per Provider Service.

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

Step	Action	Result
18.	<b>Customer Obligation Co-Pay</b> - Enter the Obligation if applicable.	This field is system generated according to the SCA Percentage.

*Continued on next page*

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

## How To (continued)

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

KAMIS ID: 20000079 Name: JETSON, GEORGE Primary PSA: 7 Assessment Date: 01/30/2007  
 POC - PLAN OF CARE [Assessment](#) [Unmet Needs](#) [Caselog](#)

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

\* POC Version 2 ... \* POC Status INCOMPLETE - FOLLOW-UP NEEDED  All  Active  Open HCBS  Open Non-HCBS

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

Refer From  Refer To

#	P	Service	S	Funding	S	D	Provider	U	P	TTL	Start	End	D	S	E	MMIS	Co	Cp	Mo	Processed
1	7	ASMT		SCA	0	N	EAST CENTRAL AAA	2	YEAR	2	01/30/07	02/02/07	14				40	0	80	EXISTING
2	7	HMKR		SCA	20	N	COMMUNITY CARE CONNECTION	20	WEEK	100	02/01/07	01/29/08					13.35	267	1088	EXISTING

**Add/Modify Line(s)**

Search  \* Service ATCR - ATTENDANT CARE AND/OR PERSONAL - 1 HOUR

Self Directed  Search  \* Funding SCA - SENIOR CARE ACT

Disaster  Search  \* Provider COMMUNITY CARE CONNECTION 100026530C Edt 01/02/02 Tdt

\* Units 20 \* Frequency WEEK \* Total Units Monthly 1000

\* Start Date 02/01/2007 End Date 01/29/2008 Discharge Code ...

\* Unit Cost 14.1 Edt 07/01/02 Tdt SCA Cust. Resp. % 20 Customer Obligation Copay 2820 Monthly Cost 11280

*Continued on next page*

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

## How To (continued)

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

KAMIS ID: 20000079 Name: JETSON, GEORGE Primary PSA: 7 Assessment Date: 01/30/2007  
 POC - PLAN OF CARE [Assessment](#) [Unmet Needs](#) [Caselog](#)

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

\* POC Version 2 ... \* POC Status INCOMPLETE - FOLLOW-UP NEEDED  All  Active  Open HCBS  Open Non-HCBS

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

Refer From  Refer To

#	P	Service	S	Funding	S	D	Provider	U	P	TTL	Start	End	D	S	E	MMIS	Co	Cp	Mo	Processed
1	7	ASMT		SCA	0	N	EAST CENTRAL AAA	2	YEAR	2	01/30/07	02/02/07	14				40	0	80	EXISTING
2	7	HMKR		SCA	20	N	COMMUNITY CARE CONNECTION	20	WEEK	100	02/01/07	01/29/08					13.35	267	1068	EXISTING
3	7	ATCR		SCA	20	N	COMMUNITY CARE CONNECTION	20	WEEK	1000	02/01/07	01/29/08					14.1	2820	11280	NEW

**Add/Modify Line(s)**

Search  \* Service

Self Directed  Search  \* Funding

Disaster  Search  \* Provider

\* Units  \* Frequency  \* Total Units Monthly

\* Start Date  End Date  Discharge Code

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

# Saving a Plan of Care

## Introduction

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

## How To

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

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

KAMIS ID: 20000079 Name: JETSON, GEORGE Primary PSA: 7 Assessment Date: 01/30/2007  
 POC - PLAN OF CARE Assessment Unmet Needs Caselog

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

\* POC Version 2 ... \* POC Status APPROVED  All  Active  Open HCBS  Open Non-HCBS **Create New POC Version**

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

Refer From [ ] Refer To [ ]

Rows Processed 3 Rows Errors 0

#	P	Service	S	Funding	S	D	Provider	U	P	TTL	Start	End	D	S	E	MMIS	Co	Cp	Mo.	Processed
1	7	ASMT		SCA	0	N	EAST CENTRAL AAA	2	YEAR	2	01/30/07	02/02/07	14				40	0	80	EXISTING
2	7	HMKR		SCA	20	N	COMMUNITY CARE CONNECTION	20	WEEK	100	02/01/07	01/29/08					13.35	267	1068	EXISTING
3	7	ATCR		SCA	20	N	COMMUNITY CARE CONNECTION	20	WEEK	1000	02/01/07	01/29/08					14.1	2820	11280	EXISTING

# Modifying a Plan of Care

---

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

---

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

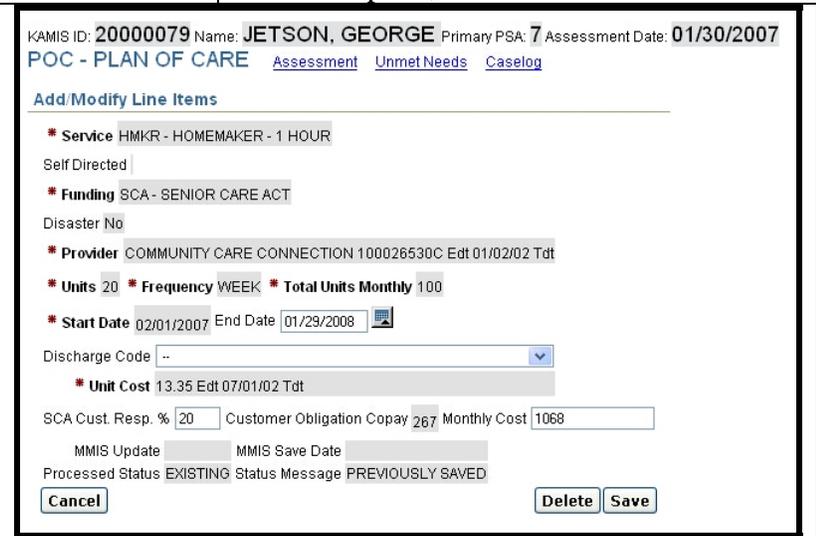
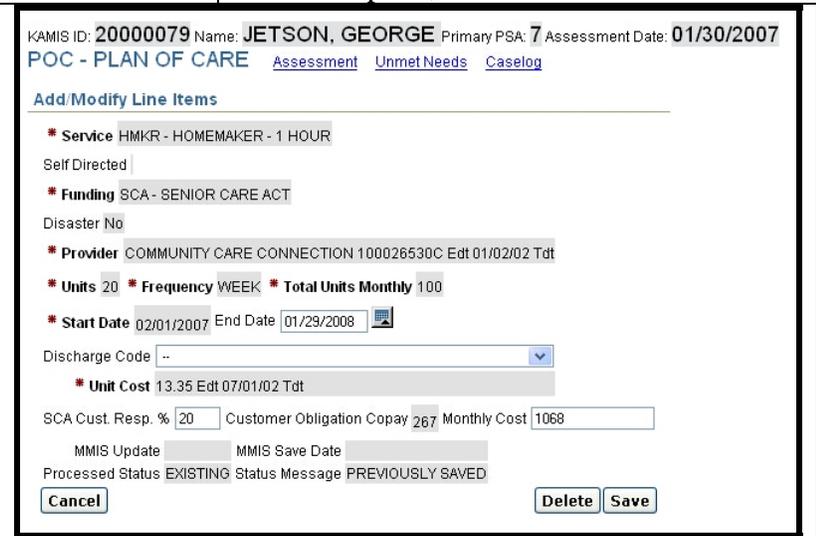
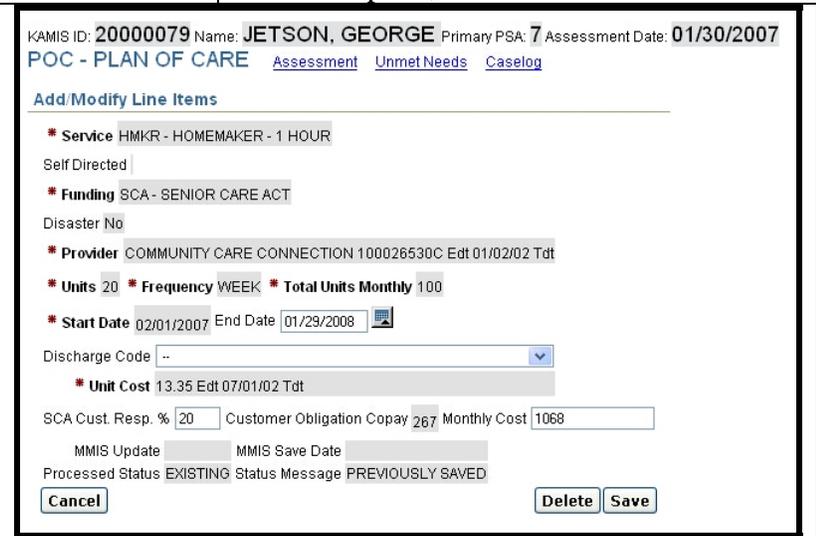
Step	Action	Result
1.	Open existing Plan of Care. Click on either the Line Items or Data Entry Navigation tab.	Makes the tab active.
2.	Click on the <b>Create New POC</b> button.	New version will be created with action buttons displayed. The page will return back to the Customer Information Page to reset the data.
3.	Click back to the Navigation tab of choice.	Page is displayed.
4.	In the Service Table locate the service line that will be modified.	

---

*Continued on next page*

# Modifying a Plan of Care, Continued

## How To (continued)

Step	Action	Result										
5.	Select the line for modification by clicking on the service code (ATCR, HMKR, etc.) link.	Line will become editable according to the navigational tab.										
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th data-bbox="570 604 786 678">Navigation Tab</th> <th data-bbox="786 604 1386 678">Action</th> </tr> </thead> <tbody> <tr> <td data-bbox="570 678 786 751">Line Items</td> <td data-bbox="786 678 1386 751">The Add / Modify Page will be displayed. When complete, click on the <b>Save</b> button.</td> </tr> <tr> <td colspan="2" data-bbox="570 751 1386 1287">  </td> </tr> <tr> <td data-bbox="570 1287 786 1402">Data Entry</td> <td data-bbox="786 1287 1386 1402">The modify regions will be displayed. When complete, click on the <b>Add/Modify Line(s)</b> button.</td> </tr> <tr> <td colspan="2" data-bbox="570 1402 1386 1528">  </td> </tr> </tbody> </table>			Navigation Tab	Action	Line Items	The Add / Modify Page will be displayed. When complete, click on the <b>Save</b> button.			Data Entry	The modify regions will be displayed. When complete, click on the <b>Add/Modify Line(s)</b> button.		
Navigation Tab	Action											
Line Items	The Add / Modify Page will be displayed. When complete, click on the <b>Save</b> button.											
												
Data Entry	The modify regions will be displayed. When complete, click on the <b>Add/Modify Line(s)</b> button.											
												

Continued on next page

## Modifying a Plan of Care, Continued

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### How To (continued)

Step	Action	Result												
6.	Only certain fields are editable	Fields editable:												
	<table border="1"> <tr> <td>SRS Office</td> <td>Units</td> </tr> <tr> <td>Case Manager</td> <td>Frequency</td> </tr> <tr> <td>Deinst/Divert</td> <td>Total Units Monthly</td> </tr> <tr> <td>MMIS Self-Direct Indicator</td> <td>End Date</td> </tr> <tr> <td>Refer To and Refer From</td> <td>Discharge Code</td> </tr> <tr> <td colspan="2" style="text-align: center;">Customer Obligation Copay</td> </tr> </table>	SRS Office	Units	Case Manager	Frequency	Deinst/Divert	Total Units Monthly	MMIS Self-Direct Indicator	End Date	Refer To and Refer From	Discharge Code	Customer Obligation Copay		
SRS Office	Units													
Case Manager	Frequency													
Deinst/Divert	Total Units Monthly													
MMIS Self-Direct Indicator	End Date													
Refer To and Refer From	Discharge Code													
Customer Obligation Copay														
7.	Click on <b>Add/Modify Line(s)</b> or the <b>Save</b> button when the changes are complete.	The modified information will be added to the line item in the table.												
8.	Change <b>POC Status</b> to <b>Approved</b> .													
9.	Press the <b>Save All POC Info</b> button.	Will save the Plan of Care.												

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# Line Deletion in KAMIS

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## Introduction

With KAMIS II it will be possible to delete a service line item if a payment has not been processed. The service line item will be retained on the previous Plan of Care versions for history. The line item will not appear on the POC version if it is deleted prior to clicking on the Save All POC Info button.

---

## How To

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

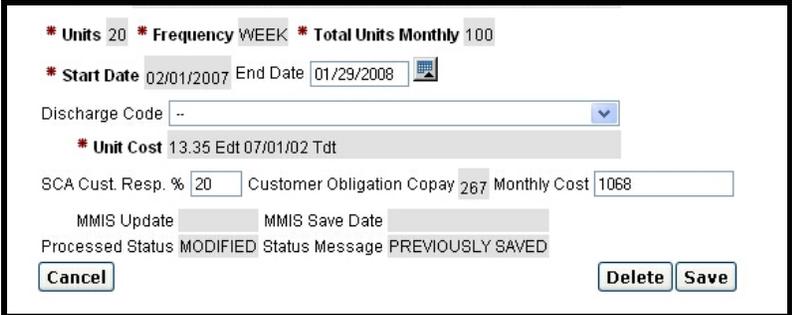
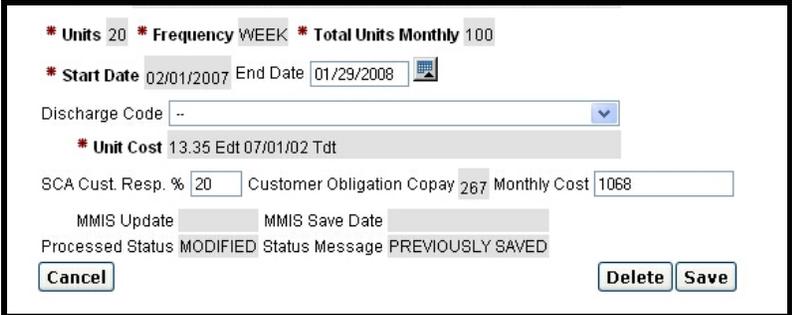
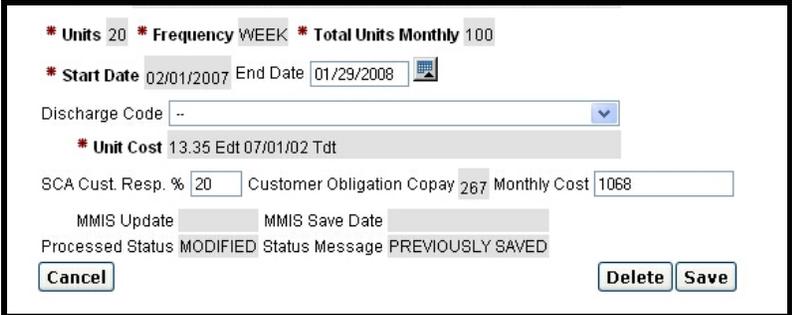
Step	Action	Result
1.	Open existing Plan of Care. Click on either the Line Items or Data Entry Navigation tab.	Makes the tab active.
2.	Click on the <b>Create New POC</b> button.	New version will be created with action buttons displayed. The page will return back to the Customer Information tab to reset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

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*Continued on next page*

# Line Deletion in KAMIS, Continued

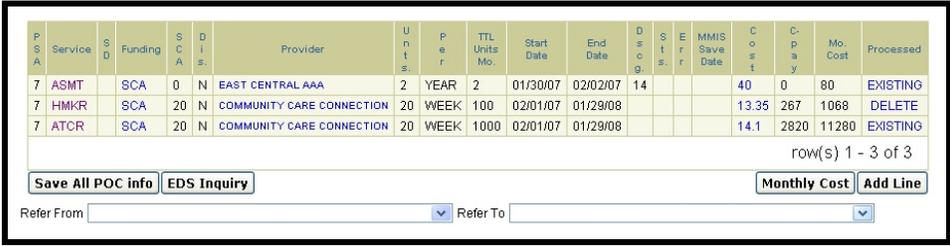
## How To (continued)

Step	Action	Result										
5.	Click on the <b>service code</b> (ATCR, HMKR, etc.) of the service line item to modify.	See description below										
	<table border="1"> <thead> <tr> <th data-bbox="568 604 786 678">Navigation Tab</th> <th data-bbox="786 604 1386 678">Action</th> </tr> </thead> <tbody> <tr> <td data-bbox="568 678 786 751">Line Items</td> <td data-bbox="786 678 1386 751">Click on the <b>Delete</b> button. A delete confirmation message will be displayed.</td> </tr> <tr> <td colspan="2" data-bbox="568 751 1386 1150">  </td> </tr> <tr> <td data-bbox="568 1150 786 1224">Data Entry</td> <td data-bbox="786 1150 1386 1224">Click on the <b>Delete</b> check box. Then click on the <b>Add/Modify Line(s)</b> button.</td> </tr> <tr> <td colspan="2" data-bbox="568 1224 1386 1444">  </td> </tr> </tbody> </table>	Navigation Tab	Action	Line Items	Click on the <b>Delete</b> button. A delete confirmation message will be displayed.			Data Entry	Click on the <b>Delete</b> check box. Then click on the <b>Add/Modify Line(s)</b> button.			
Navigation Tab	Action											
Line Items	Click on the <b>Delete</b> button. A delete confirmation message will be displayed.											
												
Data Entry	Click on the <b>Delete</b> check box. Then click on the <b>Add/Modify Line(s)</b> button.											
												

*Continued on next page*

# Line Deletion in KAMIS, Continued

## How To (continued)

Step	Action	Result
6.	The modified information will be added to the line item in the table.	The Processed column will indicate delete.
		
7.	Change <b>POC Status</b> to <b>Approved</b> .	
8.	Press the <b>Save All POC Info</b> button.	Will save the Plan of Care and the line will be deleted from the Plan of Care version.

## Closing a Plan of Care – Reassessment

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

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

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

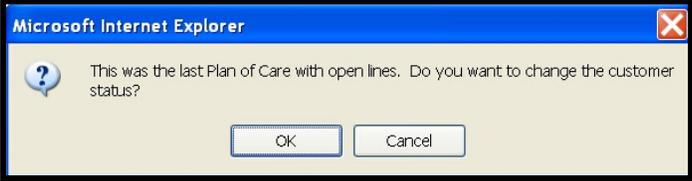
Step	Action	Result
1.	Open existing Plan of Care.	
2.	On the Line Item Page, select the <b>Create New POC</b> button.	New version will be created with action buttons displayed.
3.	In the Service Line Item table locate all open service lines that will be closed.	Follow the instructions on how to modify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

*Continued on next page*

## Closing a Plan of Care – Reassessment, Continued

---

### How to (continued)

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

---

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

---

## Introduction

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

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

---

## How to

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

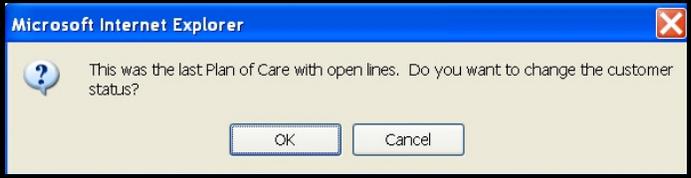
Step	Action	Result
1.	Open existing Plan of Care.	
2.	On the Line Item Page, select the <b>Create New POC</b> button.	New version will be created with action buttons displayed.
3.	Close all open service lines items.	Follow the instructions on how to modify a Plan of Care.
4.	Change <b>POC Status</b> to Approved.	

---

*Continued on next page*

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

### How to (continued)

Step	Action	Result
5.	Press the <b>Save All POC Info</b> button.	Message will display stating that this is the last Plan of Care open and does the customers status needs to be changed.
		
6.	Since this Plan of Care is being closed due to the person becoming inactive or deceased, click on <b>OK</b> .	<p>Will continue to save the Plan of Care.</p> <p>In addition the page will be forwarded to the Person Administration page.</p> <p>See Chapter 6 – Person Administrations for instructions on changing a person status.</p>