

# Chapter 29 – Services Provided (225) Data Entry

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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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# Service Provided (225) Overview

## Introduction

Each month Aging and Disability Resource Centers (ADRCs) send the Services Planned Report to all providers that have provided services for their customers during the previous month. After the providers return the report to the ADRC, indicating the *actual* number of units provided, the Service Provided (225) process can then be completed by the ADRC for each provider.

The Service Provided (225) module uses the Plan of Care to determine which customers will display in the 'Pending Services' region for the specified criteria. When the 225 is processed, billing records are created that are then used by the KAMIS Payment Authorization/Approval applications. KDADS Accounting Division staff use these applications to make payments back to the ADRCs.

## Prerequisites

Budget Requirements:

- There must be an Approved Budget in existence for the selected Funding Source.
- There must be an Available Balance sufficient to cover the total amount being billed.

Plan of Care:

- The POC being accessed for the Service Provided billing cannot be locked (i.e. make sure the Plan of Care window is not open; if it is, use the Unlock & Close link to close it.)
- It must be in Approved status.

## Service Provided Regions

The various regions that make up the Service Provided page are shown below.

Selection criteria that determine what Pending Services will display.

Customer service lines that meet the selected criteria (obtained from their current Plan of Care)

Totals (numbers update when 'Recalculate Totals' button is clicked)

Updated Budget Information

### SERVICE PROVIDED (225)

Start New 225 Process - Enter New Criteria

\* NOTE: To change a provider or service/funding, click on the Red "Start New 225 Process - Enter New Criteria" button first.

\* **Organization** 4 - JAYHAWK AREA AGENCY ON AGING    \* **Month** Aug    \* **Year (yyyy)** 2016    \* **Provider Search** jayhawk    \* **Provider** JAYHAWK AREA AGENCY ON AGING ==> 1002605808 TOPEKA  
 JAYHAWK PHARMACY ==> TOPEKA  
 JAYHAWK PLUMBING ==> LAWRENCE

\* **Funding Program (with approved budgets only)** SCA - SENIOR CARE ACT - 183    \* **Service** ASMT - ASSESSMENT-COMPREHENSIVE - 746     Check to Preload Units Auth.    A Selected to list from... ALL Display Supplementals No

Previously Paid Services - Forwards to Report KMS-0006

**Pending Services**

KamisID	Customer	SSN	Start Date	End Date	Dischg. Code	SCA Pct.	PI Bill.	PI Coll.	Units Prov.	Unit Cost	Units Auth.	Units Paid	Paid Date	Proc Status
PHI redacted			08/02/2016	08/02/2016	14	100				16.5	14			
			10/28/2015	10/27/2016	14	0				16.5	18.5			
			08/02/2016	08/03/2016	14	100				16.5	20			
			08/02/2016	08/09/2016	14	0				16.5	21			
			04/13/2016	04/12/2017	14	0				16.5	16			
			07/28/2016	08/01/2016	14	100				16.5	20.5			
			08/27/2015	08/26/2016	14	0				16.5	24.5			
<b>PENDING TOTALS:</b>			-	-	-	-	0	0	0	-	134.5	0	\$0	-
KamisID	Customer	SSN	Start Date	End Date	Dischg. Code	SCA Pct.	PI Bill.	PI Coll.	Units Prov.	Unit Cost	Units Auth.	Units Paid	Paid Date	Proc Status
<b>COMBINED TOTALS:</b>			-	-	-	-	0	0	0	-	134.5	0	\$0	-
Period Start Date	Period End Date	Period Close Date	Budget Remaining	Est. Budget Remaining										
07/01/2016	06/30/2017	08/31/2017	573695.69	573695.69										

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## Service Provided (225) Overview, continued

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### Buttons on the Service Provided page

In addition to the regions defined previously, there are several buttons that launch various actions on the Service Provided page.

#### Load 225

This button appears when the Service Provided (225) process is first launched, or when the 'Start New 225 Process – Enter New Criteria' button is pressed. It loads the appropriate Pending Services records per the selection criteria entered.

\*\*\*\*\*

#### Start New 225 Process - Enter New Criteria

Once the selected criteria's Pending Services has loaded (even if blank), this button *must* be used to clear all entries and allow new criteria to be selected/loaded. If you forget to click the button before selecting different criteria, you may have to return to the KAMIS Home Page, and then relaunch the Service Provided (225) module.

\*\*\*\*\*

#### Previously Paid Services - Forwards to Report KMS-0006

Loads the KMS-0006 Services Provided Report in a new window/tab. This report replaces the old Previously Paid Services region that used to display. Changes in the KAMIS web application environment made this change necessary. The report contains the records that were successfully processed by Services Provided (225).

\*\*\*\*\*

#### Recalculate Totals

After Units Provided are entered, click this button to calculate the totals based on the entries made. Can also be used to recalculate the totals if any changes are made to the entries before processing.

\*\*\*\*\*

#### Process 225

Once the service provided records have been updated with the appropriate units provided, click this button to process the records. Service provided records are created, and will be processed for payment by the KDADS Accounting Division the following month. Any records that were processed in error or with incorrect data must be backed out using KAMIS's Supplemental billing function. Refer to the KAMIS chapter on Supplemental Billing for detailed instructions.

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### Null or Zero Units Entered

Null or 0 (zero) units provided are not processed. These lines will be skipped and will remain available on the 225 page for future processing if needed.

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# Service Provided (225) Data Entry

## How To

Follow the steps in the table below to complete the Services Provided (225) Data Entry process.

Step	Action	Result
1.	Click on the <b>Service Provided (225)</b> button in the 'Billing' region of the KAMIS Home Page.	The initial Service Provided (225) page displays.
2.	The <b>Organization</b> defaults to the logged in user's ADRC/AAA, so no action is necessary for this field.	The logged-in user's organization displays.
3.	Select the <b>Month</b> for which the Service Provided billing is being run.	Required.
4.	The current fiscal year is the default <b>Year</b> entry. Change it if necessary.	Required.

Continued on next page

# Service Provided (225) Data Entry, continued

How To

continued

Step	Action	Result
5.	Type the provider name (partial or full name) in the <b>Provider Search</b> field and press Enter.	Required. All providers that match the search entry will display in the Provider drop-down list.
6.	Click on the correct provider name in the Provider drop-down list.	The selected provider name is highlighted. The Funding and Service fields populate with the first available entries associated with the selected provider.
7.	Select the desired funding from the <b>Funding Program</b> drop-down list.	Required. Only funding programs that have an approved budget will display.
8.	Select the desired service from the <b>Service</b> drop-down list.	Required. Only services associated with the selected funding will display.
9.	Click on the green <b>Load 225</b> button.	The <b>Pending Services</b> region lists the customers that meet the Service Provided criteria entered at the top of the page, that have not been previously processed.

**SERVICE PROVIDED (225)**

**\* NOTE:** To change a provider or service/funding, click on the Red "Start New 225 Process - Enter New Criteria" button first.

\* Organization: 9 - NORTHEAST KANSAS AAA | \* Month: Feb | \* Year (yyyy): 2017 | Provider Search: HOLTON | \* Provider: HOLTON SR CTR ==> HOLTON

\* Funding Program (with approved budgets only): OAA3C1 - OLDER AMERICANS ACT - TITLE III-C1 - 887 | \* Service: CMEL - CONGREGATE MEALS - 756

**Load 225**

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**SERVICE PROVIDED (225)**

**\* NOTE:** To change a provider or service/funding, click on the Red "Start New 225 Process - Enter New Criteria" button first.

\* Organization: 9 - NORTHEAST KANSAS AAA | \* Month: Feb | \* Year (yyyy): 2017 | Provider Search: HOLTON | \* Provider: HOLTON SR CTR ==> HOLTON

\* Funding Program (with approved budgets only): OAA3C1 - OLDER AMERICANS ACT - TITLE III-C1 - 887 | \* Service: CMEL - CONGREGATE MEALS - 756

Previously Paid Services - Forwards to Report KMS-0006

**Pending Services**

KamisID	Customer	SSN	Start Date	End Date	Dischg. Code	SCA Pct.	PI Bill.	PI Coll.	Units Prov.	Unit Cost	Units Auth.	Units Paid	Paid Date	Proc Status									
5722161	SMURF. MAMA	444-11-1955	02/06/2017	02/28/2017	-	0				1.1	25												
360974	SMURF. PAPA	444-11-1941	01/01/2017	02/28/2017	-	0				1.1	25												
<b>PENDING TOTALS:</b>												-	-	-	-	0	0	0	-	3550	0	\$0	-

**Combined Totals**

KamisID	Customer	SSN	Start Date	End Date	Dischg. Code	SCA Pct.	PI Bill.	PI Coll.	Units Prov.	Unit Cost	Units Auth.	Units Paid	Paid Date	Proc Status										
<b>COMBINED TOTALS:</b>												-	-	-	-	-	0	0	850	-	4440	850	\$935	-

**Process 225**      < Previous      Recalculate Totals

Period Start Date	Period End Date	Period Close Date	Budget Remaining	Est. Budget Remaining
10/01/2016	09/30/2017	11/30/2017	734880	734880

Continued on next page

## Service Provided (225) Data Entry, continued

### How To

*continued*

Step	Action	Result															
9.	<i>continued</i>																
<p>Note: With OAA3C (Caregiver) funding, the Pending Services entries will display the caregiver as the Customer, and will include an additional column containing the Care Recipient name as cross reference.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px auto; width: fit-content;"> <p style="text-align: center; color: blue; font-weight: bold;">Pending Services</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="background-color: #d9ead3;">KamisID</th> <th style="background-color: #d9ead3;">Customer</th> <th style="background-color: #d9ead3;">SSN</th> <th style="background-color: #d9ead3;">Care Recip.</th> <th style="background-color: #d9ead3;">Sta Dat</th> </tr> </thead> <tbody> <tr> <td>20000319</td> <td>JETSON, ELROY P.</td> <td>546-98-7412</td> <td>SPACELY, COSMO</td> <td>10/01/2</td> </tr> <tr> <td colspan="5" style="text-align: left; padding-left: 5px;">PENDING</td> </tr> </tbody> </table> </div>			KamisID	Customer	SSN	Care Recip.	Sta Dat	20000319	JETSON, ELROY P.	546-98-7412	SPACELY, COSMO	10/01/2	PENDING				
KamisID	Customer	SSN	Care Recip.	Sta Dat													
20000319	JETSON, ELROY P.	546-98-7412	SPACELY, COSMO	10/01/2													
PENDING																	
10.	Using the Services Planned Report (KMS-0002) received back from the provider, enter the appropriate number of units provided for each customer that received services for the selected month.	Note: Use the Tab key on the keyboard for ease of entry from one customer to the next.															
	<p>These fields are available for entry in the Pending Services table regardless of funding:</p> <ul style="list-style-type: none"> <li>• Units Provided</li> <li>• Units Paid</li> </ul> <p>In addition to the above fields, SCA funded services<sup>1</sup> also may have units entered for:</p> <ul style="list-style-type: none"> <li>• PI Billed</li> <li>• PI Collected</li> </ul> <p><sup>1</sup>Exceptions: SCA Case Management (CMGTS, CMGTJ) or Assessment (ASMT, AASMT) services do <i>NOT</i> bill for PI (Personal Income)</p>																

**Note:** The Units Paid field will automatically display the same number that is entered in the Units Provided field. Units Paid can be changed to a different number only if it is less than the Units Provided entry.

The Paid Date automatically populates with the system (current) date. The Paid Date cannot be changed.

*Continued on next page*

# Service Provided (225) Data Entry, continued

**How To** *continued*

Step	Action	Result
11.	Click on the <b>Recalculate Totals</b> button.	<ul style="list-style-type: none"> <li>The <b>Combined Totals</b> table updates with the totals for all services processed for the selected criteria.</li> <li>The <b>Est. Budget Remaining</b> number should update, subtracting the <i>Pending Totals</i> amount from the <i>Budget Remaining</i> amount.</li> </ul>

PENDING TOTALS:	-	-	-	-	-	-	0	0	21	-	3550	21	\$23.1	-
<b>Combined Totals</b>														
KamisID	Customer	SSN	Start Date	End Date	Dischg. Code	SCA Pct.	PI Bill.	PI Coll.	Units Prov.	Unit Cost	Units Auth.	Units Paid	Paid Date	Proc Status
COMBINED TOTALS:	-	-	-	-	-	-	0	0	871	-	4440	871	\$958.1	-
<b>Process 225</b>												<a href="#">&lt; Previous</a>		<a href="#">Recalculate Totals</a>
Period Start Date	Period End Date	Period Close Date	Budget Remaining	Est. Budget Remaining										
10/01/2016	09/30/2017	11/30/2017	734880	734856.9										

**Budget Remaining – Pending Totals = Est. Budget Remaining:**

$$734880 - 23.10 = 734856.90$$

Note: If the Est. Budget Remaining will be less than zero (\$0), the Service Provided billing cannot be processed.

The Budgeted Amount for the Funding Program can be increased using the Budget module, and then the Service Provided (225) billing can be run again.

12.	Click on the <b>Process 225</b> button.	<p>All pending service lines with Units Provided entered are processed and will be available for KDADS Payment Approvals processing.</p> <p>All processed records will show 'SAVED' in the <b>Proc Status</b> column of the Services Provided entry table.</p> <p>All records that did not have any units provided, and thus not processed, will show 'SKIPPED' in the <b>Proc Status</b> column.</p>
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Units Prov.	Unit Cost	Units Auth.	Units Paid	Paid Date	Proc Status
21	1.1	25	21	03/02/2017	SAVED
	1.1	25			SKIPPED

## Services Provided – Previously Paid Services

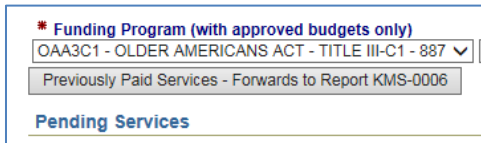
### Introduction

After a Pending Services list has been processed, the customer's 'SAVED' service line billing record will no longer appear in future 'Pending Services' lists for the same selected criteria.

All processed (SAVED) service lines can be viewed using the **Previously Paid Services – Forwards to Report KMS-0006** button located above the 'Pending Services' region.

### How To

Follow the steps in the table below to view Previously Paid Services for the specified Service Provided criteria.

Step	Action	Result
1.	Click on the <b>Service Provided (225)</b> button to launch the module.	The Service Provided (225) page displays.
2.	Enter the desired criteria for which to run the Service Provided process.	Required fields: Month Year Provider Funding Program Service
3.	Click on the green <b>Load 225</b> button.	If there are any pending services (not billed) for the selected criteria, they will display in the Pending Services table. Otherwise, it will be empty.
4.	Click on the <b>Previously Paid Services – Forwards to Report KMS-0006</b> button. 	A new browser tab/window opens, and the report displays.  View the entries for paid services for the month/year and provider specified in the Service Provided (225) criteria.  Note: Depending on the number of previously paid records, the report may take several seconds to a minute or more to display.

### Optional Report Customization

The following steps are optional, but the result is a customized report that displays only the entries for the specific funding/service combination selected in the 225 billing.

Step	Action	Result
1.	Click on the <b>Actions</b> button.	The possible Actions list displays.
2.	Click on <b>Filter</b>	The 'Filter' region displays.
3.	Select 'Funding' from the <b>Column</b> drop-down list.	Will filter the report for a single funding program.

*Continued on next page*



## Services Provided – Previously Paid Services, continued

**Optional Report Customization**      *Continued*

Step	Action	Result
4.	In the 'Expression' field, either type in the <b>Funding</b> Program (this field is case-sensitive, so enter letters in ALL CAPS), or click on the down arrow button to the right of the field and select the Funding from the list.	The funding program from the Services Provided (225) previously run displays.
5.	Click on the <b>Apply</b> button.	The filter is created and the report updates to display only records with the selected funding.
6.	Click on the <b>Actions</b> button.	The possible Actions list displays.
7.	Click on <b>Filter</b>	The 'Filter' region displays.
8.	Select 'Service' from the <b>Column</b> drop-down list.	Will filter the report for a single service.
9.	In the 'Expression' field, either type in the <b>Service</b> (this field is case-sensitive, so enter letters in ALL CAPS), or click on the down arrow button to the right of the field and select the service from the list.	The service from the Services Provided (225) previously run displays.
10.	Click on the <b>Apply</b> button.	The filter is created and the report updates to display only records with the selected service.
If you want to print this customized report, it is recommended you download the report to an Excel spreadsheet (Actions > Download) and format as necessary for a printable report. The 'Print View' button only prints the default report.		

# Troubleshooting

## Introduction

Several things can interrupt the Service Provided (225) billing process and prevent it from completing successfully. Error messages and missing data caused by validations (data checks) on the data entered, and missing budgets, can all prevent the Service Provided process from completing successfully.

## Error Messages

The following is an example of an error message that displays due to a process rule not being followed, and caught by a validation that runs at the field level.

Units Paid is automatically filled with the same number as Units Provided after tabbing out of the 'Units. Prov.' field. If Units Paid is manually altered to be greater than Units Provided, an error message displays and after clicking on OK, the Units Paid entry is blanked out. Tabbing/clicking out of the Units. Prov. field again, or entering the correct Units Paid number manually, will fix the error.

PI Coll.	Units Prov.	Unit Cost	Units Auth.	Units Paid	Paid Date	Proc Status
	10	16.5	18.5	15	08/22/2016	
	15	16.5	16	15	08/22/2016	

## Missing Data

The following is an example of data that is deleted due to an invalid number entry.

If '0' is entered for Units Provided, the field will go back to a blank field as soon as the cursor moves (tab or mouse click to next field.):

Units Prov.	Unit Cost	Units Auth.	Units Paid	Paid Date	Proc Status
10	16.5	14	10	08/22/2016	
0	16.5	18.5			
	16.5	25			

'Null' units are skipped during processing. Because 0 units would calculate to a 0 payment, they are treated as a null entry. Any record that is found to be skipped after processing can be processed in a future Service Provided (225) billing.

Units Prov.	Unit Cost	Units Auth.	Units Paid	Paid Date	Proc Status
10	16.5	14	10	08/22/2016	
	16.5	18.5			
20	16.5	25			

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# Troubleshooting, continued

## Selection Criteria Does Not Populate

The following is an example of selection criteria not populating due to a missing Approved budget.

After selecting the month, year, and provider, the Funding Program and Services drop-down lists do not populate.

**SERVICE PROVIDED (225)**

Load 225

**\* NOTE:** To change a provider or service/funding, click on the Red "Start New 225 Process - Enter New Criteria" button first.

**\* Organization** 
**\* Month** 
**\* Year (yyyy)** 
**Provider Search** 
**\* Provider**

**\* Funding Program (with approved budgets only)** 
**\* Service**

Select to list from...
 
 Display Supplementals

**Pending Services**

KamisID	Customer	SSN	Start Date	End Date	Dischg. Code	SCA Pct.	PI Bill.	PI Coll.	Units Prov.	Unit Cost	Units Auth.	Units Paid	Paid Date	Proc Status
PENDING TOTALS:	-	-	-	-	-	-	0	0	0	-	0	0	\$0	-

**Combined Totals**

KamisID	Customer	SSN	Start Date	End Date	Dischg. Code	SCA Pct.	PI Bill.	PI Coll.	Units Prov.	Unit Cost	Units Auth.	Units Paid	Paid Date	Proc Status
COMBINED TOTALS:	-	-	-	-	-	-				-			\$	-

Recalculate Totals

This provider is associated with OAA3C1 and OAA3C2 funding for meal, nutrition, and assessment services. The OAA Budgets for Federal Fiscal Year 2017, which starts October 1 each year, have not been updated to Approved status. Because there is no Approved Budget for October 2016, the services provided billing cannot proceed.

**Budget Maintenance**

**\* PSA** 
**\* Start Date (mm/dd/yyyy)** 
**\* Funding Source**

**Current Budget Revision**

Period End Date	Version	Status	Budgeted Amount	Active	Document Id	Period Close Date
09/30/2017	1	WORK IN PROGRESS		N		11/30/2017

**Budget Revision History**

Period End Date	Version	Status	Budgeted Amount	Active	Document Id	Period Close Date
09/30/2017	0	PROJECTED	2000000	Y	-	11/30/2017

1 - 1

**Budget dates for this CME/Funding**

Start	End	Period Close	Status
10/01/2016	09/30/2017	11/30/2017	PROJECTED
10/01/2015	09/30/2016	11/30/2016	APPROVED
10/01/2014	09/30/2015	11/30/2015	APPROVED
10/01/2013	09/30/2014	11/30/2014	APPROVED
10/01/2012	09/30/2013	11/30/2013	APPROVED
10/01/2011	09/30/2012	11/30/2012	APPROVED
10/01/2010	09/30/2011	11/30/2011	APPROVED

Missing Funding and Service lists can also be the result if an Approved Budget has a zero balance.

Refer to KAMIS Manual Chapter 21 – Budget Administration for instructions on working with Budgets.