# How to Run the View Add Ons Report

The **View Add Ons** report allows a Case Management Entity (CME) to search for individuals who have an Add On in their Plan of Care (POC). An Add On increases the rate or staffing ratio for a service, or the number of available attendant care hours for an individual. Only service rate and staffing ratio Add Ons can currently be entered in eXPRS. When Add Ons for attendant care hours are implemented, the **View Add Ons** report will be updated to return results for those as well.

CMEs can use this report to:
1) Identify which individuals have Add Ons, and for which services.
2) Identify Add Ons that are nearing expiration to take any needed action.
3) For any other Case Management activities needing Add On information.

How to Run the View Add Ons Report:
1) Log in to eXPRS and select **Plan of Care > Reports > View Add Ons**
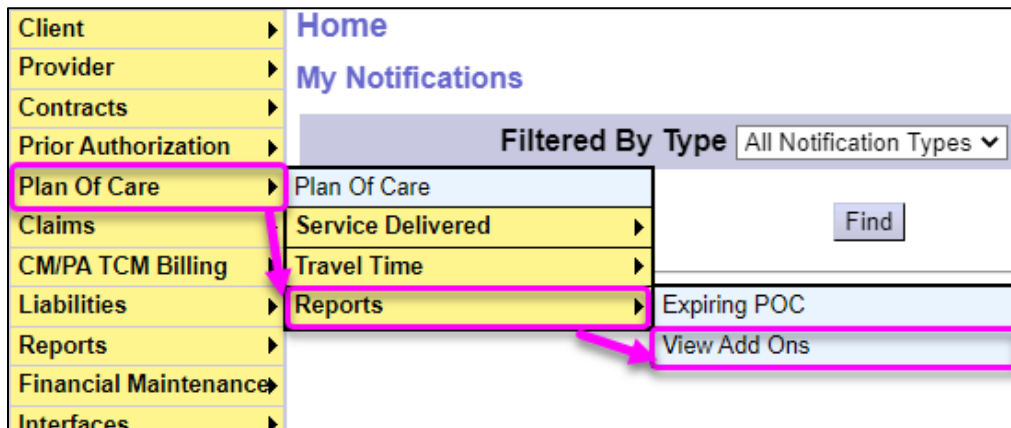
2) On the **View Add Ons** page**,** enter the **Effective Date & End Date** along with any other search criteria and select **Find**. Search Criteria are defined in **Appendix A.**

- **TIP:** Selecting **Yes** on the **Expiring Add Ons Only** radio button causes only Add Ons that are set to expire by the **End Date** to appear in the result set.

3) Each result row shows the **Add On Type**, **Unit Type & Frequency,** along with the **Effective Date** & **End Date** of the add on. Review the result set and export (if needed). All data points are defined in **Appendix B.**

In the screenshot above:
- **Row #1:** Staff Ratio Add On of 25 Hours per week from 9/21/2022 to 11/30/2024 for Day Support Activity 2:1.
- **Row #2**: Rate Add On of $41.13 per hour from 9/21/2022 to 11/30/2024 for Employment Path Services Solo.
- **Row #3**: Rate Add On of $233.54 per day from 7/1/2022 to 6/30/2027 for an Adult Residential Service.

APPENDIX A: View Add Ons Search Criteria Definitions

View Add Ons

Selecting 'Yes' for Expiring Add Ons Only will limit results to only Add Ons that expire during selected date ranges.

Note: If criteria entered results in more than 20,000 rows, date returned will be truncated. You may need to narrow your search criteria to return a smaller dataset.

A	Plan ID:	
B	Client Prime:	
C	* Effective Date :	5/1/2022
D	* End Date:	5/31/2022
E	Expiring Add Ons Only:	○ Yes ◉ No
F	DHS Contract Num:	
G	Service Type:	Select...
H	Provider Cat:	Select...
I	Add On Type:	Select...
J	Claim Batch Job Status:	Select...
K	Add On Status:	Select...

[Find] [Reset] [Close]

A. **Plan ID =** The eXPRS ID for an individual's Plan of Care

B. **Client Prime =** The ODHS prime number assigned to a specific individual

C. **Effective Date =** The first date the Add On is effective

D. **End Date =** The last date the Add On is effective

E. **Expiring Add Ons Only (Yes/No Radio Button):**
- Selecting **Yes** causes only Add Ons that are set to expire by the **End Date** to appear in the results.
- Selecting **No** causes all Add Ons that were active within the entered date range to appear in the results

F. **DHS Contract Num =** The contract number for the CME that authorized the POC services for the individual.

G. **Service Type =** A dropdown list of Service Types that an Add On can apply to. This allows users to limit results based on the selection.

H. **Provider Cat** = A dropdown list of Provider Categories that allows users to limit results based on the selection. This shows as **Service Setting** in the results list

I. **Add On Type =** A dropdown list of Add On Types that allows users to limit results based on the selection.

J. **Claim Batch Job Status** *(Useful for Technical Staff Only)* **=** A dropdown list of Claim Batch Job Status that allows users to limit results based on the selection.

K. **Add On Status =** A dropdown list of the various statuses an Add On may be in. This allows users to limit the results based on the selection.

APPENDIX B: View Add Ons Result Set Column Definitions

Plan ID	Client Prime	Client Name	Service Type	Modifier	Service Setting	Type	Unit Type	Frequency
45602295			Children's Residential	NA	Agency	Rate	Days	Day

1. **Plan ID =** The eXPRS ID for an individual's Plan of Care
2. **Client Prime** = The ODHS prime number assigned to a specific individual receiving services.
3. **Client Name** = The first and last name of the individual for whom the service was authorized and delivered.
4. **Service Type** = The Service Type that the Add On applies to.
5. **Modifier** = The Service Type Modifier Code that the Add On applies to.
6. **Service Setting** = The Service Setting of the Provider that is serving the individual who has an Add On. This shows as **Provider Cat** in the Search Criteria.
7. **Type** = The Add On type (e.g., Rate, Staff Ratio).
8. **Unit Type** = The Unit Type that the Add On is billed in (e.g., **10.00 Hours** per week).
9. **Frequency** = The frequency that the Add On is measured against (e.g., 10.00 hours **per week).**

Rate Amount	Authorized Hours/Units	Effective Date	End Date	Status	NOPA Resolved	Corrected	Job	Job Status
	25.00	9/21/2022	11/30/2024	Approved	No	false	584302407	New
$41.13		9/21/2022	11/30/2024	Approved	N/A	false	584302344	New

10. **Rate Amount** = The increased amount paid for services delivered that have a Rate Add On during the listed Effective Date & End Date.
11. **Authorized Hours/Units:** The number of hours or units authorized for a Staff Ratio Add On during the listed Effective Date & End Date.

12. **Effective Date** = The effective date of the details associated with the row's Add On.
13. **End Date** = The end date of the details associated with the row's Add On.
14. **Status** = The current status of the Add On
15. **NOPA Resolved** = Specifically for an Attendant Care Hours Add On, which has not yet been implemented in the system. This column indicates whether a NOPA is applicable to the Add On, and if so, whether or not it has been resolved.
16. **Corrected** = A column indicating whether the Add On was applied retroactively.
    - **True** – The Add On was applied to the service retroactively
    - **False** – The Add On was not applied to the service retroactively
17. **Job** *(Technical use only)* = The ID number of the Batch Job which is used by technical staff
18. **Job Status** *(Technical use only)* = The status of the Batch Job which is used by technical staff.