

How to Enter and Update an Individual's Monthly Assessed Attendant Care Hours in the Plan of Care

When an individual's Oregon Needs Assessment (ONA) and Individual Support Plan (ISP) are completed, they may be assigned an amount of **Monthly Assessed Attendant Care Hours** and/or **Weekly Employment Hours** as part of their assessed need.

Some Service Prior Authorizations (SPAs) and their Service Delivered Billing Entries (SDs) reconcile against these limits, and these authorizations & billings cannot exceed the limit available to the individual.

The following charts show which services reconcile to which limits.

Monthly Assessed Attendant Care Hours		Weekly Employment Hours	
Procedure Code	Modifier Code	Procedure Code	Modifier Code
OR502 - State Plan Personal Care	NA	OR401 - Ind Sup Employment - Job Coaching	W5 - Initial
W6 - Ongoing			
W4 - Maintenance			
S1 - Self Employed			
WV - Initial without VR Services			
OR526 - Attendant Care	NA	OR541 - Employment Path Svcs	W1 - Facility
	R3 - 1:3 Supports		R1 - 1:1 facility
	RB - 1:2 Supports		ZH - 2:1 single provider facility
ZE - 2:1 staff authorized	ZF - 2:1 both 1 Agency facility		
OR542 - Day Support Activities	R1 - 1:1 Supports - Facility		W2 - Employment Path/Community
	RC - 1:1 Supports - Community		RC - 1:1 community
	RS - 1:1 Solo - Community		ZE - 2:1 single provider community
	W1 - Facility		ZC - 2:1 both 1 Agency community
	W2 - Community		RS - 1:1 solo community
	ZC - 2:1 Both 1 Agency - Community		OR543 - Sm Grp Supp Emp
	ZE - 2:1 staff authorized	RC - 1:1 community	
	ZF - 2:1 Both 1 Agency - Facility	ZE - 2:1 single provider community	
	ZH - 2:1 Single Provider - Facility	ZC - 2:1 both 1 Agency community	

CME users will need one of the following roles enter and update hours:

- **CDDPs:** Local Authority POC Manager or POC Super User
- **Brokerages:** Brokerage POC Manager or POC Super User
- **State Kids Services:** State Kids Svcs POC Manager or POC Super User

How to Access the Plan of Care:

1) Login to eXPRS. If users have multiple login options, use the Local Authority (for CDDPs), Contractor (for Brokerage), or State for (State Kids).

The image shows three separate login form sections. Each section has a 'Login Name' field, a 'Password' field, and an 'Organization/Program Area' dropdown menu. A red arrow points to the dropdown menu in each section, indicating the selection of the organization type. The first section is for 'County (Local Authority)', the second for 'Brokerage (Contractor)', and the third for 'State Kids (State)'. Each form also includes a 'Forgot your password?' link and a 'Submit' button.

2) Select **Plan of Care > Plan of Care**.

The image shows a navigation menu with several options: Client, Provider, Contracts, Prior Authorization, Plan Of Care, Claims, CM/PA TCM Billing, and Liabilities. The 'Plan Of Care' option is highlighted with a pink circle and a pink arrow pointing to it. Below the menu, there are options for 'Filter by Type' and 'All'.

3) On the **Find Plan of Care** page, enter criteria and select **Find**.

The image shows the 'Find Plan of Care' search form. It includes fields for 'Plan ID', 'Client Prime' (with the value 'XY20000A' and a magnifying glass icon), 'Service Element' (set to 'All'), 'Plan Begin', 'Plan End', 'DHS Contract Num', 'Status', and 'Max Displayed' (set to '25'). There are radio buttons for 'Overlap', 'Contain', and 'Exact' next to the date fields. A pink arrow points to the 'Find' button at the bottom.

TIP: To find a specific individual's Plan of Care, search by their Client Prime.

4) Select the **Plan ID** hyperlink to open a POC.

Plan ID	Client Prime	Client Name	DHS Contract Num	Plan Begin	Plan End	Status
29*****15	xyz0000a	DEMO, CLIENT		04/01/2019	03/31/2020	Accepted
36*****84	xyz0000a	DEMO, CLIENT		04/01/2020	03/31/2021	Accepted
42*****29	xyz0000a	DEMO, CLIENT		04/01/2021	03/31/2022	Accepted

5) On the **Plan of Care > Plan Overview** tab, Select the **Edit** Button.

Plan of Care

Plan Id: 42*****29 Plan Dates: 4/1/2021 - 3/31/2022
Client Name: DEMO, CLIENT Client Prime: xyz0000a
Plan Status: Accepted

Edit Copy Print Summary

Service Eligibility **Plan Overview** In Home Services Residential Supported Living Community Transportation Ancillary Legacy

Monthly Assessed Attendant Care/Skills Training Hours

Dates	Hour Limit
4/1/2021 - 3/31/2022	157.00

How to Enter and Update Monthly Attendant Care Hours:

6) Select the **Edit** button in the **Monthly Assessed Attendant Care/Skills Training Hour** section to edit the hour limit for the current segment.

Plan of Care

Plan Id: 42*****29 Plan Dates: 4/1/2021 - 3/31/2022
Client Name: DEMO, CLIENT Client Prime: xyz0000a
Plan Status: Accepted

Done

Service Eligibility **Plan Overview** In Home Services Residential Supported Living Community Transportation Ancillary Legacy

Plan Dates: 4/1/2021 - 3/31/2022 Update

Monthly Assessed Attendant Care/Skills Training Hours

Dates	Hour Limit
4/1/2021 - 3/31/2022	157.00

Add Edit

7) With the current Attendant Care Hour segment open, enter the new **Hour Limit** and select **Save**. Shown below, the hour limit was changed from **157** hours to **225** hours per month.

Plan of Care

Plan Id: 42*****29 Plan Dates: 4/1/2021 - 3/31/2022
Client Name: DEMO, CLIENT Client Prime: xyz0000a
Plan Status: Accepted

Done

Service Eligibility **Plan Overview** In Home Services Residential Supported Living Community Transportation Ancillary Legacy

Monthly Assessed Attendant Care/Skills Training Hours

Dates	Hour Limit
4/1/2021 - 3/31/2022	225.00

Save Cancel

8) If updating an existing segment to add a new segment, Select the **Add** button.

Plan of Care

Plan Id: 42*****29 Plan Dates: 4/1/2021 - 3/31/2022
Client Name: DEMO, CLIENT Client Prime: xyz0000a
Plan Status: Accepted

Done

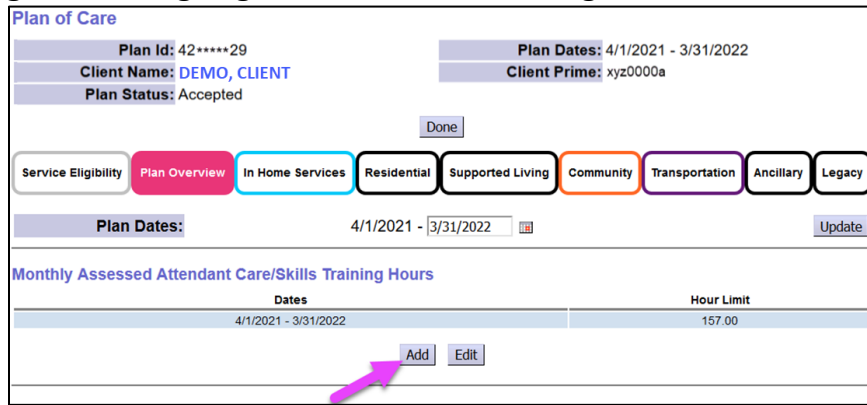
Service Eligibility Plan Overview In Home Services Residential Supported Living Community Transportation Ancillary Legacy

Plan Dates: 4/1/2021 - 3/31/2022 Update

Monthly Assessed Attendant Care/Skills Training Hours

Dates	Hour Limit
4/1/2021 - 3/31/2022	157.00

Add Edit



9) Enter an **End Date** for the original segment. The next segment will auto-populate based on the previous one.

Plan of Care

Plan Id: 42*****29 Plan Dates: 4/1/2021 - 3/31/2022
Client Name: DEMO, CLIENT Client Prime: xyz0000a
Plan Status: Accepted

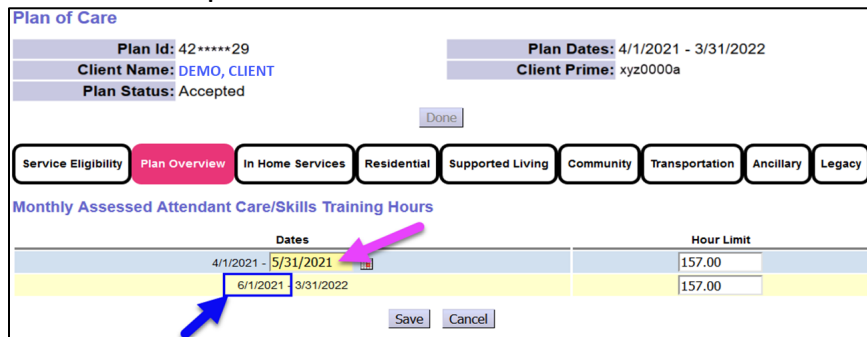
Done

Service Eligibility Plan Overview In Home Services Residential Supported Living Community Transportation Ancillary Legacy

Monthly Assessed Attendant Care/Skills Training Hours

Dates	Hour Limit
4/1/2021 - 5/31/2021	157.00
6/1/2021 - 3/31/2022	157.00

Save Cancel



10) Update the **Hour Limit** fields that apply for the specific date ranges and select **Save**. Shown below, the new segment is updated to 225 hours per month.

Plan of Care

Plan Id: 42*****29 Plan Dates: 4/1/2021 - 3/31/2022
Client Name: DEMO, CLIENT Client Prime: xyz0000a
Plan Status: Accepted

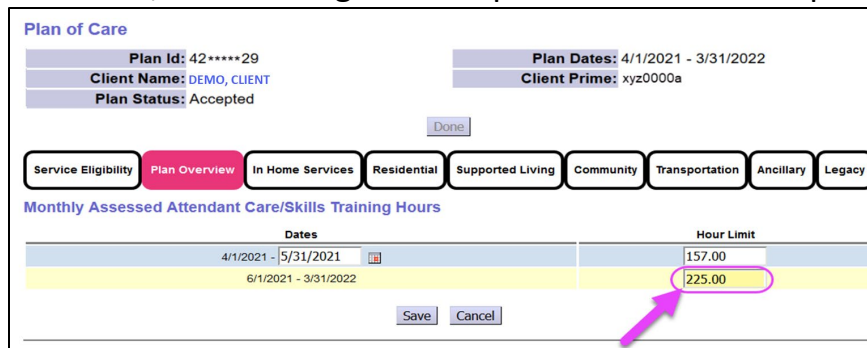
Done

Service Eligibility Plan Overview In Home Services Residential Supported Living Community Transportation Ancillary Legacy

Monthly Assessed Attendant Care/Skills Training Hours

Dates	Hour Limit
4/1/2021 - 5/31/2021	157.00
6/1/2021 - 3/31/2022	225.00

Save Cancel



How to Enter and Update Weekly Employment Hours:

- 1) Select the **Add** button in the **Weekly Employment Hours Approved per ISP** section to add hours.

Plan of Care

Plan Id: 42*****29 Plan Dates: 4/1/2021 - 3/31/2022
Client Name: DEMO, CLIENT Client Prime: xyz0000a
Plan Status: Accepted

Delete Done

Service Eligibility Plan Overview In Home Services Residential Supported Living Community Transportation Ancillary Legacy

Plan Dates: 9/1/2020 - 8/31/2021 Update

Monthly Assessed Attendant Care/Skills Training Hours

Dates	Hour Limit
9/1/2020 - 8/31/2021	74.00

Add Edit

Weekly Employment Hours Approved per ISP

Add

- 2) With the **Weekly Employment Hours** section open, enter the correct hours and then select **Save**. Shown below, 25 hours were added.

Service Eligibility Plan Overview In Home Services Residential Supported Living Community Transportation Ancillary Legacy

Monthly Assessed Attendant Care/Skills Training Hours

Dates	Hour Limit
9/1/2020 - 8/31/2021	74.00

Weekly Employment Hours Approved per ISP

Dates	Hour Limit	Supported Employment Only
9/1/2020 - 8/31/2021	25.00	<input type="checkbox"/>

Save Cancel

- 3) To update an existing **Weekly Employment Hours** limit, Select the **Add** button.

Monthly Assessed Attendant Care/Skills Training Hours

Dates	Hour Limit
9/1/2020 - 8/31/2021	74.00

Add Edit

Weekly Employment Hours Approved per ISP

Dates	Hour Limit	Supported Employment Only
9/1/2020 - 8/31/2021	25.00	NO

Add Edit

- 4) Enter an **End Date** for the original segment. The date entered **must** be a Saturday. The next segment will auto-populate based on the previous one, and the will auto-update to be the next day (Sunday).

Service Eligibility **Plan Overview** In Home Services Residential Supported Living Community Transportation Ancillary Legacy

Monthly Assessed Attendant Care/Skills Training Hours

Dates	Hour Limit
4/1/2021 - 3/31/2022	157.00

Weekly Employment Hours Approved per ISP

Dates	Hour Limit	Supported Employment Only
4/1/2021 - 5/29/2021	25.00	<input type="checkbox"/>
5/30/2021 - 3/31/2022	25.00	<input type="checkbox"/>

Save Cancel

- 5) Update the **Hour Limit** fields that apply to the specific date ranges and select **Save**. Shown below, the update is for 40 hours of Supported Employment Only.

Monthly Assessed Attendant Care/Skills Training Hours

Dates	Hour Limit
4/1/2021 - 3/31/2022	157.00

Weekly Employment Hours Approved per ISP

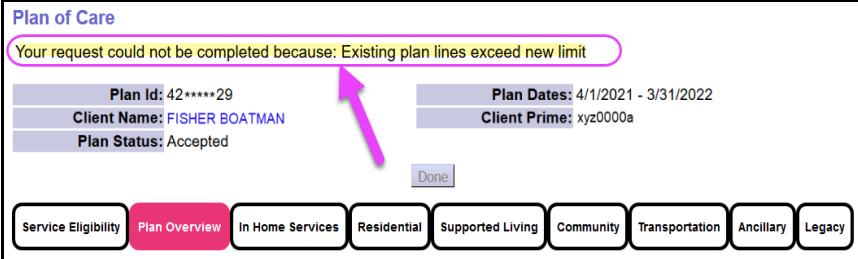
Dates	Hour Limit	Supported Employment Only
4/1/2021 - 5/29/2021	25.00	<input type="checkbox"/>
5/30/2021 - 3/31/2022	40	<input checked="" type="checkbox"/>

Save Cancel

Plan Lines, SPAs and SD billings for the Employment and Attendant Care services listed on p.1 will read these updated limits for the applicable service date ranges.

APPENDIX A: Key Points for Entering Monthly Attendant Care Hours:

- Attendant Care hour segments can begin and end on any date. Although it is normally easiest to modify segments to coincide with the end or start of a new month, this is not required.
- When updating segments with a new hour limit that is lower than what currently exists, the following validation message may display: ***“Your request could not be completed because: Existing plan lines exceed new limit”***.



The screenshot shows a web interface for a "Plan of Care". At the top, a yellow error message is displayed: "Your request could not be completed because: Existing plan lines exceed new limit". Below the message, there are two columns of information: "Plan Id: 42*****29", "Client Name: FISHER BOATMAN", and "Plan Status: Accepted" on the left; and "Plan Dates: 4/1/2021 - 3/31/2022" and "Client Prime: xyz0000a" on the right. A "Done" button is located below the information. At the bottom, there is a horizontal navigation bar with buttons for "Service Eligibility", "Plan Overview" (which is highlighted in red), "In Home Services", "Residential", "Supported Living", "Community", "Transportation", "Ancillary", and "Legacy". A pink arrow points from the error message to the "Plan Overview" button.

This message occurs because the Hours limit cannot be lower than what has already been successfully billed for that date range. Corrections may be needed to the Plan Line units, SPA Units, or SD Billings before the reduced hour limit amount can be entered. See the guide [How to Edit-Correct-Void Services in a POC](#) for more information on corrections

- All Attendant Care Plan Lines & SPAs in a POC can list an amount equal to or less than the Hour Limit. This gives flexibility for the individual to receive a combination of services from multiple providers up to the limit. However, the combination of all Attendant Care services billed by all providers in a month cannot exceed the hours limit for that date range.

APPENDIX B: Key Points for Entering Weekly Employment Hours

- When entering or updating **Weekly Employment Hours** segments, the date range must begin on a Sunday and end on Saturday (to align with the calendar week). If the change is intended to occur on a date that does not align with this Saturday/Sunday break, analysis will be needed to determine which Saturday/Sunday dates will best support the change.
- All employment Plan Lines & SPAs in the POC can list an hour limit equal to or less than the **Weekly Employment Hours** limit. This gives flexibility for the individual to receive a combination of services from multiple providers. However, the combination of employment services billed by all providers for a week cannot exceed the **Weekly Employment Hours** limit on the Plan of Care.
- Some employment services may be allowed or disallowed based on the **Weekly Employment Hours** limit entered for that date range. This ensures that employment services in the POC align with the I/DD waiver specifications.
 - Limits of **25 hours per week or less** will allow authorization (alone or in combination) of any and all the following hourly employment services.
 - **OR401-Job Coaching**
 - **OR541-Employment Path**
 - **OR543-Small Group Employment**
 - Weekly Hours Limits of **26-40 hours per week** will allow for the authorization of **OR401-Job Coaching** only.
- **OR542-Day Support Activities** services may be authorized in conjunction with hourly employment services, but it does not reconcile to the **Weekly Employment Hours** limits. **OR542-DSA** is an attendant care service, and reconciles to the **Monthly Assessed Attendant Care** hours limit in the POC.
- When updating segments, the following validation message may display: ***“Your request could not be completed because: New dates overlap existing plan line(s)”***. This occurs when there are Plan Lines/SPAs for employment services that overlap the new date ranges.
 - To resolve this, navigate to the **Community** tab in the POC and update the existing Plan Lines/SPAs to end them as of the end date being entered on the existing **Weekly Employment Hours** segment.
 - Once complete, the updates can be completed to the **Weekly Employment Hours**, and new employment service Plan Lines/SPAs can be created. These will need to use the same start date as the new **Weekly Employment Hours** segment just entered.