

How to Add Documents as Attachments to a Plan of Care (POC)

(updated 10/18/2021)

There is a feature in eXPRS Plan of Care (POC) that enables the authorizing Case Management Entity (CME) to upload and attach supporting documents to the POC. Examples of the types of documents that a CME may wish to include in an individual's POC might be a copy of their ISP, their Needs Assessment, an exception approval memo, or other documentation related to the POC and services authorized within.

POC will accept files in various formats, such as Word, Excel, or PDF. And while an unlimited number of documents can be attached to a POC, there is a size limit for each individual file/document uploaded and attached. ***That document file size limit is 4MB*** (megabytes).

Uploading and attaching a document to a POC can be done at any time, such as when first creating the POC or later after a POC has been established.

A user must have the appropriate assigned **POC Manager** user role to do this POC document upload/attachment work in eXPRS.

To upload and attach a document to an individual's POC:

1. Log in to eXPRS. You will need to select the correct Organization/Program Area option when logging in to do this work. Either the **Local Authority** (for CDDPs), **Contractor** (for Brokerages), or **State** (for State or CIIS staff).

CDDPs use Local Authority:

Login

Password accepted. Choose your organization and/or program area for this session.

You are in the Practice environment

Login Name:	<input type="text" value="loginname"/>
Password:	<input type="password" value="....."/>
Organization/Program Area:	<input type="text" value="County (Local Authority)"/>

[Forgot your password?](#)

Brokerages use Contractor:

Login

Password accepted. Choose your organization and/or program area for this session.

You are in the Practice environment

Login Name:	<input type="text" value="loginname"/>
Password:	<input type="password" value="....."/>
Organization/Program Area:	<input type="text" value="Brokerage (Contractor)"/>

[Forgot your password?](#)

State/CIIS staff use State.

Login

Password accepted. Choose your organization and/or program area for this session.

You are in the Practice environment

Login Name:	<input type="text" value="loginname"/>
Password:	<input type="password" value="....."/>
Organization/Program Area:	<input type="text" value="(State)"/>

[Forgot your password?](#)

- 2. Search for the Plan of Care that needs documents attached.
From the left-hand yellow menu, click on **Plan of Care** → **Plan of Care**.

Client	▶ Home
Provider	▶ My Notifications
Contracts	▶
Prior Authorization	▶ Filtered By Type All Notifi
Plan Of Care	▶ Plan Of Care
Claims	▶ Service Delivered
CM/PA TCM Billing	▶ Travel Time
Liabilities	▶ Reports
Reports	▶
Financial Maintenance	▶

- 3. In the **Find Plan of Care** page, search for the POC that needs to have attachments added.
→ **PRO TIP:** Searching by the individual's prime number will be the easiest search method.

Enter the individual's **Client Prime** in the corresponding field, then click **FIND** to search for POCs for that individual.

Find Plan of Care

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

Plan ID:	<input type="text"/>
Client Prime:	xyz0000a
Service Element:	All <input type="text"/>
Plan Begin:	<input type="text"/> <input checked="" type="radio"/> Overlap <input type="radio"/> Contain <input type="radio"/> Exact
Plan End:	<input type="text"/> <input checked="" type="radio"/> Overlap <input type="radio"/> Contain <input type="radio"/> Exact
DHS Contract Num:	<input type="text"/>
Status:	<input type="text"/>
Max Displayed:	All <input type="text"/>

- From the results list, click on the **blue Plan ID** number to open the individual's POC that needs documents attached. Verify you are opening the correct POC needed by reviewing the **Plan Begin & Plan End** dates.

Find Plan of Care

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

Plan ID:	<input type="text"/>
Client Prime:	xyz0000a
Service Element:	All <input type="text"/>
Plan Begin:	<input type="text"/> <input checked="" type="radio"/> Overlap <input type="radio"/> Contain <input type="radio"/> Exact
Plan End:	<input type="text"/> <input checked="" type="radio"/> Overlap <input type="radio"/> Contain <input type="radio"/> Exact
DHS Contract Num:	<input type="text"/>
Status:	<input type="text"/>
Max Displayed:	25 <input type="text"/>

Export options: CSV | Excel | PDF | RTF

Plan ID	Client Prime	Client Name	DHS Contract Num	Plan Begin	Plan End	Status
38****9	xyz0000a	FISHER BOATMAN	1****5	06/15/2020	05/31/2021	Accepted
43****01	xyz0000a	FISHER BOATMAN	1****5	06/01/2021	05/31/2022	Accepted

5. In the **Plan of Care** page, click on **Edit** to open the POC to make changes, such as add documents.

Plan of Care

Plan Id: 43****01	Plan Dates: 6/1/2021 - 5/31/2022
Client Name: FISHER BOATMAN	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
6/1/2021 - 5/31/2022	174.00

Weekly Employment Hours Approved per ISP

Dates	Hour Limit	Supported Employment Only
6/1/2021 - 5/31/2022	17.00	YES

Add Ons

Plan of Care Notes

6. Scroll down to the **Attachments** section in the middle of the POC.

Plan of Care

Plan Id: 43****01	Plan Dates: 6/1/2021 - 5/31/2022
Client Name: FISHER BOATMAN	Client Prime: xyz0000a
Plan Status: Accepted	

[Done](#)

[Service Eligibility](#) [Plan Overview](#) [In Home Services](#) [Residential](#) [Supported Living](#) [Community](#) [Transportation](#) [Ancillary](#) [Legacy](#)

Plan Dates: 6/1/2021 - 5/31/2022 [Update](#)

Monthly Assessed Attendant Care/Skills Training Hours

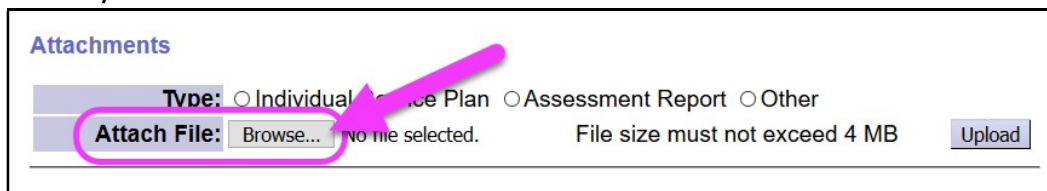
Attachments

Type: Individual Service Plan Assessment Report Other

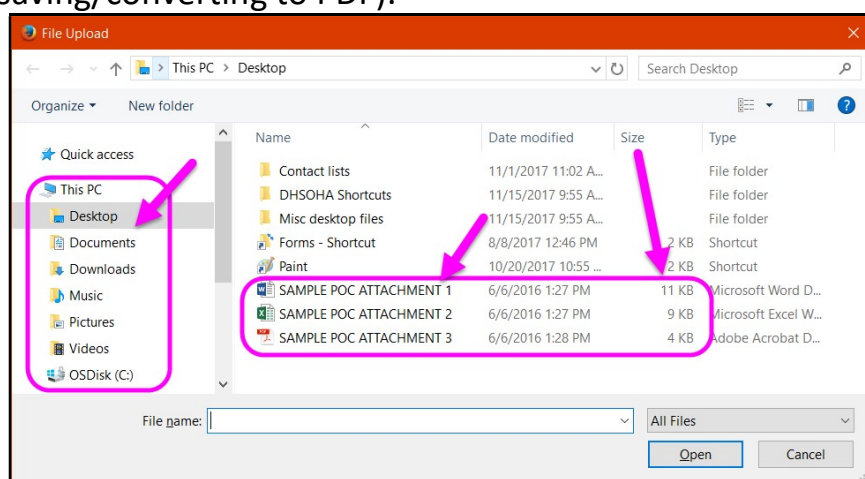
Attach File: [Browse...](#) No file selected. File size must not exceed 4 MB [Upload](#)

Plan of Care Notes

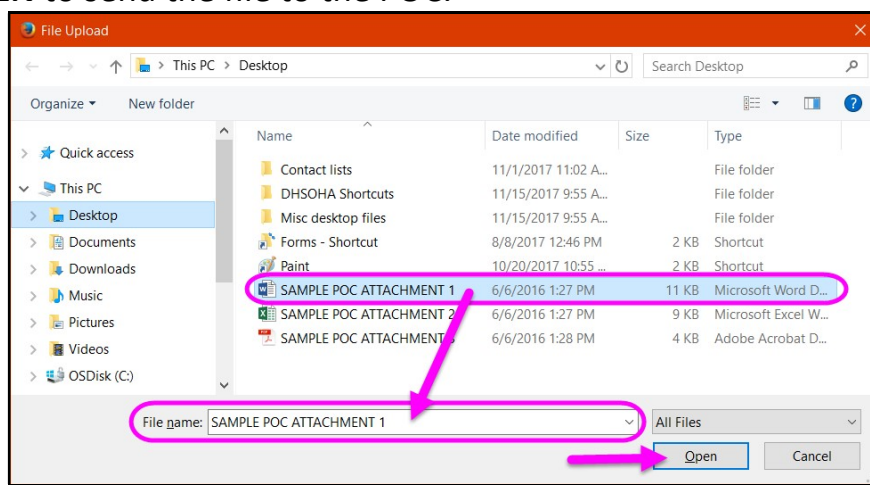
7. Click on **BROWSE** to search your computer for the file to be uploaded/attached to the POC.



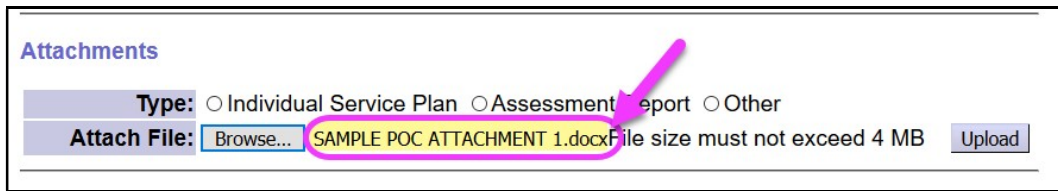
8. The **Browse** button will open a pop-up search window to locate the files to be uploaded to the POC. Use this **File Upload** window to search your computer/network to find the document(s) needed. When the document is located, verify its file size to be sure that it is less than 4MB. Some files may need to be saved or converted to a different file format to reduce file size (such as saving/converting to PDF).



9. From the **File Upload** window, select the file to be uploaded & attached to the POC. It will populate the **File Name** field at the bottom of the window. Click **OPEN** to send the file to the POC.

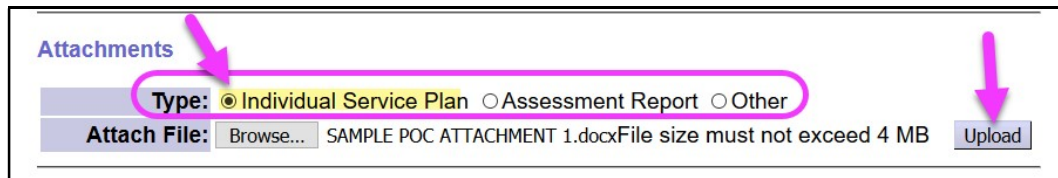


10. Back in the POC, the file you just selected will now show next to the **Browse** button.



The screenshot shows the 'Attachments' section of a form. It includes a 'Type' field with radio buttons for 'Individual Service Plan', 'Assessment Report', and 'Other'. Below this is an 'Attach File' field with a 'Browse...' button. To the right of the 'Browse...' button, the text 'SAMPLE POC ATTACHMENT 1.docx' is displayed, indicating a file has been selected. Further right, it says 'File size must not exceed 4 MB' and there is an 'Upload' button.

11. Click one of the radio buttons next to a **TYPE** of file label to identify the type of file for the attachment. Then click **UPLOAD** to upload & attach the file selected to the POC.



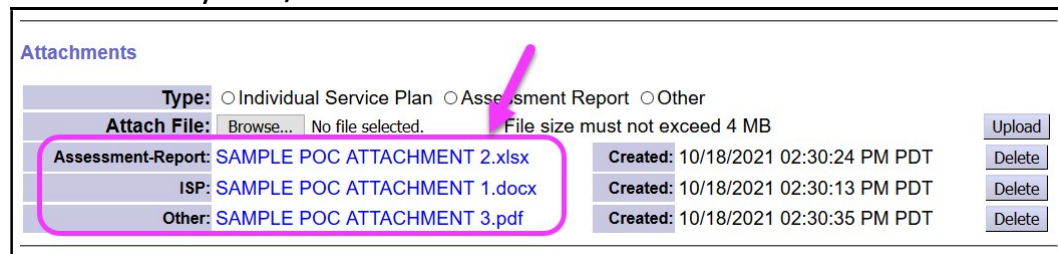
The screenshot shows the 'Attachments' section. The 'Type' field now has the 'Individual Service Plan' radio button selected. The 'Attach File' field still shows 'SAMPLE POC ATTACHMENT 1.docx'. The 'Upload' button is highlighted with a pink arrow.

12. The file will now be attached to the POC. It is viewable by anyone who has permissions to view the individual's POC by clicking on the **blue hyperlink** file name.



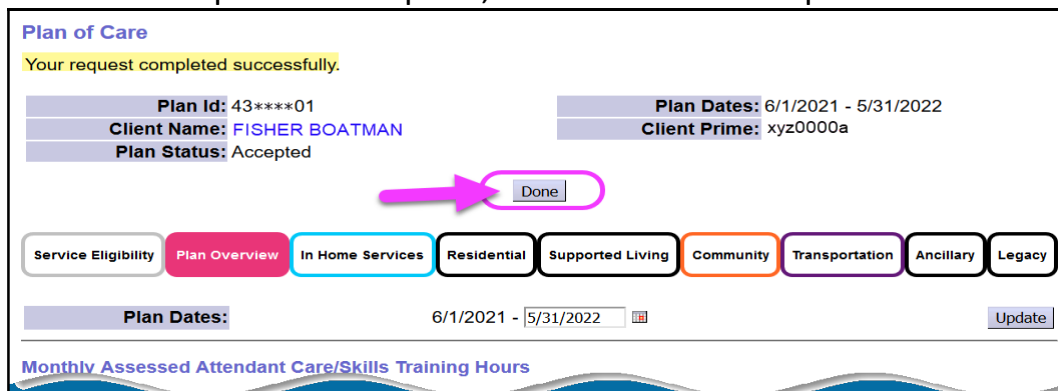
The screenshot shows the 'Attachments' section with a list of files. The first entry is 'Assessment-Report: SAMPLE POC ATTACHMENT 2.xlsx', which is highlighted with a pink circle. To its right, it shows 'Created: 10/18/2021 02:30:24 PM PDT' and a 'Delete' button. The 'Type' field above has radio buttons for 'Individual Service Plan', 'Assessment Report', and 'Other'.

13. Repeat steps #5 - #11 above to add more files/documents to the POC. Users can add as many files/documents as needed.



The screenshot shows the 'Attachments' section with a list of three files. The first file is 'Assessment-Report: SAMPLE POC ATTACHMENT 2.xlsx', the second is 'ISP: SAMPLE POC ATTACHMENT 1.docx', and the third is 'Other: SAMPLE POC ATTACHMENT 3.pdf'. Each file entry includes its creation date and a 'Delete' button. The 'Type' field above has radio buttons for 'Individual Service Plan', 'Assessment Report', and 'Other'.

14. When the file upload is complete, click **DONE** at the top of the POC to close it.



The screenshot shows the 'Plan of Care' page. At the top, it says 'Your request completed successfully.' Below this, there are fields for 'Plan Id: 43****01', 'Client Name: FISHER BOATMAN', 'Plan Status: Accepted', 'Plan Dates: 6/1/2021 - 5/31/2022', and 'Client Prime: xyz0000a'. A 'Done' button is highlighted with a pink circle. Below the 'Done' button are several tabs: 'Service Eligibility', 'Plan Overview', 'In Home Services', 'Residential', 'Supported Living', 'Community', 'Transportation', 'Ancillary', and 'Legacy'. At the bottom, there is a 'Plan Dates' field with '6/1/2021 - 5/31/2022' and an 'Update' button.

15. The files/documents can be viewed as attachments included in the POC.

Plan of Care

Plan Id: 43****01	Plan Dates: 6/1/2021 - 5/31/2022
Client Name: FISHER BOATMAN	Client Prime: xyz0000a
Plan Status: Accepted	

[Edit](#) [Copy](#) [Print Summary](#)

[Service Eligibility](#) [Plan Overview](#) [In Home Services](#) [Residential](#) [Supported Living](#) [Community](#) [Transportation](#) [Ancillary](#) [Legacy](#)

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Dates	Hour Limit	Supported Employment Only
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Add Ons

Attachments

Assessment-Report: SAMPLE POC ATTACHMENT 2.xlsx	Created: 10/18/2021 02:30:24 PM PDT
ISP: SAMPLE POC ATTACHMENT 1.docx	Created: 10/18/2021 02:30:13 PM PDT
Other: SAMPLE POC ATTACHMENT 3.pdf	Created: 10/18/2021 02:30:35 PM PDT