FAQ for Support Plans

Question	Answer(s)
I cannot find the Plan Validation Report under the Reports menu.	***Run Plan Validation*** *The Plan Validation report is not available until AFTER Plan Validation has been run at least one time. To run Plan Validation, click the File Menu and select Save and Validate*
I received the LOC letter in a note but I cannot locate the tickler to begin the plan.	***Was LOC Denied?*** *If LOC was denied, you will not get a tickler. You will receive a request for additional information via a note record.* ***Was LOC Approved?*** *If LOC was approved and you did not receive the tickler. Verify that you are the Care Coordinator for the consumer you are looking for. On the consumer's record, click the Programs tab and in the worker column next to the consumer's program verify that you name (care coordinator) is populated. If somebody else's name is listed, then contact SDS, this could indicate an issue on the Division record that SDS Admin's need to correct.*
I cannot find my consumer when I search for him/her by last name?	***Possible Data Entry problem*** *We have seen in the past that sometimes the person doing data entry has mixed up the consumer's first name and last name. So, if you cannot find your consumer by their last name, try typing the consumer's first name in when looking for their last name.* ***Filters*** *Make sure the operator is correct. For example, if you are looking for a last name = Smith but the operator is not equal to, the resulting list will be the exact opposite of what you are actually looking for.* *One of the easiest filter operators to use is contains. This operator is useful if you don't know the exact spelling of someone's name but you know they have a certain combination of letters. For example, last name contains stone will produce a list consumers with the last names of: Bellstone, Freestone, Stoner, Featherstone, Stonefield, Stoneman, etc.*
How do I track the Application/Assessment?	*The consumer Application and Assessment status can be seen on the Programs tab of the consumer's record in the Status field. This will show you if the assessment has been requested, scheduled or an Assessment QC is in progress.*
How do I track the Support Plan approval process?	*The consumer support plan is tracked on the Plans tab of the consumer's record on the Plan Information page in the Plan Status field. This will show you where the Plan currently is in the approval process, with statuses such as Regulatory Review, Approved Pending DPA, Approved Pend SA and finally Approved.*

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The Cost of Plan of Care report is not showing a value in the Total Cost column for one of the planned services.	***Planned Service Data Entry error*** *It is very important to fill out the Planned Service page from top to bottom. If you select a Provider FIRST and then go back up and enter the Units Per Period and Period, the total cost field WILL NOT automatically calculate. The Units Per Period and Period fields MUST BE POPULATED FIRST before you select a provider for the page to auto-calculate correctly. To fix, start at the top of the page and reselect the fields in order from top to bottom beginning with the Region-Program (Consumer's Region) field.*
The Consumer's Personal Goal is showing up under a specific service on the Person Centered Support Plan Report.	***Remove the Service Link from the Personal Goal*** *Under the Needs-Goals subpage, find the consumer's personal goal. Click the personal goal to open and remove any Service Links. To remove a Service Link, click the drop-down and select the blank row at the top of the list.*
The consumer's guardian is not showing up on the Person Centered Support Plan report.	***Add a case relation with Primary Case Relationship equal to Legal Representative.*** *The Person Centered Support Plan Report is programed to only pull specific data onto the report. A case relation with the Primary Case Relationship Type equal to Legal Representative will pull into the Recipient's Legal Representative area of the report. In the case where the consumer has a guardian, the guardian WILL BE the recipient's legal representative*
The recipient's emergency contact is not showing up on the Person Centered Support Plan report.	***Add a case relation with Primary Case Relationship equal to Emergency Contact-Primary.*** *The Person Centered Support Plan Report is programed to only pull specific data onto the report. A case relation with the Primary Case Relationship Type equal to Emergency Contact-Primary will pull into the Recipient's Emergency Contact area of the report.*
The Medical and/or Psychiatric Contacts table is empty on the Person Centered Support Plan Report.	***No Professional Relations entered*** *The Medical and Psychiatric contacts table is populated from the Professional Relations tab of the Consumer's record. In order for Professional Relation to show up in the table the Primary Relationship field must be a medical professional: Advanced Nurse Practitioner, Audiologist, Behavioral Therapist, Board Certified Behavior Analyst, Dentist, Doctor, Health/Medical Professional, Occupational Therapist, Other Healthcare Provider, Physical Therapist, Physician Assistant, Primary Care Physician, Psychiatrist, Psychologist, Speech Therapist, Therapist.*
The Reason for Visit and/or Frequency columns of the Medical and/or Psychiatric Contacts table is blank on the Person Centered Support Plan Report.	***Values were not entered on the Professional Relations Detail page*** *The Medical and Psychiatric contacts table is populated from the Professional Relations tab of the Consumer's record. In order for Professional Relation to show up in the table the Primary Relationship field must be a medical professional: Advanced Nurse Practitioner, Audiologist, Behavioral Therapist, Board Certified Behavior Analyst, Dentist, Doctor, Health/Medical Professional, Occupational Therapist, Other Healthcare Provider, Physical Therapist, Physician Assistant, Primary Care Physician, Psychiatrist, Psychologist, Speech Therapist, Therapist.* *Two additional fields were added to the Professional Relations Detail Page to capture data that is specifically needed for the Person Centered Support Plan Report. Medical: Reason for Visit and Medical: Frequency need to be populated in Professional Relations Detail for it to pull onto the report.*

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One of the following pieces of information is missing on the Person Centered Support Plan Report: • **School and/or Employment Information** • **Emergency Response Information** • **Personal Profile** • **Summary of Non-Waiver Supports and Services** • **Planning Team**	***Missing or Incomplete Person Centered Support Plan Details form*** *The plan form named Person Centered Support Plan Details is where the identified information to the left is captured. This form feeds the Person Centered Support Plan report so if the form has not been added to the plan or is incomplete the report will also be incomplete. To add the form, click the Plan Forms subpage, select Add Form from the File menu and select Person Centered Support Plan Details form. Fill out the form thoroughly.*
The Provider I want is not available in the Planned Service list, why?	***The Provider could have one of the following:*** • *Provider Action* • *Suspension* • *Decertification or* • *Closure*
The Provider I want is not available in the Provider Association list, why?	***The Provider could have one of the following:*** • *Provider Action* • *Suspension* • *Decertification or* • *Closure*
What is the Region-Program list?	***The Consumer's Region and Program***
The Service I want is not available in the Service Code list, why?	***Invalid Program*** *Certain Services are only offered under certain programs so if you do not see a specific service being offered for the consumer's program, double check your Region-Program selection.*
How do I know when to use Service Schedules?	***Only for a PCA service Plan*** *Service Schedules are only used for PCA. They will never be used for a Waiver Support Plan.*
What do I do if the system's automatic calculation exceeds the regularity cap?	***Adjust Total Units down*** *If entering a service that is not an annual, monthly or daily unit, then enter the units as a weekly average. If system exceeds regulatory cap, then adjust Total Units field down to regulation.*
If I created a Plan in the wrong Consumers record or I updated the wrong Plan in my Consumer record, who do I alert at SDS?	***Plan Note or Email*** *Add a plan note to the plan and add the Plan Reviewer as the Note Recipient or send an email to SDS RAU.*
I received a Plan Validation error, how do I fix it?	***Refer to Job Aid J08 Plan Validation*** *All of the plan validation errors messages and how to fix each on are listed in the job aid*
Do dates need to be changes?	*Dates will only need to be changed if the service is only going to be offered for part of the year. Example, the consumer will only be using Adult Day during the summer months or the consumer will get 3 months of pre-employment services.*
Where can we find the consumer's region information if we don't know it?	***Consumer Demographics*** *Click on the Demographics tab of the consumer record. Click Edit Demographics from the Edit menu. Click the addresses subpage, then click the Residence Address to open. Find the Region field about halfway down the page.*

Document Tracking

Version	Author/Editor	Date	Description
1.0	Jennifer Johns	11/29/2017	Initial Creation
1.1	Jennifer Johns	12/1/2017	Added two addition FAQ about Guardian and emergency contact not pulling into the report
1.2	Jennifer Johns	12/6/2017	Added questions from the training session. Changing Medical professionals be to documented Professional Relations instead of Case Relations