



Service Changes Tip Sheet

3.0 Service Changes (Tips)

- You will remain in the same consumer record until you log off or switch to another consumer using the **Search** link in the upper left corner of the screen.
- To skip a screen, click on the screen you want to go to on the blue menu bar at the top of the screen.
- Only the first letter or letters of a provider's name need to be entered on the SSD screens.
- If [Save and Continue] does not take you to the next screen, read the error message at the top of the screen.
- Remember to use the HCSIS menu links (not the [Back] button in your web browser) for navigation in HCSIS. Some pages will automatically "expire" once the user navigates away from the page. If you use the [Back] button in the Internet Explorer, you may encounter a *Page has Expired* message in HCSIS. If the web page shows an error that it cannot display a secured page, click the [Refresh] button in the toolbar or use menu path View > Refresh to resume navigation in HCSIS. Then click on [Retry] in the next window that displays. HCSIS will refresh the screen to the latest state it was in before the page expired. If the [Refresh] button does not work, contact your supervisor or HCSIS Administrator.
- The tip sheet is organized with each major step listed in a separate box.
- The Headings of each tip box list the following information:

Tip number Tip Sheet Name (Step Name)

HCSIS Menu Path needed to complete step

(Scope needed to complete step)

- Most tip boxes have a **Gray** heading. These tips represent steps to be completed by the Service Coordinator.
- A few tip boxes have a **White** heading. These tips represent steps to be completed by the SC Supervisor.
- Some tip boxes have a **Black** heading. These tips represent steps to be completed by the OLTL Staff.
- **Logging in and out of HCSIS:** When you log back into HCSIS, follow the appropriate menu path on the tip sheet. You will be prompted to perform a search so HCSIS knows which consumer's information you want to update. Search by **Last Name** and click [Search]. If more than one consumer has that last name, select the consumer you want by clicking the link **Last Name, First Name** for the consumer. Then the screen will appear with the consumer's name in the blue header at the top of the screen.
- **Note:** If a consumer is identified as being served by multiple program offices, the consumer's record can be shared across program offices (Office of Developmental Programs, Office of Long Term Living, and Office of Mental Health and Substance Abuse Services). Certain information, such as demographic, eligibility, and Individual Service Plan (ISP) information, can be viewed and/or updated by each program office serving the consumer.
- If you experience difficulties or have questions about HCSIS, the HCSIS Help Desk is available to answer and troubleshoot your questions. **Please contact the HCSIS Help Desk at 1-866-444-1264.**



Service Changes Tip Sheet

3.1.1 Service Changes (Create Draft Critical Revision)

Plan > Plan Admin > Create Draft

(Service Coordination, SC Supervision)

➤ Following the menu path above, the *Create Draft* screen will display.

Note: Search for the consumer using the consumer's first and last name or SSN. The screen will appear with the consumer's name in the blue header at the top of the screen.

➤ Select the **Waiver/Program Type** from the drop-down list.

➤ Select **Critical Revision** in the Category of Plan Changes field.

➤ Click [Create Draft].

➤ Verify the draft plan was created by checking to see if an **Operation Successful** message appears at the top of the screen. If you do not receive an **Operation Successful** message, an error has occurred and the draft plan was not created. Read the error message at the top of the screen, address the error, and click [Create Draft] again.

➤ Do not attempt to create two draft plans with different waivers at the same time in separate tabbed Internet Explorer windows. Doing so could wrongly assign the waiver of one plan to the other plan. If you receive the error "Either waiver/program status is invalid or plan dates are out of waiver/program date range" upon saving, double-check the waivers in both draft plans.

Note: If a consumer is also served by ODP, both ODP and OLTL can capture a consumer's plan information unique to their program office in HCSIS. In addition, OLTL can view a consumer's plan created by ODP via the *Print Plan* screen in HCSIS.



Service Changes Tip Sheet

3.1.2 Service Changes (Adding NEW Services)

ISP > Serv & Supp > SSD

(Service Coordination, SC Supervision)

Note: Skip this step if you are not adding new provider services to the consumer's plan.

➤ Following the menu path above, the *SSD* screen will display.

Note: If applicable, search for the consumer using the consumer's first and last name. The screen will appear with the consumer's name in the blue header at the top of the screen.

➤ Enter the following information:

- **Provider** (if known – this is not a required field)
- **County** (SSD section)

➤ Click [Search].

➤ Select the services to add to the plan by clicking the checkbox to the left of the service name(s). Be sure to reference the **Contract Start Date** on the SSD to ensure you are selecting a service that fits within the plan dates.

Note: *When searching for services in the SSD screen, use the Go To box to view "All" results or narrow search criteria to show fewer services on the screen.*

➤ Click [Add to Selected].

➤ Repeat these steps for each provider of new services.

➤ To add Vendor Services to the plan, continue on to **step 3.1.3**.

➤ If vendor services will not be added to the consumer's plan, click on **Service Details** in the blue menu bar at the top of the screen to go to the *Service Details* screen and skip to **step 3.2.1** of this tip sheet.



Service Changes Tip Sheet

3.1.3 Service Changes (Adding NEW Vendor Services)

Plan > Serv & Supp > SSD-Vendor Services

(Service Coordination, SC Supervision)

Note: Skip this step if you are not adding new vendor services to the consumer's plan.

- If you just finished adding provider services to the plan, use the "Go To" drop-down list located in the upper right corner of the HCSIS window to select **Vendor Services**.
- Click [Go].
- If you navigated away from the *SSD* screen or you are logging back in to HCSIS, follow the menu path above and the *SSD* screen will display.
- Enter the following information:
 - **Provider** (This is a required field)
 - **County of Service**
- Click [Search].

Note: *Narrowing your search criteria by entering the full provider name will show fewer services on the screen.*

- Click on the vendor service that you would like to add.

Note: See tip sheet **6.0 Vendor Services** for additional information on Vendor Services.

3.2.1 Service Changes (Service Model Change, OLD Service Model Details)

Plan > Serv & Supp > Serv Dtls

(Service Coordination, SC Supervision)

Note: Skip this step if the service model is not changing.

- Following the menu path above, the *Service Details* screen will display.
- Click the **Select** circle (or radio button) for a service on the left side of the table at the top of the screen.
- Click [Edit] and the selected service's information will appear in the fields below the table.
- Highlight **Independent Living**
- Update the following information:
 - **Total Annual Units**
 - **Old Service Units** = *Current Total Units in HCSIS – (Old total permanent hours assessed per week * Number of weeks left in the fiscal year from change date * 4)*
 - **Expected Stop Date** (Set this to **the day before the consumer will be receiving services in the new model.**)
- Note the First Paid Service Date and Last Paid Service Date fields if needed for reference.
- Click [Save].



Service Changes Tip Sheet

3.2.2 Service Changes (Service Model Changes, NEW Service Model Details)

Plan > Serv & Supp > Serv Dtls

(Service Coordination, SC Supervision)

Note: Skip this step if the service model is not changing.

- Following the menu path above, the *Service Details* screen will display.
- Click the **Select** circle (or radio button) for a service on the left side of the table at the top of the screen.
- Click [Edit] and the selected service's information will appear in the fields below the table.
- Highlight **Independent Living**.
- Enter the following information:
 - **Total Annual Units**
 - **New Service Units** = *Number of weeks left in year from model change date * (Total permanent hours assessed* 4)*
 - **Expected Start Date** (Set this to **the date the consumer is expected to begin receiving the service**)
 - **Expected Stop Date** (Set this to **6/30/20XX** unless otherwise noted)
- Note the First Paid Service Date and Last Paid Service Date fields, which should both be blank at this point.
- Click [Save].



Service Changes Tip Sheet

3.3 Service Changes (*PERMANENT CHANGE IN HOURS*, Details)

Plan > Serv & Supp > Serv Dtls

(Service Coordination, SC Supervision)

Note: Skip this step if the service change does not include a permanent change in hours.

- Following the menu path above, the *Service Details* screen will display.
- Click the **Select** circle (or radio button) for a service on the left side of the table at the top of the screen.
- Click [Edit] and the selected service's information will appear in the fields below the table.
- Highlight **Independent Living**.
- Enter the following information:
 - **Total Annual Units**
 - **Service Units OLD** = *Old total units in HCSIS – (Old total permanent hours assessed per week * number of weeks left in fiscal year from change date * 4)*
 - **Service Units NEW** = *New total hours * (Number of weeks left in fiscal year from change date * 4)*
 - **Total units to enter into HCSIS** = *OLD total units determined above + NEW total units determined above*
 - **Expected Start Date** (Do not modify)
 - **Expected Stop Date** (Do not modify)
- Note the First Paid Service Date and Last Paid Service Date fields if needed for reference.
- Click [Save].
- Repeat these steps for each service that is changing.



Service Changes Tip Sheet

3.4 Service Changes (*TEMPORARY CHANGE IN HOURS*, Details)

Plan > Serv & Supp > Serv Dtls

(Service Coordination, SC Supervision)

Note: Skip this step if the service change does not include a temporary change in hours.

- Following the menu path above, the *Service Details* screen will display.
- Click the **Select** circle (or radio button) for a service on the left side of the table at the top of the screen.
- Click [Edit] and the selected service's information will appear in the fields below the table.
- Highlight **Independent Living**.
- Enter the following information:
 - **Total Annual Units**
 - **Service Units** = *Old total units in HCSIS+ (Number hours change per week "this can be a negative number" * Number of weeks of change * 4)*
 - **Expected Start Date** (Do not modify)
 - **Expected Stop Date** (Do not modify)
- Note the First Paid Service Date and Last Paid Service Date fields if needed for reference.
- Click [Save].
- Repeat these steps for each service that is changing.



Service Changes Tip Sheet

3.5 Service Changes (Reducing Units to Zero)

Plan > Serv & Supp > Serv Dtls

(Service Coordination, SC Supervision)

Note: Skip this step if you are not reducing the service units on the consumer's plan to zero. If the service you are modifying is a budget based vendor service, see **Step 6.4** of the **Vendor Services Tip Sheet**.

- Following the menu path above, the *Service Details* screen will display.
- Click the **Select** circle (or radio button) for a service on the left side of the table at the top of the screen.
- Click [Edit] and the selected service's information will appear in the fields below the table.
- Change **Total Annual Units to 0**

Note: You can only enter zero for services with no utilization. For services with utilization, the service can only be deleted if the service provider's fiscal department first voids all claims for that service for the time period of the service recorded on the consumer's HCSIS plan.

No other fields need to be modified.

- Note the First Paid Service Date and Last Paid Service Date fields if needed for reference.
- Click [Save].
- Repeat these steps for each approved service that will be removed from the consumer's plan.
- Skip to **Step 3.7** to submit the plan.

Note: Once this Critical Revision is submitted and approved, another Critical Revision should be created and the service can be deleted from the plan (see **Step 3.6**).

3.6 Service Changes (Removing an Approved Service)

Plan > Serv & Supp > Serv Dtls

(Service Coordination, SC Supervision)

Note: This step cannot be completed until the units of service have been reduced to zero (see **Step 3.5**). Skip this step if you are not deleting a service from the consumer's plan.

- Follow the HCSIS menu path above.
- Click the **Select** circle (or radio button) for a service on the left side of the table at the top of the screen.
- Click [Delete].
- Click [Yes] to confirm the removal of the service from the consumer's plan.
- Continue on to **Step 3.7** to submit the plan.



Service Changes Tip Sheet

3.7 Service Changes (Submit Plan)

Plan > Plan Admin > Draft Plans

(Service Coordination, SC Supervision)

- Follow the HCSIS menu path above.
 - Search for the consumer's plan by **Last Name** or **SSN**.
 - Answer **Are any of the Consumers attendants family members** (Select Yes/No from drop-down list).
 - Enter any comments/details by clicking **View/Add Comments**. A separate window opens and allows multiple comment entries. *Please see the **Comment Box Requirements Tip Sheet** for more information about what details should be provided here.*
- Note:** Comments are viewable to all users who have access to view the plan in HCSIS. Comments entered on this screen cannot be deleted or modified. If necessary, a new comment should be added to clarify or correct errors.
- Click [Submit Comments] to save comments.
 - Click [Close] to return to the *Draft Plans* screen.
 - Click [Submit] to submit the plan for review.
 - Verify the draft plan was submitted by checking to see if an **Operation Successful** message appears at the top of the screen. If you do not receive an **Operation Successful** message, an error has occurred and the plan was not submitted. Read the error message at the top of the screen, address the error, and click [Submit] again.



Service Changes Tip Sheet

3.8 Service Changes (Review Plan)

Plan > Plan Admin > Pending Review/Approval

(SC Supervision)

Note: This step is performed by the SC Supervisor.

- Follow the HCSIS menu path above.
- Search for the consumer's plan by **Last Name and First Name** or **SSN**.
- Enter any comments/details by clicking **View/Add Comments**. A separate window opens and allows multiple comment entries. *Please see the **Comment Box Requirements Tip Sheet** for more information about what details should be provided here.*

Note: Comments are viewable to all users who have access to view the plan in HCSIS. Comments entered on this screen cannot be deleted or modified. If necessary, a new comment should be added to clarify or correct errors.

- Click [Submit Comments] to save comments.
- Click [Close] to return to the *Pending Review/Approval* screen.
- Click [Save] to save the plan without submitting the plan, click [Reviewed] to send the plan on for approval, or click [Pending Revision] to send the plan back to the Service Coordinator for revision.

Note: If you send the plan back to the Service Coordinator for revision, be sure to explain why the plan needs to be revised in the comments.

3.9 Service Changes (Approve Plan)

Plan > Plan Admin > Pending Approval/Review

(OLTL Staff)

- Following the menu path above, the *Pending Approval* screen will display.
- Enter search criteria such as **First Name**, **Last Name**, **SSN**, **Waiver/Program Type**, or **SC Entity** and **SC**.

Note: Only one of the search fields listed above is required.

- Set the search criteria field **Category of Plan Changes** to **Critical Revision**.
- Click [Search].
- Find the plan for the consumer and click on the appropriate hyperlink.

Note: If only one consumer's plan is produced from your search criteria, HCSIS automatically directs you to their plan without having to click on a hyperlink.

- Review the consumer's plan information as needed by bringing up a read-only version of the plan by clicking on the printable version of the plan link.
- Click [Approved].

Note: If a consumer is also served by ODP, both ODP and OLTL can capture a consumer's plan information unique to their program office in HCSIS. In addition, OLTL can view a consumer's plan created by ODP via the *Print Plan* screen in HCSIS.




Service Changes Tip Sheet

3.10 Service Changes (Review ISP Approval Alert)

Tools > Alerts > Pending Alerts

(Service Coordination)

- Follow the HCSIS menu path above or click on the  alerts link on the HCSIS home page.
- Under “Alert Search Criteria” select “ISP Status Set to Approved” as the “Subject”.
- Click [Search].
- Find the Alert for the consumer. The consumer plan has been approved and no additional action is required.
- If no Alert can be found for the consumer.
 - Under “Alert Search Criteria” select “ISP status set to pending revision” as the “Subject”.
 - Click [Search].
 - Find the Alert for the consumer.
 - Click on “Individual plan requires revisions.”
 - Proceed to **step 3.9, ISP Set To Pending Revision.**
- If no Alert can be found under either “ISP Status Set to Approved” or “ISP status set to pending revision” no decision has yet been made regarding this consumers plan.

3.11 Service Changes (ISP Set To Pending Revision)

Plan > Plan Admin > Pending Revision

(Service Coordination)

- Click **View/Add Comments** to review the comments regarding why the plan was not approved.
- Click [Revise].
- Make the needed changes to the plan and resubmit as detailed in **steps 3.1.1 through 3.7.**