

2020 Instructions

General 2020 Info

- Open the 2020, enable Macros (go to “Tools”, “Macros”, Security”) -use the medium security setting.
- Most of the highlighted fields are cells that are “open” for data entry. Some of the highlighted cells have set ranges with drop-down boxes. Most of the white cells are locked down and cannot be edited. A couple of exceptions to that are “County Category” and “Calendar Workshop Closure” dates. Those are white but can be and generally should be changed
- Start on page 1 upper left hand corner. Input data in the highlighted fields only (outside of the above exceptions), line by line
- The residential portion of the 2020 (all services falling within the ODDP range) is for the span listed on the 2020, as determined by the different periods. This is further explained within the Input instructions. The Adult Day Array and Non-Medical Transportation portion is different. It is for the annual span of the person whose ISP is starting on the date of the residential plan. This may/may not be more than one person depending upon ISP annual dates
- **Daily Rate Application-** the light purple areas are not editable but are highlighted because these are the new figures that are needed for the Daily Rate Applications. Total hours by provider and total cost of OSOC and HPC by individual
- The aqua box is for general notes
- **Input data for each person residing in the residential setting who receives services**

Individual Information- Page 1 Data Input

Light Yellow fields

1. Period begin date (skip until span date is entered)
2. Revision/Redetermination-marked with an X
3. SSA Name
4. Edit Date- does not automatically populate (older versions did with today’s date)
5. County Category- use drop-down box to enter county category- ODDP ranges will change accordingly
6. Span Change-does not affect calculations, an area to note a change
7. Last Name (notice how the name is added below in the first line for ODDP range)
8. First Name
9. Person’s Medicaid number (12 digits)
10. Funding Source-Level 1, IO, or County
11. Reimbursement- drop-down old/new (Do not use old)
12. Span begin date-enter span
13. Go back and enter period begin date- based on the varying span dates- it will be the latest of all dates
14. ODDP Range-drop-down 0-9. Calculated based upon county category
15. Medical add-on- drop-down Y/N
16. Behavioral add-on- drop-down Y/N
17. Provider- enter #1-3 with name(s)- later entries require the # only, the name will automatically appear
18. Provider- agency or individual status using drop-down for each provider (note rates change)
19. Scroll down past Day Service, NMT providers and HPC/OSOC calculations
20. ATN/ transportation-enter units per frequency-frequency is a month
21. Provider/info. for “Additional 1:1 HPC”
22. ASW = Social Work
23. Additional blank boxes for other waiver services/costs (the area on the left is for data entry to calculate, the area on the right for description)
24. Before moving to the next work sheet, review all data entries for accuracy. Be sure the steps above have been followed for each person who is sharing services in the residential setting

Staffing Patterns- Page 9 data input

Light Yellow fields

1. Recall which letter is associated with which pattern (scroll down and view the 7 options) Change the patterns if needed. The patterns can be changed and can start with any day of the week.
2. Enter the provider number (#1, #2) the name will populate automatically
3. Service will be HPC or OSOC-again note the drop-down box (the base rate is calculated)
4. The first two lines of each schedule are dedicated for the use in a congregate setting where there is a mix of needs in the home between OSOC and HPC
 - o These two lines require different treatment than other lines of the schedule. Use a “1” to indicate individual(s) who receive OSOC and a “H” to indicate those who receive HPC
 - o The rate add on will apply if the consumer in the mixed line receiving HPC is eligible
 - o If necessary, when using these two lines you may cross the midnight hour
5. Entry of start and stop times (outside of the exceptions listed in 5.) begins at 12:00 A.M. and ends at 11:59 P.M. for each person in the service cluster
6. Start time- When time is entered you must enter the time, one space, and A or P. (ex. 11 A or 11:00 A)
7. Stop time- same entry format as start time
8. Notice that the units (15 minutes) are calculated
9. Repeat steps 1-9 for each additional staffing pattern (A.-G.)
10. Review all data entered for accuracy

Calendar for Plan- Page 17 data input

Light Yellow fields

1. Notice span and Workshop Closure Dates (NOTE: The Workshop Closure Dates listed are for FCBMRDD and can be changed)
2. Enter staffing patterns (A, B, C, etc.) After entering patterns for the first two weeks the rest of the calendar will automatically fill-in
3. To change a pattern for one or more days (holiday, scheduled day program closure) enter that specific change, then adjust the remaining days, so only those specific days are changed. Reenter the routine schedule in the first row below the changed dates

Adult Day Services Input

Light Green fields

1. Always authorize Adult Day Services for the individual whose ISP caused the 2020 to be completed
2. Individual’s acuity group (pg. 1)- drop-down box for A, A1, B, or C
3. Adult Day Service providers- list all to be included on this 2020
 - o Note that each individual specific page has space for up to 3 Adult Day Array providers (Adult Day Support, Vocation Habilitation, Combo and/or Supported Employment Enclave)
 - o Note that each individual specific page there is space for up to 1 Supported Employment Community provider
4. Scroll down to reach each Individual specific page. Use drop-down box to identify the type of service provided.
5. Individual specific page- input # of hours per day. To be used if it is an “easy case”; one or more Adult Day Array programs that meet the 5-7 hour day not exceeding five days per week.
6. In the event it is not an “easy case”- go to the appropriate tab (consumer 1-6) across the bottom of the form that corresponds with the individual number at the top of page 1. Input all light green areas:
 - o ISP start date.
 - o The end date is not necessary unless it is going to be less than a year.

- Note that this page can handle 3 Adult Day Array providers: “A”, “B” and “C”. The results from the “A” will automatically fill-in the name of the first Adult Day Array provider on the consumer specific page, “B” the second, and “C” the third
- The length of the program day if it is not between 5-7 hours per day
- The rest of this page functions just like the calendar in the residential portion of the 2020 with the one exception that every Monday – Friday the option is available to assign more than one Adult Day Array provider for the same day. Ex.

MON		TUE		WED		THUR		FRI	
		1/1/2008		1/2/2008		1/3/2008		1/4/2008	
a	b	a	b	b	c	a	c	a	c

Non – Medical Transportation

Light Blue fields

1. Non – Medical Transportation providers- list all to be included on this 2020
 - Note that each individual specific page has space for up to 3 Non-Medical Transportation providers
2. Type of service being provided- per trip or per mile
3. Trips per week from each provider (not exceeding ten trips) or total miles per year

Upon Completion of the 2020 you can:

1. Note that the correct units and rates are calculated
2. Review the cost of the person’s plan to determine if costs are in her/his assigned ranges
3. Review the information for completion of PAWS
4. Prepare for discussion with the person and her/his team-clinical assessment of health/safety
5. Use the clear calendar option to restore formulas changed in the data input process
6. Save, using save as and rename. Always keep your reusable tool blank
7. Print, go to Tools on your menu bar, go to Macros, click on number of consumers (1-6), and click Run-DO NOT USE YOUR PRINT OPTION UNDER THE FILE BAR. DOING SO WILL RESULT IN ABOUT A FIFTY+ PAGE PRINT OUT
 - a. If you want to print selected pages, go to File, print, and select the specific page(s) to be printed