

## **OPWDD Guidance Documents with Payment Standards**

This guidance document contains payment standards, with all payment standards shaded in grey. Any requirement in this guidance document which is not shaded in grey is a program standard or an explanation, illumination or illustration to aid auditors in interpreting the documents. Please note that there may be instances where materials may be partially shaded in a sentence, paragraph or beneath a header. It is OPWDD's intent that only those words that are shaded shall be considered part of a payment standard and any other words within a sentence or paragraph or below a header that are not shaded should be construed to be a program standard or an explanation, illumination or illustration to aid auditors in interpreting the document.

## **Appendix B: Service Documentation Requirements for General Developmental Disability Hourly Services (Future Planning)**

### **Purpose**

This Appendix describes the documentation requirements for General Developmental Disability (DD) Hourly Services (Future Planning) within Options for People Through Services (OPTS) pilots.

### **Service Definition for Future Planning Services**

Future Planning services are face-to-face planning sessions where service staff work with consumers and caregivers to develop an individualized and comprehensive plan for the future when the caregiver can no longer care for the consumer. Future Planning services may address establishing living arrangements, surrogacy, alternatives, finances, advance directives, and general lifestyle choices for the consumer's future.

The unit of service for General DD Hourly Services (Future Planning) is an hour with services reported in 15 minute increments. When determining the "payable service time," only face-to-face service delivery by service staff actively providing the service "counts." Staff can be "regular" payroll staff or paid contract staff. A full 15 minutes of service must be documented in order for your agency to be paid. There is no "rounding up," i.e. no payment will be issued if your agency only delivers 12 minutes of service.

### **Format for Documenting General DD Hourly Services (Future Planning)**

Your agency must use the OMRDD-developed Narrative Note format to document the provision of General DD Hourly Services (Future Planning). A copy of this Narrative Note is included with this Appendix. For each "session," a continuous period of hourly general DD service, staff must document the service start and stop time. Detailed directions for completing the narrative note are attached.

Staff who actually deliver the services must document the service that they provided. By signing the narrative note, the staff who deliver the service are documenting the provision of Future Planning services. That is, they are attesting to the fact that a Future Planning service was delivered.

### **Reporting General DD Hourly Services (Future Planning)**

Payment for Future Planning services under OPTS will be issued to your agency based on service information that your agency submits to OMRDD via a secure web application. When reporting services via the OPTS Web Based Application, your agency must report the duration of face-to-face Future Planning services that were provided to a consumer during the month.

## Required Documentation for Future Planning Services

Your agency must maintain the following documentation to support the provision of Future Planning services:

- **The Narrative Note-OPTS General Developmental Disability Hourly Services (Future Planning) written for every service delivery.** The narrative note must describe the service that staff provided to the consumer and/or the consumer's caregivers. Staff should include the consumer's and/or caregiver's response to the Future Planning service and any discussion of issues or concerns that occurred. A copy of the narrative note format is included with this Appendix.
- **The General Developmental Disability Services (Future Planning) Plan.** Where a plan has been established between the consumer, consumer's caregivers and staff, a copy of the plan must be maintained.
- For Individuals with Individualized Service Plans (ISP), **A Copy of the Consumer's ISP** covering the time period for the claim developed by the consumer's Medicaid Service Coordination (MSC) or Plan of Care Support Services (PCSS) Coordinator. The OPTS General Developmental Disability Hourly Services (Future Planning) must be identified in Other Services or 100% OMRDD Funded Supports and Services section of the ISP and the required information must be completed as follows.

<p><b>Name:</b> <u>Your Agency's Name Here</u></p> <p><b>Type of Service:</b> <u>OPTS General DD Hourly Services (Future Planning)</u></p> <p><b>Frequency:</b> <u>Hour</u> <b>Duration:</b> <u>Ongoing</u> <b>Effective Date:</b> <u>No later than the 1<sup>st</sup> day of service delivery</u></p> <p><b>Person's Valued Outcome or Reason for Receiving the Service:</b> <u>Valued Outcomes for receiving General DD Hourly Services (Future Planning)</u></p> <p>_____</p>
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## Documentation Retention

All documentation specified above must be kept the balance of the calendar year in which they were made and for six (6) additional years thereafter. See Appendix A for additional requirements regarding record retention.