

OPWDD Guidance Documents with Payment Standards

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Appendix B: Service Documentation Requirements for General Developmental Disability Hourly Services (Trip Planning)

Purpose

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

Service Definition for Trip Planning Services

Trip Planning services are face-to-face planning sessions where service staff work with consumers to improve skills needed for trip planning and to develop an individualized plan for a future trip. Trip Planning services may address keyboarding, computer and internet skills, budgeting, and arranging accommodations, meals, and activities.

The unit of service for General DD Hourly Services (Trip 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 (Trip Planning)

Your agency must use the OMRDD-developed Checklist format to document the provision of General DD Hourly Services (Trip Planning). A copy of this format 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 checklist are attached.

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

Reporting General DD Hourly Services (Trip Planning)

Payment for Trip 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 Trip Planning services that were provided to a consumer during the month.

Required Documentation for Trip Planning Services

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

- **The General DD Hourly (Trip Planning) checklist showing:**
 - **A contemporaneous record of the “start and stop times” of the face-to-face provision of General DD Hourly (Trip Planning) services by staff.** Where the General DD Hourly (Trip Planning) provider reports via the OPTS Web Application that four hours of service were delivered, the OPTS checklist must show that the staff member provided four hours of service (e.g., service start time is 9:00 a.m. and service stop time is 1:00 p.m.).
 - **Contemporaneous Documentation of at least one face-to-face General DD Hourly (Trip Planning) Service staff provided during each continuous service delivery period.** The General DD Hourly (Trip Planning) service must be drawn from the consumer’s General DD Hourly (Trip Planning) Plan. For example, the General DD Hourly (Trip Planning) staff person assists the consumer from 9:00 a.m. to 11:00 a.m. and initials the checklist documenting the provision of at least one service during this period. The worker must document at least one additional service when he/she returns at 2:00 p.m. and delivers an additional hour of service.
- **The General Developmental Disability Services (Trip Planning) Plan.** Which describes the services that will be provided to the consumer. 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) Service Coordinator. The OPTS General Developmental Disability Hourly Services (Trip 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.

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

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.