

## **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 Monthly Services (Room & Board)**

### **Purpose**

This Appendix describes the documentation requirements for General Developmental Disability (DD) Monthly Services (Room & Board) within Options for People Through Services (OPTS) pilots.

### **Service Definition for General DD Monthly (Room & Board)**

General DD Monthly is an OPTS service that funds an individual's approved room and board expenses which are not covered by the individual's monthly SSI payment. The specific allowable costs for each individual that may be funded through OPTS are outlined in the agency's OPTS Agreement, but may include utilities, transportation, food and rent subsidy.

The unit of service for General DD Monthly Services is one month. The OPTS agency will be paid for one month of OPTS General DD Monthly (Room & Board), when they attest that the agency has paid for the consumer's allowable room and board costs in excess of SSI in accordance with the OPTS agreement.

### **Format for Documenting General DD Monthly Services (Room & Board)**

Your agency must use the OMRDD-developed Attestation Document record form to document the provision of General DD Monthly Services (Room & Board). A copy of this Attestation Document is included with this Appendix. Detailed directions for completing the Attestation Document Record are also attached.

By signing the Attestation Document, the agency's staff is attesting to the fact that the expenses which were paid with OPTS funds were only those outlined in the OPTS Agreement.

### **Reporting General DD Monthly Services (Room & Board)**

Payment for General DD Monthly Services (Room & Board) 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 attest each month that the services provided were those services outlined in the OPTS Agreement.

### Required Documentation for General DD Monthly Services (Room & Board)

Your agency must maintain the following documentation to support the provision of General DD Monthly Services (Room & Board):

- **The Attestation Document-OPTS General Developmental Disability Monthly Services (Room & Board).** The Attestation Document must be signed once a month by the staff responsible for ensuring that the room and board costs were paid and that these costs are allowable costs identified in the OPTS agreement. A copy of the Attestation Document is included with this Appendix.
- **The Annual General Developmental Disability Monthly Services (Room & Board) Itemized Record.** Staff must prepare and submit once a year an annual report of all funds expended during the calendar year under this agreement. This annual report must be signed by the agency's executive director and must be provided to OMRDD no later than February 1, of the year following the calendar service year. For example, payments made in calendar year 2005, must be included in the annual report which is submitted to OMRDD no later than February 1, 2006. The report must identify the payee, the amount paid over the year, and the purpose (e.g., rent subsidy or utilities).
- **The OPTS General DD Monthly (Room & Board) Quality Assurance Checklist.** Staff must complete the checklist twice a year. Then the Service Coordinator, participant or his/her guardian, and the staff completing the checklist must sign and date the Quality Assurance Checklist
- **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 Monthly Services 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:**     Your Agency's Name Here    

**Type of Service:**     OPTS General DD Monthly Services (Room & Board)    

**Frequency:**Month **Duration:** Ongoing **Effective Date:** No later than the 1<sup>st</sup> day of service delivery

**Person's Valued Outcome or Reason for Receiving the Service:**

    Reason for needing General DD Monthly Services (Room & Board)    

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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.