

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 OPTS General Developmental Disability Per Unit Services (Transportation Services)

Purpose

This Appendix describes the documentation requirements for General Developmental Disability Per Unit Services (Transportation Services) within Options for People Through Services (OPTS) pilots.

Allowable Destinations for OPTS Transportation Services

OPTS Transportation services are provided only to consumers who OMRDD has authorized to receive the service. Consumers must also meet the consumer eligibility criteria described on page 3 of this Appendix.

Transportation services provided under this contract are for the express purpose identified in page 3. The transportation services funded under this contract cannot duplicate transportation services available from other resources (e.g. transportation provided by residential providers for community inclusion activities). OPTS Transportation Services are not to be used to transport the consumer to medical or clinical appointments. OPTS Transportation services also cannot be used to transport the consumer to Day Treatment, Day Habilitation, Prevocational Services or other Medicaid-funded day programs. If it is determined that trips funded under this agreement are for a purpose other than that identified on page 3, OMRDD will reverse payments or take other appropriate contract action.

Each transportation trip must either begin at the consumer's home or end at the consumer's home even if multiple stops occur between the pick up origination and the drop off destination. For example, if the consumer is picked up at the library, but wants to stop at the bookstore before going home, this trip (library to store to home) would be considered one, one-way trip.

Format for Documenting OPTS Transportation Services

Your agency must use the OMRDD-developed documentation record to document the provision of OPTS Transportation Services. A copy of this documentation record is included with this Appendix. Staff who deliver the Transportation Service must initial the record, thus documenting the provision of the service.

Reporting OPTS Transportation Services

Payment for OPTS Transportation Services 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 will report the total number of one-way trips provided to a consumer on a given service date.

Required Documentation for OPTS Transportation Services

Your agency must maintain the following documentation to support the provision of OPTS Transportation Services:

- **OPTS Transportation Service-Documentation Record**, which is completed by the driver. There is a separate record for each day on which services are provided. Each one-way trip must either begin or end at the consumer's home. For each one-way trip, the driver must identify the consumer name, TABS ID, pick-up address, the final drop-off address and purpose of trip. If multiple stops occur during a one-way trip, the driver must list the reason for the other stops in the Purpose of Trip section. The sheet must also document the odometer reading at the start and end of each day on which Transportation Services are provided.
- **For consumers who are enrolled in the Home and Community Based Services (HCBS) Waiver, your agency must maintain a copy of the consumer's ISP** covering the time period of the claim developed by the consumer's Medicaid Service Coordination (MSC) or Plan of Care Support Services (PCSS) coordinator. The OPTS Transportation Service must be identified in the "Other Services or 100% OMRDD funded supports or Services" section of the ISP and the required information must be completed as follows:
 - Name of Provider = *Your Agency's Name*
 - Type of Medicaid Service = OPTS/General Developmental Disability-Per Unit Services (*Transportation Services*)
 - Frequency = *One-way trip*
 - Duration = *On-Going*
 - Effective Date = *No later than the first day of service delivery*
 - Person's Valued Outcome or Reason for Receiving the Service = *Is drawn from the list of valued outcomes identified in section 1 of the ISP.*

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.

Criteria for Eligible Consumers

- Consumers must be authorized by the DDSO
- Consumers must be enrolled in the appropriate OPTS program in TABS
- Consumers cannot live in a certified residential setting
- Consumers live independently or with family in rural areas where other transportation resources are not readily available.
- Consumers must be engaged in self-determination activities

Purpose of Transportation

- Trips can be used to transport the consumer for shopping or recreational outings
- On an exception basis, the OPTS Transportation Service may be used to transport the consumer to his or her Supported Employment job. It is expected that OPTS Transportation Services will be used for transportation to or from the Supported Employment job site only when the regular means of transportation is temporarily unavailable. If the number of trips to or from a job site exceeds six one-way trips per year per consumer, OMRDD will consider that the transportation is not being provided on an exception basis.
- This transportation is to be used to promote the consumer's integration opportunities and independence. A family member may be transported only when the family member is accompanying the consumer and is providing necessary care and support during the excursion.
- Trips must be used to promote a consumer's self advocacy
- Trips must be above and beyond Residential Habilitation staff services as described in the consumer's Residential Habilitation Plan.
- Examples of acceptable trips would include self-advocacy meetings, schools where presentations will be made to increase understanding of individuals with disabilities, and continuing education classes.

NOTE: Each OPTS proposal that is designated to have General DD Per Unit Services (Transportation Services) should have their own "page 3" of this Appendix B. This document contains all Criteria for Eligible Consumers and Purpose of Transportation, see individual OPTS contracts for standards applicable to specific agencies.