

Cathy Cooper  
Authorized Signature

Number: SPD-AR-08-067  
Issue Date: 10/24/2008

Topic: Developmental Disabilities

Due Date:

Subject: Service Site Assignment on DD50-Residential Services Client Prior Authorizations in eXPRS

**Applies to (check all that apply):**

- |  |  |
|--|--|
| <input type="checkbox"/> All DHS employees                     | <input type="checkbox"/> County Mental Health Directors  |
| <input type="checkbox"/> Area Agencies on Aging                | <input type="checkbox"/> Health Services   |
| <input type="checkbox"/> Children, Adults and Families         | <input type="checkbox"/> Seniors and People with Disabilities  |
| <input checked="" type="checkbox"/> County DD Program Managers | <input checked="" type="checkbox"/> Other (please specify): DD Regional Coordinators; CDDP-Local Authority eXPRS users |

**Action Required:** Review and update all current accepted Client Prior Authorizations (CPAs) for individuals in SE50 24-hour Residential Services to reflect the current service site address location.

**Reason for Action:** The Restructuring Budgets And Rates project (ReBAR) will begin assessments and rate changes for SE50 24-hour Residential Services beginning November 2008. The ReBAR rate schedule is constructed taking into account service-setting size. In order to correctly assign rates and track the number of individuals authorized for services at a specific residential site in comparison to that site's licensed capacity, all CPAs for individuals currently in SE50 24-hour Residential Services need to be reviewed and updated to reflect the individual's current service site address.

The eXPRS system was constructed with coding to support a comparison of the site address in a CPA to the selected provider's licensed capacity for the specified site. While this coding has always been part of the system, the function was not activated at the time of the original deploy of the system. The system is now being enhanced to add edit functions that limit the number of CPAs with a specific site address to the specified licensed capacity for the site.

To fully support the implementation of ReBAR rates in eXPRS for individuals in SE50 24-hour Residential Services, the license capacity edit function must be fully operational and activated by January 1, 2009.

**ACTION TO BE TAKEN:**

CDDPs must review all active SE50 24-hour Residential CPAs to verify that the site address listed on the CPA is the actual site location where the individual is receiving services. If the site address is not accurate, the CDDP must create a new CPA for the individual that lists their current and correct service site address location.

eXPRS has been recently updated with a “copy CPA” feature to make the creation of a new CPA for an individual easier and more time efficient.

Step-by-step instructions on how to edit or change the service site location information on a CPA is attached with this Action Request.

CDDPs must prioritize the CPAs to be reviewed and updated as follows:

**By November 30, 2008:** CPA review and updates must be completed for individuals that will be in the first 300 individuals receiving assessments from the DD Assessment Unit beginning in mid-November. Each CDDP should have already received a list of individuals targeted for a SIS assessment from the ReBAR Program.

**By December 31, 2008:** CPA review and updates must be completed for all remaining individuals in SE50 24-hour Residential Services. The site location licensed capacity edit will activate January 1, 2009.

If when attempting to select a site location, you cannot locate the current site location information for the Provider in the drop down menu in eXPRS, please contact the DHS Service Desk at 503-945-5623 to report the issue.

**Field/Stakeholder review:**       Yes       No

**If yes, reviewed by:**

*If you have any questions about this action request, contact:*

<b>Contact(s):</b>	<ul style="list-style-type: none"> <li>• <b>Julie Harrison, Regional Coordinator:</b> for problems using eXPRS to locate or change the CPA site locations</li> <li>• <b>Brande Martinez, eXPRS Business Analyst:</b> for problems using eXPRS</li> <li>• <b>Jan Morgan, ReBAR Program Manager:</b> for questions regarding ReBAR and the SIS Assessment process</li> </ul>		
<b>Phone:</b>	Julie: 503-945-9794 Brande: 503-945-9412 Jan: 503-945-6409	<b>Fax:</b>	
<b>E-mail:</b>	Julie: <a href="mailto:Julie.A.Harrison@state.or.us">Julie.A.Harrison@state.or.us</a> Brande: <a href="mailto:Brande.Martinez@state.or.us">Brande.Martinez@state.or.us</a> Jan: <a href="mailto:Jan.M.Morgan@state.or.us">Jan.M.Morgan@state.or.us</a>		

## How to edit or change the site location information on a DD50-Residential Service Client Prior Authorization (CPA) in eXPRS

1. Log in to eXPRS as your CDDP's Local Authority user.
2. From the left hand yellow menu, click on "**PRIOR AUTHORIZATIONS**", then from sub menu "**CLIENT PRIOR AUTH**", and then click on "**FIND CPA**".
3. Enter the search criteria you need in the FIND CPA search windows to take you to the CPA you need to edit or change the client's service site location.
4. Click "**FIND**" to get the list of CPA(s).
5. From the list of CPAs, click on blue hyperlink for the most current CPA for the individual who's CPA you want to change to open it.
6. Once the CPA is open, from the buttons at the bottom, click on "**EDIT**". This will open the editable fields in Section 5 of the CPA.
7. Change the end date of the CPA to the day after the date you are doing the edits. (For example: if you are working on changing the CPA on **10/10/2008**, then the end date you should use is **10/11/2008**. This will prevent any need to reprocess claims for the current CPA.)
8. Change the ONGOING field from "Y" to "N".
9. Click on the calculator icon next to the CPA TOTAL to recalculate the total with the new date range.
10. Add any notes you may want in the ADD NOTES field.
11. Click "**SAVE**".
12. Then click on "**COPY**" to make a **draft** copy of that CPA you just ended.
13. In the **draft** copy, click "**EDIT**" to open the CPA to enable the edit fields to change information.
14. Click on the "**PREVIOUS**" button twice. This will move you up the CPA until you are able to edit the SITE information in Section 3.
15. Select the appropriate site location address for where that individual is receiving services from the drop down menu.

16. Click "**NEXT**" in Section 4.
17. In Section 5, change the start date to the day immediately following the end date of the CPA you ended. (For example, if the end date of the previous CPA was changed to 10/11/2008, then the start date of this new CPA should be 10/12/2008).
18. Change the end date now to be the last day of the biennium.
19. Set the ONGOING field to "Y".
20. Do not change anything in the RATE field. The information should have auto-filled and be the same as the previous CPA that you copied.
21. Click on the calculator icon next to the CPA TOTAL to recalculate the total with the new date range.
22. Add any notes you may want in the ADD NOTES field.
23. Click "**SAVE**".
24. Then click "**SUBMIT**".
25. To find and edit the next CPA you need to change the site address information on, repeat steps 4-24.

As always, please contact the **DHS Service Desk** at **503-945-5623** if you have difficulty with the system.