

CAPS 2 Pay-in Worksheet Instructions (OACCESS Form #: Pay-inN)

1. **From the toolbar, click on the *Benefits* icon** 
 - a. Select the *Case Overview* Tab
 - Mark the client as the Primary Applicant (PA) for both Medical (MED) Assistance and Services (SVC).
2. **From the toolbar, click on the *Financial* icon** 
 - a. Select the *IncM/Empl & Income* Tabs
 - Add all income types, income amounts & other information
3. **From the toolbar, click on the *Medical* icon** 
 - a. Select the *Health Ins.* Tab
 - Add all Health Insurance types, premium amounts & other information
 - b. Select the *Medical Cost* Tab
 - In the *Medical Expense Detail* section's *Type* drop-down list
 - Select 'Client Pay In' (required field)
 - Select all other allowable medical deductions, such as 'Other Incurred Medical'
 - Mark the 'Allowable Med. Deduction' check box (required field)
 - In the *Person(s) Responsible* section
 - Select the Client Name and Involvement of 'Primary Payor'
4. **Set-up and complete the CAPS APD In-home Service Benefit and Plan as follows:**
 - a. MUST select one or more of the following service types: In-home Care (HCW) (Hourly, Live-in or Spousal Pay) **OR** In-Home (HK or PC) Agency Contract
 - b. In order to select Home Delivered Meals (HDM), the client must be receiving another waived service. If HDM is selected, complete the following:
 - Select the *Provider Detail* button from the Services group box
 - From the Provider Details screen, select the *595 Details* button and enter the quantity of meals for the month (click on the *Add Month* button to enter another month).
5. **From the toolbar, click on the *Printer* icon** 
 - a. Select *CAPS 2 Pay-inN Worksheet* to preview or print form
Note: This worksheet can be viewed or printed from a pended or approved Service Plan
 - Select in the following order: Assessment, Benefit and then Plan needed to calculate the client pay-in
 - b. Enter the date the client pay-in will be in effect
 - This date must be within the CAPS 2 plan begin and end dates
 - The Pay-in calculation will include all services in the plan that fall between this date range