Autism Data Reporting System Manual

Texas Health and Human Services

May 2023

HHSC AUTISM DATA REPORTING SYSTEM (ADRS)

The HHSC Autism Program works in partnership with local community agencies through contracts to provide focused applied behavior analysis services for children, ages three through fifteen, who have a diagnosis of autism spectrum disorder.

The HHSC Autism Data Reporting System (ADRS) is the system used by the HHSC contractors to record the services provided to the HHSC clients. After contractors record services provided in the ADRS each month, the contractors submit the monthly invoice.

This manual is a guide that provides the user with instructions to access the different screens within the system and enter the case information.

HELPFUL TIPS

Case Examples

The screen shots in this user guide consist of mock cases and a mock provider created by HHSC CAP staff. The screen shots will contain the fictitious surname of Barefield.

Table of Contents

The Table of Contents (TOC) in this guide lists all the sections. Each section listed in the TOC is a link to the section. Click the link to go to the section.

Using the Tab Key in the System

While entering data in the system, use the TAB key to move to the next data field. If you use the ENTER key before entering all the data, the system will display an error message indicating the fields that still need to be entered.

Using the Right and Left Arrows

The system does not navigate to a previous screen or the next screen when using the right or left arrow (the Back arrow) on the upper left-hand top of the browser screen.

Entering Dates

When entering a date, always use mmddyyyy. The system automatically enters slashes for the date. For example, when the date of 09012022 is entered the system will show the date as 09/01/2022.

System Timeout

The system times out after 20 minutes of no activity.

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TABLE OF SCREEN SHOTS

1100 Accessing ADRS

The user accesses ADRS at the following url: autism.hhsc.state.tx.us

Upon accessing the ADRS, the user will be routed to the Autism User's Agreement.

1102 User Agreement and Logging In

The contractor must read and agree to the terms and conditions on this page to access ADRS.

Autism Program Data Reporting System

WARNING: THIS IS A TEXAS HEALTH AND HUMAN SERVICES INFORMATION RESOURCES SYSTEM THAT CONTAINS STATE AND/OR U.S. GOVERNMENT INFORMATION. BY USING THIS SYSTEM YOU ACKNOWLEDGE AND AGREE THAT YOU HAVE NO RIGHT OF PRIVACY IN CONNECTION WITH YOUR USE OF THE SYSTEM OR YOUR ACCESS TO THE INFORMATION CONTAINED WITHIN IT. BY ACCESSING AND USING THIS SYSTEM YOU ARE CONSENTING TO THE MONITORING OF YOUR USE OF THE SYSTEM, AND TO SECURITY ASSESSMENT AND AUDITING ACTIVITIES THAT MAY BE USED FOR LAW ENFORCEMENT OR OTHER LEGALLY PERMISSIBLE PURPOSES. ANY UNAUTHORIZED USE OR ACCESS, OR ANY UNAUTHORIZED ATTEMPTS TO USE OR ACCESS, THIS SYSTEM MAY SUBJECT YOU TO DISCIPLINARY ACTION, SANCTIONS, CIVIL PENALTIES, OR CRIMINAL PROSECUTION TO THE EXTENT PERMITTED UNDER APPLICABLE LAW.

User's Agreement

When entering this system, the user agrees to the following terms and conditions

This system is restricted to authorized users only. Unauthorized access, use, misuse or modification of this system, the data contained herein, or in transit to/from this system, may constitute a violation of federal, state and local laws and subject individual(s) to disciplinary action and/or criminal prosecution. This system and associated usage is subject to monitoring and security testing by authorized personnel.

If you do not agree to abide by the above terms and conditions, do not log on to the Autism Program Data Reporting System.

Please enter your username and password.

Account Information

User name [   ]

Password [   ]

Ok and sign in

Forgot Password

After the user has read the terms and conditions, the user may login to the system by entering the username and password and clicking Ok and sign in. If the user does not agree to the terms and conditions, the user may close the screen to exit the system.

If the user does not have access rights, is inactive, or typed in an incorrect username and/or password, the user will see the following error message: Login was unsuccessful. Please correct the errors and try again. The username or password provided is incorrect.

*Contractor staff who enter records into more than one contractor location/contract must have a unique username and password for each location/contract.

If the external user forgets their username and/or password, they will be required to contact their HHSC Program Provider Administrator for assistance at Childrens.Austism.Program@hhs.texas.gov.

2000 Navigation

2100 Static Options

Once the user gains access to the system, the application populates the static options consisting of **Skip to Content, Zoom Layout, Short Cut Keys,** and **Welcome**.

Screen Shot 2 – Static Options

2101 Skip to Content

When the user clicks on **Skip to Content**, the system will allow the user to move directly to the **Case Search** content on the screen.

2102 Zoom Layout

When the user clicks on **Zoom Layout**, the system will Zoom into the content on the screen.

2103 Short Cut Keys

When the user clicks on **Short Cut Keys**, the application opens the **Short Cut Keys** page. These are keyboard short cuts for the user.

Screen shot 3- Short Cut Keys

Short Cut Keys

Buttons	Short Cut Keys
Close Page; Close; Cancel; No	Alt + C
New	Alt + I
OK; Yes; I Agree; Authorize	Alt + O
Print	Alt + P
Print Preview	Alt + P
Reset	Alt + R
Save	Alt + S
Search	Alt + L
Zoom Layout	Alt + Y and Enter

2104 Welcome Field

The **Welcome** field displays the name of the user currently logged in. The username will appear above the **Case Search** box.

2200 Top Navigation

The application also populates a top navigation menu with these options:

- Caseload Management
- Report
- My Account
- Provider Admin

See Sections 3000 through 6000 for more information on how to navigate through these options.

Screen Shot 4 – Navigation Menu

| Caseload Management | Report | My Account | Provider Admin | User Name: Kim O'Connor |

Case Search

Case Search

Local Case Number [ ]

Autism Case Number [ ]

First Name [ ]

Last Name [ ]

Provider Name Kim's Best Autism Services

Case Status [Active ▾]

[Search] [New Case] [Reset] [Export to Excel]

Results:

Records Returned: 1

Consumer Name	Date of Birth	Local Case Number	Enrollment Date	Exit Date
Address	City	State	Zip	Phone
Provider Name				
Sybil Deirdre Barefield	01/01/2010	123456	01/01/2020	
123 Scoon Ave	Austin	TX	78755	(512) 555-5555
Kim's Best Autism Services				

3100 Case Search

The contractor conducts a case search in the following situations:

    a) Searching for an existing active client;

    b) Searching for an existing inactive client; or

    c) Creating a new client entry.

3101 Searching for an Active Client

Searching for an existing active client who is currently participating in the contractor's program is the most common type of search used by contractors.

To search for an active client on the contractor's client list:

- enter the case number or the name of the client and set the **Case Status** to Active; or
- **scroll down** to see the list of all the clients enrolled in the contractor's program.

The system defaults to the contractor's client list. See Screen Shot 5: Case Search with the Case Status as Active. When the client's name appears, the user will see the following fields for the client:

- Consumer Name and Address;
- Date of Birth and City;
- Local Case Number, State, and Zip Code;
- Enrollment Date and Phone; and
- Exit Date.

Click on the client's name to access the case information. See Section 3200, Case Information, regarding the client information.

3102 Searching for an Inactive Client

Searching for an inactive client is used when the contractor has a client that is returning to the program. To search for an inactive client on the contractor's client list:

- enter the case number or the name of the client and set the **Case Status** to **Inactive**; or

- scroll down to see the list of all the clients enrolled in the contractor's program.

The system defaults to the contractor's client list. When the client's name appears, click on the client's name to access the case information. See Section 3200, Case Information, regarding the client information.

3103 Creating a New Client Entry

To create a new client entry, the system requires the contractor to conduct a client search. This requirement ensures that the client has not already exceeded the hourly service limits in the HHSC Autism program.

To search for a client, enter a portion of or the applicant's entire first and/or last name. Do not include punctuation such as periods (e.g., "Jr.") or commas (e.g., "Garcia, Jr."). Set the **Case Status** to **Active and Inactive**. The system defaults to the contractor's client list.

The contractor will see a:

- list of the contractor's clients with the same name; or

- message indicating that no records were found.

If the client's name appears, click on the client's name. The **Case Information** page will open with populated information. The user can edit the fields as needed. See Section 3200, Case Information regarding the client information.

Screen Shot 6 – Case Search with Case Status as Active and Inactive

If the new client does not appear on the list, then click on the **New Case** button to create a new entry. When the user clicks on the **New Case** button, the return data list includes all clients statewide with the same information, regardless of the provider. This allows the contractor to check to see if the client is listed in another program. See Screen Shot 7: New Case Search with Statewide List of Clients.

If client is listed on the statewide list, click on the client's name. The **Case Information** page will open with populated information. The user can edit the fields as needed. See Section 3200, Case Information, regarding the client information.

Screen Shot 7 – New Case Search with Statewide List of Clients

| Caseload Management | Report | My Account | Provider Admin | User Name: Kim O'Connor |

Case Search

New Case Search

Try to find the consumer on the system. If not create a new case

Records Returned: 2

The list includes all clients statewide with the same last name regardless of the provider. Click New Case if client is not on the list

Name	Phone	Hours Of Service	Focused Period		
Provider Name	Address	City	Zip	Date of Birth	Entry Date	Exit Date
Sybil Barefield	5125555555	0.00				
Kim's Best Autism Services	123 Scoon Ave	Austin	78755	01/01/2010	10/19/2022	
Samuel Barefield	5125555555	0.00				
Kim's Best Autism Services	123 Scoon Ave	Austin	78755	02/01/2010	10/19/2022	01/01/2021

New Case

If the client does not appear on the statewide list, click on the **New Case** button. Enter the following information for the <u>new</u> client on the **Case Information** page:

- Provider (Enter the provider's name)
- Local Case Number (Enter the contractor's case number)
- First Name
- Last Name
- Middle Name
- Date of Birth (mmddyyyy: The system will automatically add the slashes)
- Gender
- Parent/Responsible Party First Name
- Parent/Responsible Party Last Name
- Relationship: Enter the relationship of the parent or responsible party to the client. If the relationship is not listed select Other and enter the relationship in the Relationship/Other field
- Phone
- Phone Type
- Email
- Address1

- Address 2

- Zip Code (The system automatically fills in the city, state, and county.)

- City

- State

- County

- Autism and other medical conditions (Enter the autism spectrum disorder and any secondary or tertiary medical conditions:

    ‣ Autism Diagnosis

    ‣ Secondary Medical Conditions

    ‣ Tertiary Medical Conditions

    ‣ Age at Diagnosis

- Language Spoken (Primary language spoken in the home)

- Race and Ethnicity: Enter all that apply.

- Proof of Texas Residency: Enter proof of residency. If the proof of residency choice is not listed, select **Other** in the drop-down menu and enter the type of proof in **Resident Other**

- Family Income

    ‣ Family Gross Income: Use the income tax gross income. If an income tax return was not filed, gather the household's last month's pay checks to determine a monthly income amount and multiply by 12 to come up with an annual gross income.

    ‣ Family Adjusted Gross Income: Use the adjusted gross income from the income tax return or use the annual gross income minus allowable deductions.

    ‣ Family Income Range: The system automatically fills in this information based on the Family Adjusted Gross Income.

    ‣ Family Size: Enter the family size.

- Insurance Information: Check all the insurances the client has. Enter the client's insurance number for each insurance type, as appropriate.

    ‣ CHIP

    ‣ Medicaid

    ‣ Medicare

    ‣ TRICARE

    ‣ Private Insurance

    ‣ No Insurance

- Prior ECI Services: Answer Yes or No.

- Referral Source: Enter the source of referral by using the drop-down menu. If the user selects **Other source**, **if so, please provide**, then enter the other source under Other Referral Source.

- Enrollment and Exit Information

  - Enrollment Date: Enter the enrollment date. Clients are enrolled on the date they receive pre-testing or the first date of services, whichever is first.

  - Exit Date: Enter the date the client exited the program.

  - Exit Reason: Enter the exit reason by using the drop-down menu. If **Other** is selected, please enter the reason in the **Exit Reason Other** field.

  - Past Exit Reasons: Click on **Past Exit Reasons** to view other past exit reasons. The system will populate the page with past exit reasons.

- Save: To save the client information, click on **Save** at the bottom of the screen

- Close: To exit out of the page, press Close Screen.at the bottom of the screen

- Preview Print: To print the client information screen, click on **Preview Print** at the bottom of the screen. The system will provide a printable page that can be viewed before printing. The system displays two new buttons: scroll up to see **Print** or **Close Page**. To print the page, click on Print. To close the preview page, click on **Close Page**. The system will take the user back to the **Case Information** page.

3200 Case Information

The **Case Information** option appears on the **Caseload Management** menu after clicking on a client name. The Case Information option contains two menu items: **Case Demographic** and **Note**.

3201 Case Demographic

The **Case Demographic** option provides all the demographic information that was entered when the client was added to the system. See Section 3103, Creating a New Client Entry, for all the demographic information regarding the client.

Screen Shot 8 – Case Information/Case Demographic

Caseload Management Report My Account Provider Admin User Name: Kim O'Connor

Case Search
Case Information
  ○ Case Demographic
  ○ Note
Consumer Testing
Service Record
Insurance Payment
Cost Share

Case Information for Sybil Barefield, Autism Case #: 19678, Provider Name: Kim's Best Autism Services, Hours Of Service: 9.50, Focused Period: 1/15/2022 - 1/14/2023 (Hours 5)

Provider Kim's Best Autism Services

Local Case Number 123456

First Name Sybil

Last Name Barefield

Middle Name Deirdre

Date of Birth 01/01/2010

Gender Female

Parent/Responsible Party First Name Gorganna

Parent/Responsible Party Last Name Barefield

Relationship Parent

RelationshipOther Mother

Phone (512) 555-5555

Phone Type Cell phone

Email XXXX@gmail.com

Address 1 123 Scoon Ave

Address 2

Zip Code 78755

City AUSTIN

State TX

County TRAVIS

Autism diagnosis and other medical conditions:

Autism Diagnosis Autistic Disorder

Secondary Medical Conditions Tourette Syndrome

Tertiary Medical Conditions Select From List

Age at Diagnosis 3

Language Spoken English

Race & Ethnicity:

☐ American Indian / Alaskan Native
☐ Asian
☐ Black or African American
☑ Hispanic or Latino
☐ Native Hawaiian or other Pacific Islander
☐ White

Proof of Texas Residency   [Driver's License ▾]

Resident Other   [   ]

Family Income:

Family Gross Income   [50000.00]

Family Adjusted Gross Income   [45000.00]

Family Income Range $41,001 - $51,000

Family Size   [4]

Insurance Information:

☐ Chip
☐ Medicaid
☐ Medicare
☑ TRICARE
☑ Private Insurance
☐ No Insurance

Prior ECI Services   [No ▾]

Referral Source   [Physician or other Medical Personnel or Medical institutions (public or priv ▾]

Referral Source Other   [   ]

Enrollment and Exit information

Enrollment Date   01/01/2020

Exit Date   [   ]

Exit Reason   [Select From List ▾]

Exit Reason Other   [   ]

[Save]   [Close Screen]   [Preview Print]

Created By: Kim O'Connor 10/19/2022 2:15:21 PM

Updated By: Kim O'Connor 10/19/2022 4:45:19 PM

The user may edit any information on the **Case Demographic** page by clicking on the field that needs to be edited and making the change. After all the changes are made, click on the **Save**

button at the bottom of the **Case Demographic** page. The system will show an updated status that includes the name of the user, the date, and time the update occurred.

Screen Shot 9 – Status Updated

3202 Note

The **Note** page allows the user to make notes regarding the client. To enter a new note, click on the **New** button. In the **Select Topic** field, there is a drop-down menu with the following choices:

- Enrollment
- Exit
- Pretesting
- Post testing
- Service record

Screen Shot 10 – Case Note

The Note page contains:

- A **Save** button to allow the user to save the note. After the user has saved the note, the system returns to the **Note List** page for the client, refreshing the page with the new information. A new note may be entered. The user must have a user role equal to **Case Management** or **Provider Admin** before the save button is enabled.

- The Close Screen button closes the page and returns the user to the **Note List**. Click on **Close Screen** to exit the **Note List**, then click on **Case Information** or any other item on the **Caseload Management** menu.

Screen Shot 11 – Case Note List

3300 Focused ABA

Focused ABA services are provided to children 3 through 15 years of age by a HHSC contractor to treat one or more deficits or behaviors of excess rather than the full range of developmental domains. Baseline target behavior data must be entered before a service can be uploaded or entered for the client. Treatment and post-treatment target behavior data must be entered

before a client exits the program. Enter data for each behavior that is targeted for focused ABA services.

Target Behavior

Click on Consumer Testing in the Caseload Management menu. Click on **Target Behavior** to enter a target behavior. When a user clicks Target Behavior, the system opens the **Target Behavior List** page for the client. If there is an existing target behavior record, the page is populated with existing data.

Entering a New Target Behavior

To enter a new target behavior, click on the **New Target Behavior** button and enter the following information:

- Target Behavior: Choose the target behavior from the drop-down list. The drop-down list contains the following items:
- Challenging behavior
- Adaptive Behavior
- Communication
- Social Interaction
- Target Behavior and Operational Definition: Enter the name of the target behavior and a definition
- Behavior Objective and Mastery Criteria: Enter the behavior objective and mastery criteria.
- Dependent Measure: Select the dependent measure from the following drop-down list:
- Frequency
- Duration
- Baseline Mean Description: enter the description of the base line mean
- Baseline Mean Date: Enter the date of the baseline mean
- Treatment Mean Description: Enter the treatment mean description
- Treatment Mean Date: Enter the date of the treatment mean
- Mastered Target Behavior: Choose a mastery level from the drop-down menu:
    - Yes
    - No
    - Made Progress
    - Discontinued

When the user clicks the Save button, the application validates that all required fields are entered. The system returns to the Target Behavior List page and the user may enter a new target behavior or close the screen.

Screen Shot 12 – Target Behavior, Entering New Data

3400 Service Record

When a user who has rights equal to **Case Management** or **Provider Admin** clicks on the **Service Record** link in the Caseload Management menu, the system opens the **Service Record List** page. If there are existing records, the page is populated with the existing service records for the case. The **Service Record List** page contains the following service information for the case on a grid:

- ID (individual service record ID);
- Type (ABA, Focused, or Comprehensive);
- Date (of service);
- Location (clinic, home, telehealth, or school);
- Hours (of service)
- Rate (of service)

Screen Shot 13 – Service Record List

3401 Entering a New Service Record

If you upload services, the upload populates the fields below. Follow instructions below to enter Service Records manually.

On the **Service Record List** page, the user clicks on the **New Service Record** button to enter the new service. The system opens a blank service record page . Enter the information requested in the following fields:

- Date

- Location of Service (choose from the drop down menu

- Service Type (choose from the drop down menu);

- Other Service Type - you must enter the Other Service Type.

- Hours (can enter whole numbers or decimals)

- Rate (The rate can only be modified by HHSC)

- Is Insurance Billed - Check this box if the hours are being billed to insurance first. If this box is checked, do not check the Is Autism billed box.

- Is Autism Billed - Check this box if the hours are being billed to HHSC because there is no third-party payer.

- Local Service Identifier

When the user clicks the **Save** button, the system validates that all required fields are entered or selected. If any entries are missing, the system returns an error message, and the record will not be saved to the database until the errors are corrected. After the service record is saved the application returns to the service record list page, refreshing the page with the new data.

The **Close Screen** button closes the page, and the system returns to the **Service Record List** page, refreshing the page with the new data.

Screen Shot 14 – Service Record Entry

If changes must be made to a service record, click on the ID number in the far-left column on the Service Record List (see Service Record List screen shot). The service record opens. The user can make edits and save. If the entire record needs to be deleted, click the Delete Record button. The service record will still appear in the list of services for the client but will not be calculated in the total service hours in the Service Record Report.

Screen Shot 15 – Editing or Deleting a Service Record

3500 Insurance Payment

To record an insurance payment, or other third-party payment, go to **Caseload Management** on the top navigation menu. Go to Case Search to select the client record in which you want to enter the insurance payment or other third-party payment. On the left navigation menu, select Insurance Payment and you will be in the **Insurance Payment** List screen.

Screen Shot 16 – Insurance Payment List

Click on New **Insurance Payment**. The fields will default to the current month and year; however, there is a drop-down menu to enter different months and years. Enter the correct **month and year in which the insurance payment was received** in the following fields:

- Year: Enter the year of payment

- Month: Enter the month the insurance payment was received

- Insurance Payment Amount: Enter the insurance payment amount

- Save: Click the Save button to save the record

Screen Shot 17 – Insurance Payment Entry

To edit the insurance payment amount or delete the insurance payment information, select the record to be edited or deleted by clicking on the Id number on the left.

Screen Shot 18 – Editing or Deleting an Insurance Payment

To edit the insurance payment amount, make the changes to the amount and save. To cancel the payment, select **Cancel**. If the month and year need to be edited, then cancel the payment and return to the Insurance Payment screen to add a new Insurance Payment.

3600 Cost Share

To record the cost share amount, go to **Caseload Management** on the top navigation menu. Go to **Case Search** to select the client record in which you want to enter the **cost share** amount. Once you select the client, then on the left navigation menu, select Cost Share and you will be in the **Cost Share List** screen.

Screen Shot 19 – Cost Share List

Click on **New Cost Share**. The fields will default to the current month and year; however, there is a drop-down menu to enter different months and years. Enter the correct month and year of service in the following fields:

- Year: Enter the year of service

- Month: Enter the month of service for which the cost share is made. Do not enter the month the cost share was received unless it is for the same month of service.

- Cost Share Amount: Enter the cost share amount.

- Save: Click the Save button to save the record.

Shot 20 – Cost Share Entry Screen

| Caseload Management | Report | My Account | Provider Admin | User Name: Kim O'Connor |

Case Search
Case Information
Consumer Testing
Service Record
Insurance Payment
Cost Share

Cost Share for Sybil Barefield, Autism Case #: 19678, Provider Name: Kim's Best Autism Services, Hours Of Service: 9.50, Focused Period: 1/15/2022 - 1/14/2023 (Hours 5)

Year: 2022

Month: December

Cost Share Amount: 30.00

Save   Close Screen

To edit the cost share amount or delete the cost share, select the record to be edited or deleted by clicking on the Id number on the left.

Screen Shot 21 – Editing or Deleting the Cost Share

| Caseload Management | Report | My Account | Provider Admin | User Name: Kim O'Connor |

Case Search
Case Information
Consumer Testing
Service Record
Insurance Payment
Cost Share

Cost Share List for Sybil Barefield, Autism Case #: 19678, Provider Name: Kim's Best Autism Services, Hours Of Service: 4.50, Focused Period: 1/15/2020 - 1/14/2021 (Hours 4.5)

New Cost Share

Records Returned: 1
Cost Share Total: $30.00

Id	Month	Year	Cost Share Amount	Cancel Date
32789	1	2020	30.00	

To edit the cost share amount, make the changes to the amount and save. To cancel the payment, select Delete Record. If the month and year need to be edited, then delete the payment and return to the Cost Share screen to add new cost share information

4000 Reports

The **Reports** option is found on the **Top Navigation** menu next to **Case Load Management** The purpose of this option is to allow the contractor to produce reports as needed. The report option contains data starting with September 1, 2012.

All reports contain the following buttons:

- **Search**: Allows the user to locate and display consumer records. When the Search button is clicked, if there is existing information for the type of report selected, the system will display the items.
- **Reset**: Clears the search criteria.
- **Close Screen**: Closes the page and the system returns to an empty Case Search page and does NOT populate the page.
- **Preview Print**: Allows the user to preview the report before printing.
- **Export to Excel**: Allows the user to load the return data set into an excel file and to print a hard copy of the data set.

The following are screen shots of the reports.

4001 Age at Entry

Enter the **Date From** and **Date To** for a report within a certain date range.

Screen Shot 22 – Age at Entry Report

4002 Diagnosis

Enter the Date From and Date To for a report within a certain date range.

Screen Shot 23 – Diagnosis Report

4003 Gender

Enter the **Date From** and **Date To** for a report within a certain date range.

Screen Shot 24 – Gender Report

4004 Family Income

Enter the **Date From** and **Date To** for a report within a certain date range. This is based on the Family Adjusted Gross Income data.

Screen Shot 25 – Family Income Report

4005 Primary Language

Enter the **Date From** and **Date To** for a report within a certain date range.

Screen Shot 26 – Primary Language Report

4006 Race/Ethnicity

Enter the **Date From** and **Date To** for a report within a certain date range.

Screen Shot 27 – Race/Ethnicity Report

4007 Service Record

Enter the **Date From** and **Date To** for a report within a certain date range. The hours billed to HHSC in this report should reconcile with hours billed to HHSC on your invoice. If you find a discrepancy, this report can be exported to excel to assist you in determining the problem. See the screen shot below:

Screen Shot 28 – Service Record Report

4008 Enrolled No Services

This report shows clients who are enrolled in services but have not received services. Choose no services last 60 days or no services from the drop down. The report will show all clients who have not received services.

Screen Shot 29 – Enrolled No Services Report

4009 Monthly Summary

The system defaults to the current fiscal year. The user can use the drop down to select a previous year. This report is designed to provide the contractor with an overview of the following:

- Number of Clients on the Interest List, monthly and cumulative for the year
- Number of Clients Served monthly, cumulative (unduplicated) for the year and percent of the target (contract number) served
- Number of Clients Entering monthly and cumulative for the year
- Number of Clients Exiting monthly and cumulative for the year
- Family Cost Share collections monthly and cumulative for the year
- Insurance Collections monthly and cumulative for the year
- HHSC Contract Funds spent monthly and cumulative for the year
- Remaining HHSC Contract Funds cumulative for the year

The report summarizes information from submitted invoices and data entered on clients who are enrolled in services, dismissed from services and on the consumers interested list.

Screen Shot 30 – Monthly Summary Report

| Caseload Management | Report | My Account | Provider Admin | User Name: Kim O'Connor |

HHSC Monthly Summary

Provider Name: Kim's Best Autism Services

State Fiscal Year: 2020

[Search]

Provider	Contract Value	Contract Value Adjustments	End Year Contract Value Adjustments	Number of Children To Serve (Target)
Kim's Best Autism Services	$100000.00	$0.00	$100000.00	15

9/2019

Provider	Interest List	# Entering Service	# Served In Report Month
	# Exiting Program in Report Month	Unduplicated # Served Through Report Month	% of Target Served
	Total Insurance Collected	Family Cost Share	Monthly Billing
Kim's Best Autism Services		0	0
	0	1	0%
	$0	$0	$0

10/2019

Provider	Interest List	# Entering Service	# Served In Report Month
	# Exiting Program in Report Month	Unduplicated # Served Through Report Month	% of Target Served
	Total Insurance Collected	Family Cost Share	Monthly Billing
Kim's Best Autism Services		0	0
	0	1	0%
	$0	$0	$0

Sidebar navigation:
- Age at Entry
- Diagnosis
- Gender
- Family Income
- Primary Language
- Race/Ethnicity
- Service Record
- Enrolled No Services
- Monthly Summary
- Indirect Cost
- Cost Share Tool
- Insurance Report
- Focused ABA Report
- Target Behavior Report

4010 Indirect Cost

The system defaults to the current fiscal year. The user can use the drop-down menu to select a different fiscal year.

Screen Shot 31 – Indirect Cost Report

| Caseload Management | Report | My Account | Provider Admin | User Name: Kim O'Connor |

Age at Entry
Diagnosis
Gender
Family Income
Primary Language
Race/Ethnicity
Service Record
Enrolled No Services
Monthly Summary
Indirect Cost
Cost Share Tool
Insurance Report
Focused ABA Report
Target Behavior Report

Indirect Cost Report

Provider Name Kim's Best Autism Services ▾

State Fiscal Year: 2023 ▾

[Search]   [Close Screen]

4011 Cost Share Tool

Enter the **Family Size** from the drop-down menu, the Family Annual Income, and the Hours of Service. This is the same table that is found on the HHSC website, Resources for Autism Contractors | Texas Health and Human Services. The user can use this table to determine the family cost share. The information is not saved as part of the client record.

Screen Shot 32 – Cost Share Tool

| Caseload Management | Report | My Account | Provider Admin | User Name: Kim O'Connor |

Age at Entry
Diagnosis
Gender
Family Income
Primary Language
Race/Ethnicity
Service Record
Enrolled No Services
Monthly Summary
Indirect Cost
Cost Share Tool
Insurance Report
Focused ABA Report
Target Behavior Report

Autism Program Cost Share Program

Family Size: 4 ▾

Family Annual Income: 50000

Hours Of Service: 20

Cost Share: $0.00

[Search]   [Close Screen]

HHSC Children's Autism Program Fee Schedule (Fee per Service Hour)

FPL	Family Size 1	Family Size 2	Family Size 3	Family Size 4	Family Size 5	Family Size 6	Family Size 7	Family Size 8 & More
600+%	$20.00	$20.00	$18.00	$16.00	$14.00	$12.00	$10.00	$8.00
551%-600%	$17.50	$17.50	$15.50	$13.50	$11.50	$9.50	$7.50	$5.50
501%-550%	$15.00	$15.00	$13.00	$11.00	$9.00	$7.00	$5.00	$3.00
451%-500%	$12.50	$12.50	$10.50	$8.50	$6.50	$4.50	$2.50	
401%-450%	$10.00	$10.00	$8.00	$6.00	$4.00	$2.00		
351%-400%	$7.50	$7.50	$5.50	$3.50	$1.50			
301%-350%	$5.00	$5.00	$3.00	$1.00				
251%-300%	$2.50	$2.50	$1.00					
203%-250%	$1.00	$1.00						
<202%								

4012 Insurance Report

Choose a provider and a case status from the drop-down menus and click Search. The system reports on the percentage of services by insurance type in a table based on case status.

Screen Shot 33 – Insurance Report

| Caseload Management | Report | My Account | Provider Admin | User Name: Kim O'Connor |

Insurance Report

Age at Entry
Diagnosis
Gender
Family Income
Primary Language
Race/Ethnicity
Service Record
Enrolled No Services
Monthly Summary
Indirect Cost
Cost Share Tool
Insurance Report
Focused ABA Report
Target Behavior Report

Provider Name: Kim's Best Autism Services

Case status: All

Search   Reset   Close Screen

Preview Print

Records Returned: 2

Insurance	Count	Percentage
CHIP	0	0.00 %
Medicaid	0	0.00 %
Medicare	0	0.00 %
Tricare	1	50.00 %
Private	2	100.00 %
None	0	0.00 %
Tx Health Kids	0	0.00 %

Records Returned: 2

Autism Case ID	Name	Vendor Name	Status	CHIP	Medicaid	Medicare	Tri Care	Private	None	Tx Health Kids
19678	Sybil Barefield	Kim's Best Autism Services	Enrolled	N	N	N	Y	Y	N	N
19679	Samuel Barefield	Kim's Best Autism Services	Not Enrolled	N	N	N	N	Y	N	N

4013 Focused ABA Report

The purpose of this report is to provide a 12-month snapshot of clients enrolled with a particular provider. Choose a provider from the drop-down menu and click search.

Screen Shot 34 – Focused ABA Report

Caseload Management	Report	My Account	Provider Admin	User Name: Kim O'Connor

Focused ABA Rolling 12 Months Report
Provider Name: [Kim's Best Autism Services ▼]

[Search] [Reset] [Close Screen]

[Preview Print] [Export to Excel]

Records Returned: 1

Autism Case ID	Name	Vendor Name	Date Of Birth	Service Hours	First Service Record Date	Period	Number of Hours Used in Focused Period
19678	Sybil Barefield	Kim's Best Autism Services	1/1/2010	9.50	1/15/2020	1/15/2022 - 1/14/2023	5

Side navigation:
Age at Entry
Diagnosis
Gender
Family Income
Primary Language
Race/Ethnicity
Service Record
Enrolled No Services
Monthly Summary
Indirect Cost
Cost Share Tool
Insurance Report
Focused ABA Report
Target Behavior Report

4014 Target Behavior Report

Enter an enrollment date in the Enrollment Date From field. Enter an enrollment date in the Enrollment Date To field. Check the box to include inactive cases and/or to include records without a new target behavior. Choose the vendor (contractor) and click Search. Scroll down to the client record you are looking for.

Screen Shot 35 – Target Behavior Report

Caseload Management	Report	My Account	Provider Admin	User Name: Kim O'Connor

Age at Entry
Diagnosis
Gender
Family Income
Primary Language
Race/Ethnicity
Service Record
Enrolled No Services
Monthly Summary
Indirect Cost
Cost Share Tool
Insurance Report
Focused ABA Report
Target Behavior Report

New Target Behavior Report

Enrollment Date From: 12/15/1972

Enrollment Date To: 12/15/2022

Include Inactive Cases: ☐
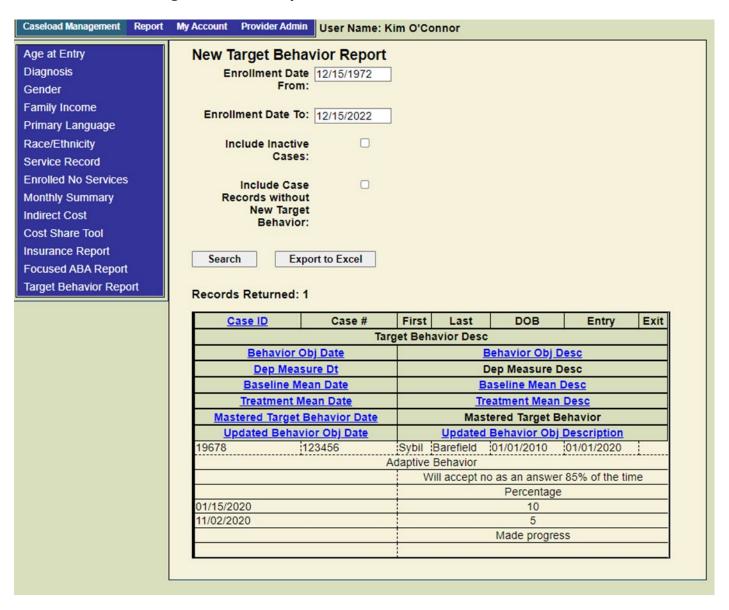
Include Case Records without New Target Behavior: ☐

[Search] [Export to Excel]

Records Returned: 1

Case ID	Case #	First	Last	DOB	Entry	Exit
Target Behavior Desc						
Behavior Obj Date			Behavior Obj Desc			
Dep Measure Dt			Dep Measure Desc			
Baseline Mean Date			Baseline Mean Desc			
Treatment Mean Date			Treatment Mean Desc			
Mastered Target Behavior Date			Mastered Target Behavior			
Updated Behavior Obj Date			Updated Behavior Obj Description			
19678	123456	Sybil	Barefield	01/01/2010	01/01/2020	
Adaptive Behavior						
			Will accept no as an answer 85% of the time			
			Percentage			
01/15/2020			10			
11/02/2020			5			
			Made progress			

5000 My Account

The **My Account** link is found on the **Top Navigation** menu. The user must have a user role equal to Case Management or Provider Admin before the **My Account** option is displayed. This option allows the user to change their password.

5100 Change Password

When a user clicks the **Change Password** option on the **Top Navigation** menu, the system opens the **Change Password** page. The user is required to enter the current password, the new password and to confirm the new password. When the user clicks the save button the application validates that all required fields are entered/selected.

Screen Shot 36 – Change Password

6000 Provider Admin

The **Provider Admin** option is found on the **Top Navigation** menu. This option is available for provider administrators only. When clicking on the **Provider Admin** option, the system opens the left navigation menu with of the following options:

- User Maintenance
- Edit Provider
- Invoice Maintenance
- Consumers Interested
- Upload File
- Uploaded Records

6100 User Maintenance

The User Maintenance option allows the provider administrator to:

- select and update an existing user record; or
- create a new user record.

*Contractor staff who enter records in to more than one contractor location/contract must have a unique username and password for each location/contract.

If the user clicks the **User Maintenance** option in the left navigation field, the system opens the **User List** page. The **User List** page contains the following buttons and drop-down menus:

- **New** - When the user selects this button, the administrator can create a new user in the following naming convention: (first initial, last name, "reg", Region Number, i.e., "kocconnorreg00"). Note: The user must have user role equal to "Provider Admin" before the new button is enabled.

- **Close Screen** - When the user clicks on this button, the user can close the page and save the changes.

- **Export to Excel** - When the user clicks on this button, the administrator can load the return data set into an excel file and print a hard copy of the data set.

If there is existing user information, the screen will display the First Name; Last Name; Email; Phone; and Inactive Date.

The user's last name will be a hyperlink and when clicked, the system will take the administrator to the user page.

Screen Shot 37 – User List

When the administrator clicks the New button or the name hyperlink, the system opens the User page. If there is an existing user record, the page will be populated with existing data. If the administrator is adding a new user record, then the page will open a blank user maintenance page.

*Contractor staff who enter records in to more than one contractor location/contract must have a unique username and password for each location/contract.

The user may add or update the following fields:

- First name
- Last name
- Email Address
- Phone
- Phone Type
- Username
- Inactive date
- Provider Admin (access rights)
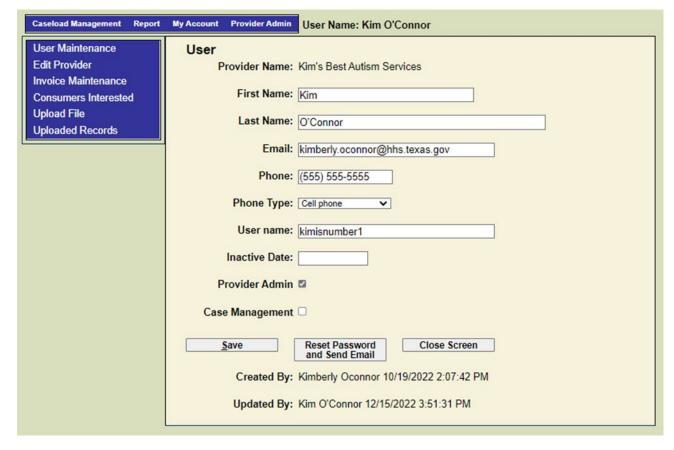- Case Management (access rights)

The User Page has three buttons at the bottom: Save, Reset Password and Send Email, and Close Screen. When the user clicks the Save button the application validates that all required fields are entered. If any entries are missing the application returns an error message and the record will not be saved until the errors are corrected.

After the record is saved the application returns to the **User List** page, refreshing the page with the previously entered search criteria. When the user clicks the **Close** button, the system returns to the **User List** page, refreshing the page with the previously entered search criteria.

The administrator can edit the information by selecting the user and adding the updated information. Click Save to update the information.

Screen Shot 38 – User Information

6200 Edit Provider

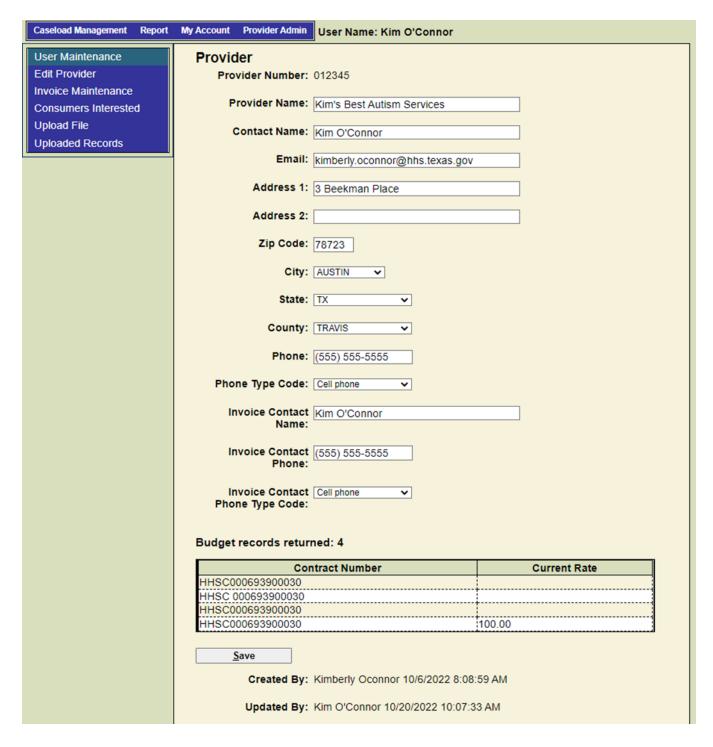The **Edit Provider** option allows the administrator to add or update the information regarding the provider. When the user clicks on the **Edit Provider** option, the system opens the **Provider** page populated with existing data or a blank screen. The user may add or update the following fields:

- Provider Name
- Contact Name
- Email Address
- Address
- Zip Code
- City
- State
- County
- Phone

- Phone Type

- Invoice Contact Name (this is the name that appears on the invoice)

- Invoice Contact Phone

- Invoice Contact Phone Type

Screen Shot 39 – Edit Provider

Caseload Management	Report	My Account	Provider Admin	User Name: Kim O'Connor

User Maintenance
Edit Provider
Invoice Maintenance
Consumers Interested
Upload File
Uploaded Records

Provider

Provider Number: 012345

Provider Name: Kim's Best Autism Services

Contact Name: Kim O'Connor

Email: kimberly.oconnor@hhs.texas.gov

Address 1: 3 Beekman Place

Address 2:

Zip Code: 78723

City: AUSTIN

State: TX

County: TRAVIS

Phone: (555) 555-5555

Phone Type Code: Cell phone

Invoice Contact Name: Kim O'Connor

Invoice Contact Phone: (555) 555-5555

Invoice Contact Phone Type Code: Cell phone

Budget records returned: 4

Contract Number	Current Rate
HHSC000693900030	
HHSC 000693900030	
HHSC000693900030	
HHSC000693900030	100.00

[Save]

Created By: Kimberly Oconnor 10/6/2022 8:08:59 AM

Updated By: Kim O'Connor 10/20/2022 10:07:33 AM

The following fields are set by HHSC and can't be modified by the user: Provider Number, Contract Number, and Current Rate (Hourly Bill Rate).

When the user clicks the **Save** button the system validates that all required fields are entered. If any entries are missing the system returns an error message and the record will not be saved until the errors are corrected.

The administrator clicks on the **Save** button to save the provider record. After the record is saved the system stays on the **Provider** page and refreshes the page with the updated information. Use the menu on the left to navigate to a different function.

6300 Invoice Maintenance

The **Invoice Maintenance** option allows the user to enter invoice information that it will submit to the HHSC Autism Program using the MRP Packet. When the user clicks on the **Invoice Maintenance option**, the system opens the contractor's **Invoice List** page.

Upon entry to the **Invoice List** page, the user will see Date From and Date To fields already populated. The user may search for an invoice by entering the following information:

- **Date From and Date To** - Enter the dates to get invoices within the user's desired date range and click on the Search button.

- **New Invoice** - Click on the New Invoice button to create a new invoice. For more information on how to create a new invoice, see below for **Creating a New Invoice**.

- **Reset** - Click on the Reset button to go back to the Invoice List page with the same default date range.

- **Export to Excel** – Click on **Export to Excel** to create a spreadsheet of the invoice list

Another way to search for an invoice is to scroll down to the list of invoices. Upon entry into the **Invoice List** page, the system automatically populates this page with the contractor's previous invoices. The user can search for an invoice by scrolling down to the list of invoices. There is a bar menu above the invoice list with the following fields:

- Invoice Id - This field has a hyperlink to the invoice.

- Provider name - This field lists the provider's name.

- State Date - The system automatically sets the invoice date range from the most recent date to the earliest date. When the user clicks on the Start Date, the system reverses the date order from the earliest date to the most recent date.

- End Date - Just like the Start Date, the system automatically sets the invoice date range from the most recent date to the earliest date. When the user clicks on the Start Date, the system reverses the date order from the earliest date to the most recent date.

- Amount - This is the amount of the invoice
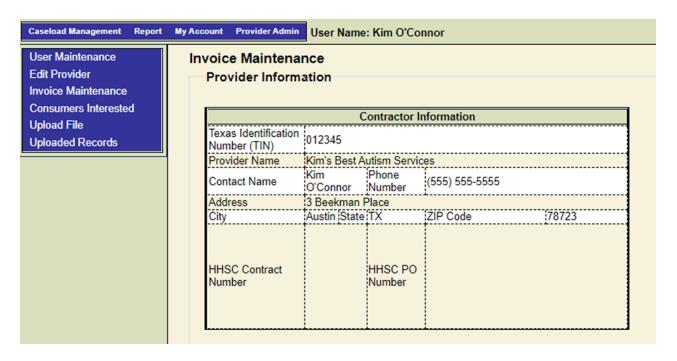
Screen Shot 40 – Invoice List

Creating a New Invoice

When the user clicks on the **New Invoice** button, the **Invoice Maintenance** page displays with the following fields:

Provider Information

This box contains the contractor's Texas Identification Number (TIN), Provider Name, Contact Name, Address, City, State, Zip Code, and HHSC Contract Number. These items are pre- filled when you enter the **Invoice Maintenance** page.

Screen Shot 41 – Provider Information

Autism Services

This section requires the provider to enter the Start Date, End Date, and Submitted Date.

Autism Services		
Dates of Service		
Start Date	End Date	Submitted Date 10/20/2022

Description of Services

The user enters information in the following fields:

1. **Treatment hours. Current month. No Third-Party Payer.** Enter the total aggregate number of direct services hours for the current month for **clients with no third-party payer**. The system automatically calculates the Rate and the Amount.

2. **Treatment hours. Current month. Third-Party Payment Received or Denied**. Enter the total aggregate number of direct service hours for the current month for which third-party payment was received or denied in the current month. Press the **Tab** key to move to the next field. The system automatically calculates the **Rate** and the **Amount**.

3. **Treatment hours. Previous month(s). Third-Party Payment Received or Denied.** Enter the aggregate number of direct service hours for previous months for which third-party payment was received or denied in the current month. Press the **Tab** key to move to the next field. The system automatically calculates the **Rate** and the **Amount**.

4. **Third-Party Reimbursements (sum of all third-party reimbursements-current and previous months listed above).** Enter the total amount of third-party payments received during the current month.

5. **Cost share. Current month (Collected or owed).** Enter the total cost share amount for the month, whether the client has paid the total amount or still owes the amount.

6. **Deduction for repayment of previous Advance Payment** - Enter the amount of a previous advance payment provided by the HHSC Autism Program.

7. **Deduction to correct invoiced amount** – Enter the amount of any overpayments during the fiscal year.

8. The system calculates the **Total Amount of Invoice**.

Description	Hours	Rate	Amount
Treatment hours. Current month. No Third-Party Payer.			$0.00
Treatment hours. Current month. Third-Party Payment Received or Denied.		$0.00	$0.00
Treatment hours. Previous month(s). Third-Party Payment Received or Denied.			$0.00
	Sub-Total		$0.00
Third-Party Reimbursements (sum of current and previous months listed below).			$0.00
	Sub-Total		$0.00
Cost share. Current month (Collected or owed).			
Deduction for repayment of previous Advance Payment.			
Deduction to correct invoiced amount			
Total Amount of Invoice			$0.00

Third Party Reimbursements

When there are third party reimbursements to report, the user clicks the **Add Reimbursement** button and enters the months for which third-party payer reimbursements were received and the amount received for each listed month. You may use either the first or last day of the month when entering the date.

Third-Party Payer Reimbursements

Date	Amount	Comments
	0	
Sum of Third-Party Payer Reimbursements $0.00		

Add Reimbursement

Advance Payment

Under certain circumstances outlined in the contract, the contractor may request an advance payment from the HHSC Autism Program. When the contractor has authorization to request an advance payment from the Autism Contract Manager, the contractor may request the advance in the Invoice Maintenance page.

The contractor enters the **Treatment Hours. Total number of treatment hours provided in the previous month where client have Third-Party coverage that was not reimbursed during the month.** The system automatically calculates the rest of the fields.

Advance Payment

Description	Rate	Amount
Treatment Hours. Total number of treatment hours provided in the previous month where children have Third-Party coverage that was not reimbursed during the month.		
HHSC Hourly Rate	$100.00	
Amount Requested		
Percent of Amount Requested	80.00%	
Amount of Advance Payment (cumulative amount of outstanding Advance Payments shall not exceed 15% of Current Fiscal Year Contract Balance)		

Once all required data is entered the user clicks the Save button. When the Save button is clicked, the user's name will be populated in the Created By field**. This serves as the contractor's signature that the invoice is being submitted for payment. It must be submitted by the end of the tenth calendar day of the following month. The HHSC Autism Program Specialist will pull the invoice on the eleventh calendar day of the following month for payment**. The contractor is required to upload the Monthly Reporting Packet (MRP) and supporting documentation to the Contractor Portal. For access to the Contractor Portal, contact HHSC at Childrens.Autism.Program@hhs.texas.gov.

The invoice must be maintained in accordance with federal and state laws, HHSC policy, and the contract with HHSC. To save and print a copy of the invoice, click on the **Print** button at the bottom of the page. A print view of the invoice opens. Click the **Print** button at the bottom of the invoice and follow the prompts to print or save the invoice. Click the **Close Screen** button to go back to the invoice.

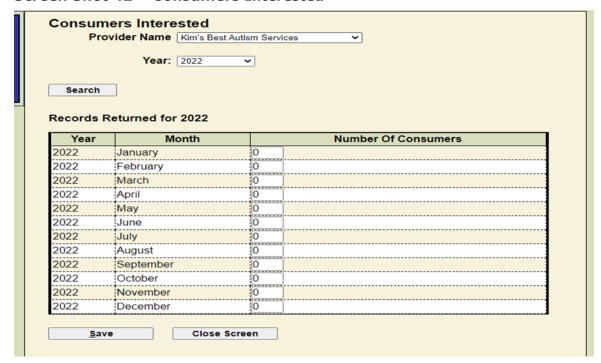The user can print the invoice after it has been saved.

6400 Consumers Interested

The Consumers Interested option allows the user to enter the number of eligible individuals that are interested in enrolling in the program by month.

When this option is selected, the system will display the Consumers **Interested** page. The **Consumers Interested** page defaults to the contractor's name in the **Provider Name** field. The user enters the year in the **Year** field and clicks on **Search**. The system will display all the months for the year. In the **Number of Consumers** field, the user enters the number of consumers on the interest list for the month. Click the Save button to save the entry. To leave this page, click on **Close** button.

Screen Shot 42 – Consumers Interested

6500 Upload File

The **Upload File** option in the navigation menu allows the user to upload the contractor's **Service Record, Insurance Payment**, and **Cost Share** files to submit to HHSC.

6501 How to Create and Upload the Service Record

Creating the Service Record

1. Create the file using Excel. Open an Excel spreadsheet.

2. The first row of the file must be filled with the following headings with no spaces:

   Column A: LocalCaseNumber

   Column B: ServiceDate

   Column C: ServiceTypeCode

   Column D: ServiceTypeDescription

   Column E: ServicelocationCode

   Column F: ServicelocationDescription

Column G: Hours

Column H: IsInsBilled?

Column I: IsHHSCBilled

Column J: FileName

Column K: LocalServiceIdentifier

3. Starting on row 2, enter the information that corresponds to the header as follows:

Column A: LocalCaseNumber - Enter the local case number identifier

Column B: ServiceDate - Enter the date of service

Column C: ServiceTypeCode - Enter the service type code as follows:

05 for Focused ABA

Column D: ServiceTypeDescription - Enter the service type description.

Column E: ServicelocationCode - The service location codes are specific to the provider.

Column F: ServicelocationDescription - Enter the location of the service.

Column G: Hours - Enter the number of hours of the service provided

Column H: IsInsBilled? - If insurance is billed, enter a Y for yes; if insurance is not billed enter an N for no.

Column I: IsHHSCBilled - If HHSC is billed, enter a Y for yes; if HHSC is not billed enter an N for no

Column J: FileName - Enter the file name in the following format:

NameofProviderServiceRecordmmyyyy. See the following example: KimsBestAutismServicesServiceRecord062023.

Column K: LocalServiceIdentifier - Enter the local service identifier. This comes from the contractor's billing system. This is optional, you are not required to enter this field. This lets you update specific service records.

Save the file by selecting **File,** then **Save As.** In the **File Name** field, enter the same **FileName** that was entered in Column J. In the **Save as type** field, use the drop-down menu and select **CSV (Comma delimited) (*.csv).** Then click on **Save** to save the file anywhere on the C: drive of the computer or any drive on a server.

Please note: Providers should not enter a Y in both column H and column I. If insurance is billed, enter a Y in column H and an N in column I

Screen Shot 43 – Example of Service Record Using Excel

The service record was saved by the provider as HHSCOCT14.cvs in the documents folder.

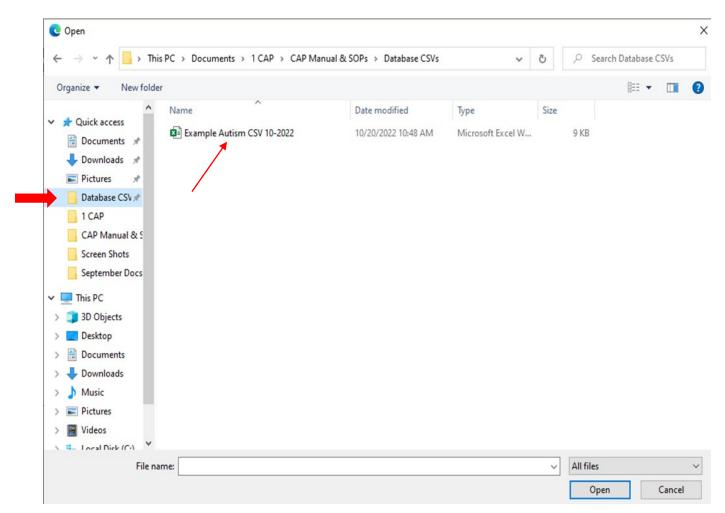|	A	B	C	D	E	F	G	H	I	J	K
1	local case number	service date	service type code	service type description	service location code	service location description	hours	is insurance billed	is dars billed	filename	local service identifier
2	AP75887	10/1/2014	1	ABA	81	clinic - South Dallas	5	N	Y	DARS OCT14	
3	AP75887	10/2/2014	1	ABA	81	clinic - South Dallas	6	N	Y	DARS OCT14	
4	AP75887	10/6/2014	1	ABA	81	clinic - South Dallas	5	N	Y	DARS OCT14	
5	AP75887	10/7/2014	1	ABA	81	clinic - South Dallas	5	N	Y	DARS OCT14	
6	AP75887	10/9/2014	1	ABA	81	clinic - South Dallas	5	N	Y	DARS OCT14	
7	AP75887	10/14/2014	1	ABA	81	clinic - South Dallas	5	N	Y	DARS OCT14	
8	AP75887	10/15/2014	1	ABA	81	clinic - South Dallas	5	N	Y	DARS OCT14	
9	AP75887	10/16/2014	1	ABA	81	clinic - South Dallas	5	N	Y	DARS OCT14	
10	AP75887	10/20/2014	1	ABA	81	clinic - South Dallas	5	N	Y	DARS OCT14	
11	AP75887	10/21/2014	1	ABA	81	clinic - South Dallas	5	N	Y	DARS OCT14	
12	AP75887	10/22/2014	1	ABA	81	clinic - South Dallas	6	N	Y	DARS OCT14	
13	AP75887	10/23/2014	1	ABA	81	clinic - South Dallas	5	N	Y	DARS OCT14	
14	AP75887	10/27/2014	1	ABA	81	clinic - South Dallas	5	N	Y	DARS OCT14	
15	AP75887	10/28/2014	1	ABA	81	clinic - South Dallas	5	N	Y	DARS OCT14	
16	AP75887	10/29/2014	1	ABA	81	clinic - South Dallas	5	N	Y	DARS OCT14	
17	AP75887	10/30/2014	1	ABA	81	clinic - South Dallas	2.25	N	Y	DARS OCT14	
18	AP75905	10/1/2014	1	ABA	77	clinic - North Dallas	5	N	Y	DARS OCT14	
19	AP75905	10/6/2014	1	ABA	77	clinic - North Dallas	4.5	N	Y	DARS OCT14	
20	AP75905	10/7/2014	1	ABA	77	clinic - North Dallas	5	N	Y	DARS OCT14	
21	AP75905	10/8/2014	1	ABA	77	clinic - North Dallas	4.75	N	Y	DARS OCT14	

Uploading the Service Record

Select **Provider Admin** on the top bar menu, click on **Upload Files** and select **Service Record.** The system opens the **Service Record File Upload** page.

Screen Shot 44 – Service Record File Upload

Click the Choose File button and select a delimited file from the "C" drive (or any server-based drive).
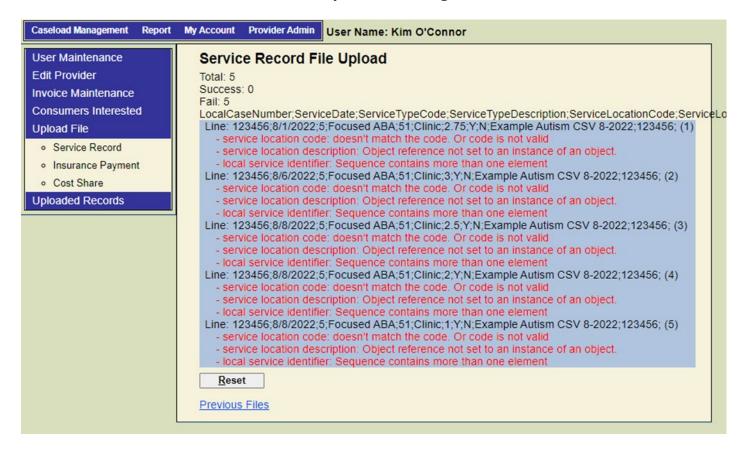
Screen Shot 45 – Selecting a Delimited File from the C Drive

Once the "CSV (Comma delimited)(*.csv)" file is selected the user will be returned to the service record file upload page and then click the "OK" button. A number of validation edits will be performed.

If the records do not pass the validation edits the application will return an error page to the user. The system will display each row with the record that failed the validation along with the error description.

Service Record 46 – Service Record File Upload Error Page

The user corrects the records on their C drive (or corrects the records in their automated system) and they will need to re-choose and upload the corrected delimited file from their C drive (or any server- based drive).

This can be a repetitive process, but once the validations are 100% successfully completed the application will insert the service records into the database and display information concerning the number of records processed and the number of successes.

6502 Uploading the Insurance Payment

How to create and upload the Insurance Payment

1. Create the file using Excel. Open an Excel spreadsheet.

2. The first row of the file must be filled with the following headings with no spaces:

   Column A: LocalCaseNumber

   Column B: Month

   Column C: Year

   Column D: InsPaymentAmt

   Column E: Hours

   Column D: FileName

Screen Shot 47 – Example of Insurance Payment File Using Excel

	A	B	C	D	E	F
1	LocalCaseNumber	Month	Year	InsPaymentAmt	Hours	FileName
2						
3						
4						
5						
6						
7						
8						
9						

1. Starting on row 2, enter the information that corresponds to the header as follows:

   Column A: LocalCaseNumber- Enter the local case number for the client.

   Column B: Month - Enter the month using the number of the month. For example, for March, use the number 3.

   Column C: Year - Enter the 4-digit year: yyyy.

   Column D: InsPaymentAmt - Enter the insurance payment amount.

   Column E: Hours - Enter the number of hours of services provided to the client.

   Column F: FileName - Enter the file name as the name of the provider,

   CostShareRecord, and the month and year for the record. Example: KimsBestAutismServicesInsuranceRecord062023

2. Save the file by selecting **File** on the top menu bar, then **Save As**. In the **File Name** field, enter the same **File Name** that was entered in Column J. In the **Save as type** field, use the drop-down menu and select **CSV (Comma delimited) (*.csv)**. Then click on **Save** to save the file anywhere on the C: drive of the computer or any drive on a server.

Uploading the Insurance Payment

The process for uploading the **Insurance Payment** is the same as uploading the Service Record. The user clicks on **Insurance Payment** under the **Upload File** menu. The system opens the **Ins Payment File Upload** page. Click the **Browse** button and select a delimited file from the C drive (or any server-based drive). Once the CSV (Comma delimited) (*.csv) file is selected, the system will return to the **Ins Payment File Upload** page. Click the "OK" button. A number of validation edits will be performed. If the records do not pass the validation edits, the system will return an error page to the user. The system will display each row with the record that failed the validation along with the error description. The user corrects the records on the "C" drive (or corrects the records in their automated system). After correcting the errors, return to the **Ins Payment File Upload** page select **Browse** to upload the corrected delimited file. This can be an iterative process, but once the validations are 100% successfully completed the application will insert the records into the database and display information concerning the number of records processed and the number of successes.

6503 Uploading the Cost Share Record

How to create and upload the Cost Share Record

1. Create the file using Excel. Open an Excel spreadsheet.

   The first row of the file must be filled with the following headings with no spaces:

   Column A: LocalCaseNumber

   Column B: Month

   Column C: Year

   Column D: CostShare

   Column E: FileName

Screen Shot 48 – Example of Cost Share File Record Using Excel

	A	B	C	D	E
1	LocalCaseNumber	Month	Year	CostShare	FileName
2					
3					
4					
5					
6					
7					

1. Starting on row 2, enter the information that corresponds to the header as follows:

   Column A: LocalCaseNumber - Enter the local case number for the client.

   Column B: Month - Enter the month using the number of the month. For example, for March, use the number 3.

   Column C: Year - Enter the 4-digit year: yyyy.

   Column D: CostShare - Enter the Cost Share amount or the insurance deductible, co-insurance, or co-payment amount (DCC).

   Column E: FileName - Enter the file name as the name of the provider, CostShareRecord, and the month and year for the record. Example: KimsBestAutismServicesCostShareRecord062023

1. Save the file by selecting **File**, then **Save As**. In the **File Name** field, enter the same **FileName** that was entered in Column J. In the **Save as type** field, use the drop-down menu, and select **CSV (Comma delimited) (*.csv)**. Then click on **Save** to save the file anywhere on the C: drive of the computer or any drive on a server.

Uploading the Cost Share Record

The process for uploading the Cost Share Record is the same as uploading the Service Record. Click on the **Cost Share** under the **Upload File** menu. The system opens the **Cost Share File Upload** page. Click the **Browse** button and select a delimited file from the C drive (or any server-based drive). Once the delimited file is selected, the system will return to the **Cost Share File Upload** page. Click the "OK" button. Several validations edits will be

performed. If the records do not pass the validation edits, the system will return an error page to the user. The system will display each row with the record that failed the validation along with the error description. The user corrects the records on the "C" drive (or corrects the records in their automated system). After correcting the errors, return to the **Cost Share File Upload** page select **Browse** to upload the corrected delimited file. This can be an iterative process, but once the validations are 100% successfully completed the application will insert the records into the database and display information concerning the number of records processed and the number of successes.

6504 Tips for Successful Uploading

- The date of service will accept 1/1/22 or 01/01/22 or 1/1/2022 or 01/01/2022.
- The upload will accept a text file that is a conversion from an excel file by using the Text (tab delimited or CSV (Comma delimited) (*.csv)) file option.
- One of the common errors is when the file name in the service data doesn't match exactly the file name given to the file. Don't include spaces in the file name to make them match.
- Other information that might be helpful when using Excel to build files for upload:
  - Header Line/First Line of File - Make sure that there are no spaces in the titles on the first line.
  - Date Format (mm/dd/yyyy) - To get the date in the format required in an Excel document, you can use a date format available under the English (Caribbean) set f date formats. The required format (mm/dd/yyyy) is not available in the English (United States) which would normally be the default set of date formats in Excel.
  - Service Type Description/Service Location Description - Make sure that there are no spaces after the descriptions.

6600 Uploaded Records

After the contractor has successfully uploaded the records, the user can access the records to review.

6601 Insurance Payments

Click on **Uploaded Records** and then on **Insurance Payment**. The system displays the Case Monthly Insurance Payment Maintenance page.

To search for a case monthly insurance record, enter the **Year** and the **Month** of the report and click the **Search** button. The system will display the record for the month requested. The ID number is an active link.

Screen Shot 49 – Case Monthly Insurance Payment Maintenance

Click on the ID number. The system displays the **Case Monthly Insurance Payment** for the client. The user can cancel the **Case Monthly Insurance Payment** record by clicking on **Cancel,** then **Save.** To exit the page, click on **Close.** The system will display the **Case Monthly Insurance Payment Maintenance** page with the updated cancellation date.

Screen Shot 50 – Case Monthly Insurance Payment

6602 Cost Share

Click on Uploaded Records and then on Cost Share. The system displays the Case Monthly Cost Share Maintenance page.

To search for a case monthly cost share record, enter the **Year** and the **Month** of the report and click the **Search** button. The system will display the record for the month requested. The record returned will contain the ID number, **Case** ID, **Year, Month, Name of the client, Payment Amount** and **the Cancel Date.** The ID number is an active link.

Screen Shot 51 – Case Monthly Cost Share Maintenance

| Caseload Management | Report | My Account | Provider Admin | User Name: Kim O'Connor |

Case Monthly Cost Share Maintenance

Year: 2022 ▾

Month: September ▾

Search   Reset   Close Screen

Preview Print   Export to Excel

Records Returned: 1
Cost Share Total: $25.00

ID	Case ID	Year	Month	Name	Payment Amount	Cancel Date
32791	19678	2022	9	Sybil Barefield	25.00	

Menu items:
- User Maintenance
- Edit Provider
- Invoice Maintenance
- Consumers Interested
- Upload File
- Uploaded Records
  - Insurance Payment
  - Cost Share

Click on the ID number. The system displays the **Case Monthly Cost Share** for the client. The user can cancel the **Cost Share** record by clicking on **Cancel**, then **Save**. To exit the page, click on **Close**. The system will display the **Case Month Cost Share Maintenance** page with the updated cancellation date.

Screen Shot 52 – Case Monthly Cost Share

| Caseload Management | Report | My Account | Provider Admin | User Name: Kim O'Connor |

Case Monthly Cost Share

Cost Share 25.00

Cancel Cost Share

Save   Close Screen

Updated By:
Created By: Kim O'Connor 10/20/2022 11:45:31 AM

Menu items:
- User Maintenance
- Edit Provider
- Invoice Maintenance
- Consumers Interested
- Upload File
- Uploaded Records
  - Insurance Payment
  - Cost Share

The End!