

**Program Support Unit (PSU)  
User Guide for the STAR  
Kids Individual Service  
Plan (SK-ISP) Form**



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# Program Support Unit (PSU) STAR Kids Individual Service Plan (SK-ISP) Form

## STAR Kids Individual Service Plan (SK-ISP) Form Introduction

STAR Kids is a managed care program that provides Medicaid benefits to clients 20 years of age and younger with disabilities and meet specific requirements. Clients receive medical benefits and are able to obtain assistance with coordinating care. Because this is a managed care program, Managed Care Organizations (MCOs) will assess the client's needs and create an individual service plan (ISP). Once an ISP is created, the SK-ISP form is submitted by the MCO through the LTC Online Portal.

This User Guide is intended for Program Support Unit (PSU) staff who review and process SK-ISP forms. PSU staff will be able to access SK-ISP forms, determine action to be taken on forms pending review, generate the H2065-D/DS Notification Letter form, terminate the SK-ISP, add notes that will appear in the History trail, edit content to forms in specific statuses and run SK-ISP reports in the LTC Online Portal.

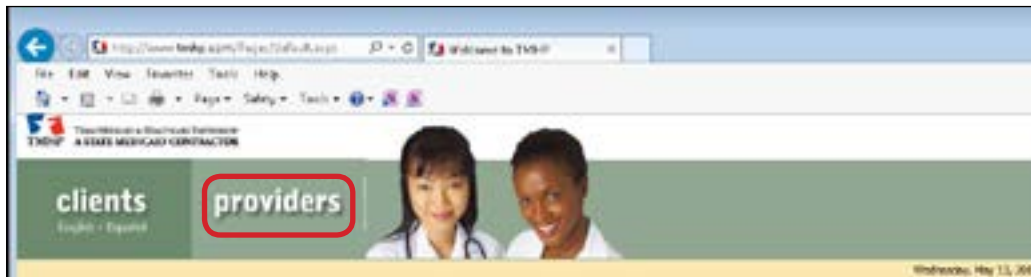
## Program Support Unit (PSU) STAR Kids Individual Service Plan (SK-ISP) Form Process Flow

This section of the User Guide covers the PSU SK-ISP form process flow. Before PSU staff enter the work flow process, the managed care organization (MCO) must have submitted the SK-ISP form. It will automatically go through the verification program and if there are no errors found, the SK-ISP form will be processed and set to status ***Processed/Complete*** or ***Pending PSU Review***. PSU staff will generate the H2065-D/DS Notification Letter form and mail it to the applicant/member. The MCO will be notified by the LTC Portal once Form H2065-D/DS Notification Letter form is available.

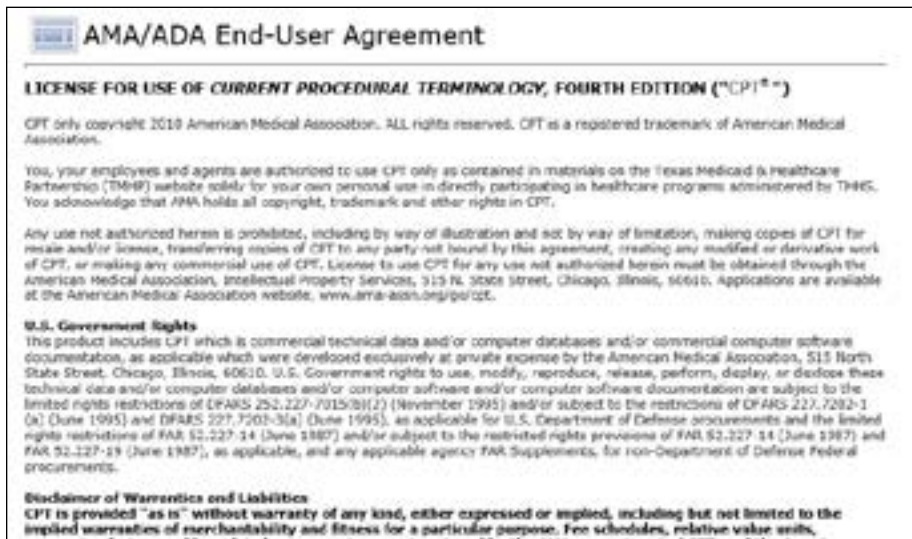
Sometimes though, there will be status codes that are displayed that will keep the form from going through the regular process. PSU staff will be responsible for dealing with some of these status codes. This part of the User Guide explains these status codes and the process for working with those status codes.

The first step in the process is logging into the Long Term Care (LTC) Online Portal.

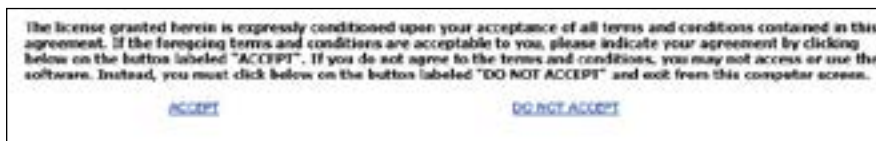
- 1) Go to TMHP.com and click **providers**.



- 2) If this is the first time on the site, the electronic end-user agreement will be displayed.

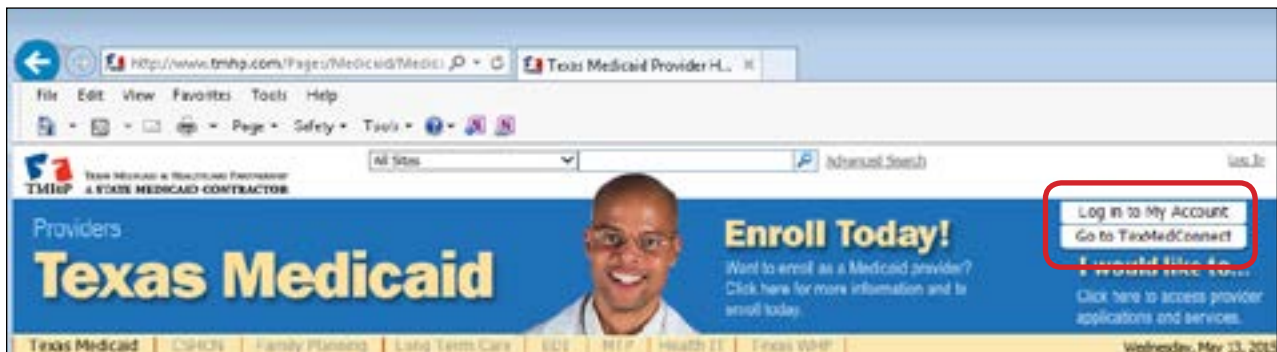


- a) Scroll down to read and acknowledge the end-user agreement.
- b) Click **ACCEPT** to login.



- 3) The default page displayed at login is the provider home page. In the upper right corner, click **Log in to My Account**.

**Note:** The portal can also be accessed by clicking **Long Term Care**, then selecting **Log In to LTC Online Portal**.



- 4) Enter credentials into the log-in box.



First time users need to submit HHSC Form IT001 to HHSC IT staff requesting TMHP VPN and LTC Portal-External Report Viewer access in order to receive a TMHP user name and temporary password.

**Note:** *At least one administrator account is required for LTC Online Portal access. Administrators can create accounts and manage permissions for other user accounts associated with the same provider number. Please contact your administrator to update account permissions.*

- 5) The Power Search page is the default page when logged into the LTC Online Portal.

Power Search allows users to retrieve submissions and perform searches with different types of criteria. Additional information can be found in the [Long Term Care Online Portal User Guide for Managed Care Organizations](#).



- 6) The blue navigational bar is located at the top of the page and shows all the activities PSU staff will be able to access. All PSU staff will have the same access level.



## Power Search for PSU Status Codes

Power Search is the best way to search for SK-ISP forms that need PSU staff attention.

- 1) On the Power Search page, located in the Forms sections, all required fields are marked with red dots. When searching for Forms, the only required fields are the To Date and the From Date. While it is only necessary that the required fields are completed, note that search results can be narrowed by completing additional fields.

The screenshot shows the 'Power Search' interface. At the top, there are navigation tabs: 'Search', 'Reports', and 'Printable Forms'. The main heading is 'Power Search'. Below this, there are three main sections for search criteria:

- Forms:** Includes a 'Type of Form' dropdown menu (currently showing 'DLN'), a 'From Date' field with a calendar icon, and a 'To Date' field with a calendar icon.
- Client:** Includes input fields for 'Last Name', 'First Name', 'SSN', 'Medicaid Number', and 'CARE ID'.
- Vendor:** Includes a 'Provider no.' field with the value '900010100'.

Below these sections is an 'Additional Criteria' section with a 'Service Group' list:

- 1. Nursing Facility
- 2. CLASS
- 3. CBA
- 4. SSLC (ICF)
- 5. ICF Community/State
- 6. ICF Non-State
- 8. Hospice

A small downward-pointing arrow is visible at the bottom right of the 'Additional Criteria' section.

- 2) Click the arrow in the Type of Form field. This will show a menu listing the different forms that can be searched.

This screenshot shows the 'Power Search' interface with the 'Type of Form' dropdown menu open. The menu lists various form types:

- DLN
- MSQTR 2.0: Minimum Data Set (Quarterly)
- MS 3.0: Minimum Data Set (Comprehensive)
- MSQTR 3.0: Minimum Data Set (Quarterly)
- MSARR: PASARR screening
- RE: PASRR Evaluation
- PL1: PASRR Level 1 Screening
- PSS: PASRR Specialized Services
- Waiver 2.0: Medical Necessity and Level of Care Assessment
- Waiver 3.0: Medical Necessity and Level of Care Assessment
- Individual Movement Form
- Targeted Case Management Request
- Provider Location update form
- 8578 Intellectual Disability/Related Condition Assessment
- 3080 Individual Plan of Care
- 8582 Individual Plan of Care
- 3615 Request to Continue Suspended Services
- 3616 Request for Termination of Waiver program Services
- H1700-1: HCBS STAR+PLUS Waiver Individual Service Plan
- STAR Kits Screening and Assessment Instrument (SAI)
- STAR Kits Individual Service Plan (IS-ISP)

The 'Additional Criteria' section is also visible, showing the same 'Service Group' list as in the previous screenshot.

- Click the **STAR Kids Individual Service Plan (SK-ISP)** form entry. The Type of Form field will populate with the chosen information.

**Search Criteria**

**Form**

Type of Form: STAR Kids Individual Service Plan (SK-ISP) ▼

DLN:

**Enter ISP Start Date Range**

From Date: mm/dd/yyyy ▼

To Date: mm/dd/yyyy ▼

- In the SK-ISP Start Date Range fields, select the From Date and To Date to set the search range. Enter a larger date range to get a broader search and enter a smaller date range to narrow the search.

**Search Criteria**

**Form**

Type of Form: STAR Kids Individual Service Plan (SK-ISP) ▼

DLN:

**Enter ISP Start Date Range**

From Date: 01/01/2017 ▼

To Date: 01/01/2020 ▼

- Search for a specific client using any of the criteria located in the Applicant/Member field.

**Applicant/Member**

Last Name:

First Name:

SSN:

Medicaid Number:

Date of Birth: mm/dd/yyyy ▼

- Search for forms submitted by a particular vendor by filling in information about that vendor in the Vendor field. A Plan Code and a Service Area narrows down the search results.

**Vendor**

Provider Number:

MCO Name:  ▼

Service Area:  ▼

Plan Code:  ▼

County:  ▼



- 7) Using search criteria in the Additional Criteria field will help to narrow down the search results even further. We will discuss a few of the options in the Additional Criteria area.

**Additional Criteria**

Status	Type Authorization	Other
<input type="checkbox"/> Form Inactivated	<input type="checkbox"/> Initial	<input type="checkbox"/> ME-Waiver
<input type="checkbox"/> MCO Action Required	<input type="checkbox"/> Reassessment	<input type="checkbox"/> MFPD
<input type="checkbox"/> Pending Notification		<input type="checkbox"/> SSI
<input type="checkbox"/> Pending PSU Review		
<input type="checkbox"/> Processed/Complete		
<input type="checkbox"/> PSU Invalid/Complete		
<input type="checkbox"/> PSU Processed/Complete		
<input type="checkbox"/> Terminated		
<input type="checkbox"/> Transferred		

Show Locked Forms:  ▼

- a) Status — One way to narrow results is to search by status codes. A search can be conducted by choosing one or several status codes. PSU staff are responsible for reviewing forms set to status *Pending PSU Review*, *Processed/Complete*, and *PSU Processed Complete*.

**Additional Criteria**

**Status**

- Form Inactivated
- MCO Action Required
- Pending Notification
- Pending PSU Review
- Processed/Complete
- PSU Invalid/Complete
- PSU Processed/Complete
- Terminated
- Transferred

- b) Type Authorization — PSU staff can also search for initial or reassessment authorizations.

**Type Authorization**

- Initial
- Reassessment

- c) Other — The ME-waiver box should always be checked on the SK-ISP form.

**Other**

- ME-Waiver
- MFPD
- SSI

- 8) Once all pertinent information has been selected for the search, scroll to the bottom of the page and select the search option to use. PSU staff can search for forms to view in any order or create a list of forms to work in sequence. Select the best option for the type of search that is being done. Search results will be displayed at the bottom of the Power Search page. The data contained in the search can be exported to Excel® or saved for later use.

**Search Options**

You may either **Search for forms to view in any order** or **Create a list of forms to work in sequence**.

You may also optionally save this search for later use

Search Name: \_\_\_\_\_

Make public

Save Search

- a) If Search for forms to view in any order is chosen, the default search results will be by the Document Locator Number (DLN). You can select any of the column hyperlinks to create a customized sort.

Export Data to Excel  
Total Record(s): 113  
Displayed Record(s): 1 to 113

Locked	DLN	Provider	SSN	Name	Year of Renewal	Provider Number	Status	Original Renewal Date	MCO Name	Service Area	Type of Authorization	SKP From Date	SKP To Date	County	Plan Code
<input type="checkbox"/>	<a href="#">00000000000000000000</a>	00000000	000000000000	00000000000000000000	00	00000000	New Individual	03/15/2019	Amnegrup	0400	Other	03/2017	12/31/2019	Sevier	04
<input type="checkbox"/>	<a href="#">00000000000000000000</a>	00000000	000000000000	00000000000000000000	00	00000000	Terminated	03/15/2019	Amnegrup	0400	Other	03/2017	12/31/2019	Sevier	04
<input type="checkbox"/>	<a href="#">00000000000000000000</a>	00000000	000000000000	00000000000000000000	00	00000000	Plan Exterminated	03/15/2019	Amnegrup	0400	Other	03/2017	12/31/2017	Sevier	04
<input type="checkbox"/>	<a href="#">00000000000000000000</a>	00000000	000000000000	00000000000000000000	00	00000000	Terminated	03/15/2019	Amnegrup	0400	Other	03/2017	12/31/2017	Sevier	04
<input type="checkbox"/>	<a href="#">00000000000000000000</a>	00000000	000000000000	00000000000000000000	00	00000000	Reading PDU Renewal	02/12/2019	Community First	0400	Other	03/2017	12/31/2017	Sevier	04
<input type="checkbox"/>	<a href="#">00000000000000000000</a>	00000000	000000000000	00000000000000000000	00	00000000	Reading PDU Renewal	03/15/2019	Community First	0400	Other	03/2017	12/31/2017	Sevier	04
<input type="checkbox"/>	<a href="#">00000000000000000000</a>	00000000	000000000000	00000000000000000000	00	00000000	455 Renewal/Complete	03/15/2019	Community First	0400	Other	03/2017	12/31/2017	Sevier	04

- b) If the search with the Create a list of forms to work in sequence is chosen, the search results will default to opening the first SK-ISP form in the list. This is also the first DLN listing when the Search for forms to view in any order is chosen.

Search - Reports - Printable Forms

### STAR Kids Individual Service Plan (SK-ISP)

[Return to Search Results](#)

Current Status: Terminated    Name: 00000000000000000000    DLN: 00000000000000000000

**Forms Actions:**  
[Add Note](#)   [Print](#)   [Skip Form](#)

**Managed Care Organization**

Provider No. \_\_\_\_\_

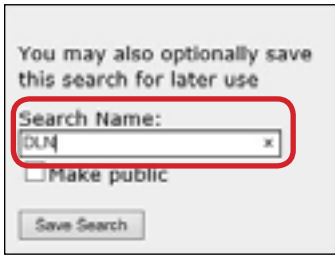
MCO Name: ACTIA

Service Coordinator: 1957

Plan Code: K1

County: Johnson

- c) Searches can also be saved. This is helpful if you need to perform a search with the same criteria on a recurring basis. For example, you may need to search for forms for a specific vendor number set to a specific status each week.



- i) Each search will need to be named to be saved. Once the search is named, click **Save Search**.
- ii) The Search results can then be found under My Searches. Click **My Searches** in the blue navigational bar to show the list of saved searches.



- iii) Any named search results will appear in the My Saved Searches list.

My Saved Searches			
all 1700	<a href="#">Remove</a>	<a href="#">Open</a>	<a href="#">Work Results</a>
DLN	<a href="#">Remove</a>	<a href="#">Open</a>	<a href="#">Work Results</a>
DLN	<a href="#">Remove</a>	<a href="#">Open</a>	<a href="#">Work Results</a>
psu user H1700 search	<a href="#">Remove</a>	<a href="#">Open</a>	<a href="#">Work Results</a>

## SK-ISP Pending PSU Review Process

If there is a status code of *Pending PSU Review*, there are a couple of items PSU staff should check.

### Total Estimated Waiver Cost exceeds Annual Cost Limit

If the MCO submitted an authorization with a Total Estimated Waiver Cost that exceeds the Annual Cost Limit, the PSU staff will need to follow policy to determine if the overage has been approved or if the SK-ISP needs to be turned over to the HHSC High Needs Coordinator. The Over Annual Cost Limit override with GR approval box will only show up if the Total Est. Waiver Costs is over the Annual Cost Limit.

Quantity	Service Category	Est. Annual Service Units	Rate	Est. Annual Cost
1	Health Care- Home attached with SK-ISP	10.00	\$20.00	\$200.00
1	Health Care- Home attached with SK-ISP	300.00	\$400.00	\$120,000.00

Total Est. Waiver Costs: \$120,200.00

Annual Cost Limit: \$10,000.00

Over Annual Cost Limit Override With GR Approval:

### Program Eligibility

PSU staff reviews the SK-ISP to see if Medically Dependent Children Program (MDCP) waiver program eligibility has been met.

### Workflow Actions

- 1) PSU staff must review ISP begin and end dates to ensure the dates are correct before moving on to step two. PSU staff should modify dates using the Edit Content button if the dates are not correct. (Refer to Edit Content section for details about editing ISP dates.)
- 2) If, after reviewing the form, PSU staff determines that action is required by the MCO, click the **MCO Action Required** button. This will send the SK-ISP form back to the MCO from which it originated and the MCO can then inactivate the form and submit a new SK-ISP form with adjusted or corrected information.

Once the form is in **MCO Action Required** status, the MCO has 45 days to inactivate the form. The 45-day deadline is for forms in the **MCO Action Required** status only. The MCO cannot change information in the SK-ISP form, so they will need to inactivate the form and create a new SK-ISP form with the correct information or changes made in the new SK-ISP form. The MCO can use the inactivated form as a template.

An MCO can inactivate a form when it is one of the following statuses:

- **MCO Action Required**
- **Pending PSU review**

If the form is not inactivated in the 45-day timeframe, the form will be system-inactivated.

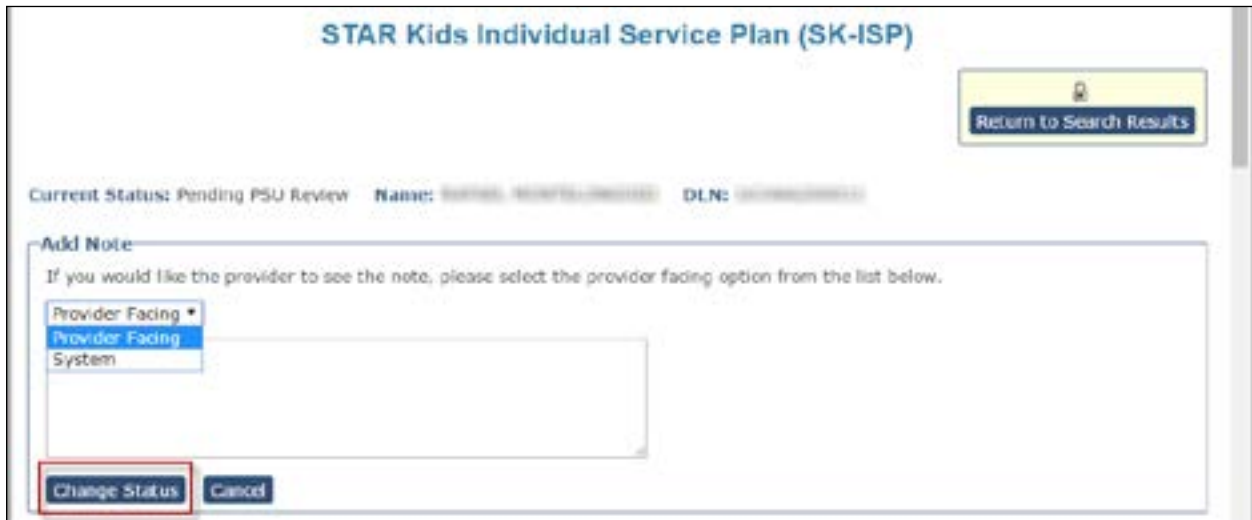
- 3) If services are not approved and MCO action is not required, click the **PSU Invalid/Complete** button. The form status will be set to **PSU Invalid/Complete**.

- If services are approved, eligibility has been met, and the form is correct, click the **PSU Processed/Complete** button. If this is an initial SK-ISP, the form status will be set to **Pending Notification**. If the SK-ISP is a reassessment, the form status will be set to **PSU Processed/Complete**.

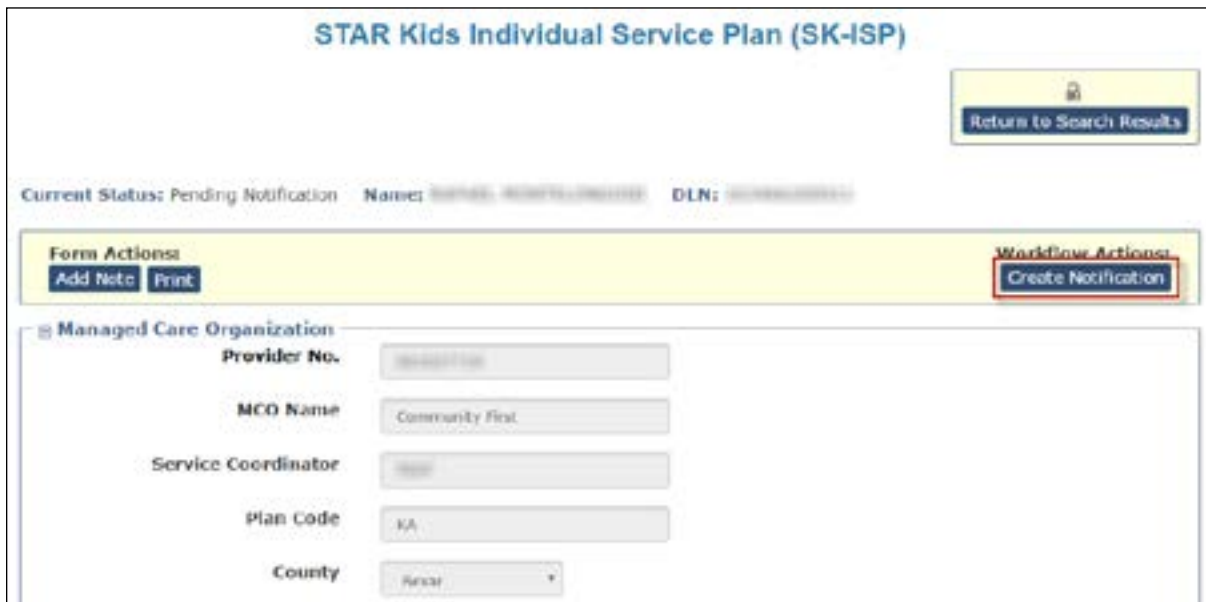


## Generate the H2065-D/DS Notification Letter Form

When the **PSU Processed/Complete** button is clicked, an option to add a note appears. (Refer to the Add Notes/History section for details about adding notes.) Once completed, click the **Change Status** button to save the note to the History trail. The form status will be changed to **Pending Notification**. When an initial SK-ISP form is designated as **Pending Notification**, PSU staff can generate a H2065-D/DS Notification Letter form. The form status updates to **PSU Processed/Complete** once the H2065-D/DS Notification Letter form is generated.

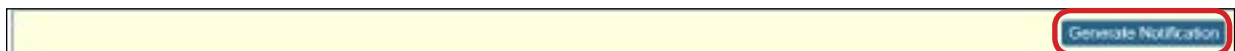


- To generate the H2065-D/DS Notification Letter form, click **Create Notification**.

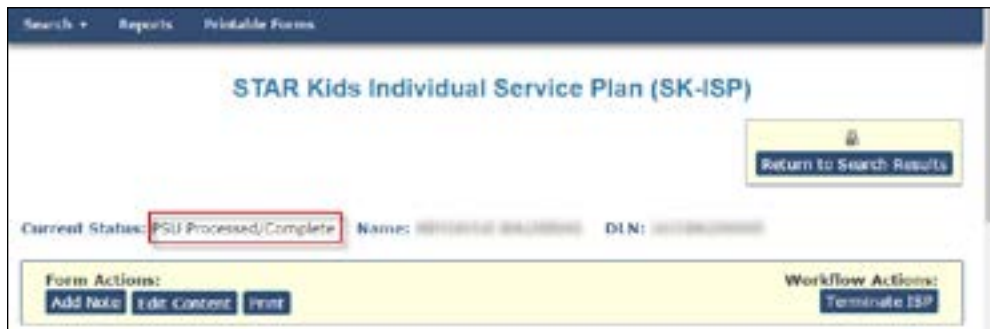


The H2065-D/DS Notification Letter form will then be displayed with several of the fields pre-populated. You will then need to complete the form.

- 2) Once all fields on the form are completed, click the **Generate Notification** button.



- 3) The H2065-D/DS Notification Letter form will then be created as a Portable Document Format (PDF) document, which can then be printed out and the PDF file can be saved.
- 4) The form status will update to **PSU Processed/Complete** once the notification is generated.



- 5) Once the H2065-D/DS Notification Letter form has been generated, a PDF will be saved to the Long Term Care Portal database.

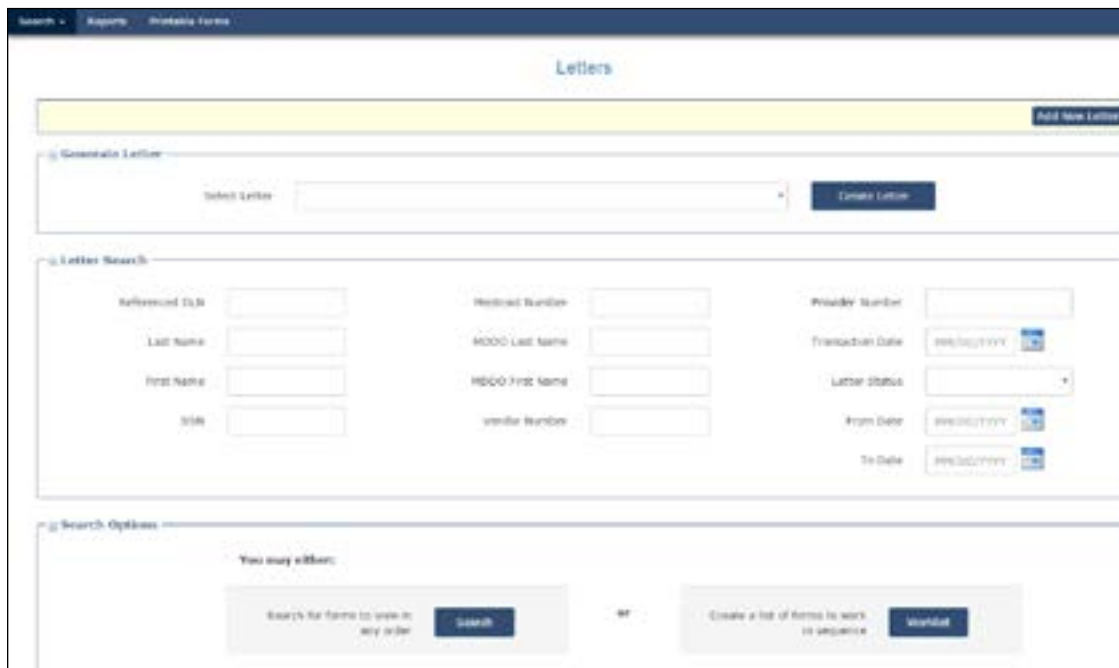
## View Letters process

The PSU staff can use the Letters search function in the blue navigational bar to view letters.

- 1) From the Search drop-down menu, choose Letters.



- 2) Enter criteria to search for Letters, and choose a Search Option. All letters that fit the search criteria will be displayed.





3) To view a letter, click the **View Letter** link.

Letter DLN	Referenced DLN	Letter Type	MO/DO Last Name	MO/DO First Name	Recipient Last Name	Recipient First Name	Status	Received Date
View Letter		INSDO					Completed	1/4/2017 9:27:19 AM
View Letter		INSDO					Pending Printer	1/3/2017 3:22:58 PM
View Letter		CLDRH					Pending Printer	1/3/2017 3:22:57 PM
View Letter		CLDRH					Pending Printer	1/3/2017 3:22:58 PM
View Letter		CLDRH					Pending Printer	1/3/2017 3:22:58 PM
View Letter		WDRSD					Completed	1/3/2017 8:29:38 AM

## Terminate SK-ISP Form

After ensuring the ISP dates are correct, PSU staff can terminate a form that is in status **Processed/Complete** or **PSU Processed Complete**. Terminated forms are assigned a **Terminated status**, and cannot be modified.

**Note:** PSU staff must ensure the ISP dates are correct prior to termination. The ISP cannot be modified once it is **Terminated**.

Use Power Search to locate the form that needs to be terminated.

Search +
Reports
Printable Forms

### STAR Kids Individual Service Plan (SK-ISP)

Return to Search Results

Current Status: Processed/Complete    Name: [REDACTED]    DLN: [REDACTED]

**Form Actions:**

Add Note   Edit Content   Print

**Workflow Actions:**

Terminate ISP

**Managed Care Organization**

**Provider No.**

**MCO Name**

**Service Coordinator**

**Plan Code**

**County**

**Applicant/Member**

**Group Code**

**ME-Waiver**



- 1) Click on the **Terminate ISP** button and the ISP To Date will become enabled. Enter a new ISP To Date to add the SK-ISP termination date.

The screenshot shows the 'Individual Service Plan Event' form. The 'Effective Date' is 12/11/2016. 'Type Authorization' has 'Initial' selected and 'Reassessment' is unselected. 'ISP From Date' is 02/01/2017. 'ISP To Date' is empty. 'MFPD' is unselected. The 'Termination Reason' dropdown menu is open, showing 'Exceeds cost limit' as the selected option.

- 2) Choose a Termination Reason from the drop-down menu.

This screenshot shows the same form as above, but with the 'Termination Reason' dropdown menu expanded. The menu lists various reasons for termination, with 'Exceeds cost limit' highlighted in blue. Below the form, the 'Individual Service Plan Services' section is visible, showing a table with columns for 'Delivery', 'Service', and 'Est. Annual Cost'. The 'Est. Annual Cost' is \$1,250.00. The 'Total Est. Waiver Costs' is \$100.00. The 'Annual Cost Limit' is also shown.

**Note:** PSU staff must request supervisor approval when using termination reason *Other*.

- 3) Click on **Submit Form**. The form will be updated to the status **Terminated**.

## Reassessments

The PSU staff can use the Letters search function in the blue navigational bar for the reassessment process.

- 1) When a form is submitted as a Reassessment, it will automatically go through the verification program and if there are no errors found, the SK-ISP form will be processed and set to status ***Processed/Complete***. If the Total Estimated Waiver Cost exceeds the Annual Cost Limit, the status will be set to ***Pending PSU Review***.

The screenshot shows the 'Individual Service Plan Event' form. The 'Effective Date' is 12/11/2016. The 'Type Authorization' field is highlighted with a red box and has 'Initial' and 'Reassessment' radio buttons, with 'Reassessment' selected. Other fields include 'ISP From Date' (02/01/2017), 'ISP To Date' (03/07/2017), 'MFPD' (unchecked), and 'Termination Reason' (Forward cost limit).

- 2) PSU will retrieve the reassessment ISP's DLN.
- 3) From the Search drop-down menu, choose Letters.

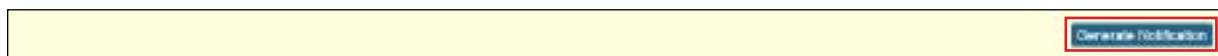


- 4) Select 2065-D/DS: Notification of Managed Care Programs Services from the drop-down menu. Click the **Create Letter** button.

The screenshot shows the 'Letters' search page. At the top, there is a search bar and a 'Create Letter' button highlighted with a red box. Below the search bar, there is a dropdown menu with '2065-D/DS: Notification of Managed Care Programs Services' selected. The page also contains various search filters and options.

5) The H2065-D/DS Notification Letter form will then be displayed. PSU staff will then need to complete the form.

- 6) Enter data into the required fields (as indicated by the red dots). If you try to submit a letter but have missing information from required fields, you will receive error messages indicating which required fields must be completed before the letter can be submitted.
- 7) When all of the information has been entered, click the **Generate Notification** button at the bottom of the letter. If the letter is submitted successfully, a DLN will be assigned.



# ISP Form Actions

## Add Notes/History

PSU staff can also add notes to the History trail of the SK-ISP form. To add a note, click **Add Note** under the Form Actions heading.

History	
Form Submitted	Changed by <b>sfanc1</b> on 8/13/2013 7:29:54 AM
8/13/2013 7:29:54 AM	<b>sfanc1</b> : Form entered workflow.
Pending PSU Review	Changed by <b>System</b> on 8/13/2013 7:29:56 AM
8/13/2013 7:29:56 AM	<b>System</b> : Pending PSU Review.
SAS Request Pending	Changed by <b>System</b> on 8/19/2013 6:39:03 PM
8/19/2013 6:39:03 PM	<b>System</b> : The request is being processed by DADS. Please allow 2-4 business days for the next status change.
Processed / Complete	Changed by <b>System</b> on 8/20/2013 4:36:10 AM
8/20/2013 4:36:10 AM	<b>System</b> : SAS Change Request completed successfully.

- 1) Open Internet Explorer®.
- 2) The Power Search page is the default page when logged into the LTC Online Portal. From the Search drop-down menu, choose Letters.



- 3) Select Letter: Choose **2065-D/DS: Notification of Managed Care Programs Services** from the drop-down box.
- 4) Enter information in the Letter Search section to help narrow your search. Social Security Number (SSN) and/or Medicaid Number are the most common search options.
- 5) Click the **Search** button at the bottom of the screen.
- 6) A list of results is shown at the bottom of the screen. To display the details of a letter, click the **View Letter** link.

**Note:** This search also provides the Referenced DLN for a letter. The Referenced DLN can be entered as the DLN option while in Power Search.

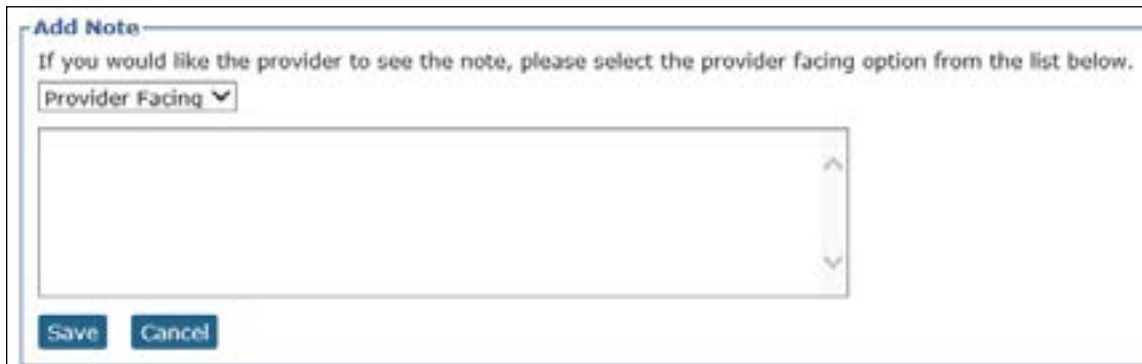
- 7) Locate the Form Actions bar at the top of the SK-ISP form.



- 8) After a letter is opened, the PSU staff can add a note to the letter by clicking the **Add Note** button in the Form Actions bar. Once the note is entered, PSU staff would click the **Save** button. If PSU staff does not want to enter the note, they would click the **Cancel** button.

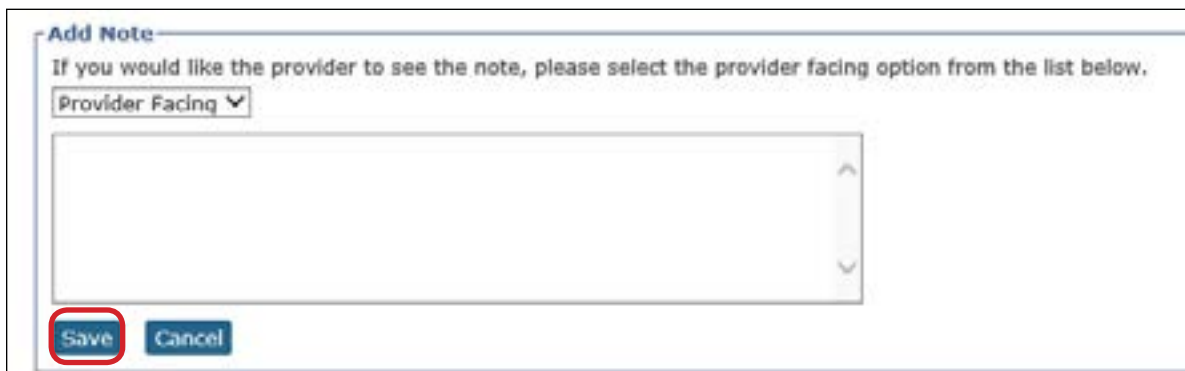


- 9) The Add Note box will be displayed. Enter information (up to 500 characters). You can also choose to make the note viewable to the provider by selecting **Provider Facing** from the drop-down box. Selecting **System** only allows TMHP and PSU to see the note.



The screenshot shows a dialog box titled "Add Note". Inside, there is a text instruction: "If you would like the provider to see the note, please select the provider facing option from the list below." Below this is a dropdown menu currently showing "Provider Facing". Underneath the dropdown is a large, empty text area for entering the note. At the bottom left of the dialog are two buttons: "Save" and "Cancel".

- 10) Once the note is complete, click the **Save** button to save the note to the History trail.



This screenshot is identical to the previous one, but the "Save" button at the bottom left is circled in red to indicate it should be clicked.

### Edit Content

PSU staff can edit ISP dates on SK-ISP forms in *Pending PSU Review*, *Processed/Complete*, or *PSU Processed/Complete* statuses. Click **Edit Content** in the Form Actions bar.



The screenshot shows a horizontal bar with two sections. The left section is labeled "Form Actions:" and contains three buttons: "Add Note", "Edit Content", and "Print". The "Edit Content" button is highlighted with a red rectangular box. The right section is labeled "Workflow Actions:" and contains three buttons: "MCD Action Required", "PSU Invalid/Complete", and "PSU Processed/Complete".

- 1) The ISP From Date and the Money Follows the Person Demonstration (MFPD) checkbox can be modified on forms set to status **Pending PSU Review**. The MFPD box should be checked for Money Follows the Person limited nursing facility stay applicants and members.

The screenshot shows the 'Individual Service Plan Event' form. The 'Effective Date' is 01/21/2018. 'Type Authorization' has 'Initial' selected. 'ISP From Date' is 07/01/2001 and 'ISP To Date' is 06/30/2002. The 'MFPD' checkbox is currently unchecked. There is a text box for 'Change Justification'.

For forms in **Processed/Complete** or **PSU Processed/Complete** status, the ISP From Date, ISP To Date, and the Change Justification text box are required.

The screenshot shows the 'Individual Service Plan Event' form. The 'Effective Date' is 02/02/2017. 'Type Authorization' has 'Initial' selected. 'ISP From Date' is 03/01/2017 and 'ISP To Date' is 02/26/2018. The 'MFPD' checkbox is currently unchecked. There is a text box for 'Change Justification'.

**Note:** Modifications to the fields described in these scenarios require that the user fill in the Change Justification text box (up to 500 characters) with an explanation of the reason for modification. This text box only populates when editing an SK-ISP, and is a required field. Additionally, when the ISP From Date is changed, the ISP To Date will automatically extend for 12 calendar months. To change both dates, change the From Date first, followed by the To Date. The ISP To Date can be extended up to 4 months at a time. This allows PSU staff to extend an ISP during the fair hearing process, if necessary.

- 2) Click **Cancel** to discard edits. Click **Save Changes** to update the content. Entries will be generated in the Form History, detailing the changes made and the reasons for the change.

The screenshot shows a yellow bar at the bottom of the form containing two buttons: 'Cancel' on the left and 'Save Changes' on the right.

## Print

Use the Print feature to print a hard copy of completed SK-ISP form. Click the **Print** button to print the form. The **Print** button is available in all statuses, as well as prior to form submission. When you click the **Print** button, the form is displayed as a PDF document.

The screenshot shows the form footer with two sections: 'Form Actions' containing 'Add Note', 'Edit Content', and 'Print' buttons; and 'Workflow Actions' containing 'MCO Action Required', 'PSU Invalid/Complete', and 'PSU Processed/Complete' buttons. The 'Print' button is highlighted with a red box.

## SK-ISP PSU Reports

PSU staff can pull two different reports from the LTC Online Portal in regards to the SK-ISP form. The two reports that PSU staff can search for are the SK-ISP PSU Status Pending Report and the SK-ISPs for Reassessment or Overdue Report.

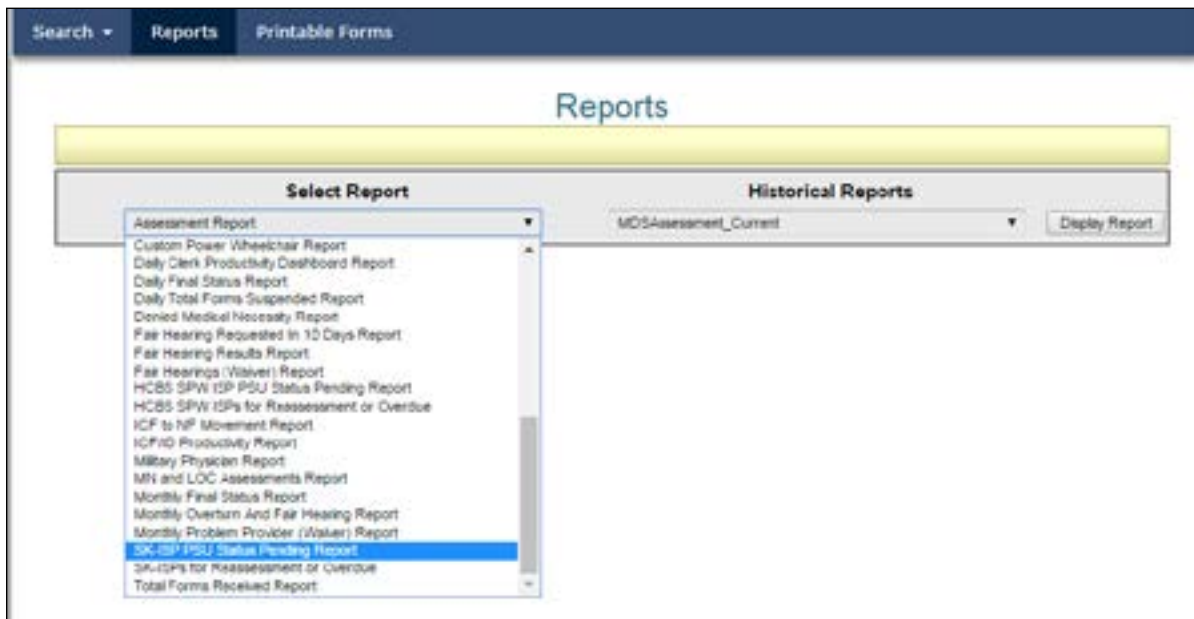
- 1) To start, Click **Reports** on the blue navigational bar.



- 2) The reports page will be displayed.



- 3) Click the arrow beside the Select Report box. Select the desired report from the drop-down menu.



- 4) After selecting the report type, you can then choose the Historical Report type. Click the **Display Report** button.





- 5) Your search results will open and be displayed in a separate window. The SK-ISP PSU Status Pending Report includes SK-ISP Forms set to status **Pending PSU Review** or **MCO Action Required**. This report will show you the service area, MCO Name, Plan Code, DLN, Form Status, and how many days this SK-ISP has been in this status.

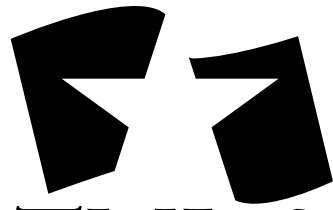
SK-ISP PSU Status Pending Report for the Period Ending 12/31/2016					
Service Area	MCO Name	Plan Code	DLN	Form Status	Days In Form Status
Bexar	Community First	KA	XXXXXXXXXX	Pending PSU Review	21
Bexar	Community First	KA	XXXXXXXXXX	Pending PSU Review	21
Bexar	Community First	KA	XXXXXXXXXX	Pending PSU Review	21
Bexar	Community First	KA	XXXXXXXXXX	Pending PSU Review	21

- 6) The Reassessment or Overdue report is used to determine which clients have an expired SK-ISP, or to note when the current SK-ISP is going to expire and a new SK-ISP has not yet been submitted. The ISP To Date of the most recent Processed/Completed SK-ISP is used to determine when the SK-ISP is going to expire. The SK-ISPs are grouped into expiring within 61-90 days, within 31-60 days, within 0-30 days, or already expired. The SK-ISP will no longer be included on the report when the ISP To Date of the most recent SK-ISP is greater than 120 days of the report run date. An SK-ISP submitted with an ISP From Date that is greater than 120 days from the previous ISP To Date is considered to be an Initial form and will not be included in the Reassessment report.

SK-ISPs For Reassessment or Overdue for Period Ending 12/31/2016						
Service Area	MCO Name	Plan Code	Days Until ISP Expiration	Expiring ISP DLN	ISP Expiration Date	MN Status
Bexar	Superior Health Plan	KE	Expired (Late)	163496200018	10/31/2016	Not Ready
Bexar	Superior Health Plan	KE	Expired (Late)	163496200021	9/30/2016	Not Ready
Bexar	Superior Health Plan	KE	90 days	163446200010	3/31/2017	Not Ready
Number of Forms for MCO: 3						

- a) Here are some examples: A client has an SK-ISP with a date range 1/1/2015 – 12/31/2015. An SK-ISP has not yet been created for 1/1/2016 – 12/31/2016. If the report is run on 1/31/2016 (report is generated on the last day of each month), the expiring DLN will be included in the report, noting Expired (Late) in the Days Until ISP Expiration column of the report because the ISP To Date of 12/31/2015 is prior to the report run date and the ISP To Date is less than 120 days from the report run date.
- b) A client has an SK-ISP with a date range 1/1/2015 – 12/31/2015. An SK-ISP has not yet been created for 1/1/2016 – 12/31/2016. If the report is run on 5/31/2016 (report is generated on the last day of each month), the expiring DLN will NOT be included in the report because the ISP To Date of 12/31/2015 is prior to the report run date and the ISP To Date is greater than 120 days from the report run date.





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