ADSA WEB ACCESS

ADSA Web Access – County Training

Washington State
Department of Social & Health Services

ADSA Aging & Disability Services Administration

Aging & Disability Services Administration
Training Services
Revised – April, 2009

Table of Contents

Overview

The **ADSA** (Aging & Disability Services Administration) **Web Access** is a new system designed to support County services for the Division of Developmental Disabilities (DDD) clients.

ADSA Web Access (AWA):

- Offers a consistent and reliable interaction for Counties statewide.
- Provides a County connection to specific areas of CARE (Comprehensive Assessment Reporting & Evaluation) application.
- Collects more information from Providers to monitor quality.
- Automates the billing and service authorization processes.
- Sets the stage for eventual connection to Provider One – a modern, more efficient payment system being developed for a broad range of social services.

About this Workbook:

This workbook provides exercises to get you up and running quickly. The exercises are self-paced and can be used together with the training version of the ADSA Web Access. The lessons are designed to first tell you about a course of action, and then give you an opportunity to try it, step-by-step.

Help:

Please direct all questions about the AWA system to the ADSA Help Desk at:

- In the Olympia Area: 725-2460
- Statewide: 1-800-818-4024
- E-mail: ADSAHelpDesk@dshs.wa.gov

When you contact the ADSA Help Desk you will receive a response within 24 hours and will be given a tracking number. All contacts will be tracked in a database to ensure a resolution is established.

Please see the ***Login – Security*** information in the Appendix of this workbook for additional information about logging in for the first time.

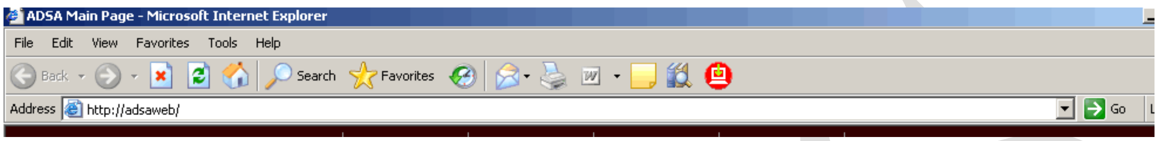
Please turn to the next page to get started.

Get Started

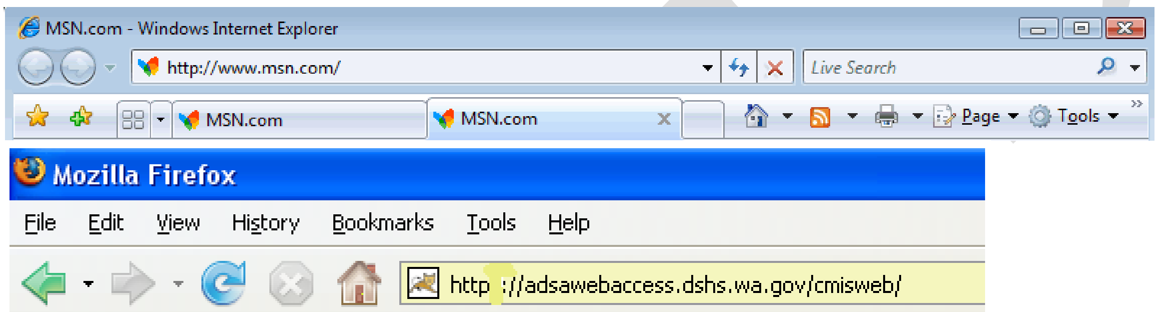
Web Browser – Get Around – Quick Review

Launch the browser:
Launch your web browser as you normally do.

Menus and Links:
For Internet Explorer version 6:



For Internet Explorer 7 or Firefox:



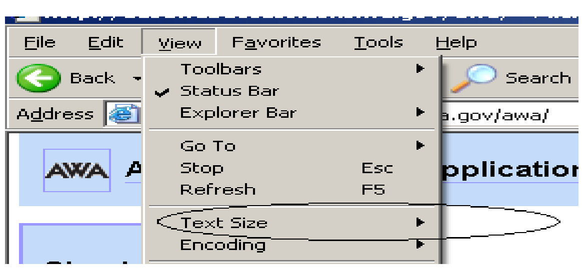
Navigation Buttons:

- The "Home"  button returns you to the main page – all browsers
- The "Back" 

 button returns you to the previous page(s) - all browsers.
  Launch ADSA Web Access

Enter the ADSA Web Access address: http://adsawebaccess.dshs.wa.gov/awa/

Tip if you have problems viewing information – CMIS screens are getting cutoff - you can always change you view thru your control bar choose View, choose Text Size and change down a size.



Please turn to the next page to login.

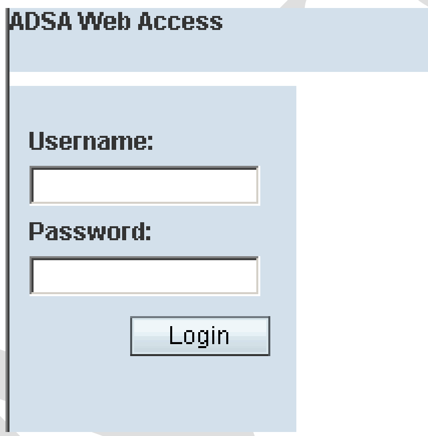
Login

The ADSA Web Access is a site on the web where many users can access data. There are several other groups besides Counties who need limited access to client data. Some of these people will use the same ADSA Web Access; however, their security group will only allow access to the specific site they need.

Prior to Login you need to obtain you Username and Password thru the ADSA help desk (see page 4 for contact information).

1. Please *type* in your username.

2. *Enter* the Password and *click* Login.



3. *Pull down* the County menu and *see* your County(s).

4. *Click* Continue. The Work List will be displayed.

5. Notice the upper right corner of the screen. You will see your Username and the County where you are logged in. You will also see a Help link.

6. *Click* the Help link and explore it now. (Close when you are finished.)

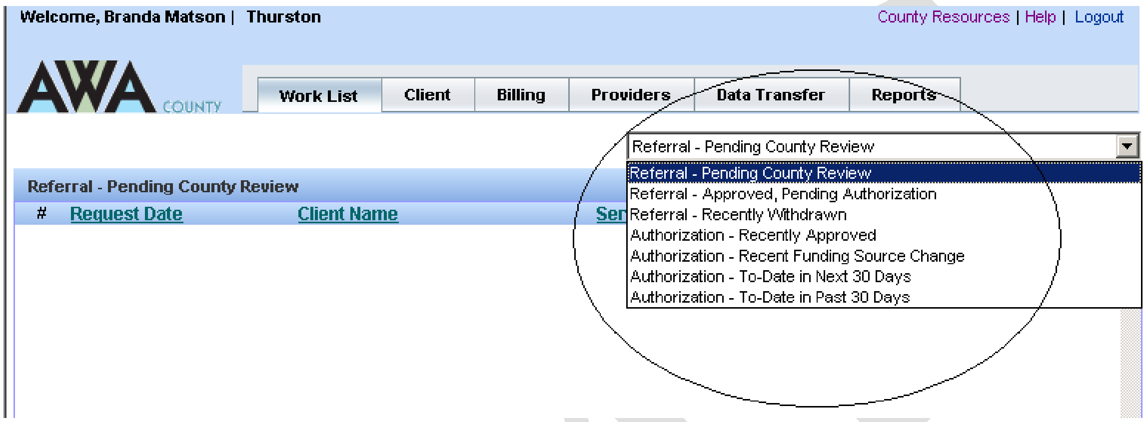
Please turn to the next page for an overview of the Work List.

Work List – Get Started

Overview

The Work List displays notices and current activities about the status of referrals and authorizations. The Work List is dynamic and changes daily as work is performed.

The initial information in the Work List comes directly from client information entered into CARE (Comprehensive Assessment Reporting & Evaluation) by the DDD Case Manager.



The Work List provides a method to manage the review/approval processes flow.

Look at the items in the Work List:

1. *Pull down* the menu and *select* each choice to see the different lists.
   Choices include:
   a. Referral - Pending County Review
   b. Referral – Approved, Pending Authorization
   c. Referral – Recently Withdrawn
   d. Authorization – Recently Approved
   e. Authorization – Recent Funding Source Change
   f. Authorization - To-Date in Next 30 Days
   g. Authorization – To-Date in Past 30 Days

2. *Return* to “Referral – Pending County Review” when you are finished.

To Sort any list:

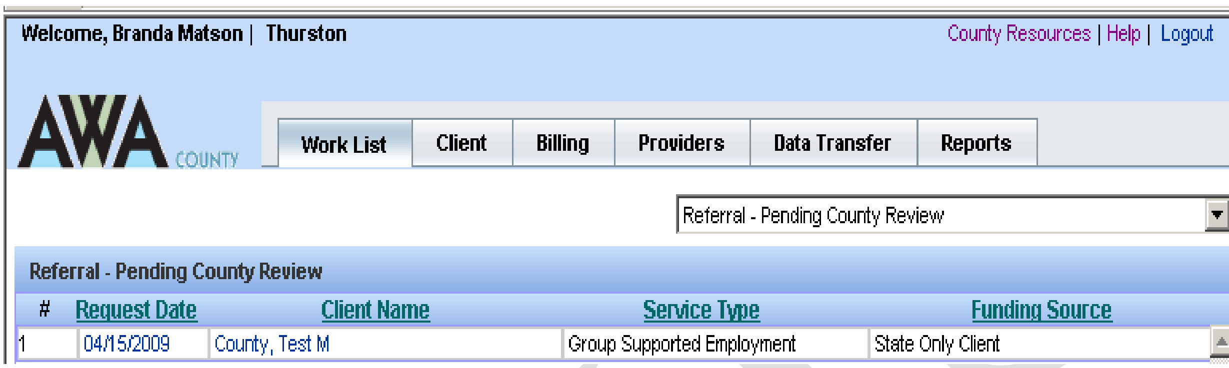
3. *Click* a column header and the list will sort by that column. (Click again and the sort will go in the opposite order.)

Turn to the next page to practice navigating through the Referrals – Pending County Review.

Work List

Referral – Pending County Review

The DDD Case Manager will enter County referrals into CARE. When the Case Manager completes the information and marks the status as "Pending County Response" a notice is added to the Work List for the Resident County (and the Service County if different).



The County of Residence/Service County will deny or approve the referral. When the County finalizes the referral, the DDD Case Manager will receive a "Tickler" the next day that the referral is ready for authorization or withdrawal.

If you click on a <u>Request Date</u> or <u>Client Name</u>, a screen detailing the County Service Referral Request will be displayed.

Try it:

1. *Click* on a client's request date or name.

   The Referral Request detail screen will be displayed. ***(We will work with this screen next!)*** NOTE: Once you are looking at a client's record you have exited the Work List.

2. *Click* the Work List tab to return to the Work List.

   Note: You have now exited the Referral Request and are back on the Work List.

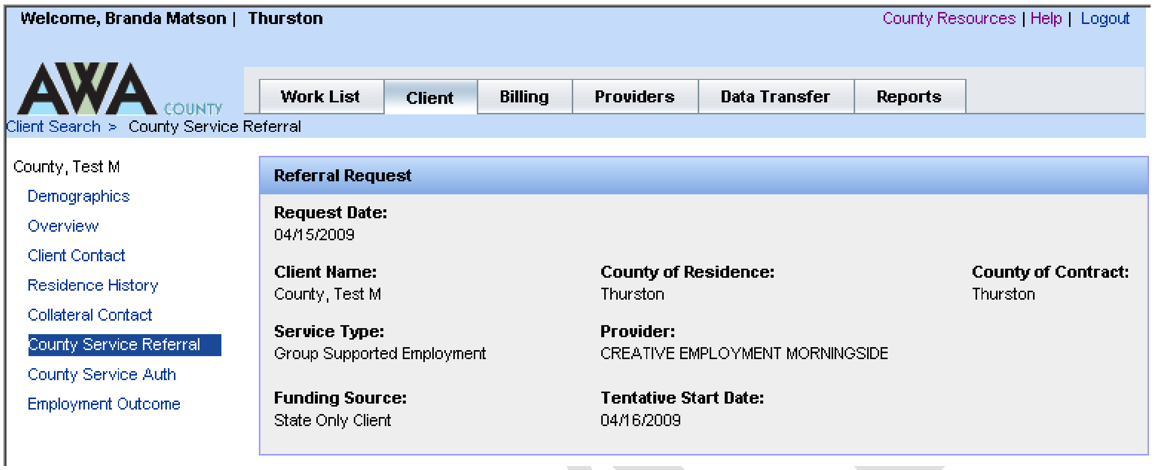
3. Let's look at a client – choose a client from "Referral – Pending County Review.

Turn to the next page for information about the **Referral Request** detail screen.

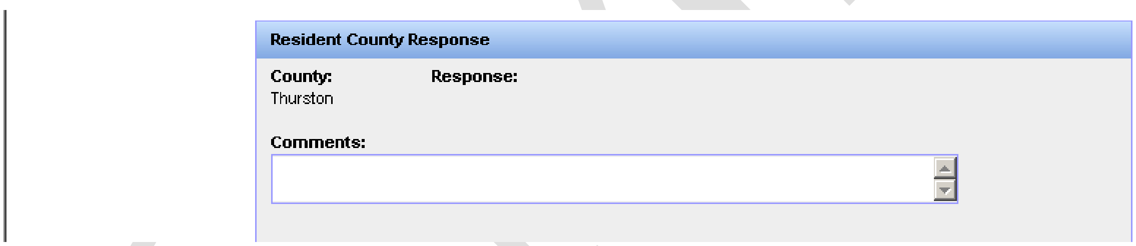
Referral Request Detail Screen Overview

The Referral Request detail screen is divided into three (3) sections. The top section **"County Service Referral"** is populated from the CARE application that the DDD Case Manager completes, *and is view only*.

When you view the Referral Request detail screen you will see links to the client's information screens (left column). (We will explore these screens later.)



"**Resident County Response**" section and "**Service County Response**" section



- If Resident County and Service County are the same, the Resident County Response section will be disabled as above.

- If the Counties are different, the Resident County must enter its response ***before*** the Service County can enter its response. Cross-County Agreements require two (2) approvals. Neither County can update the other County's data.

PROVIDER NOTE: If the Provider is not already selected by the DDD Case Manager, the Resident County Response section will be disabled. The Service County will enter the Provider. (We will work with the Provider screens later.)

> You can print this document to use as a planning tool when you are talking with the Provider.
> *Click* the **Print** button –a PDF document will open. (Close when you are finished.)

Turn to the next page to finalize the client's referral request.

Finalize the Referral Request

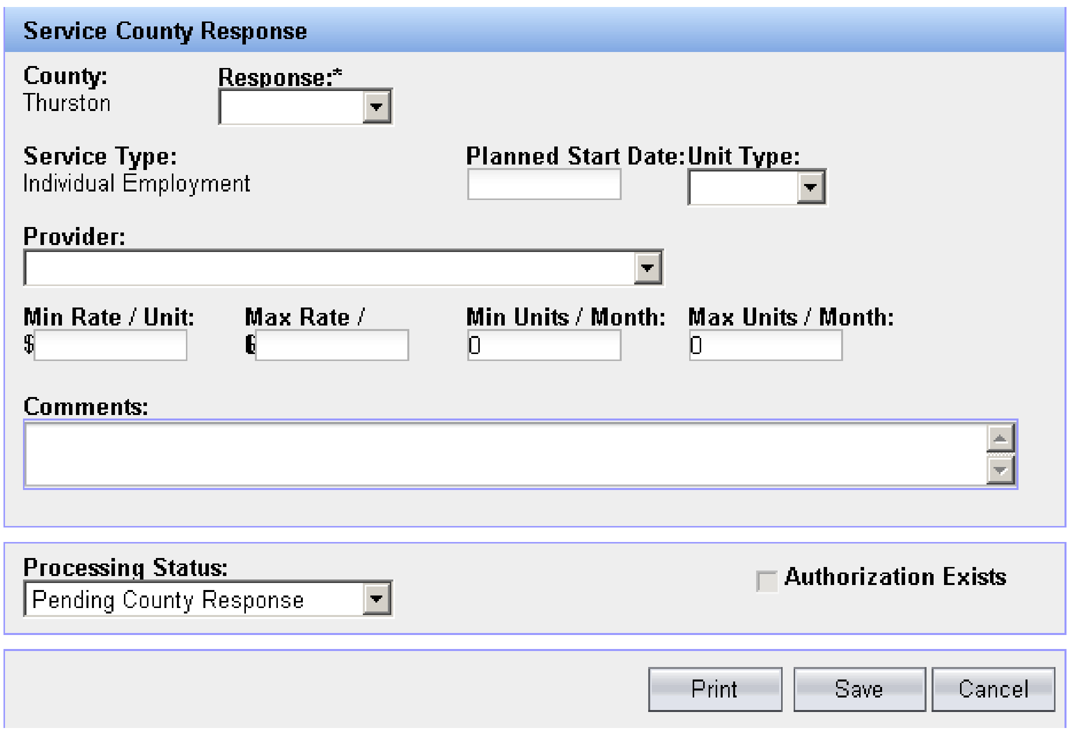
Sample scenario:
Our client is a 21-year old student. He/she recently graduated from school and is transitioning to adult services with a new job. He/she has been referred to an Individual Employment Provider. Provider had determined that they will be supporting this client 10-20 Hours/Month also known at the “expected range of service hours”.

1. You should be viewing your client’s Referral Request detail screen.

2. *Scroll down* to the Service County Response section.

3. *Enter* the information into the fields. TIP: You can click into the next field, or press the [Tab] key to jump.

4. If you enter the “Response” first you will see that some items turn red and you will receive a “System Message” about required fields. Change the Response to be blank and continue.



5. Enter the “Planned Start” date, it cannot be earlier then the “Tentative Start Date” provided by the Case Manager.

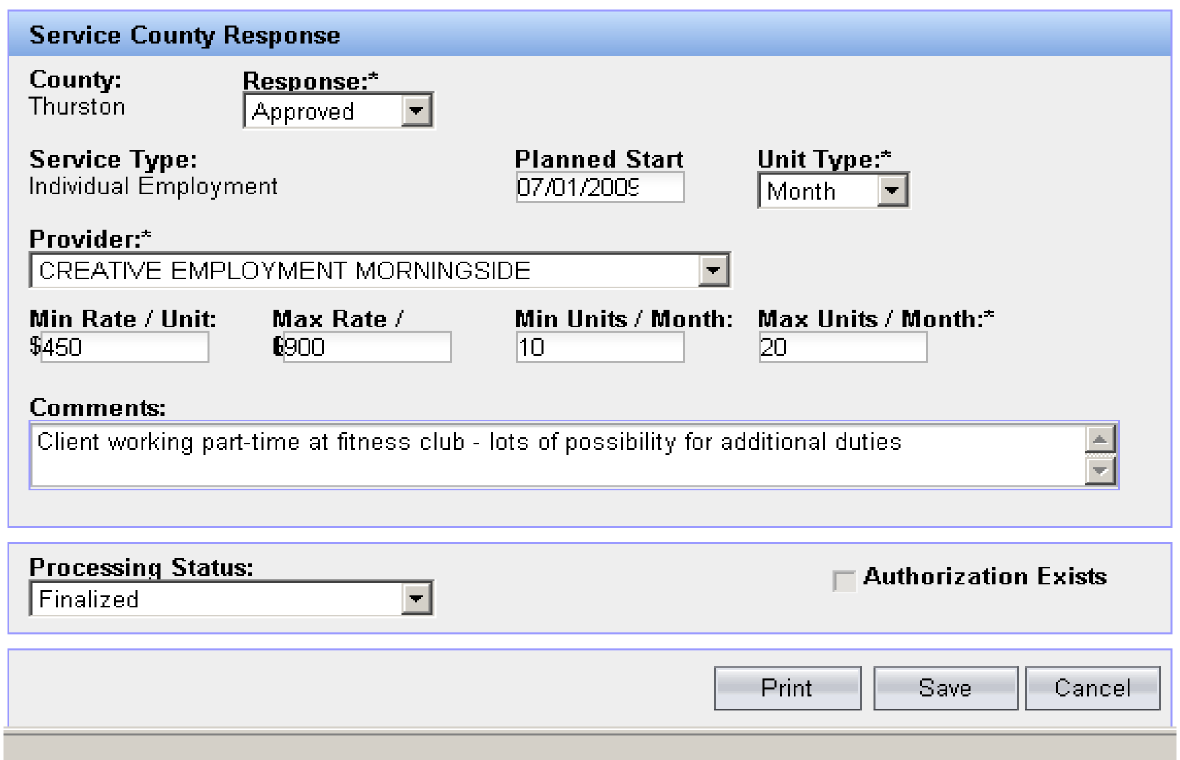
6. Choose the appropriate “Unit Type” from the drop down list. The Unit Type should align with your County’s Rate / Fee Schedule. The Unit Type option is limited to Hour, Day, or Month.
   - ✓ An “Hour” is at least fifty (50) minutes of direct service.
   - ✓ A “Day” is at least four (4) hours of direct service;
   - ✓ A "Month" is at least fifteen (15) days of direct service (a day is a least 4 hours of direct service), or a documented range of service hours (to include in the fee/rate schedule).

7. Confirm the Case manger's chosen Provider by selecting the same one. NOTE: If you know something about this provider – example they are at capacity – reject the referral and make a comment to the Case Manager. In fact, if you see something like a incorrect fund source code or the service type doesn't seem appropriate – reject the referral and make a comment to the Case Manager.

8. Enter the "Minimum Unit Rate" and then enter the "Maximum Unit Rate". This should be consistent with your County's Rate / Fee Schedule and is connected to the "Unit Type" chosen. NOTE: If the unit rate is the same for both minimum and maximum you must at least enter that rate in Maximum.

9. The "**Minimum & Maximum # of Units** will represent the Range of Service Hours a client can expect to receive from his/her service provider. This range does not need to match the unit type – like month – it will **always reflect Hours**

10. Make sure to choose "**Approved**" for the Response (the request is now filed) and "**Finalized**" for the Processing Status (the request can now be processed).



When the Service County changes the Processing Status to "Finalized" the client's DDD Primary Case Manager will be notified the next day.

NOTE: The "Planned Start Date" will be the default "From Date" on the Service Authorization.

Save the Referral Request

The 

button is like an "undo" button. It will cancel all the entries.

- If the screen is view only, the "Existing Authorization" box will be checked. This means that the request was previously finalized and an authorization already created.
- If DDD has withdrawn the request, the "Processing Status" field will display "Withdrawn" and the screen will be view only.

Click the 

button.

You will be returned to the Work List.

- Once you have finalized and saved the referral request, it will be dropped from the "Referral – Pending County Review" Work List. ***(Look at this Work List to see.)***

- The DDD Primary Case Manager will then authorize or withdraw this approved request in CARE.

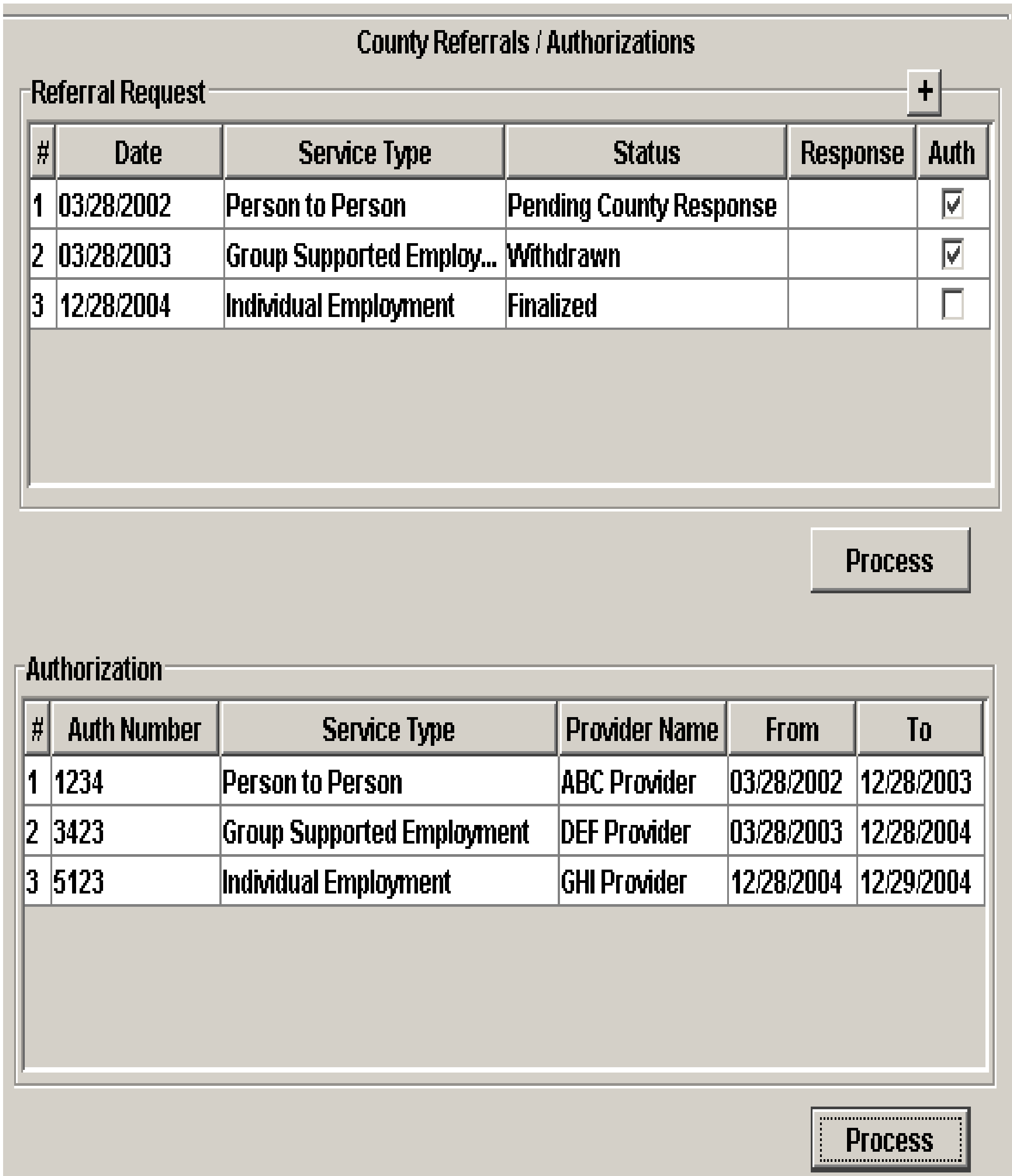
- The request is added to the "Referral – Approved, Pending Authorization"

Turn the page to see what a case manager views in the CARE for Referrals / Authorizations.

Work List

DDD Case Manager Client Referral / Authorization Screen

DDD Case Managers use this County Referrals/Authorizations screen in CARE to process both referral requests and authorizations. This is what a Case Manger sees:



Turn to the next page to look at the Referral – Approved, Pending Authorization.

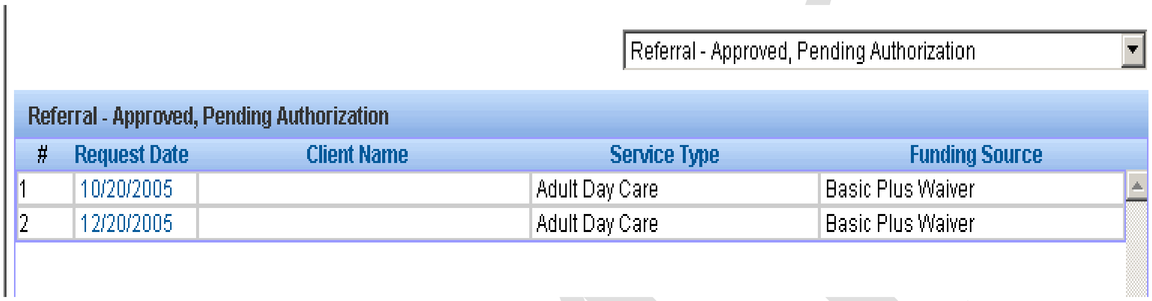
Work List

Referral – Approved Pending Authorization

"Approved, Pending Authorizations" are referrals that have been approved and are in finalized status. When you finalize a referral request, the DDD Case Manager will receive a tickler the next day in CARE. Clients will remain on this list until the referral request has been withdrawn, or an authorization has been created.

1. *Click* the Work List tab.

2. *Pull down* the Work List menu; *choose* "Referral – Approved, Pending Authorization".

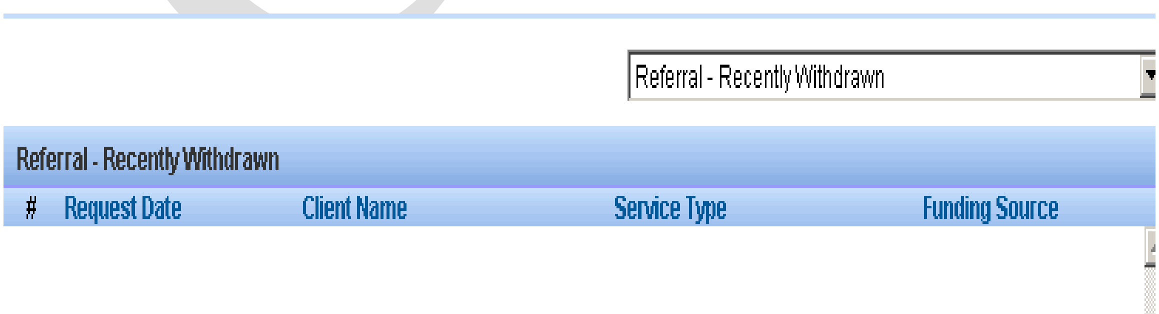


NOTE: Clicking client's name/request date will return you to the Referral Request detail screen. (Click the Back button on your browser to return to your place in the Work List.)

Referral – Recently Withdrawn

If DDD withdraws the referral, the request will be removed from the Approved, Pending Authorization list and placed on the "Referral – Recently Withdrawn" list. Referrals on this list have a status of "withdrawn" within the last thirty (30) days. Clients will remain on this list for thirty (30) days. They will be removed from this list after that time.

1. *Pull down* the Work List menu; *choose* "Referral – Recently Withdrawn".



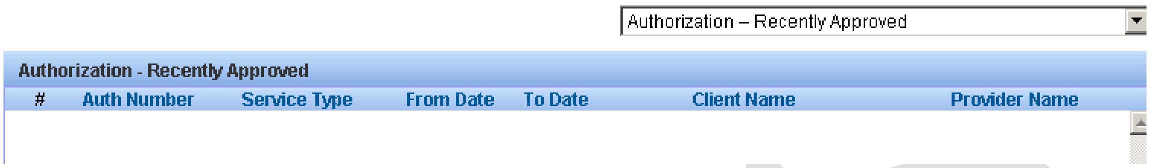
Turn to the next page to look at the Authorization – Recently Approved.

Work List

Authorization – Recently Approved

Once DDD has authorized the service, the referral will be removed from the Approved, Pending Authorization list and placed on the "Authorization – Recently Approved" list. *Recently Approved* authorizations are those that have been completed within the last thirty (30) days. Clients will remain on this list for thirty (30) days. They will be removed from this list after that time.

1. *Return* to the Work List; *choose* "Authorization – Recently Approved".



   Notice that the number in the "Auth Number" column is a link.

2. *Click* the authorization number to go to the County Service Authorization detail screen: *This screen is view only.*

NOTE: Each Authorization is now required to have an end date. The end date (To Date) can be extended for one year at a time, with the exception of child development which is limited to the child's 3rd birth date.

Turn to the next page to view the Authorization – Recent Funding Source Change list.

Work List

Authorization – Recent Funding Source Change

“Recent Funding Source Change” records are authorizations with a second or subsequent funding source **Start Date** within the last thirty (30) days. The dates are recorded in the Funding Source History table. Clients will remain on this list for thirty (30) days. They will be removed from this list after that time.

1. *Return* to the Work List; *choose* “Authorization – Recent Funding Source Change”.

2. *Click* the authorization number to go to the same Service Authorization detail screen.

   The **Funding** table displays funding source history and shows the start date for each funding source for this service:

Turn to the next page to view the “Authorization – To Date in Next 30 Days” work list.

Work List

Authorization – To Date in Next 30 Days

The “To Date” of End Date in 30 Days records is authorizations with the “To Date” within the next thirty (30) days. Clients will remain on this list for thirty (30) days. Within 30 days you must renew the authorization or it will be removed from this list and go to the Date in Past 30 Days.

1. *Return* to the Work List; *choose* “Authorization – End Date in 30 Days”.

Authorization - To-Date in Next 30 Days

#	Auth Number	Service Type	From Date	To Date	Client Name	Provider Name	Closed
1	1062633	Individual Employment	04/01/2004	04/30/2009		THURSTON CO SOCIAL SVCS	
2	1075991	Individual Employment	06/13/2006	04/30/2009		THURSTON CO SOCIAL SVCS	
3	1034704	Individual Employment	07/01/1999	04/30/2009		ST. MIKE'S TIKES	
4	1053833	Individual Employment	07/01/2003	04/30/2009		ST. MIKE'S TIKES	
5	1061876	Individual Employment	04/01/2004	04/30/2009		ST. MIKE'S TIKES	
6	1062636	Individual Employment	04/01/2004	04/30/2009		ST. MIKE'S TIKES	
7	1058050	Community Access	04/01/2004	04/30/2009		COMMUNITY RESOURCES/THURSTON	
8	1060682	Community Access	04/01/2004	04/30/2009		COMMUNITY RESOURCES/THURSTON	
9	1060694	Community Access	04/01/2004	04/30/2009		COMMUNITY RESOURCES/THURSTON	

NOTE: Clicking the authorization number will take you to the same Service Authorization detail screen.

Turn to the next page to look at the Authorization – To Date in Past 30 Days.

Work List

Authorization – To Date in Past 30 Days

Authorizations closed with a "To Date" within the last thirty (30) days will be listed. Clients will remain on this list for thirty (30) days. They will be removed from this list after that time.

1. *Return* to the Work List; *choose* "Authorization – Recently Closed".

Authorization - To-Date in Past 30 Days

#	Auth Number	Service Type	From Date	To Date	Client Name	Provider Name	Closed
1	1068722	Group Supported Employment	05/01/2005	04/14/2009		MORNINGSIDE/THURSTON	✓
2	1065408	Individual Employment	11/01/2004	04/01/2009		CREATIVE EMPLOYMENT MORNINGSIDE	✓
3	1078515	Person to Person	09/21/2006	03/31/2009		CAREER QUEST, LLP/THURSTON	✓
4	1089114	Group Supported Employment	06/01/2008	03/31/2009		MORNINGSIDE/THURSTON	
5	1089115	Group Supported Employment	06/01/2008	03/31/2009		MORNINGSIDE/THURSTON	
6	1091738	Community Access	12/01/2008	03/31/2009		EMPLOYMENT SOLUTIONS PLUS	

The "To Date" means --- do not pay after this date!

You have finished with the Work Lists.

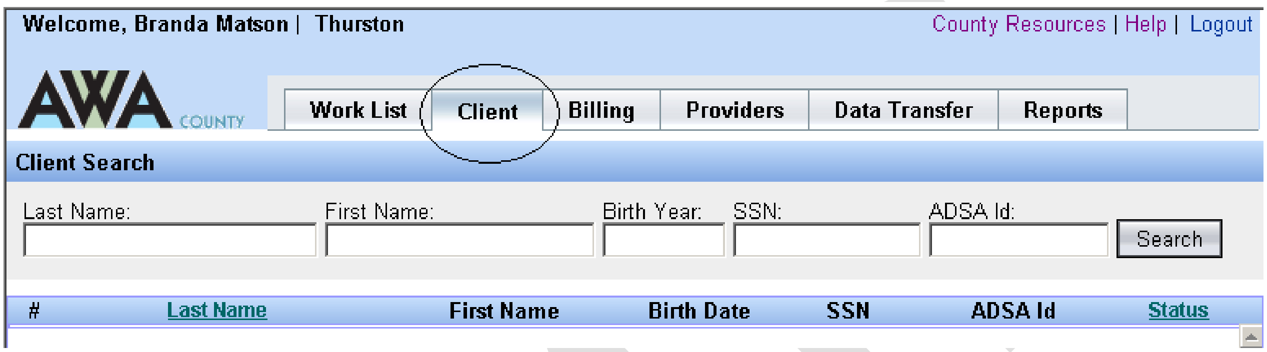
Turn to the next page to practice searching for a client.

Client

Search

The Search function will retrieve clients currently or previously living in the County, (active and inactive) with a referral or authorization.

1. *Select* the Client tab.



2. *Enter* your search criteria into one (or more) of the fields, and *click* Search.

   NOTE: You can enter a partial last name or a partial first name. The SSN and ADSA ID fields will require exact matches.

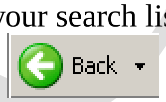
3. *Sort* the columns by clicking in the column header if the list is long.

   To view the client's record:

4. *Click* the client's name and his/her Demographic screen will be displayed.

   TIP: There are two ways to return to the search screen.

   (1) Return to your search list:

5. *Click* the back 

button and you will be returned to your search list.

6. *View* another client from the list.

7. Notice the "Client Search" link (at the top of the left column):


Click to return to a blank screen.

   View your client:

8. Use the steps you already know to *find* and *view* your client.

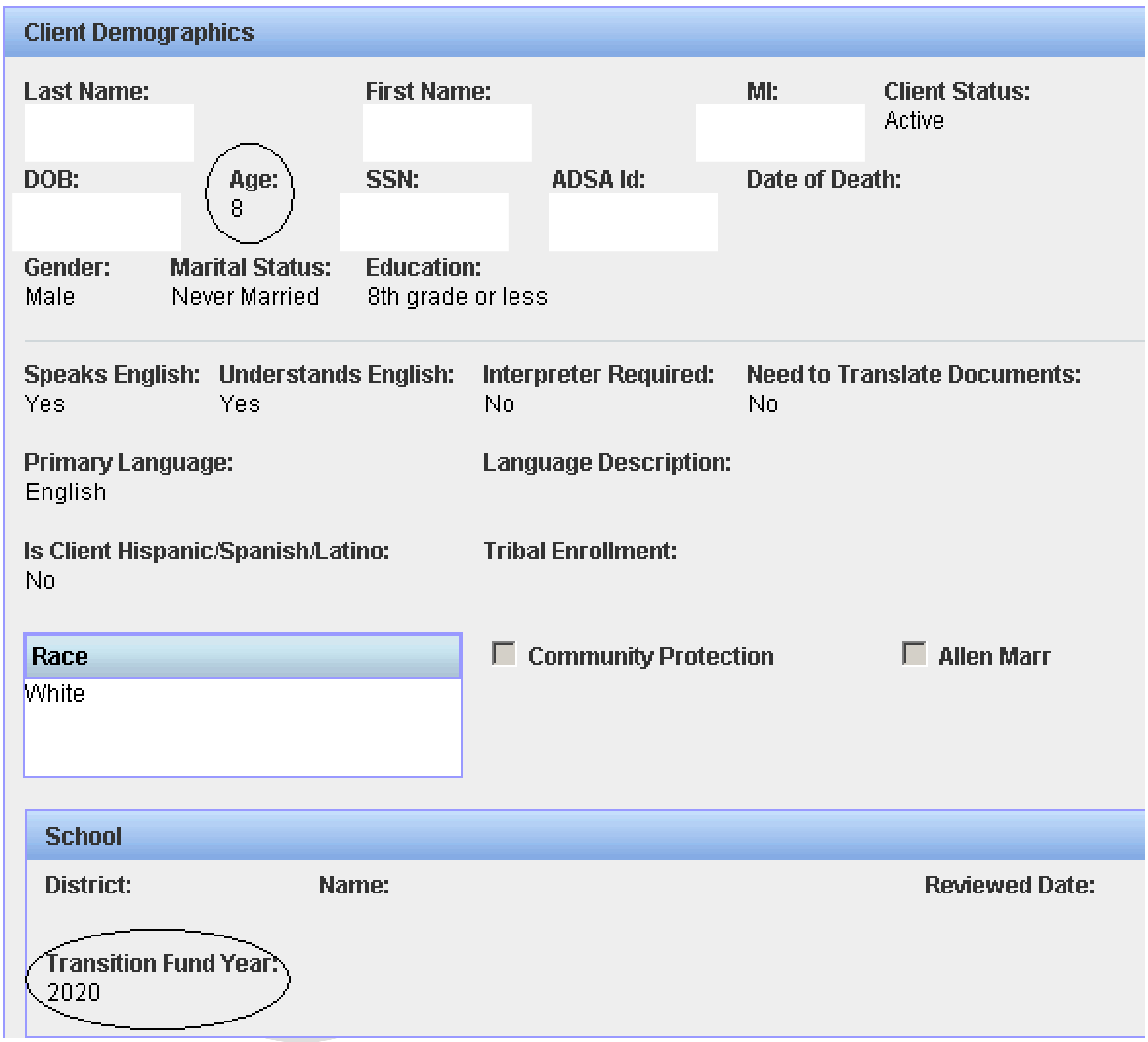
Turn to the next page for a quick overview of the Demographics screen.

Client

Demographics

Information on the Client Demographics screen is populated from the CARE data screens. The information is view only.

1. The Demographics screen:


Client Demographics

Last Name: First Name: MI: Client Status: Active

DOB: Age: 8 SSN: ADSA Id: Date of Death:

Gender: Male Marital Status: Never Married Education: 8th grade or less

Speaks English: Yes Understands English: Yes Interpreter Required: No Need to Translate Documents: No

Primary Language: English Language Description:

Is Client Hispanic/Spanish/Latino: No Tribal Enrollment:

Race: White Community Protection Allen Marr

School

District: Name: Reviewed Date:

Transition Fund Year: 2020

The client's **age** is system calculated from the date of birth. The **"Transition Fund Year"** (anticipated graduation year) is also system calculated from the date of birth.

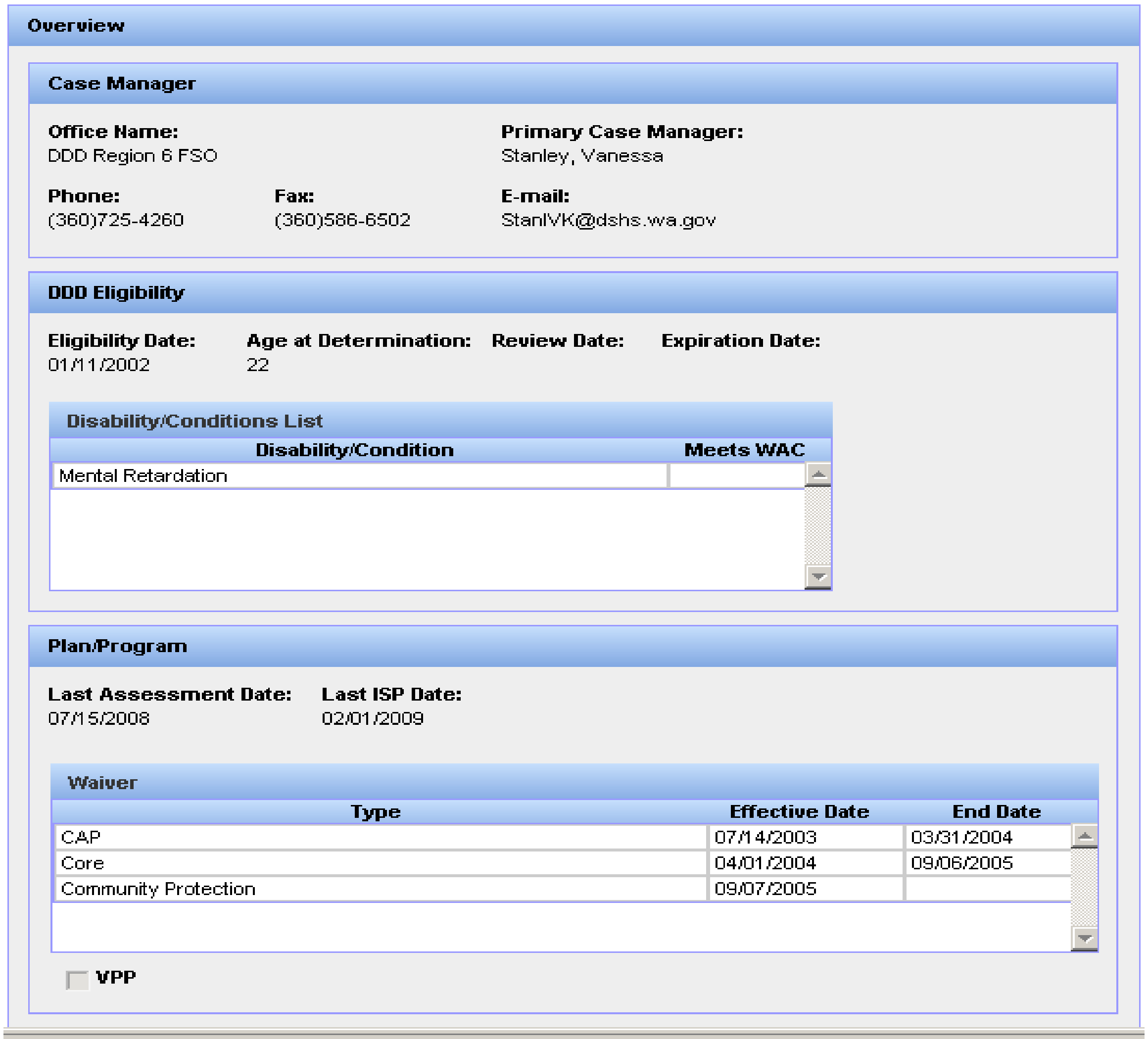
Turn to the next page for information about the Overview screen.

Client

Overview Screen

Information on the Overview screen is populated from CARE data screens. The information is view only.

1. *Click* the Overview link. The Overview screen will be displayed:


Overview

Case Manager

Office Name: DDD Region 6 FSO
Primary Case Manager: Stanley, Vanessa
Phone: (360)725-4260
Fax: (360)586-6502
E-mail: StanlVK@dshs.wa.gov

DDD Eligibility

Eligibility Date: 01/11/2002
Age at Determination: 22
Review Date:
Expiration Date:

Disability/Conditions List

Disability/Condition	Meets WAC
Mental Retardation	

Plan/Program

Last Assessment Date: 07/15/2008
Last ISP Date: 02/01/2009

Waiver

Type	Effective Date	End Date
CAP	07/14/2003	03/31/2004
Core	04/01/2004	09/06/2005
Community Protection	09/07/2005	

VPP

You will see:

- The DDD Primary Case Manager's contact information.
- The client's current DDD eligibility data.
- The client's current Individual Support Plan (ISP) information.
- And any Waiver history
- Voluntary Placement Program "VPP" status.

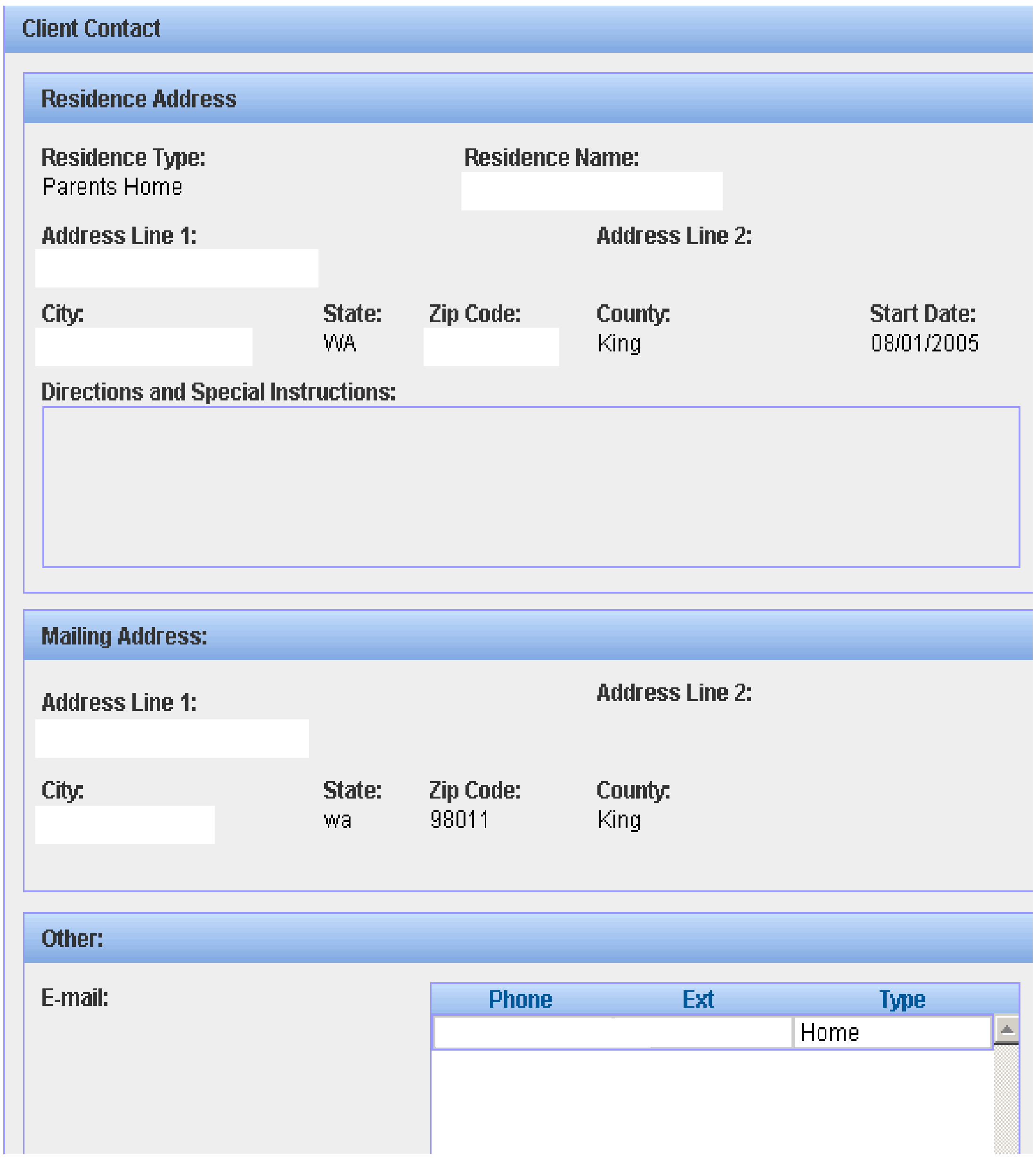
Turn to the next page for information about the Client Contact screen.

Client

Client Contact

Information on the Client Contact screen is populated from CARE data screens. The information is view only.

1. *Click* the Client Contact link. The Client Contact screen will be displayed:



The **"Directions and Special Instructions"** text box not only contains information about finding the client's residence, but also may contain safety instructions for someone visiting the client. For example, the client may have a dangerous dog.

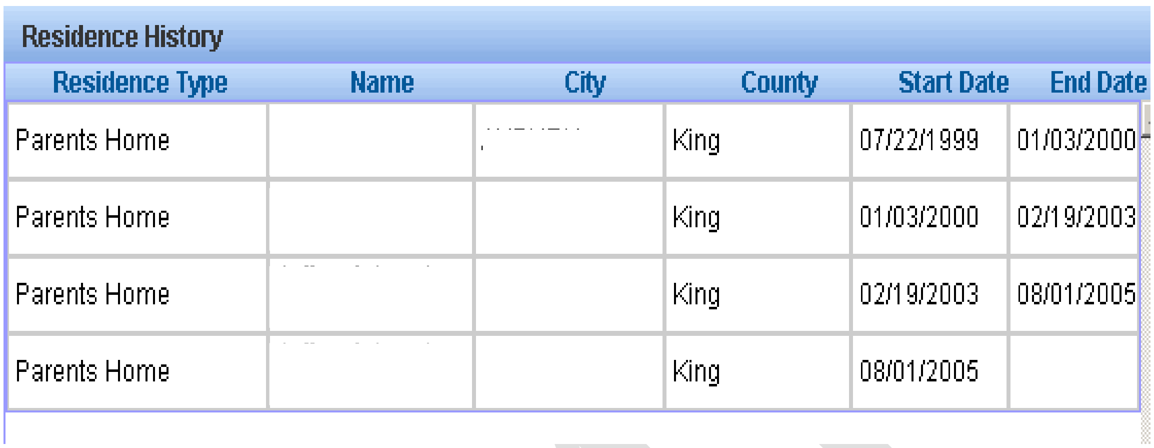
Turn to the next page for information about the Residence History screen.

Client

Residence History

Information on the Residence History screen is populated from CARE data screens. The information is view only.

1. *Click* the Residence History link. The Residence History screen will be displayed:

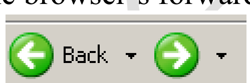

Residence History

Residence Type	Name	City	County	Start Date	End Date
Parents Home			King	07/22/1999	01/03/2000
Parents Home			King	01/03/2000	02/19/2003
Parents Home			King	02/19/2003	08/01/2005
Parents Home			King	08/01/2005	

The Residence History screen will list residence history. (The Client Contact screen lists the client's *current* residence.)

NOTE: Remember you can click the browser's "Back" 

button anytime you wish to return to previous screens.

Likewise you can click the browser's forward arrow if you want to return to where you were before you selected back. 

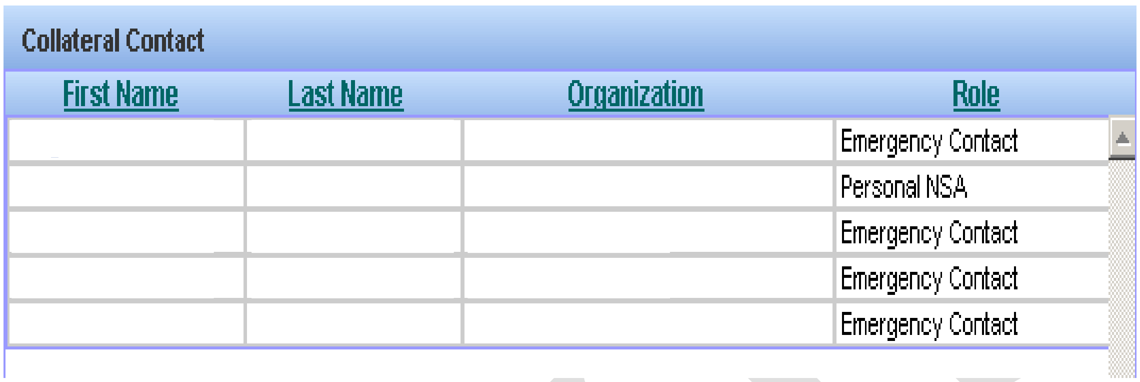
Turn to the next page for information on the Collateral Contact screen.

Client

Collateral Contact

Information on the Collateral Contact screen is populated from CARE data screens. The information is view only.

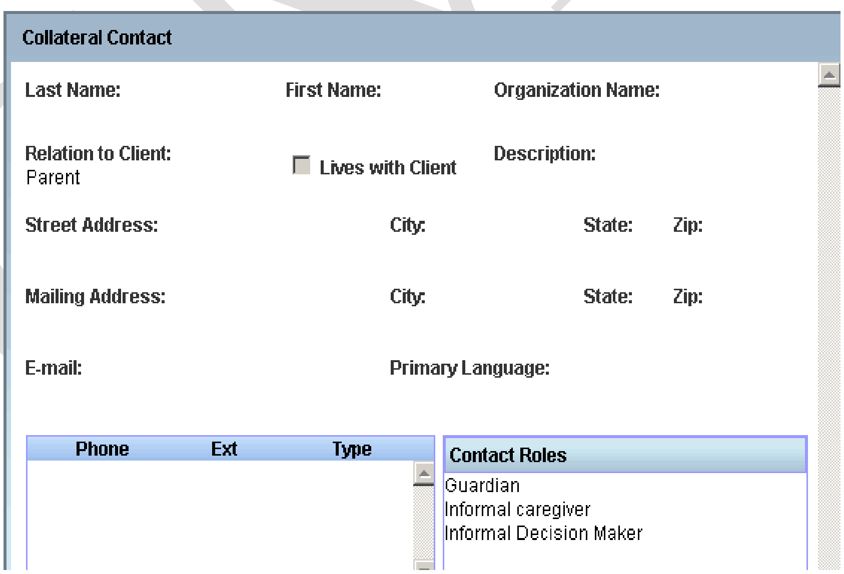
1. *Click* the Collateral Contact link. The Collateral Contact screen will be displayed:



This screen lists those who live with the client, and all the collateral contacts with any of the following roles: Emergency Contact, Guardian, Personal Necessary Supplemental Accommodation "NSA", and Representative/Protective Payee.

To see more details about a collateral contact:

2. *Click* the collateral contact's first or last name. A dialogue box is displayed:



3. *Click* Close when you are finished.

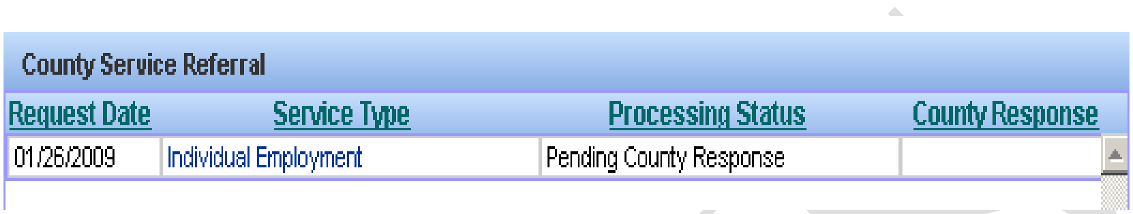
Turn to the next page for information on the County Service Referral screen.

Client

County Service Referral

The County Service Referral is a **history of referral requests**. This screen is populated by the DDD Case Manager in CARE. The information is view only.

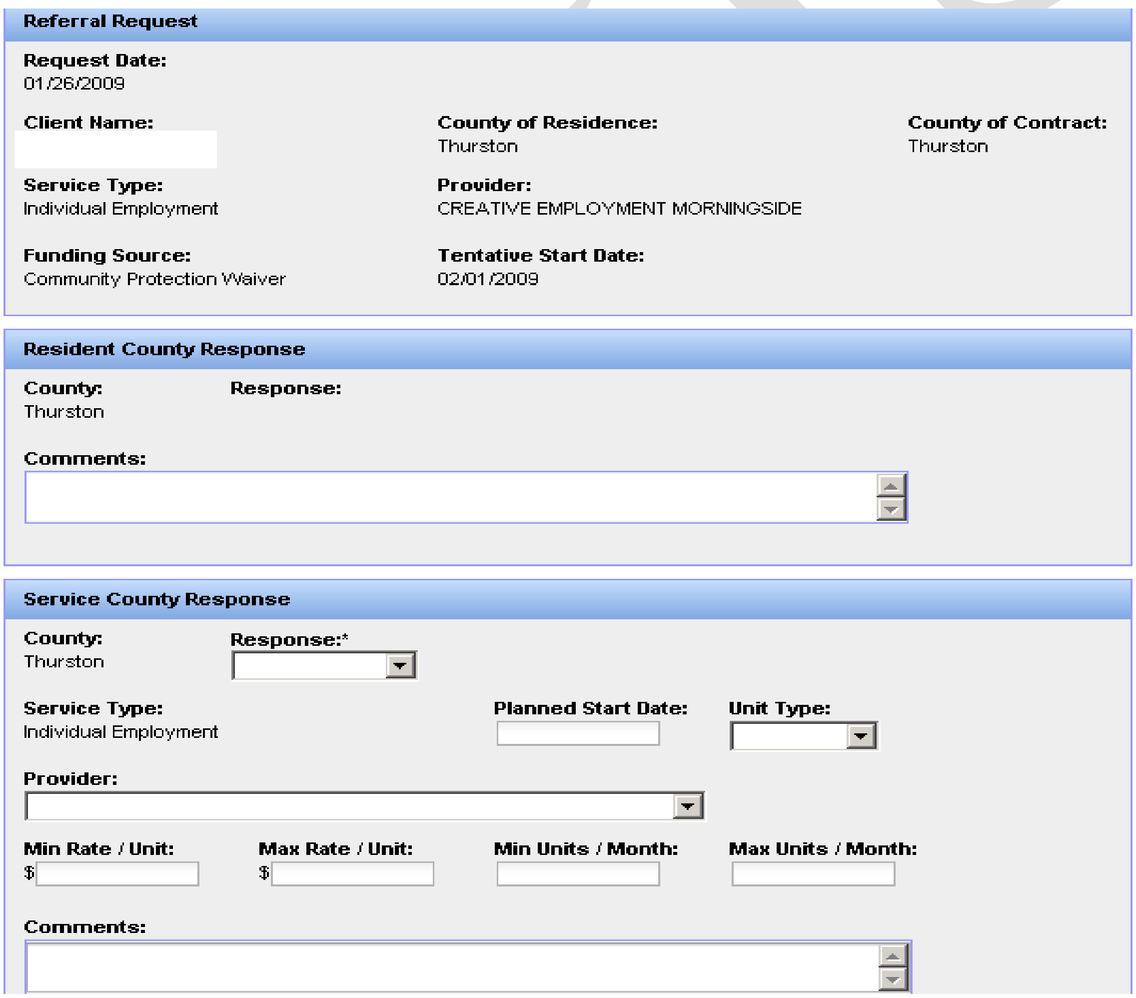
1. *Click* the County Service Referral link. The County Service Referral List screen will be displayed:



County Service Referral

Request Date	Service Type	Processing Status	County Response
01/26/2009	Individual Employment	Pending County Response	

2. *Click* on the <u>service type</u> and you will be returned to the Referral Request detail screen, which will be view only.



Referral Request

Request Date:
01/26/2009

Client Name:

County of Residence:
Thurston

County of Contract:
Thurston

Service Type:
Individual Employment

Provider:
CREATIVE EMPLOYMENT MORNINGSIDE

Funding Source:
Community Protection Waiver

Tentative Start Date:
02/01/2009

Resident County Response

County:
Thurston

Response:

Comments:

Service County Response

County:
Thurston

Response:*

Service Type:
Individual Employment

Planned Start Date:

Unit Type:

Provider:

Min Rate / Unit: $

Max Rate / Unit: $

Min Units / Month:

Max Units / Month:

Comments:

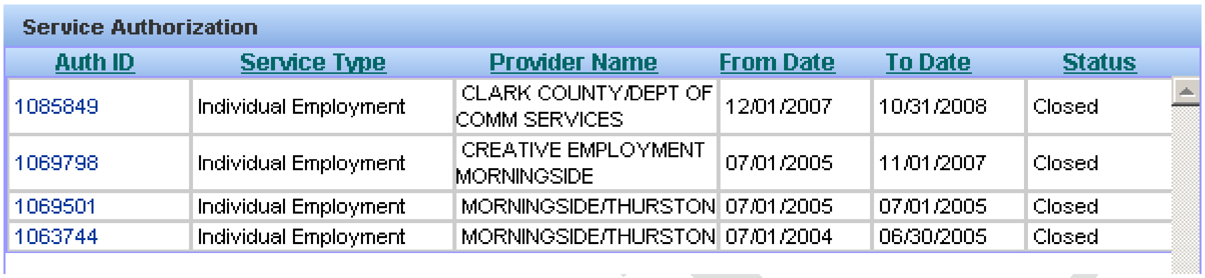
Turn to the next page to view the County Service Authorization screen.

Client

County Service Authorization

The County Service Authorization List is a history of the authorizations and within each authorization there is a history of the funding sources for that authorization. This screen is populated by the DDD Case Manager in CARE. The information is view only.

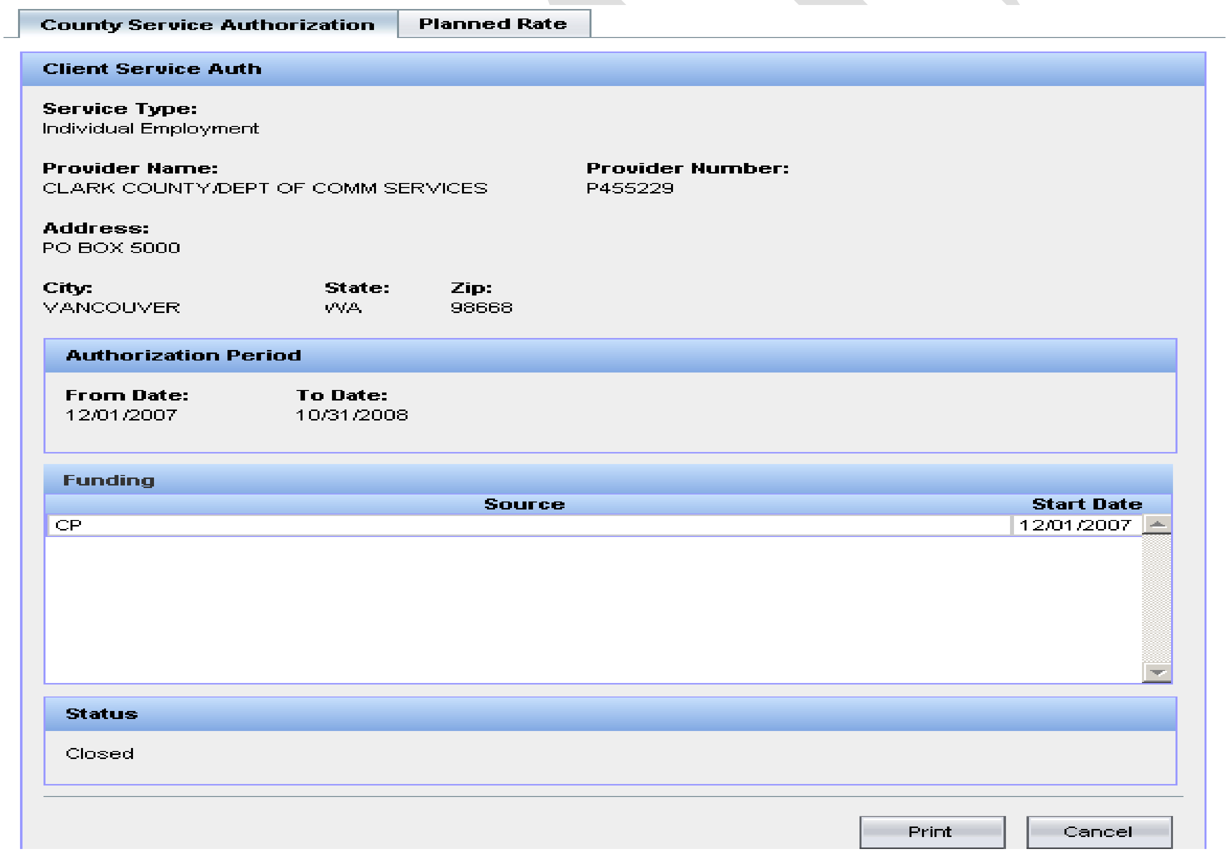
1. *Click* the County Service Auth link. The Service Authorization screen will be displayed:



Service Authorization

Auth ID	Service Type	Provider Name	From Date	To Date	Status
1085849	Individual Employment	CLARK COUNTY/DEPT OF COMM SERVICES	12/01/2007	10/31/2008	Closed
1069798	Individual Employment	CREATIVE EMPLOYMENT MORNINGSIDE	07/01/2005	11/01/2007	Closed
1069501	Individual Employment	MORNINGSIDE/THURSTON	07/01/2005	07/01/2005	Closed
1063744	Individual Employment	MORNINGSIDE/THURSTON	07/01/2004	06/30/2005	Closed

2. *Click* the Authorization number "Auth ID" to view the Service Authorization detail screen.



3. *Click* the Print button. A PDF document will be displayed. Close when you are finished viewing the document.

Turn to the next page to view the Planned Rate screen

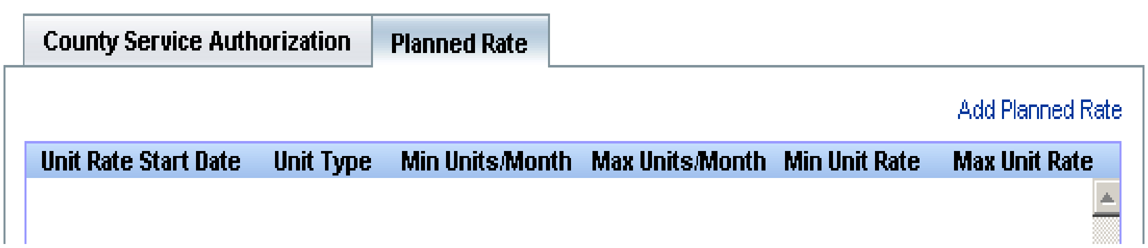
Client

County Service Authorization – Planned Rate

The Planned Rate tab will be a used as a communication tool to rely information about client's budgets or planned expenditures and their planned range of service hours (Minimum – Maximum Units/Month) to case management.

1. At the County Service Authorization screen you will see a "Planned Rate" tab:

2. *Click* on the "Planned Rate" tab and you will see the following screen:



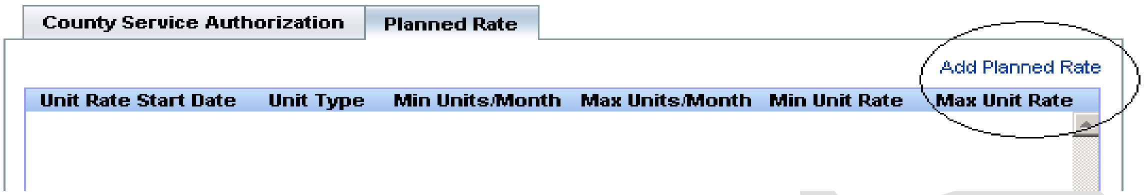
Note: The Planned rate information will be populated from **new** County Service Referrals commencing May 4, 2009. So if the information is needed for an existing client you can provide it at any time.

Turn to the next page to view continued information on the Planned Rate screen.

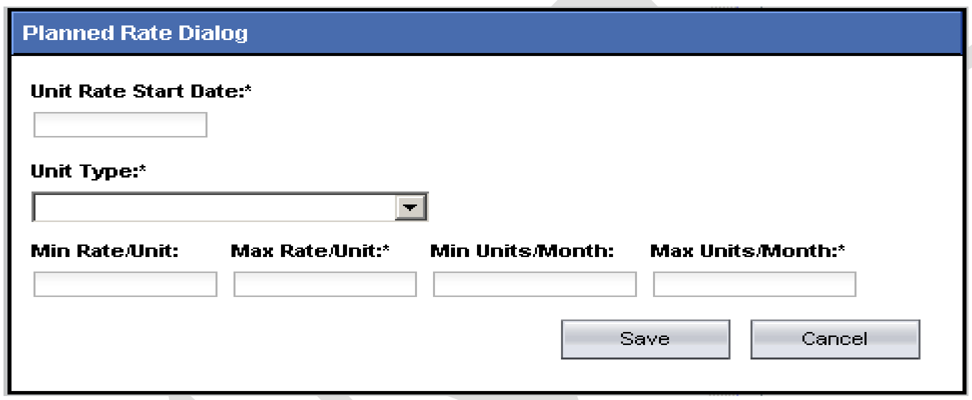
Client

County Service Authorization – Planned Rate continued

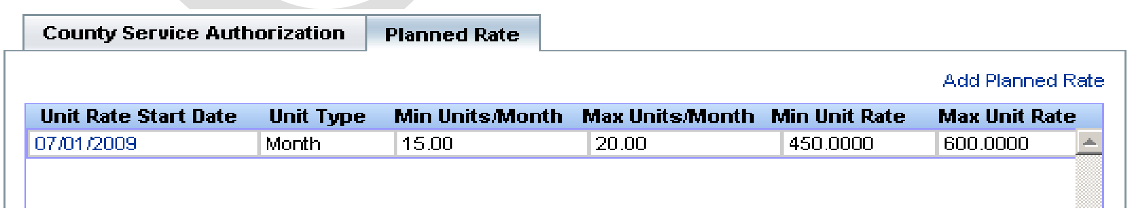
3. To update the "Planned Rate" information for changes occurring or to add new information to provide Case Manager with Budget information *click* on the "Add Planned Rate":



4. The following dialog box will appear:



5. *Enter:*
   a. The date this information begins in the "Unit Rate Start Date"
   b. Unit Type – Hour or Day or Month.
   c. The minimum and maximum rate per unit.
   d. The range of service hours per month the client expects to receive. (Min Hrs./Month and Max Hrs./Month).
   e. *Click* on SAVE and the information will populate:



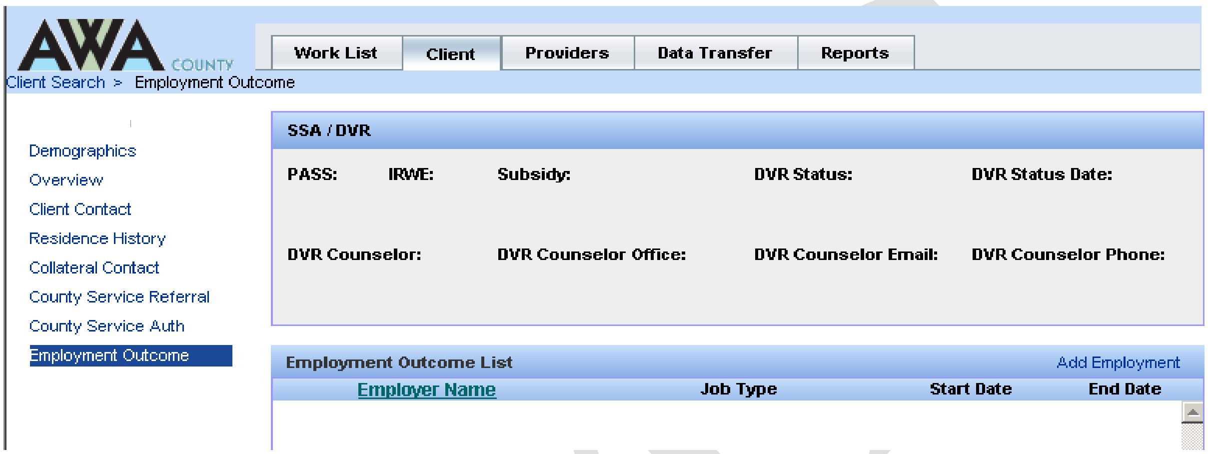
Note: Case Mangers will receive a tickler notify them that the Planned Rate information has changed.

Turn to the next page to view the Employment Outcomes screen.

Client

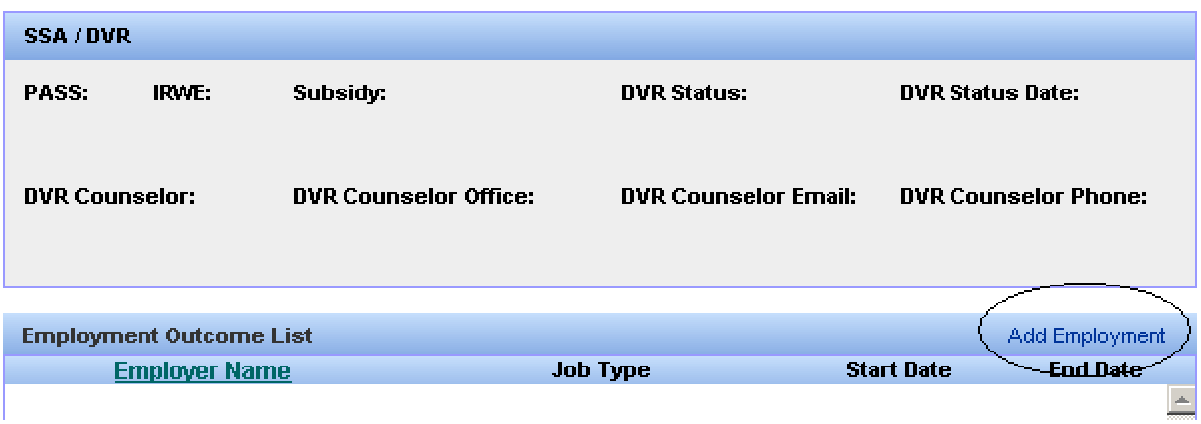
Employment Outcome

The Employment Outcome screen is divided into two sections. The top section contains Social Security "SSA" benefits information and Division of Vocational Rehabilitation "DVR" information. The information is populated directly for SSA & DVR. The bottom half of the screen contains information about a clients Employer, job and benefits. This information will be provided by the County.



There are two ways that Employment Outcome information can be entered. The first is one record at a time and the second we will explore later under "Data transfer".

1. To add Employment Outcome information on a client *click* on "Add Employment"

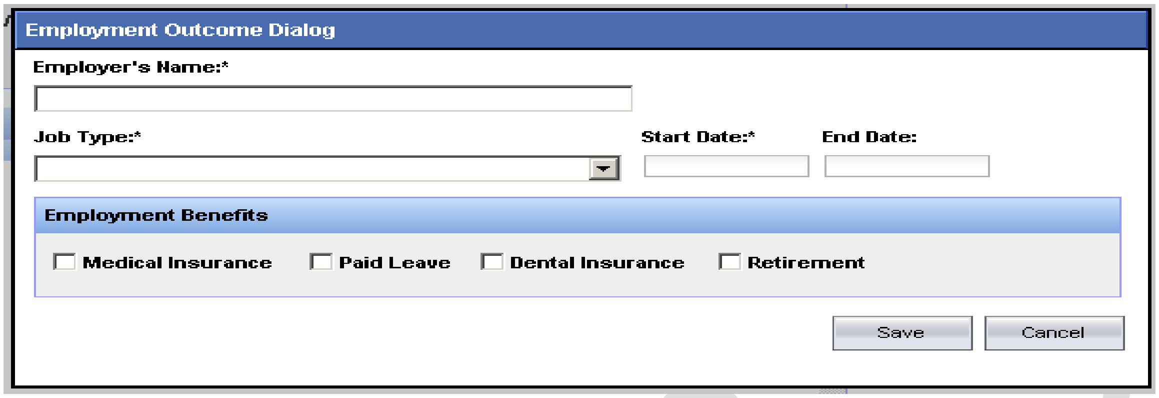


Turn to the next page to continue with the Employment Outcomes screen.

Client

Employment Outcome – continued

2. The following dialog box will appear.



3. Enter Employer's name
4. Choose the appropriate job type from the drop down selection.
5. Enter the job "Start Date".
6. Enter any benefits the client receives by *clicking* on the appropriate box.
7. "Save" the record
8. To change or update the information click on the Employer Name.

9. The dialog box will appear with the information previously saved. You can edit or add new information anytime.
10. "Save" the record, the changes are instantly recorded.

You have finished viewing the Client information screens.

Turn to the next page for an overview of the billing.

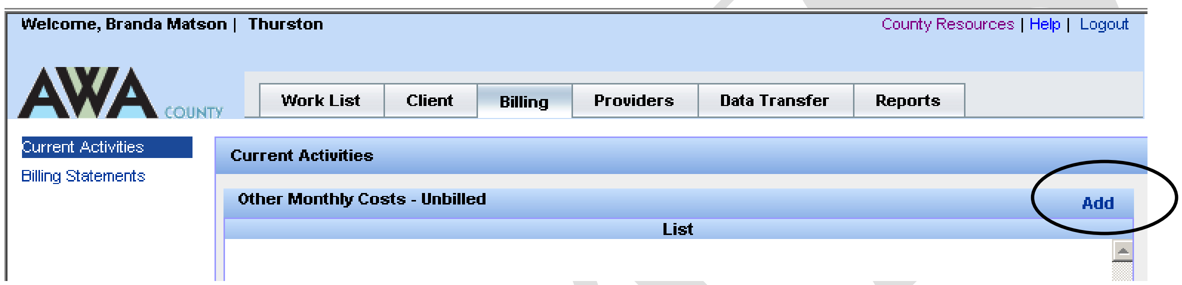
Billing

Overview

This section is for entering and reviewing billing information. It is used to include the County Indirect costs such as Administration "10" series, Training "30" series, Information & Education "40" series, and the Other "90" series as well as review unbilled direct client billings prior to posting.

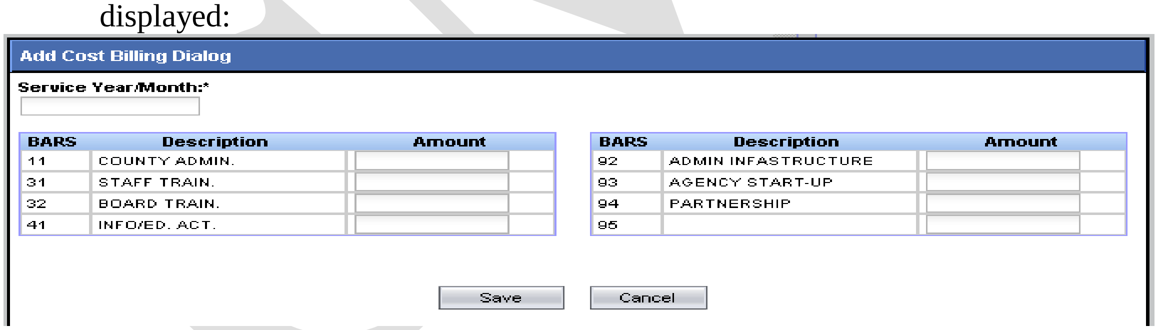
Current Activities/Indirect Monthly Costs

This screen is used to enter Indirect Monthly Costs. The County will bill DDD for categories that are **indirectly related to client (specific client(s) is not identifiable)** but are included in contract.



The **Add** button will display the "Other Monthly costs" details screen so you can enter administrative costs.

1. *Click* the Add link (upper right corner) and the Add Cost Billing dialogue box will be displayed:



2. *Type* the Service Month (example 200801).
3. *Enter* the Amounts under the appropriate BARS Codes.
4. When you are finished, *click* Save. You will be returned to the Current Activity screen.
5. *View* the Unbilled Statements again. Close when you are finished.

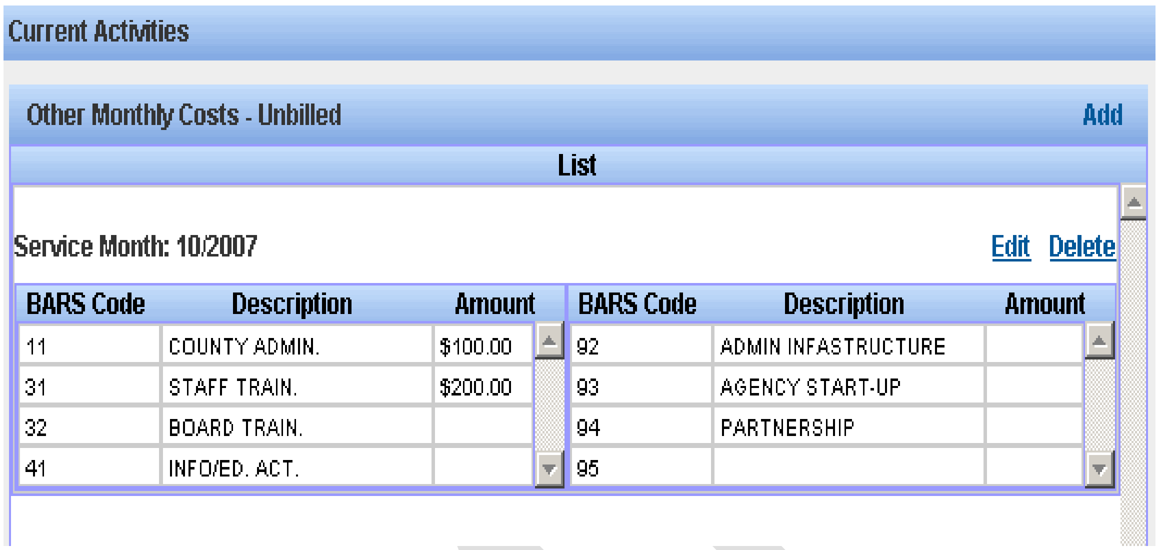
Guidelines for Other Monthly Costs:

- Service Month cannot be in the future.
- Other Monthly Costs that were reported in error (or not previously reported) can be entered here for a prior service month that has already been billed to DDD.
- Multiple Service Months (other monthly costs) may be included in the current Billing Month.

Indirect Monthly Costs - Edit/Delete

Current Other Monthly Costs billing month data that has not been "posted" may be viewed and edited on this screen.

1. *Click* the Current Activities link. The Current Billing Activities screen is displayed:



The **View Unbilled Statements** button will display the County Billing Summary in PDF file format (as a report).

2. *Click* the View Unbilled Statements button. Close when you are finished.
3. Turn to the next page to continue.

Each service month displayed on this screen can be edited or deleted until it is "posted".

Edit:

1. *Click* the Edit link for a service month.
2. *Enter* a change and *click* Save.
3. You can view your edits on this screen, or you can click the "View Unbilled Statements" button again to view your edits on the PDF report.

NOTE: To delete an amount, enter a zero. For example if you enter an amount of $100 in error, it will be saved. To remove it, re-enter the amount as zero.

Delete:

4. *Click* the Delete link for a service month.
5. *Click* "Yes" when asked if you are sure.

Your billing month will be deleted.

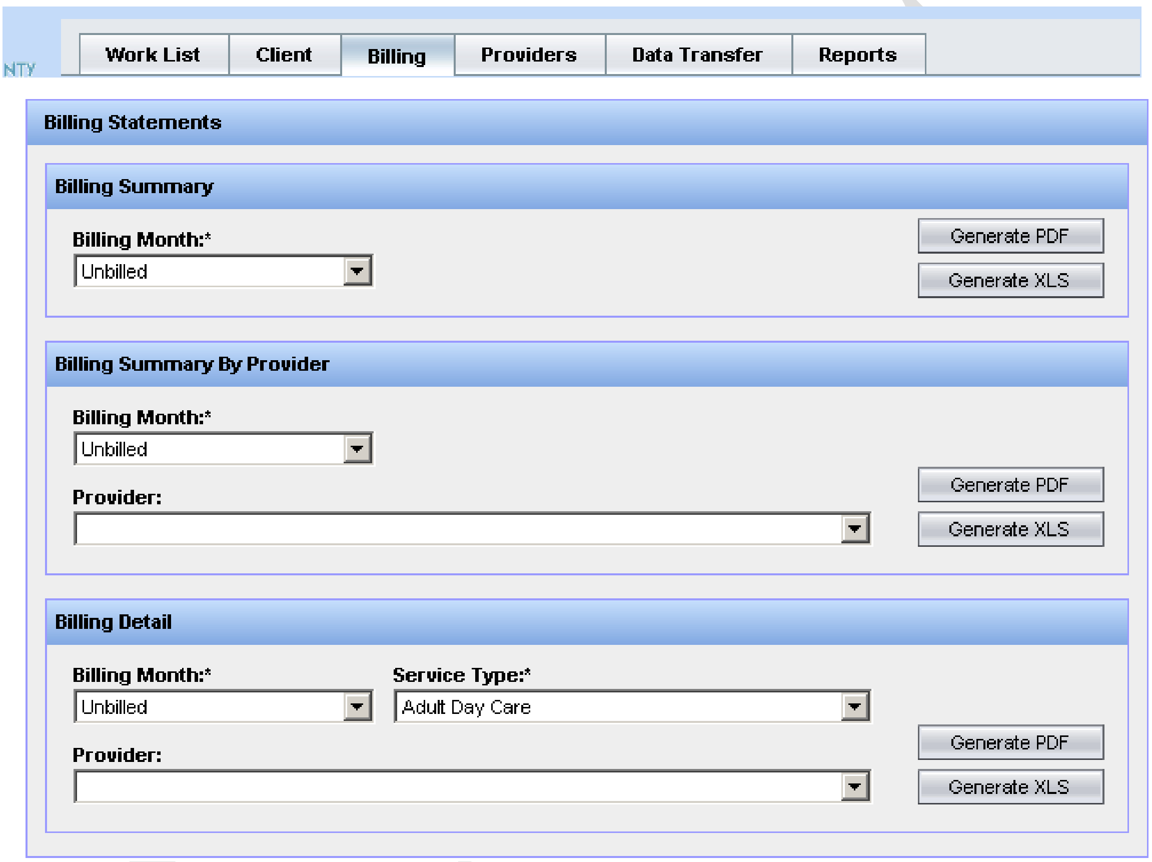
We will talk about the Post function later – since it is the last step in the process.

Billing

Billing Statements - Unbilled

The Billing Statements screen is divided into two (2) sections, the Billing Summary at the top, and the Billing Detail on the bottom. Another way to check for errors is to view "Unbilled" statements.

1. *Click* the Billing Statements link. The Billing Statements screen will be displayed:



Billing Summary:

1. *Pull down* the Billing Month menu and *choose* Unbilled.

2. *Generate* a PDF. *Close* when you are finished.

Billing Detail:

1. *Pull down* the Billing Month menu and *choose* Unbilled.
2. *Pull down* the Service Type menu and *choose* Individual Employment. *Generate* a PDF.
3. *Close* when you are finished.

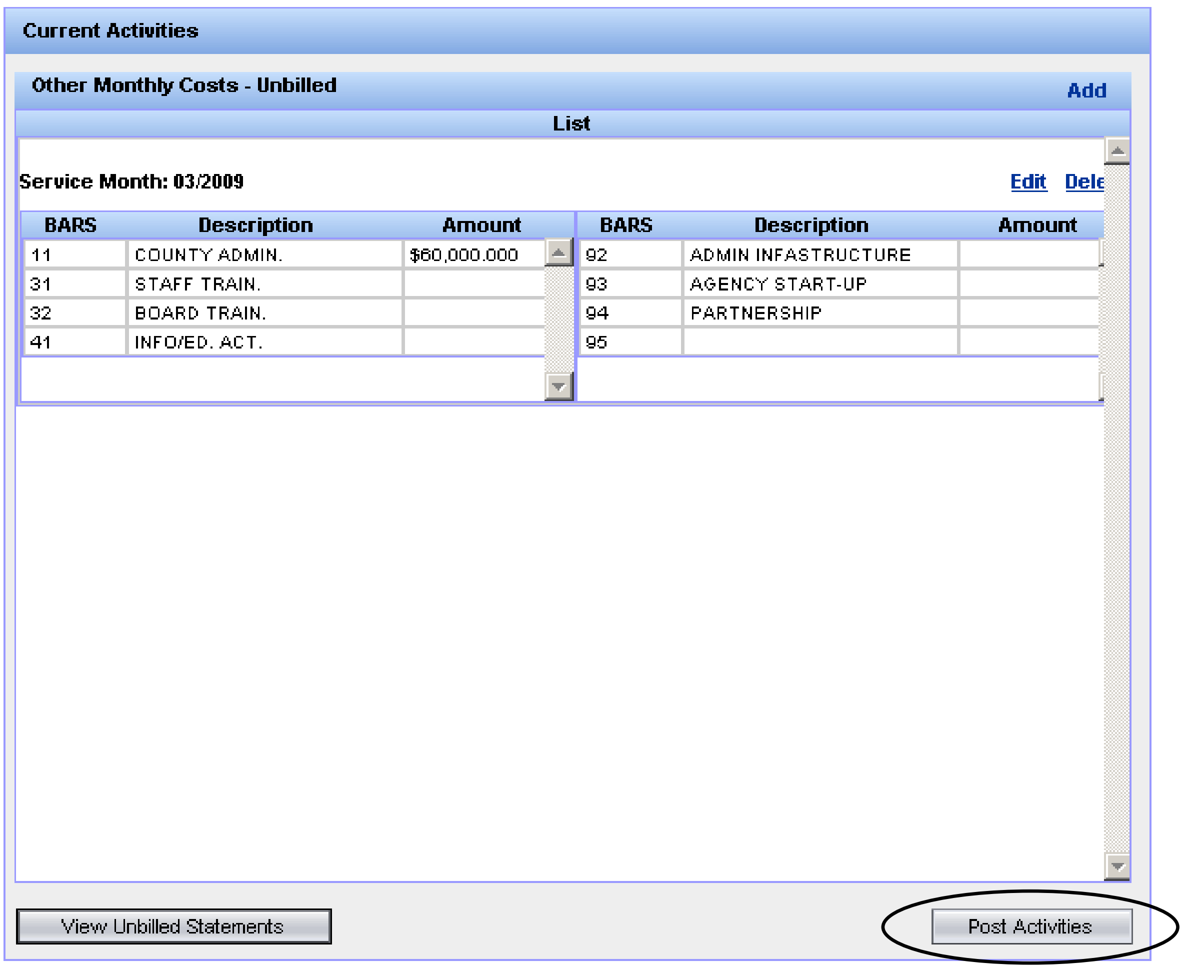
Turn to the next page for information about Posting the billing.

Billing

Current Activities - Post

Billing can be “Posted” only once each calendar month. The “month” is based on the web server clock (not your computer clock). The Billing Month data may include multiple Service Months. Once the billing has been “Posted” the County Billing Summary will not be available from this screen. It will be available from the Billing Statements screen.

Before posting, you should review the Unbilled Statement to assure you have entered all the data you need submitted at this time.



1. When the “Post Activities” button (on the Current Activities screen) is clicked the posting happens behind the scenes, and may take a few minutes.

You will see a message that says “**Posting successful**”.

Turn to the next page for information about Data Transfer.

Data Transfer

Overview

The County has two data transfer processes: One for Employment Outcome information and the other for Billing.

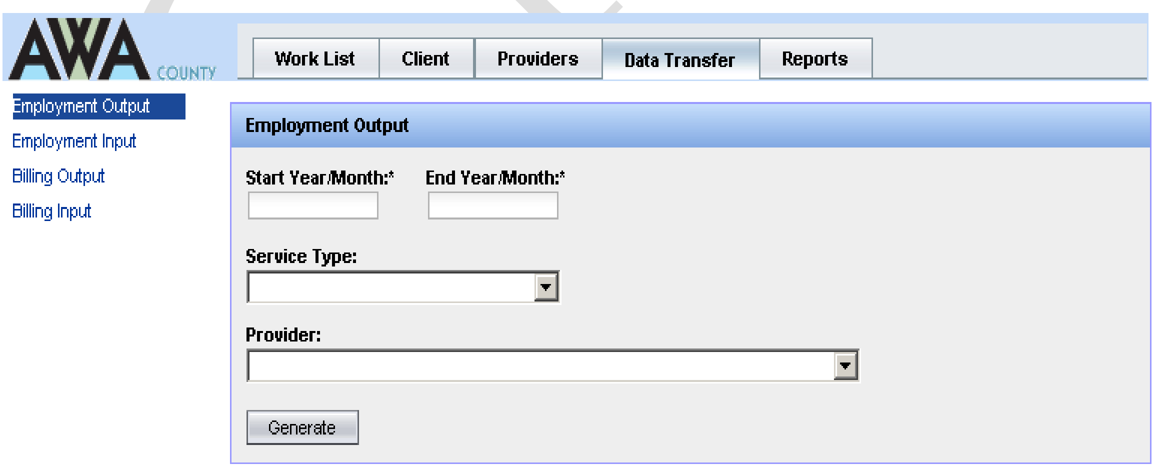
During each month the County extracts (from DDD) data on clients authorized for services in their County. The Employment extract **(Output)** contains clients authorized for service in their County during the time period specified in the authorization range (start year/month and end year/month). The extract information will contain any previous information provided by the County until an employment job end date is provided.

After the County receives incorporates client employment data from their Providers, the data is validated and uploaded **(Input)** to DDD. The County may submit to DDD employment data as often on wanted. Corrections can be made individually thru the Client Employment Outcomes dialog box or by uploaded corrected information.

During the last week of the service month, or early the next month, the County extracts (from DDD) data on clients authorized for service in their County. The Billing extract **(Output)** contains both Resident and Service Counties for each service authorized for each client for the month and year entered.

After the County incorporates service data from their Providers, the data is validated and uploaded **(Input)** to DDD. County bills are submitted to DDD a maximum of once a month. Billing corrections and missing invoices are sent with a subsequent billing cycle.

1. *Click* the Data Transfer tab. The Data Transfer tab has several <u>links</u> located in the left column. The Output screen will be displayed:



Turn to the next page to begin with Employment Output.

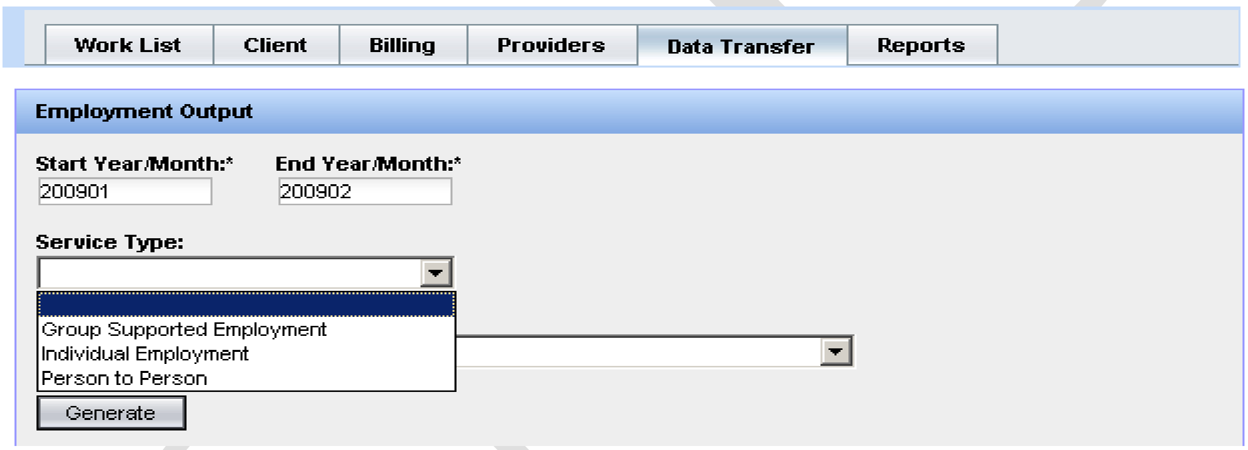
Data Transfer

Employment Output

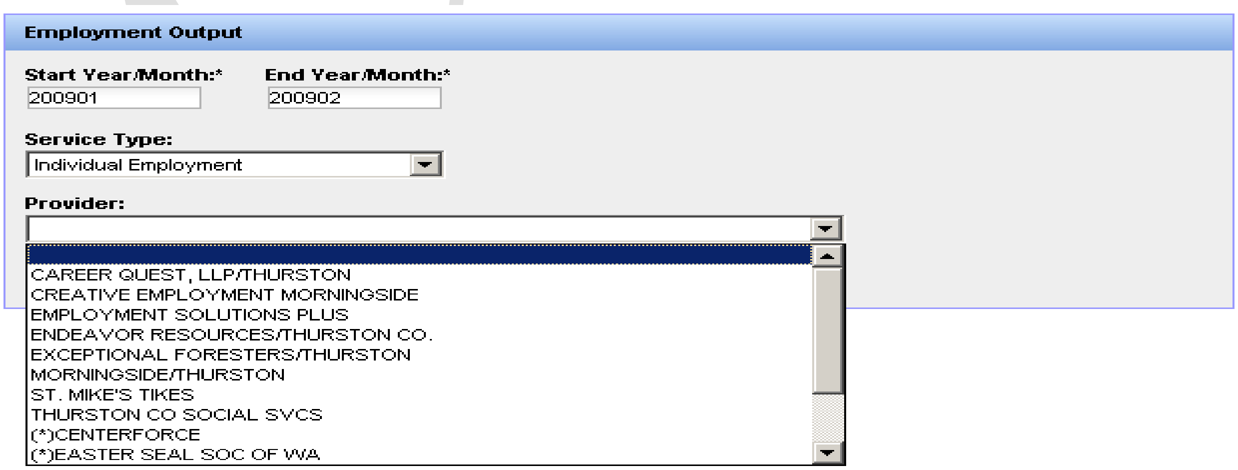
The Employment Output file is to collect information on the client's Employer, the job type, start date, benefits received and the job end date.

To generate an Employment Output file enter the Start and End dates that represents the time range of the CSA / clients to be included.

1. *Type* a Start Year/Month (example 200801) or click on the service month /year in the calendar.
2. *Type* an End Year/Month (example 200901) or click on the service month /year in the calendar.
3. Enter the **Service Type** that you want an output file for. If you do not specify the Service Type you will receive all Service Types.

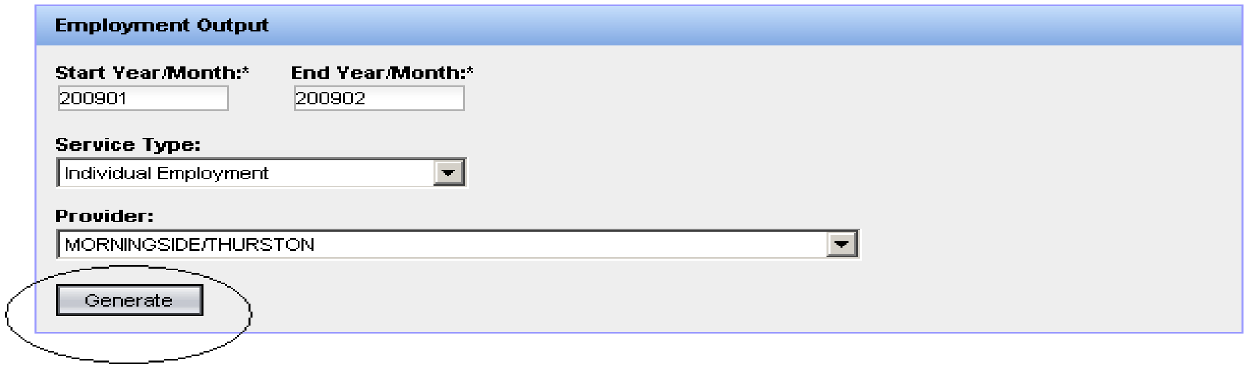


4. Enter the Provider that you want an output file for. If you do not specify the Provider you will receive all Providers for the chosen service type.

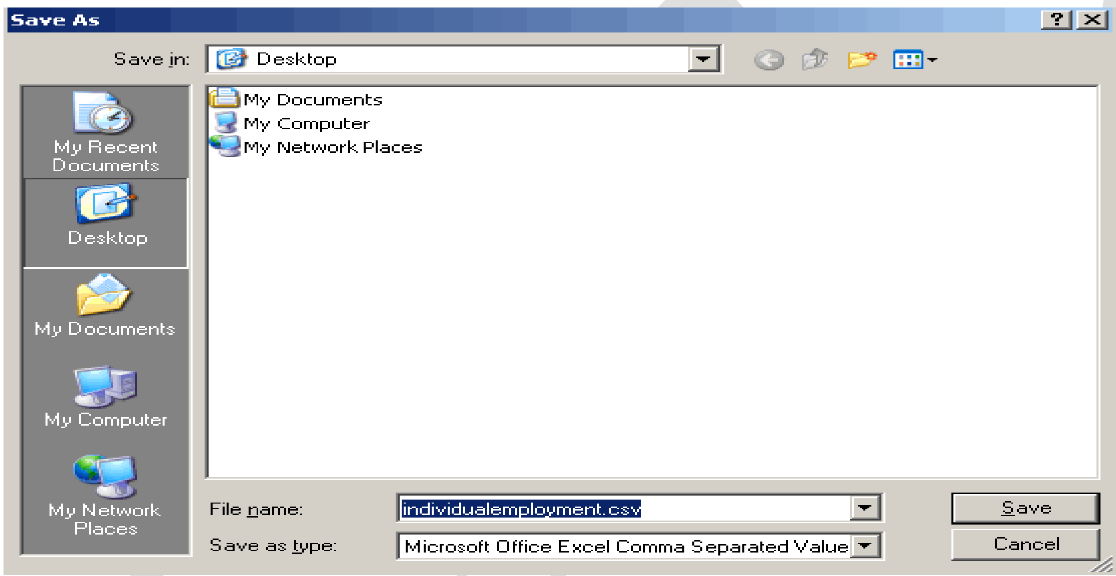


Continue with Employment Output on the next page.

5. *Click* on Generate. You will see a dialogue box asking if you want to open, or save the file.



6. *Click* Save. The “Save As” dialogue box will be displayed:



7. *Select* a location – example - the **DESKTOP** for training purposes.

8. *Name* the file – example name the file **200801CIJIEMS** (Client In Jobs IE Morningside).

   NOTE: The file will be saved as a .csv or “comma separated value” type file.

9. *Click* Save.

10. *Send* the file to appropriate provider to input the information.

Note: It is important that your providers understand the data format to use as well as the appropriate “Job Type” 4 digit code. This information it located Employment Data Records Layouts description located in the back section of this workbook.

Data Transfer

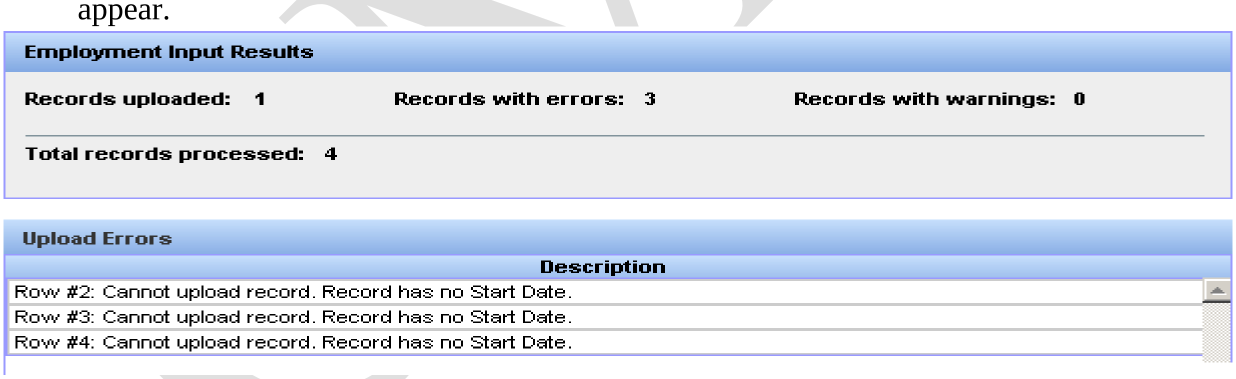
Employment Input

Once you have received the completed Employment Output file from your provider you are now ready to Input the data file.

1. Click on the Browse button and retrieve the completed file from where you saved it.

2. Once you have located the file (where you saved it) select it. The file name should appear in the File Box.

3. Click the Upload button and Employment Input Results similar to the display below will appear.



NOTE: The data is validated during Input and any errors that list are system detected errors

4. You can click on your Excel file to look at the rows that contain the errors. In the case of no Start Date for several records this may not be an error just that the client isn't working yet.

Turn to the next page to see Employment input errors process.

Employment Input Errors

Refer to the **Employment Validation Rules** in the Appendix of this workbook. Also, remember you can click the Help link for additional information at any time.

1. **Open the Excel file:**
2. *Go to* the Desktop or where ever the file was saved and *Double-click* the file name.
3. *Correct* the errors.

   Save your changes:
4. *Choose* File and *Save As….*

   Upload with corrections:
5. Use the steps you already know to upload the Employment Input file again.

   NOTE: The Upload process will update the original file with the corrected rows. So, the last upload you do will always be the one that will be used for posting the billing back to DDD.

Turn to the next page to see Billing Output.

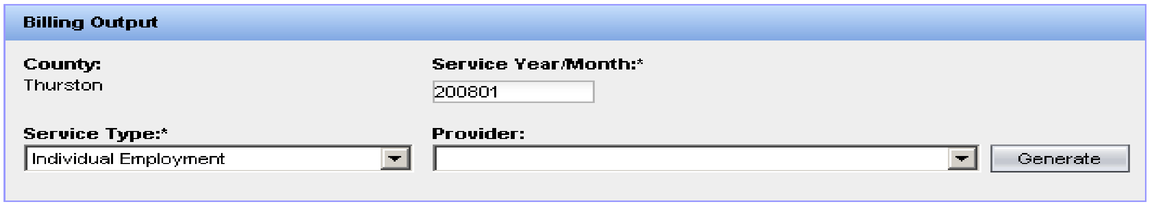
Data Transfer

Billing Output

Generate a Billing Output file.

1. *Type* a Service Month (example 200801) or click on the service month /year in the calendar.
2. *Pull down* the Service Type menu and *choose* the service type.

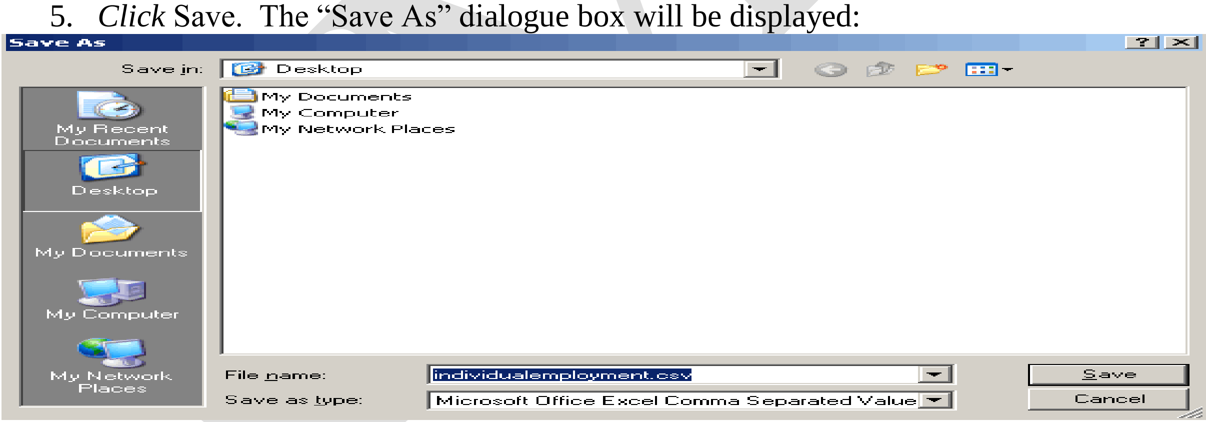
   Each **Service Type** has its own set of data elements and must be output as a separate file.



3. We will not choose a Provider for now.

   NOTE: If a **Provider** is entered, the County will receive a file containing all DDD clients authorized for the selected service in that County for the month and year *for that Provider only*.

4. *Click* the Generate button. You will see a dialogue box asking if you want to open, or save the file.
5. *Click* Save. The "Save As" dialogue box will be displayed:



6. *Select* a location – example - the **DESKTOP** for training purposes.
7. *Name* the file – example name the file **<u>200801IE Tikes</u>** (Jan IE Tikes).

   NOTE: The file will be saved as a .csv or "comma separated value" type file.

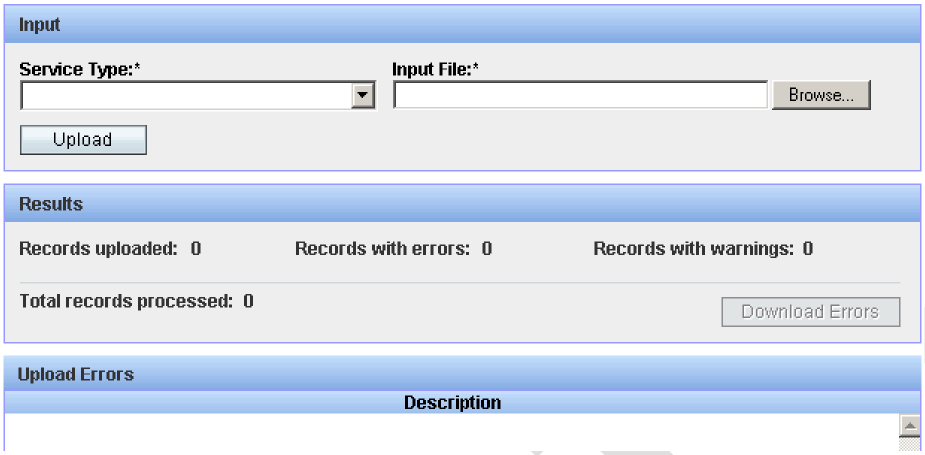
8. *Click* Save.
9. *Send* the file to appropriate provider to input the information.

Turn to the next page to practice with Billing Input.

Billing Input

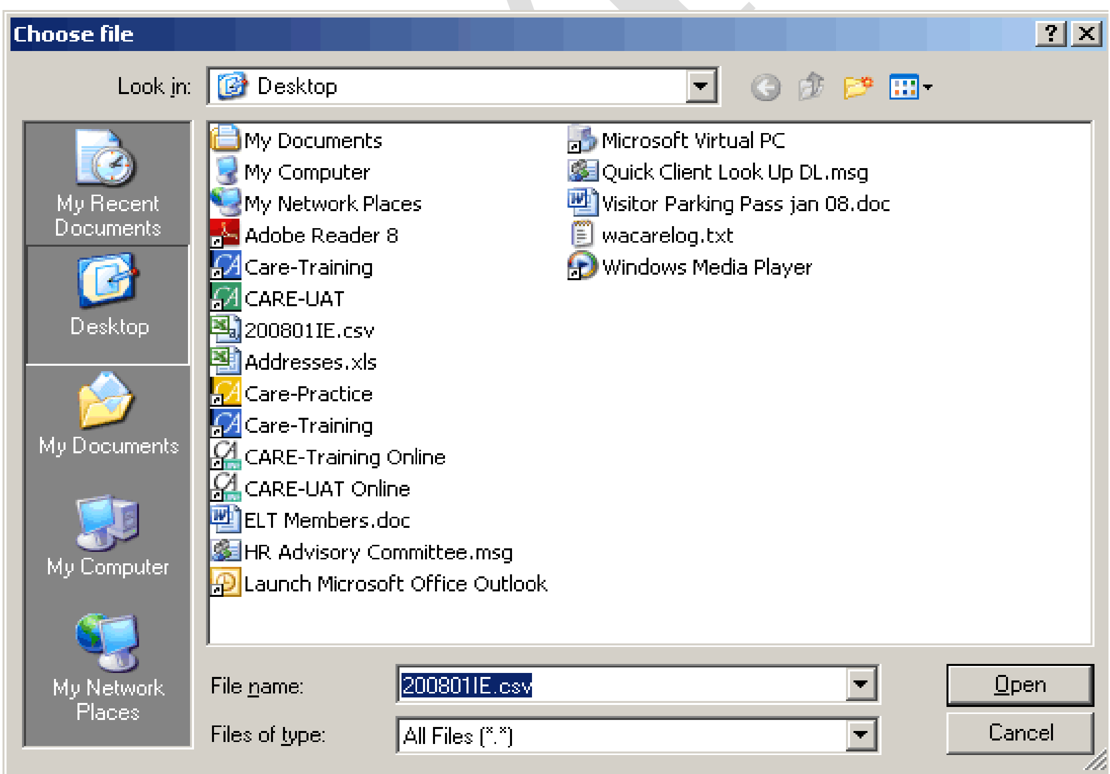
The County may submit (upload) data files multiple times before “posting” the bill.

1. *Click* the Input link. The Input screen will be displayed:



2. *Pull down* the Service Type menu and *select* Individual Employment. Each Service Type has its own set of data elements and must be Input as a separate file.

3. *Click* the Browse button to locate the appropriate File. The “Choose a File” dialogue box will be displayed:



4. Turn to the next page to continue with Billing Input.

Billing Input continued

5. *Select* your **2008IE** file from the **Desktop**, and *click* Open.

   Note about Files: If you organize your files with clear titles and dates, you can easily locate the correct file.

6. *Click* the Upload button. The data will be uploaded to the system, and you will see a list. If errors exist, you will also see an errors list.

Example of an errors list:

Upload Errors

Description
Row #1: The column 'Unit Type' is required.
Row #2: The column 'Unit Type' is required.
Row #3: The column 'Unit Type' is required.
Row #4: The column 'Unit Type' is required.
Row #5: The column 'Unit Type' is required.
Row #6: The column 'Unit Type' is required.
Row #7: The column 'Unit Type' is required.
Row #8: The column 'Unit Type' is required.

You can click on your Excel file to look at the rows that contain the errors.

NOTE: The data is validated during Input and any errors that list are system detected errors. For example, Unit Type must have an entry; # of Units and Unit Rate must have a valid number (Unit Rate cannot be a zero). You will be able to download/output the records with errors to a file to make corrections.

Refer to the **County Billing table** in the Appendix of this workbook. Also, remember you can click the Help link for additional information at any time.

Turn to the next page to correct the errors.

Billing errors

If you see an error:

10. *Click* the "Download Errors" button. You will see a dialogue box asking if you want to open, or save the file.

11. *Click* Save. The "Save As" dialogue box will be displayed.

12. *Select* a location – in class choose DESKTOP.

13. *Name* the file – in class name the file **2008IE_errors.**

    NOTE: The file will be saved as a .csv or "comma separated value" type file.

14. *Click* Save.

Open the Excel file:

15. *Go to* the Desktop.

16. *Double-click* the **2008IE_errors file**.

17. *Correct* the errors.

Save your changes:

18. *Choose* File and *Save As*….

19. *Choose* Desktop; name the file **2008IE_corrected** and *minimize* the file.

Upload with corrections:

20. Use the steps you already know to Upload the Input file again.

    NOTE: The Upload process will update the original file with the corrected rows. So, the last upload you do will always be the one that will be used for posting the billing back to DDD.

Turn to the next page to view the Billing correction process.

Billing Correction Record

Once you have posted a billing, it becomes a permanent record and cannot be changed.

You can, however, create a correction record with the next Input (use the corrected file for the same service month) so it will be added to the next Billing Statement. The next Billing Statement will display that corrected record. (The information is found in the Billing Detail report.)

Example:

Billing #1:

Service Month	Service	Provider	Unit	Rate	Total
7/2007	IE	Chris	2	1.00	2.00

You discover that Chris' rate should be $150.00 not $1.00.

Billing #2 – Correction Record:

Service Month	Service	Provider	Unit	Rate	Total
*7/2007	IE	Chris	2	150.00	298.00

A corrected row will be indicated by an asterisk *.

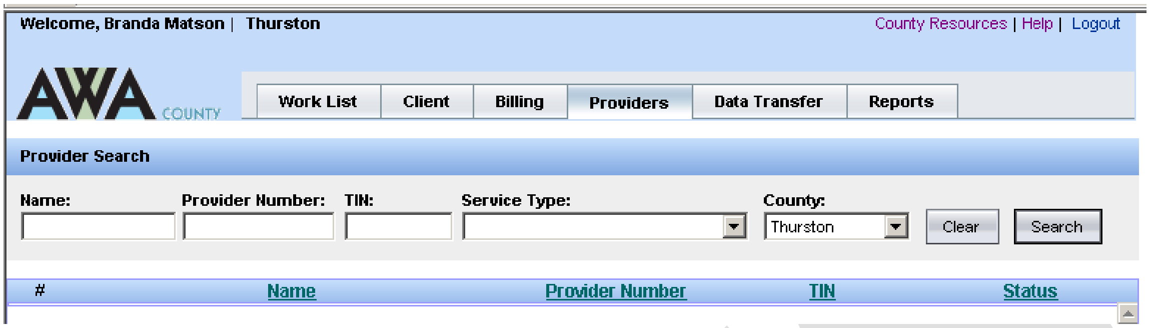
You have completed the Billing screens!

Please turn to the next page for information on the Providers screen.

Providers

The Provider screens are used to maintain Provider information in all Counties.

1. *Click* the Providers tab. The Provider Search screen will be displayed:

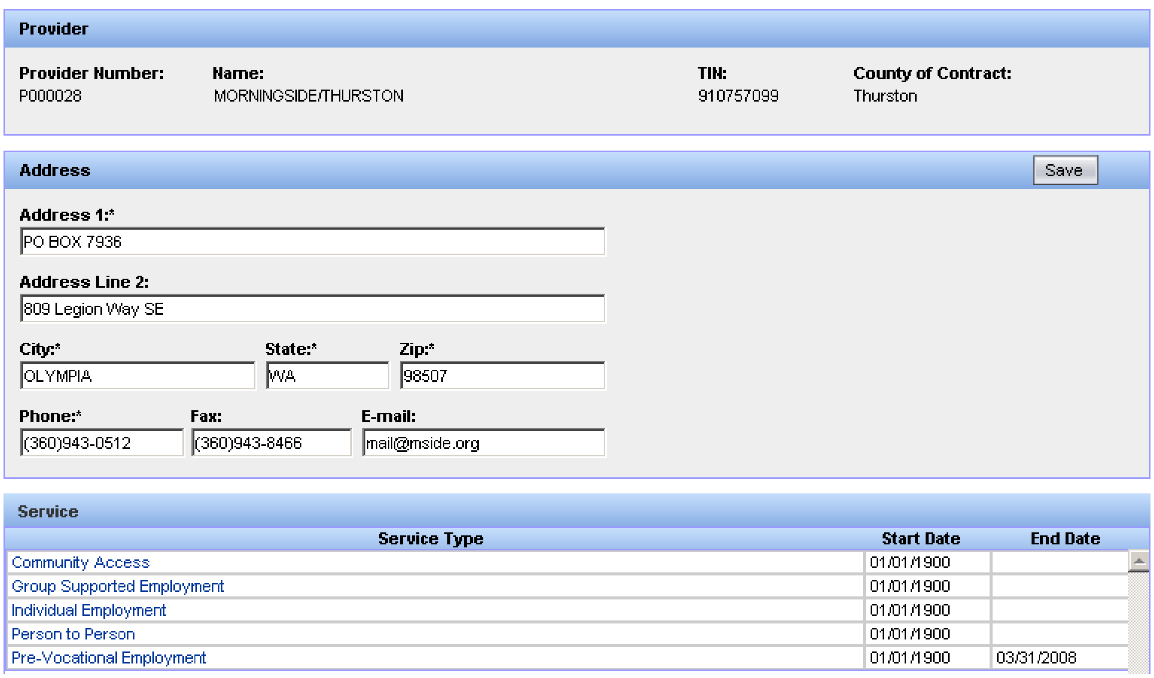


2. *Enter* your search criteria into one (or more) of the fields, and *click* Search.

   NOTE: The search rule is – Name, **OR** Provider # **OR** TIN (Tax ID number) **AND** Service type **AND** County.

3. A list matching your search request will be returned.

4. *Click* on a <u>Provider's name</u> to see details:



Turn to the next page to continue.

Providers

Edit

Only staff in the County of Contract can update the Provider data. Data will be view only for all other Counties. **County staff may update the Address, Telephone, FAX, and E-Mail.** Any other Provider information must be entered into the CARE by DDD.

Update a Provider's information:

1. You should be viewing a Provider's screen.

2. *Click* in one of the fields to edit. You can click, or use the [Tab] key to jump to the next field.

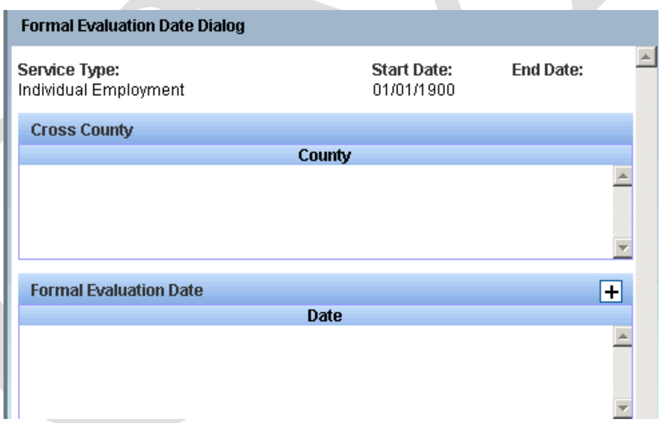
3. *Click* Save when you are finished.

Formal Evaluation Dates

A history of formal evaluation dates for Providers can be recorded on this screen.

1. You should be viewing a Provider's screen.

2. *Click* on a <u>Service type</u> in the Service table. The Formal Evaluation Date Dialogue box will be displayed:



3. *Click* the [+] to add a row to the Formal Evaluation Date table.

4. *Type* a date into the field – use the mm/dd/yyyy format.

5. *Click* Save.

Turn to the next page for information on Reports.

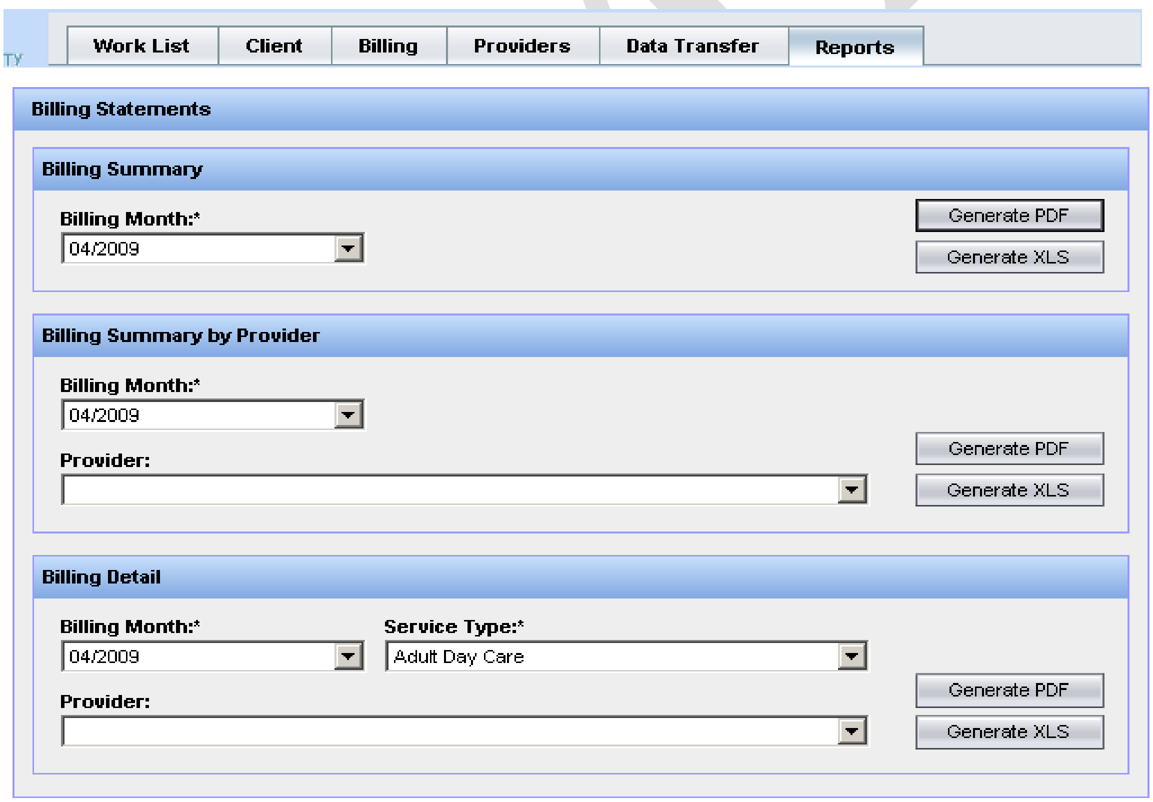
Reports

Overview

Several reports are available under the Reports tab. Reports are related to a billing month, not a service month.

Report Name	Description	Audience
County Billing Summary	Summary of County Billing by Account broken out by Funding source.	Counties, Regional Business Mgr.
County Billing Summary by Provider	County Billing Summary, cover sheet for the A-19. County Monthly DDD Services Report Provider, Program, Service	Counties, Regional Business Mgr.
County Billing Detail	County Billing Detail per program type	Counties, Regional Business Mgr.
County – Transition Graduates by Fund Year	Transition Fund Year DDD Clients (w/ filters…graduation year and county day programs)	Counties, HQ, Regions, Decision Support
County – Employment Programs Cost Benefit Analysis	Cost Benefit Analysis for County Employment Programs	Counties, Regions, HQ

1. *Click* the Reports tab. The Reports screen will be displayed:



Turn to the next page to continue.

Reports

Preview

These reports are the “canned” reports that the AWA will generate.

Try the different reports. (Do not save in class today.)

- Billing Summary by month.
- Billing Summary by Provider by month.
- Billing Detail by month.

Transition Fund Year report:

1. *Click* the Transition Fund Year link.
2. *Choose* a year and a fund source, and *generate* the report.
3. *Close* when you are finished.

Cost Benefit Analysis Report:

4. *Click* the Cost Benefit Analysis link.
5. *Choose* a service type.
6. *Enter* the start and end dates, for example: 200701 to 200801.
7. *Generate* the report; *close* when you are finished.

Turn to the next page for information on “Ad Hoc” reports.

Reports

Ad Hoc County Reports

The ad hoc report views you currently create will still be available. On March 31, 2008 the CCDB will become read-only, and no data will be entered or changed. The data in the CCDB will be replicated in the CARE database.

To retrieve data from the new tables you can:

1. Create a new database
2. Link your database to the new CARE database
3. Create any necessary ad hoc queries

To retrieve data from the old tables you can:

1. Use your current database to retrieve archived data from CCDB.

Logout

1. *Click* the Logout link (upper right corner).

2. You will be returned to the AWA opening screen.

3. *Choose*: You can close your browser, click Home to return to the browser's main page, or login to a different County (if you have security rights to more than one County).

Congratulations!!! You have completed the ADSA Web Access – County training!!!

Login - Security

We will be implementing SSL (Secure Sockets Layer) to the ADSA Web Access. This will make the web site more secure by preventing others from snooping sensitive private information. Internet Explorer needs to be configured for the ADSA Web Access so that the SSL will work smoothly.

Internet Explorer 6:
When you first go to the website, you will see the following dialogue box:

1. *Click* the Yes button to proceed.

2. You should install the ADSA Web Access certificate by *double-clicking on the padlock* on the status bar that appears on the lower right corner of the web browser, and following the Wizard.

NOTE: IE 6 requires ADSA Web Access to be listed as one of your “trusted sites” (otherwise you will experience periodic and mysterious slowdowns). To add ADSA Web Access to your “trusted sites”, do the following:

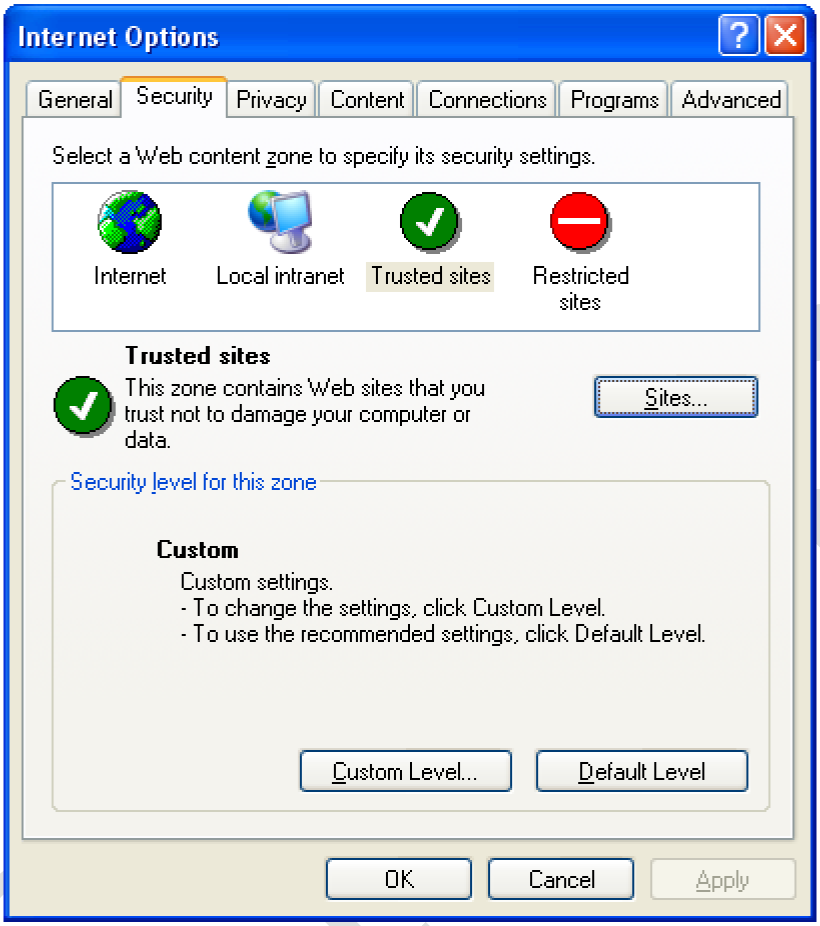
3. From the IE 6 menu bar, *select* the Tools menu,

4. Then *select* the Options menu item. The Internet Options dialog will pop up.

Turn to the next page to continue.

Login – Security continued

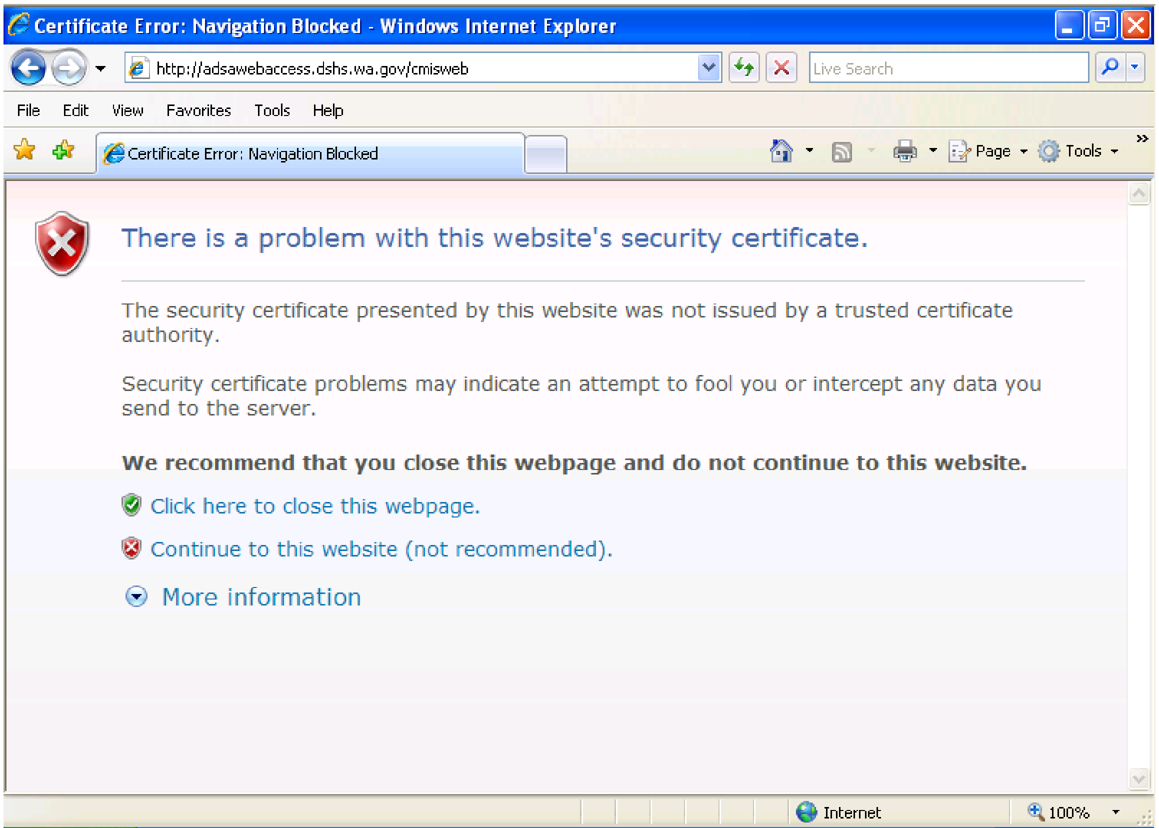
5. *Select* the Trusted Sites image, and then *click* the "Sites" button to add ADSA Web Access URL to the trusted sites list.



Turn to the next page for Internet Explorer 7 information.

Login – Security continued

Internet Explorer 7:
When you first access the website, you will see the following error screen:



You see this error message because IE 7 has a new detection system that checks to see if a website's security certificate is signed by a valid third party organization. IE 7 does not understand that we (like many small organizations that exist today) sign our own security certificate.

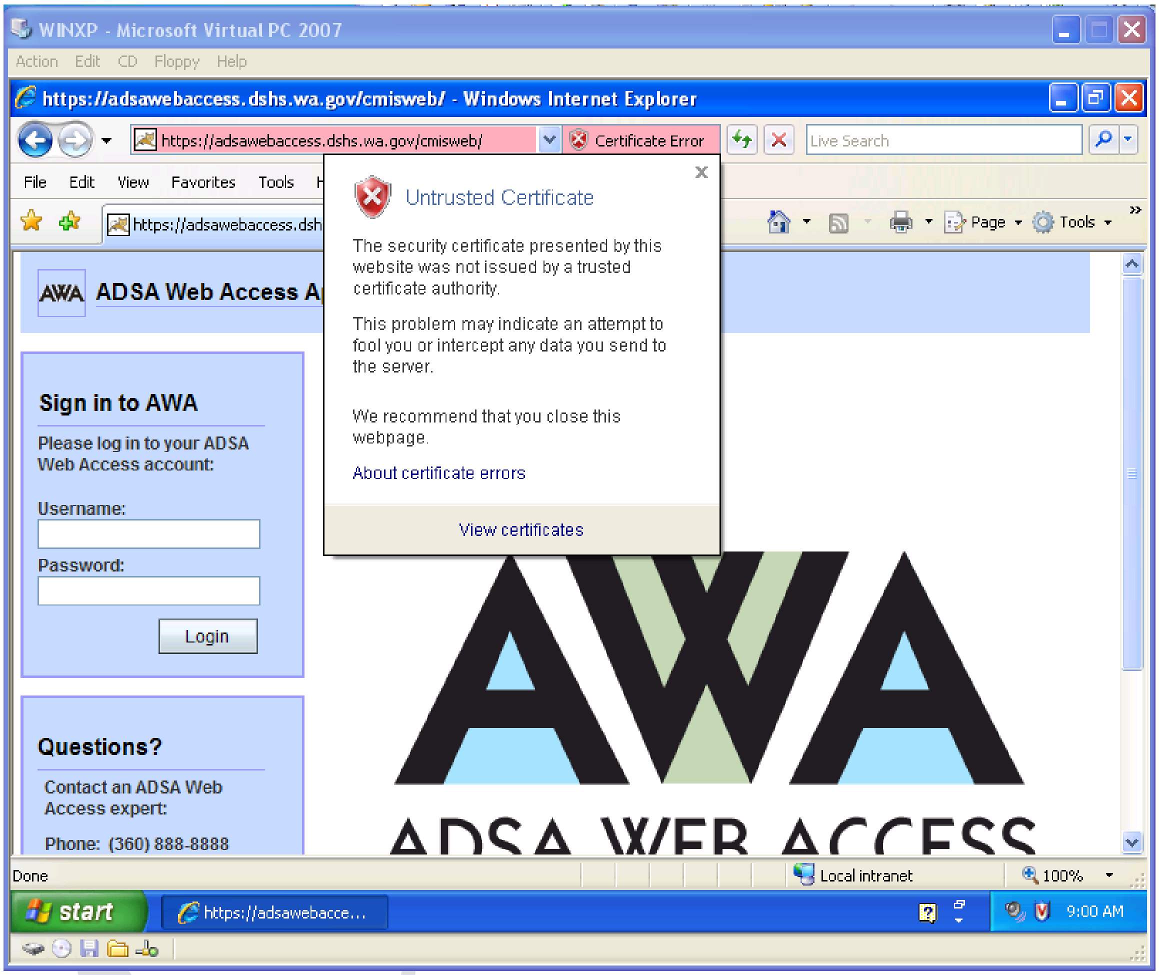
You will have to specifically tell IE 7 that ADSA Web Access is a trusted site.

Turn to the next page to continue.

Login – Security continued

1. To resolve this, *click* “Continue to this website (not recommended)”.

2. When ADSA Web Access is displayed, *click* on the box with the words “Certificate Error”; it should have a red shield with an **X** next to it. A popup will appear:



3. *Click* View Certificates; the Certificate will appear.

4. *Click* the “Install Certificate” button, and *follow the Wizard* to install the certificate. (You should do this for IE 6 as well.)

Turn to the next page for Firefox information.

Login – Security continued

Firefox:
For Firefox, you will see the following dialogue box when you first access the site:

1. *Click* the OK button. That's it – nothing else is required.

If you are using a different browser and you have questions, please contact your IT support person, or call the Help Desk.

Appendix

County Billing Date Elements

Description	Comments	ADC	CA	GSE	IE	PTP	PrV	CDS
County Identifiers								
Residence County ID	System Value	X	X	X	X	X	X	X
Provider County ID	System Value	X	X	X	X	X	X	X
Client Identifiers								
ADSAClient ID	Systematical Assigned #	X	X	X	X	X	X	X
Client First Name	System supplied	X	X	X	X	X	X	X
Client MI	System supplied	X	X	X	X	X	X	X
Client Last Name	System supplied	X	X	X	X	X	X	X
Provider Identifiers								
Provider Number	System Value	X	X	X	X	X	X	X
Provider Name	System supplied	X	X	X	X	X	X	X
Service Information								
Authorization Number	System Value	X	X	X	X	X	X	X
Service Code	System Value	X	X	X	X	X	X	X
Service From Date	System supplied	X	X	X	X	X	X	X
Service Year and Month	System supplied	X	X	X	X	X	X	X
Service To Date	System supplied	X	X	X	X	X	X	X
Projected End Date	System calculated							X
Billing Information								
Billing Month and Year	System Determined	X	X	X	X	X	X	X
Fund Source	System supplied	X	X	X	X	X	X	X
Units Type	System supplied from authorization	X	X	X	X	X	X	X
Number of Units		X	X	X	X	X	X	
Unit Rate	Dollar Amount	X	X	X	X	X	X	
Natural Number of Units								X
Natural Unit Rate	Dollar Amount							X
Other Number of Units								X
Other Unit Rate	Dollar Amount							X
Additional Expense	Dollar Amount							X
Results Information								
Provider Staff Hours		X	X		X	X		
“ “ in Job Prep					X	X		
“ “ in Job Development					X	X		
“ “ in Job Coaching					X	X		
“ “ Record Keeping					X	X		
Client Hours Paid				X	X	X	X	
Client Pathway Hours Volunteer				X	X	X	X	
Client Pathway Hours Other				X	X	X	X	
Client Hours Volunteer			X					
Client Hours Other			X					
Gross Wages	For Service Month			X	X	X	X	
Age In Months Number	Calculated by the System							X
Personal Agent Hours						X		
Personal Agent Cost	Dollar Amount					X		

County Billing Data Records Layouts

Adult Day Care

Column Name	Column Datatype	Column Comment
✓Authorization Number	Char(7)	
✓Service Year Month	Char(6)	6 characters YYYYMM
✓Service Code	Varchar	5 characters value ADC
Provider Name		1 to 60 characters
✓Provider Number	Char(7)	
✓Client Last Name	Varchar(30)	1 to 30 characters
✓Client First Name	Varchar(30)	1 to 30 characters
Client MI	Char	1 character
✓ADSAClient ID	Char(6)	
✓Fund Source	VarChar(5)	1 to 5 characters
Service From Date		A date YYYY/MM/DD
Service To Date		A date YYYY/MM/DD
Residence County ID		A number 1 to 39
✓ Provider County ID		A number 1 to 39
✓Units Type	Char	1 character value (H,D,M)
✓Number of Units	Numeric(8,2)	A number 999999.99
✓Unit Rate	Numeric(8,2)	A number 999999.99
Provider Staff Hours	Numeric(8,2)	A number 999999.99
Input Error	Varchar(100)	Blank (used by application)

Child Development Services

Column Name	Column Datatype	Column Comment
✓Authorization Number	Char(7)	
✓Service Year Month	Char(6)	6 characters YYYYMM
✓Service Code	Varchar	5 characters value CDS
Provider Name		1 to 60 characters
✓Provider Number	Char(7)	
✓Client Last Name	Varchar(30)	1 to 30 characters
✓Client First Name	Varchar(30)	1 to 30 characters
Client MI	Char	1 character
✓ADSA Client ID	Char(6)	
✓Fund Source	VarChar(5)	1 to 5 characters
Service From Date		A date YYYY/MM/DD
Service To Date		A date YYYY/MM/DD
Residence County ID		A number 1 to 39
✓Provider County ID		A number 1 to 39
✓Units Type	Char	1 character value (H,D,M)
✓Natural Number of Units	Numeric(8,2)	A number 999999.99
✓Natural Unit Rate	Numeric(8,2)	A number 999999.99
✓Other Number of Units	Numeric(8,2)	A number 999999.99
✓Other Unit Rate	Numeric(8,2)	A number 999999.99
✓Additional Expense	Numeric(8,2)	A number 999999.99
Projected End Date		A date YYYY/MM/DD
Age In Months	Smallint	A number 1 to ?
Input Error	Varchar(100)	Blank (used by application)

Community Access

Column Name	Column Datatype	Column Comment
✓Authorization Number	Char(7)	
✓Service Year Month	Char(6)	6 characters YYYYMM
✓Service Code	Varchar	5 characters value CA
Provider Name		1 to 60 characters
✓Provider Number	Char(7)	
✓Client Last Name	Varchar(30)	1 to 30 characters
✓Client First Name	Varchar(30)	1 to 30 characters
Client MI	Char	1 character
✓ADSAClient ID	Char(6)	
✓Fund Source	VarChar(5)	1 to 5 characters
Service From Date		A date YYYY/MM/DD
Service To Date		A date YYYY/MM/DD
Residence County ID		A number 1 to 39
✓Provider County ID		A number 1 to 39
✓Units Type	Char	1 character value (H,D,M)
✓Number of Units	Numeric(8,2)	A number 999999.99
✓Unit Rate	Numeric(8,2)	A number 999999.99
Provider Staff Hours	Numeric(8,2)	A number 999999.99
Client Hours Volunteer	Numeric(8,2)	A number 999999.99
Client Hours Other	Numeric(8,2)	A number 999999.99
Input Error	Varchar(100)	Blank (used by application)

Group Supported Employment

Column Name	Column Datatype	Column Comment
✓Authorization Number	Char(7)	
✓Service Year Month	Char(6)	6 characters YYYYMM
✓Service Code	Varchar	5 characters value GSE
Provider Name		1 to 60 characters
✓Provider Number	Char(7)	
✓Client Last Name	Varchar(30)	1 to 30 characters
✓Client First Name	Varchar(30)	1 to 30 characters
Client MI	Char	1 character
✓ADSAClient ID	Char(6)	
✓Fund Source	VarChar(5)	1 to 5 characters
Service From Date		A date YYYY/MM/DD
Service To Date		A date YYYY/MM/DD
Residence County ID		A number 1 to 39
✓Provider County ID		A number 1 to 39
✓Units Type	Char	1 character value (H,D,M)
✓Number of Units	Numeric(8,2)	A number 999999.99
✓Unit Rate	Numeric(8,2)	A number 999999.99
Client Hours Paid	Numeric(8,2)	A number 999999.99
Client Pathway Hours Volunteer	Numeric(8,2)	A number 999999.99
Client Pathway Hours Other	Numeric(8,2)	A number 999999.99
Gross Wages	Numeric(8,2)	A number 999999.99
Input Error	Varchar(100)	Blank (used by application)

Individual Employment

Column Name	Column Datatype	Column Comment
✓Authorization Number	Char(7)	
✓Service Year Month	Char(6)	6 characters YYYYMM
✓Service Code	Varchar	5 characters value IE
Provider Name		1 to 60 characters
✓Provider Number	Char(7)	
✓Client Last Name	Varchar(30)	1 to 30 characters
✓Client First Name	Varchar(30)	1 to 30 characters
Client MI	Char	1 character
✓ADSAClient ID	Char(6)	
✓Fund Source	VarChar(5)	1 to 5 characters
Service From Date		A date YYYY/MM/DD
Service To Date		A date YYYY/MM/DD
Residence County ID		A number 1 to 39
✓Provider County ID		A number 1 to 39
✓Units Type	Char	1 character value (H,D,M)
✓Number of Units	Numeric(8,2)	A number 999999.99
✓Unit Rate	Numeric(8,2)	A number 999999.99
Client Hours Paid	Numeric(8,2)	A number 999999.99
Client Pathway Hours Volunteer	Numeric(8,2)	A number 999999.99
Client Pathway Hours Other	Numeric(8,2)	A number 999999.99
Gross Wages	Numeric(8,2)	A number 999999.99
Provider Staff Hours	Numeric(8,2)	A number 999999.99
" " Job Prep	Numeric(3,2)	A number 999.99
" " Job Development	Numeric(3,2)	A number 999.99
" " Job Coaching	Numeric(3,2)	A number 999.99
" " Record Keeping	Numeric(3,2)	A number 999.99
Input Error	Varchar(100)	Blank (used by application)

Person to Person

Column Name	Column Datatype	Column Comment
✓Authorization Number	Char(7)	
✓Service Year Month	Char(6)	6 characters YYYYMM
✓Service Code	Varchar	5 characters value PTP
Provider Name		1 to 60 characters
✓Provider Number	Char(7)	
✓Client Last Name	Varchar(30)	1 to 30 characters
✓Client First Name	Varchar(30)	1 to 30 characters
Client MI	Char	1 character
✓ADSAClient ID	Char(6)	
✓Fund Source	VarChar(5)	1 to 5 characters
Service From Date		A date YYYY/MM/DD
Service To Date		A date YYYY/MM/DD
Residence County ID		A number 1 to 39
✓Provider County ID		A number 1 to 39
✓Units Type	Char	1 character value (H,D,M)
✓Number of Units	Numeric(8,2)	A number 999999.99
✓Unit Rate	Numeric(8,2)	A number 999999.99
Client Hours Paid	Numeric(8,2)	A number 999999.99
Client Pathway Hours Volunteer	Numeric(8,2)	A number 999999.99
Client Pathway Hours Other	Numeric(8,2)	A number 999999.99
Gross Wages	Numeric(8,2)	A number 999999.99
Provider Staff Hours	Numeric(8,2)	A number 999999.99
" " Job Prep	Numeric(3,2)	A number 999.99

“ “ Job Development	Numeric(3,2)	A number 999.99
“ “ Job Coaching	Numeric(3,2)	A number 999.99
“ “ Record Keeping	Numeric(3,2)	A number 999.99
Personal Agent Hours	Numeric(8,2)	A number 999999.99
Personal Agent Cost	Numeric(8,2)	A number 999999.99
Input Error Code	Varchar(100)	Blank (used by application)

Pre Voc Employment

Column Name	Column Datatype	Column Comment
✓Authorization Number	Char(7)	
✓Service Year Month	Char(6)	6 characters YYYYMM
✓Service Code	Varchar	5 characters value PrV
Provider Name		1 to 60 characters
✓Provider Number	Char(7)	
✓Client Last Name	Varchar(30)	1 to 30 characters
✓Client First Name	Varchar(30)	1 to 30 characters
Client MI	Char	1 character
✓ADSAClient ID	Char(6)	
✓Fund Source	VarChar(5)	1 to 5 characters
Service From Date		A date YYYY/MM/DD
Service To Date		A date YYYY/MM/DD
Residence County ID		A number 1 to 39
✓Provider County ID		A number 1 to 39
✓Units Type	Char	1 character value (H,D,M)
✓Number of Units	Numeric(8,2)	A number 999999.99
✓Unit Rate	Numeric(8,2)	A number 999999.99
Client Hours Paid	Numeric(8,2)	A number 999999.99
Client Pathway Hours Volunteer	Numeric(8,2)	A number 999999.99
Client Pathway Hours Other	Numeric(8,2)	A number 999999.99
Gross Wages	Numeric(8,2)	A number 999999.99
Input Error	Varchar(100)	Blank (used by application)

Employment Outcomes Data Records Layouts

Employment Outcome

Name	Values
Client County	Logged on County – *pre-filled*
Provider Name	From Open Authorization– *pre-filled*
Client ADSA ID	From Open Authorization– *pre-filled*
Client Last Name	From Client Demographics– *pre-filled*
Client First Name	From Client Demographics– *pre-filled*
Employer Name	Text – 64 characters possible
Job Type	Code – 4 digits (see list below)
Start Date	Date MM/DD/YYYY
End Date	Date MM/DD/YYYY
Medical Insurance	Blank, Y or N
Dental Insurance	Blank, Y or N
Paid Leave	Blank, Y or N
Retirement	Blank, Y or N
Last Employment Outcome Update Date	From Last Employment Outcome Update Date on the CMIS database

Job Type Code list:

Code	Description
JT01	Clerical
JT02	Labor
JT03	Management
JT04	Professional
JT05	Service
JT08	Administrative Support Occupations
JT09	Animal Husbandry, Agriculture, and Related Occupations
JT10	Education Occupations
JT11	Food Services Occupations
JT12	Lodging, Building, and Related Occupations
JT13	Machine Trade Occupations
JT14	Manufacturing, Construction, and Related Occupations
JT15	Medical/Health Care Occupations
JT16	Personal Service Occupations
JT17	Physical Sciences and Laboratory Technology Occupations
JT18	Professional and Support Specialists
JT19	Social Service Occupations
JT20	Wholesale/Retail Trade Occupations
JT21	Other Occupations

County Billing Instructions Detail for Data Files

*** = Required for payment**

Adult Day Care (ADC)		
*	A.	<u>Authorization Number</u> – Enter the Authorization Number from the CSA DDD authorized the service. *Pre-filled in Output.*
*	B.	<u>Service Year Month</u> – 6 characters. The year and month (**YYYYMM**) for which services are being reported. *Pre-filled in Output.*
*	C.	<u>Service Code</u> – 1 to 5 characters – ADC. *Pre-filled in Output*.
	D.	<u>Provider Name</u> – 1 to 60 characters. Enter your agency's name. *Pre-filled in Output.*
*	E.	<u>County Provider Number</u> – Enter the Provider Number, which has been assigned to your agency by CARE. *Pre-filled in Output.*
*	F.	<u>Client Last Name</u> – 1 to 30 characters. Client authorized for ADC services by the case manager on the County Services Authorization (**CSA**). *Pre-filled in Output.*
*	G.	<u>Client First Name</u> – 1 to 30 characters. *Pre-filled in Output*.
	H.	<u>Client Middle Initial</u> – 1 character. *Pre-filled in Output.*
*	I.	<u>ADSA Client ID</u> – The ADSA Client ID from the CSA. *Pre-filled in Output.*
*	J.	<u>Fund Source</u> – 1 to 5 characters. Enter the Funding Source code from the CSA. *Pre-filled in Output*.
	K.	<u>Service From Date</u> – The date (YYYY/MM/DD) from the CSA DDD authorized the service. *Pre-filled in Output.*
	L.	<u>Service To Date</u> - The date (YYYY/MM/DD) from the CSA DDD authorized the service. *Pre-filled in Output.*
	M.	<u>County ID - Residence</u> - The number (1-39) of the county in which the client resides. See Appendix A. *Pre-filled in Output.*
*	N.	<u>County ID - Provider</u> - The number (1-39) of the county in which your agency provided this service. See Appendix A. *Pre-filled in Output*.
*	O.	<u>Units Type Code</u> – 1 character. The unit of service defined in the County Program Agreement**:** **H** for hour, **D** for day or **M** for month

*	P.	Number of Units - Enter total number of service units received by the client. The “Units Number” should be consistent with the “Units Type Code”.
*	Q.	Units Rate – Enter the rate paid for each service as authorized by the county.
	R.	Provider Staff Hours Number - Enter the total hours of direct service the agency provided the client during the month.
	S.	Input Error Code – Used by the application. If blank, enter zero.

*** = Required for payment**

Child Development Services (CDS)		
*	A.	Authorization Number – Enter the Referral Number from the CSA DDD authorized the service. *Pre-filled in Output.*
*	B.	Service Year Month – 6 characters. The year and month (**YYYYMM**) for which services are being reported. *Pre-filled in Output.*
*	C.	Service Code – 1 to 5 characters – CDS. *Pre-filled in Output.*
	D.	Provider Name – 1 to 60 characters. Enter your agency's name. *Pre-filled in Output.*
*	E.	County Provider Number – Enter the Provider Number, which has been assigned to your agency by CARE. *Pre-filled in Output*.
*	F.	Client Last Name – 1 to 30 characters. Client authorized for CDS by the case manager on the County Services Authorization (**CSA**). *Pre-filled in Output.*
*	G.	Client First Name – 1 to 30 characters. *Pre-filled in Output.*
	H.	Client Middle Initial – 1 character*. Pre-filled in Output.*
*	I.	ADSA Client ID – The ADSA Client ID from the CSA. *Pre-filled in Output*.
*	J.	Fund Source – 1 to 5 characters. Enter the Funding Source code from the CSA. *Pre-filled in Output.*
	K.	Service From Date – The date (YYYY/MM/DD) from the CSA DDD authorized the service. *Pre-filled in Output.*
	L.	Service To Date - The date (YYYY/MM/DD) from the CSA DDD authorized the service. *Pre-filled in Output.*
	M.	County ID - Residence - The number (1-39) of the county in which the client resides. See Appendix A. *Pre-filled in Output.*
*	N.	County ID - Provider - The number (1-39) of the county in which your agency provided this service. See Appendix A. *Pre-filled in Output.*
*	O.	Units Type Code – 1 character. The unit of service defined in the County Program Agreement**: H** for hour, **D** for day or **M** for month

*	P.	Natural Number of Units – Enter the total number of direct service units received by the client and family in Natural Environment (as defined by IDEA – Part C) during the reporting month. If the client and family received direct service together, count only once. However, if the child and family receive direct services separately, include total units for each. The type of unit should be consistent with your county contract. Cannot be blank. Must contain a number or zero.
*	Q.	Natural Units Rate – Enter the rate paid for each Natural Based direct service unit per individual. Cannot be left blank.
*	R.	Other Number of Units – Enter the total number of service units received by the client and family that occurred in other than a "Natural Environment". If the client and family received service together, count only once. If the child and family receive service separately, include total units for each. The type of unit should be consistent with the county contract. Cannot be left blank.
*	S.	Other Units Rate – Enter the rate paid for all other county funded service units. Cannot be left blank
*	T.	Additional or Misc Expense – Enter the amount of any Additional or Misc. expense for this client for this service month. Enter zero if none. Cannot be left blank.
	U.	Projected End Date – The date (MM/DD/YYYY) services from your agency is projected to end for this client. Pre-filled in Output.
	V.	Age in Months – The client's age in months. Pre-filled in Output.
	W.	Input Error Code – Used by the application. If blank, enter zero.

Note:

1) **When posting CDS client services the professional services charges should appear under direct services in the Natural or Other category.**

2) **Additional or Misc Expense is not for direct client services. The intention of the Additional or Misc Expense category is to capture tangible material items purchased for children 0-3.**

*** = Required for payment**

Community Access (CA)		
*	A.	Authorization Number – Enter the Referral Number from the CSA DDD authorized the service. *Pre-filled in Output.*
*	B.	Service Year Month – 6 characters. The year and month (**YYYYMM**) for which services are being reported. *Pre-filled in Output.*
*	C.	Service Code – 1 to 5 characters – CA. *Pre-filled in Output.*
	D.	Provider Name – 1 to 60 characters. Enter your agency's name. *Pre-filled in Output.*
*	E.	County Provider Number – Enter the Provider Number, which has been assigned to your agency by CARE. *Pre-filled in Output.*
*	F.	Client Last Name – 1 to 30 characters. Client authorized for CA services by the case manager on the County Services Authorization (**CSA**). *Pre-filled in Output.*
*	G.	Client First Name – 1 to 30 characters*. Pre-filled in Output.*
	H.	Client Middle Initial – 1 character. *Pre-filled in Output.*
*	I.	ADSA Client ID – The ADSA Client ID from the CSA. *Pre-filled in Output.*
*	J.	Fund Source – 1 to 5 characters. Enter the Funding Source code from the CSA. *Pre-filled in Output.*
	K.	Service From Date – The date (YYYY/MM/DD) from the CSA DDD authorized the service. *Pre-filled in Output.*
	L.	Service To Date - The date (YYYY/MM/DD) from the CSA DDD authorized the service. *Pre-filled in Output.*
	M.	County ID - Residence - The number (1-39) of the county in which the client resides. See Appendix A. *Pre-filled in Output.*
*	N.	County ID - Provider - The number (1-39) of the county in which your agency provided this service. See Appendix A. *Pre-filled in Output*.
*	O.	Units Type Code – 1 character. The unit of service defined in the County Program Agreement**: H** for hour, **D** for day or **M** for month.

*	P.	<u>Number of Units</u> – Enter total number of service units received by the client. The "Number of Units" should be consistent with the "Units Type Code".
*	Q.	<u>Unit Rate</u> – Enter the rate paid for each service as authorized by the county.
	R.	<u>Provider Staff Hours Number</u> - Enter the total hours of direct service the agency provided the client during the month.
	S.	<u>Number of Client Hours Volunteer</u> - Enter the total number of hours the client spent in Volunteer activity during the service month.
	T.	<u>Number of Client Hours Other</u> - Enter the total number of hours the client spent in Other activities during the service month.
	U.	<u>Input Error Code</u> – Used by the application. If blank, enter zero.

*** = Required for payment**

Group Supported Employment (GSE)		
*	A.	<u>Authorization Number</u> – Enter the Referral Number from the CSA DDD authorized the service. *Pre-filled in Output*.
*	B.	<u>Service Year Month</u> – 6 characters. The year and month (**YYYYMM**) for which services are being reported. *Pre-filled in Output.*
*	C.	<u>Service Code</u> – 1 to 5 characters – GSE. *Pre-filled in Output.*
	D.	<u>Provider Name</u> – 1 to 60 characters. Enter your agency's name. *Pre-filled in Output.*
*	E.	<u>County Provider Number</u> – Enter the Provider Number, which has been assigned to your agency by CARE. *Pre-filled in Output.*
*	F.	<u>Client Last Name</u> – 1 to 30 characters. Client authorized for GSE services by the case manager on the County Services Authorization (**CSA**). *Pre-filled in Output.*
*	G.	<u>Client First Name</u> – 1 to 30 characters. *Pre-filled in Output.*
	H.	<u>Client Middle Initial</u> – 1 character. *Pre-filled in Output.*
*	I.	<u>ADSA Client ID</u> – The ADSA Client ID from the CSA. *Pre-filled in Output.*
*	J.	<u>Fund Source</u> – 1 to 5 characters. Enter the Funding Source code from the CSA. *Pre-filled in Output.*
	K.	<u>Service From Date</u> – The date (YYYY/MM/DD) from the CSA DDD authorized the service. *Pre-filled in Output.*
	L.	<u>Service To Date</u> - The date (YYYY/MM/DD) from the CSA DDD authorized the service. *Pre-filled in Output*.
	M.	<u>County ID - Residence</u> - The number (1-39) of the county in which the client resides. See Appendix A. *Pre-filled in Output.*
*	N.	<u>County ID - Provider</u> - The number (1-39) of the county in which your agency provided this service. See Appendix A. *Pre-filled in Output.*
*	O.	<u>Units Type Code</u> – 1 character. The unit of service defined in the County Program Agreement**:** **H** for hour, **D** for day or **M** for month

*	P.	Number of Units – Enter total number of service units received by the client. The “Number of Units” should be consistent with the “Units Type Code”.
*	Q.	Unit Rate – Enter the rate paid for each service as authorized by the county.
	R.	Number of Client Hours Paid - Enter the total number of hours the client spent in paid community employment (including paid hours for vacation, sick or holiday) during the service month.
	S.	Number of Client Pathway Hours Volunteer - Enter the total number of hours the client spent in Volunteer activity during the service month in non-segregated community activities designed to build skills and broaden awareness of job opportunities.
	T.	Number of Client Pathway Hours Other - Enter the total number of hours the client spent in Other activities during the service month in non-segregated community activities designed to build skills and broaden awareness of job opportunities. Do not include lunchtime.
	U.	Gross Wages – Enter the total earnings of the client during the reporting month. This should include all wages, any paid holiday or sick leave.
	V.	Input Error Code – Used by the application. If blank, enter zero.

*** = Required for payment**

Individual Supported Employment (IE)		
*	A.	Authorization Number – Enter the Referral Number from the CSA DDD authorized the service. *Pre-filled in Output.*
*	B.	Service Year Month – 6 characters. The year and month (**YYYYMM**) for which services are being reported. *Pre-filled in Output*.
*	C.	Service Code – 1 to 5 characters – IE. *Pre-filled in Output.*
	D.	Provider Name – 1 to 60 characters. Enter your agency's name*. Pre-filled in Output.*
*	E.	County Provider Number – Enter the Provider Number, which has been assigned to your agency by CARE. *Pre-filled in Output.*
*	F.	Client Last Name – 1 to 30 characters. Client authorized for IE services by the case manager on the County Services Authorization (**CSA**). *Pre-filled in Output.*
*	G.	Client First Name – 1 to 30 characters. *Pre-filled in Output.*
	H.	Client Middle Initial – 1 character. *Pre-filled in Output.*
*	I.	ADSA Client ID – The ADSA Client ID from the CSA. *Pre-filled in Output*.
*	J.	Fund Source – 1 to 5 characters. Enter the Funding Source code from the CSA. *Pre-filled in Output.*
	K.	Service From Date – The date (YYYY/MM/DD) from the CSA DDD authorized the service. *Pre-filled in Output.*
	L.	Service To Date - The date (YYYY/MM/DD) from the CSA DDD authorized the service. *Pre-filled in Output.*
	M.	County ID - Residence - The number (1-39) of the county in which the client resides. See Appendix A. *Pre-filled in Output*.
*	N.	County ID - Provider - The number (1-39) of the county in which your agency provided this service. See Appendix A. *Pre-filled in Output*.
*	O.	Units Type Code – 1 character. The unit of service defined in the County Program Agreement**:** **H** for hour, **D** for day or **M** for month.

*	P.	Number of Units – Enter total number of service units received by the client. The “Number of Units” should be consistent with the “Units Type Code”.
*	Q.	Unit Rate – Enter the rate paid for each service as authorized by the county.
	R.	Number of Client Hours Paid - Enter the total number of hours the client spent in paid community employment (including paid hours for vacation, sick or holiday) during the service month.
	S.	Number of Client Pathway Hours Volunteer - Enter the total number of hours the client spent in Volunteer activity during the service month in non-segregated community activities designed to build skills and broaden awareness of job opportunities.
	T.	Number of Client Pathway Hours Other - Enter the total number of hours the client spent in Other activities during the service month in non-segregated community activities designed to build skills and broaden awareness of job opportunities. Do not include lunchtime.
	U.	Gross Wages – Enter the total earnings of the client during the reporting month. This should include all wages, any paid holiday or sick leave.
	V.	Provider Staff Hours Number - Enter the total hours of direct service the agency provided the client during the month.
	W.	Phase 1 Provider Staff Hours - Intake / Discovery / Resources / **Job Prep** / Exploration – (A subset of the “Provider Staff Hours Number” total) Enter the number of phase 1 staff hours the agency provided the client during the month.
	X.	Phase 2 Provider Staff Hours - Marketing / **Job Development** – (A subset of the “Provider Staff Hours Number” total) Enter the number of phase 2 staff hours the agency provided the client during the month.
	Y.	Phase 3 Provider Staff Hours - **Job Coaching** / Job Support / Retention / Follow Along – (A subset of the “Provider Staff Hours Number” total) Enter the number of phase 3 staff hours the agency provided the client during the month
	Z.	Phase 4 Provider Staff Hours - **Record Keeping** (A subset of the “Provider Staff Hours Number” total) Enter the number of phase 4 staff hours the agency provided the client during the month.
	AA.	Input Error Code – Used by the application. If blank, enter zero.

*** = Required for payment**

Person to Person (PTP)		
*	A.	Authorization Number – Enter the Referral Number from the CSA DDD authorized the service. *Pre-filled in Output*.
*	B.	Service Year Month – 6 characters. The year and month (YYYYMM) for which services are being reported. *Pre-filled in Output*.
*	C.	Service Code – 1 to 5 characters – PTP. *Pre-filled in Output*.
	D.	Provider Name – 1 to 60 characters. Enter your agency's name. *Pre-filled in Output.*
*	E.	County Provider Number – Enter the Provider Number, which has been assigned to your agency by CARE. *Pre-filled in Output*.
*	F.	Client Last Name – 1 to 30 characters. Client authorized for PTP services by the case manager on the County Services Authorization (**CSA**). *Pre-filled in Output.*
*	G.	Client First Name – 1 to 30 characters. *Pre-filled in Output*.
	H.	Client Middle Initial – 1 character. *Pre-filled in Output.*
*	I.	ADSA Client ID – The ADSA Client ID from the CSA. *Pre-filled in Output.*
*	J.	Fund Source – 1 to 5 characters. Enter the Funding Source code from the CSA. *Pre-filled in Output*.
	K.	Service From Date – The date (YYYY/MM/DD) from the CSA DDD authorized the service. *Pre-filled in Output*.
	L.	Service To Date - The date (YYYY/MM/DD) from the CSA DDD authorized the service. *Pre-filled in Output.*
	M.	County ID - Residence - The number (1-39) of the county in which the client resides. See Appendix A. *Pre-filled in Output.*
*	N.	County ID - Provider - The number (1-39) of the county in which your agency provided this service. See Appendix A. *Pre-filled in Output.*
*	O.	Units Type Code – 1 character. The unit of service defined in the County Program Agreement**:** **H** for hour, **D** for day or **M** for month.
*	P.	Number of Units – Enter total number of service units received by the client. The "Number of Units" should be consistent with the "Units Type Code".
*	Q.	Unit Rate – Enter the rate paid for each service as authorized by the county

	R.	Number of Client Hours Paid - Enter the total number of hours the client spent in paid community employment (including paid hours for vacation, sick or holiday) during the service month.
	S.	Number of Client Pathway Hours Volunteer - Enter the total number of hours the client spent in Volunteer activity during the service month in non-segregated community activities designed to build skills and broaden awareness of job opportunities.
	T.	Number of Client Pathway Hours Other - Enter the total number of hours the client spent in Other activities during the service month in non-segregated community activities designed to build skills and broaden awareness of job opportunities. Do not include lunchtime.
	U.	Gross Wages – Enter the total earnings of the client from community employment during the reporting month. This should include all wages, any paid holiday or sick leave.
	V.	Provider Staff Hours Number - Enter the total hours of direct service the agency provided the client during the month.
	W.	Phase 1 Provider Staff Hours - Intake / Discovery / Resources /**Job Prep** / Exploration – (A subset of the “Provider Staff Hours Number” total) Enter the number of phase 1 staff hours the agency provided the client during the month.
	X.	Phase 2 Provider Staff Hours - Marketing / **Job Development** – (A subset of the “Provider Staff Hours Number” total) Enter the number of phase 2 staff hours the agency provided the client during the month.
	Y.	Phase 3 Provider Staff Hours - **Job Coaching** / Job Support / Retention / Follow Along – (A subset of the “Provider Staff Hours Number” total) Enter the number of phase 3 staff hours the agency provided the client during the month
	Z.	Phase 4 Provider Staff Hours - **Record Keeping** (A subset of the “Provider Staff Hours Number” total) Enter the number of phase 4 staff hours the agency provided the client during the month.
	AA.	Personal Agent Hours – Enter the hours spent with a Personal Agent.
	AB.	Personal Agent Cost – Enter the cost of the Personal Agent for this client for this month.
	AC.	Input Error Code – Used by the application. If blank, enter zero.

*** = Required for payment**

Pre Vocational Services/Specialized Industries (SI)		
*	A.	<u>Authorization Number</u> – Enter the Referral Number from the CSA DDD authorized the service. *Pre-filled in Output*.
*	B.	<u>Service Year Month</u> – 6 characters. The year and month (**YYYYMM**) for which services are being reported. *Pre-filled in Output.*
*	C.	<u>Service Code</u> – 1 to 5 characters – SI. *Pre-filled in Output.*
	D.	<u>Provider Name</u> – 1 to 60 characters. Enter your agency's name*. Pre-filled in Output.*
*	E.	<u>County Provider Number</u> – Enter the Provider Number, which has been assigned to your agency by CARE. *Pre-filled in Output.*
*	F.	<u>Client Last Name</u> – 1 to 20 characters. Client authorized for SI services by the case manager on the County Services Authorization (**CSA**). *Pre-filled in Output.*
*	G.	<u>Client First Name</u> – 1 to 20 characters. *Pre-filled in Output.*
	H.	<u>Client Middle Initial</u> – 1 character. *Pre-filled in Output.*
*	I.	<u>ADSA Client ID</u> – The ADSA Client ID from the CSA. *Pre-filled in Output*.
*	J.	<u>Fund Source</u> – 1 to 5 characters. Enter the Funding Source code from the CSA. *Pre-filled in Output.*
	K.	<u>Service From Date</u> – The date (YYYY/MM/DD) from the CSA DDD authorized the service. *Pre-filled in Output.*
	L.	<u>Service To Date</u> - The date (YYYY/MM/DD) from the CSA DDD authorized the service. *Pre-filled in Output.*
	M.	<u>County ID - Residence</u> - The number (1-39) of the county in which the client resides. See Appendix A. *Pre-filled in Output.*
*	N.	<u>County ID - Provider</u> - The number (1-39) of the county in which your agency provided this service. See Appendix A. *Pre-filled in Output.*
*	O.	<u>Units Type Code</u> – 1 character. The unit of service defined in the County Program Agreement**:** **H** for hour, **D** for day or **M**.

*	P.	Number of Units – Enter total number of service units received by the client. The "Number of Units" should be consistent with the "Units Type Code".
*	Q.	Unit Rate – Enter the rate paid for each service as authorized by the county.
	R.	Number of Client Hours Paid - Enter the total number of hours the client spent in paid production (including paid hours for vacation, sick or holiday) during the service month.
	S.	Number of Client Pathway Hours Volunteer - Enter the total number of hours the client spent in Volunteer activity during the service month in non-segregated community activities designed to build skills and broaden awareness of job opportunities.
	T.	Number of Client Pathway Hours Other - Enter the total number of hours the client spent in Other activities during the service month in non-segregated community activities designed to build skills and broaden awareness of job opportunities. Do not include lunchtime.
	U.	Gross Wages – Enter the total earnings of the client during the reporting month. This should include all wages, any paid holiday or sick leave.
	V.	Input Error Code – Used by the application. If blank, enter zero.

County Billing Data Validation Rules

INPUT DATA VALIDATIONS THAT CAN RESULT IN ERROR:	
1.	Required Field validation. Authorization Number Service Year Month Service Code County Provider Number County ID - Provider Client Last Name Client First Name ADSA Client ID Fund Source Number of Units (Natural and Other for CDS)* Units Rate (Natural and Other for CDS) Additional or Misc Expense (CDS only) Provider Staff Hours (IE and PTP only) * Number of Units can be zero
2.	Valid Values check Authorization Number Service Year Month – Must be a valid year month in 'YYYYMM' format. The value cannot be in the future. Service Code - Must be a valid value (Appendix F) County Provider Number Provider County - Must be a valid value (Appendix A) ADSA Client Id
3.	Authorization verification A valid authorization should exist matching the: • Specified Client (ADSA Client Id), • Provider (County Provider Number), • County Of Contract (County ID - Provider), and • Service period for the specified Service Year/Month
4.	Provider Verification A valid provider record should exist matching the: • Provider (County Provider Number), • County of contract (County ID - Provider), and • Service period for the specified Service Year/Month
5.	If (Units Number * Units Rate Number) is zero then Units Number should be zero
6.	If Provider Staff hours is zero then Phase 1 thru 4 should be zero. If Provider Staff hours is greater than zero then correlating Phases should equal to Staff hours total.
INPUT DATE VALIDATIONS THAT CAN RESULT IN WARNING	
1.	The specified Funding Source should match the value in the corresponding authorization. (The billing will be processed with the most recent Funding Source specified in Auth)

Employment Data Validation Rules

INPUT DATA VALIDATIONS THAT CAN RESULT IN ERROR:	
1.	Required Field validation. ADSA Client ID Employer Name Start Date
2.	Records without a Start Date will not be saved
3.	Records without a Employer Name will not be saved
4.	Records with unrecognizable Job Type code will not be saved

Staff Hours Phase I

Intake

- Meeting with individual, family and/or other support persons
- Provide system overview including services and funding
- Complete initial paperwork including intake assessment
- Collect individuals history/information/ records from other sources

Discovery

- Identify what are job interests
- Conduct an assessment - skills inventory
- Spot potential obstacles and probable remedies
- Consider current job market compared to individuals desired job(s)
- Develop plan including:
  - Goals
  - Methods
  - Strategies

Resources

- Benefit analysis
- Secure funding commitments from:
  - Division of Vocational Rehabilitation (DVR)
  - Social Security Work Incentive
  - Mental Health (MH)

Job Prep / Exploration

- Travel training
- Interview skills
- Grooming / hygiene / professional appearance
- Teach self advocacy
- Assistance obtaining required job items – i.e. food handlers' permit, First Aid card etc.
- Sample various work sites – tours
- Job shadow – trial work experience
- Volunteer
- Adaptive technology planning
- Develop portfolio / resume
- Apprise of job clubs

Staff Hours Phase II

Marketing / Job Development

- Conduct labor market analysis
- Network
- Target / Research Employer
- Develop relationship with employer
- Educate employer – benefits to employee individual, clarify roles, outline expectation, etc.
- Evaluate employment site, provide proposal to employer and secure commitment.
- Complete job/task analysis
- Identify natural supports
- Identify potential obstacles
- Negotiate job start
- Assist with interview process
- Job replacement / change
- Customize job / job carving
- Match the employment opportunity to the interest, strengths, and skills of the individual.

Staff Hours Phase III

Job Coaching / Job Support

- Assessment – development supports to maintain independence – i.e. jigs, checklist etc.
- Coordinate with: transportation and individuals home site schedule
- New hire orientation / testing
- Provide intensive onsite instruction / education
  - To the individual
  - To the co-workers
  - To the supervisor
- Develop natural supports
- Continuous evaluation – modifying job-site, task, and supports an necessary
- Advocating / problem solving / crisis management
- Identify stabilization
- Develop fade schedule
- Continuous communication- families, and the employer
- Coordinate referrals to community resources and case management
- Develop follow-up support plan

Retention / Follow Along

- Advancement
- Periodic on-site visits
- Communication upkeep and relationship expansion/continuation
- Quality assurance - monitoring
- Problem recognition / resolution
- Job modifications – new job tasks – re-training
- Business monitoring change – staff/co-worker re-training etc.
- Advocating – advancement opportunity, increased benefits, and/or more hours
- Update employment plans

Staff Hours Phase IV

Record Keeping

- Contact notes/logs
- Periodic progress reports
- Incident reports
- Satisfaction surveys
- Maintain files/records
- Report wage/hour info

NOTES