

*Improving Waiver Program Business
Practices through Web Solutions:
The Next Generation **Plan-of-Care***

South Dakota's HCBS Family Support 360 Program

Introduction & Background

- *In 2006, Wanda Seiler, Director of the Division of Developmental Disabilities for the State of South Dakota, invited Greystone Consumer Empowerment Systems Corp. (GCES) to revolutionize business processes supporting the HCBS Family Support 360 program using a first-of-its-kind online Plan of Care automation service.*
- *LifeQuest, a service provider and fiscal agent agency located in Mitchell, South Dakota, already working with families and individuals, was selected to serve as the statewide Agency-with-Choice provider.*

Introduction & Background

New processes were needed to address the following issues and challenges:

- *Authorizing/ updating POCs in an often remote self-directed care environment*
- *Approving time sheets and invoices within current service authorizations*
- *Paying employees and contractors in a timely (DOL-compliant) fashion*
- *Supporting field operations through Service Coordinators in a more efficient manner*

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Web-based POC features:

- *HIPAA-compliant information security*
- *Participant data, goals, service codes, service-level budgets, providers, and provider rates entered by Service Coordinators*
- *Necessary forms/ documents pre-populated from DB*
- *Automated pre- and post-authorizations*
- *'Provider-specific' time sheets/invoices generated*
- *Valid 837 claim submissions*
- *Up-to-the-last-transaction data availability*
- *Dynamic reports for service/ budget utilization, demographics, time periods, payments, etc.*
- *Transaction-level audit capabilities (who did what/ when)*

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Web-based POC Details/ Benefits:

- *HIPAA-compliant information security*
 - *Hosted database/ servers (mirrored, 128-bit encryption protection at all access points)*
 - *Login/ Password controls*
 - *User Group access controls (only see what you're supposed to see based on groups and relationships)*
 - *Event email notification (limiting PHI and other personal info to within the security structure)*

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Web-based POC Details/ Benefits:

- *Participant data entered by Service Coordinators*
 - *Current data verified/ migrated to GCES*
 - *Easy-to-use UI*
 - *Add/ edit all data relevant to participants, providers, and POCs (goals, service codes, budgets, units/ rates, case notes, etc.)*
 - *Minimizes errors & fraud*

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Web-based POC Details/ Benefits:

- *Necessary forms/ documents pre-populated from database*
 - *Common (IRS, State) and Specific (to F/EA or Brokerage) forms available as uploads*
 - *Form fields mapped to database for pre-population (minimizes input errors and input time)*
 - *Ready to print, sign, process*

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Web-based POC Details/ Benefits:

- *Automated pre- and post-authorizations*
 - *Draft POCs submitted to Medicaid authority*
 - *Medicaid authority receives email notification*
 - *POC is authorized; funds can be expended immediately (necessary services provided without delay)*
 - *Post-authorizations (authorizing provider payments) facilitated through time sheet and invoice controls*

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Web-based POC Details/ Benefits:

- *‘Provider-specific’ time sheets/ invoices generated*
 - *Specific to provider-participant relationship*
 - *Drop-down menus provide access limited to approved service codes and provider rates*
 - *Configuration settings include time-in/ time-out and ‘over-budget’ flagging options*
 - *Participant approval and ‘Close’ (ready to include in payroll/ payment batch)*

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Web-based POC Details/ Benefits:

- *Valid 837 claim submissions*
 - *Pre- and post-authorization controls produce automated 837 claim files*
 - *Authorized provider claims compiled into an 837 format that is prepared for MMIS submission and adjudication*
- *Up-to-the-last-transaction data availability*
 - *Most recent data always available*
 - *Historical data available by report*

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Web-based POC Details/ Benefits:

- *Dynamic reports*
 - *Reports constructed during implementation*
 - *New reports within a few days of request*
 - *Current budget utilization per participant, per service code*
 - *Demographic information (including diagnoses, geographic area/ zip code, age range, svc. codes, etc.)*
 - *Reports by specific time periods*
 - *Payment histories*
 - *Trend analyses*

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Web-based POC Details/ Benefits:

- *Transaction-level audit capabilities*
 - *Login/ user group identification (authority granted – access to whom and available actions)*
 - *User-action stamps (who provided action)*
 - *Date stamps (When action occurred)*
 - *IP identification (Where action occurred)*

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LifeQuest – A Provider’s Story: Payroll and Payables

- **Payroll Process** –
- *Family Selects Employee.*
- *Employee fills out provider application and sends to LifeQuest (LQ).*
- *LQ processes application and enters employee info into GCES.*
- *Support Coordinator (SC) selects in GCES which services the employee can provide and for which participants and what their pay rate will be for each service.*
- *Employee goes online and fills out timecard for appropriate pay period.*
- *Family/ participant goes online and views and approves timecard.*
- *SC goes online and reviews and closes timecard.*
- *LQ batches all closed timecards according to established pay schedule.*
- *LQ selects batch and downloads 837 file to desktop.*
- *LQ logs onto the Medicaid Launch pad website and chooses the batch and uploads file. This process takes about 5 minutes – very quick! LQ submits the file by Wednesday and gets paid 2 days later on Friday.*
- *LQ downloads a payroll transaction report from GCES to desktop then integrates that same file with accounting software (Microsoft Great Plains).*
- *Payroll transactions are integrated so no data entry is necessary. Then LQ finishes the payroll in our internal accounting software by printing checks and processing direct deposits.*

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LifeQuest – A Provider’s Story: Payroll & Payables

- **Payables Process** –
- *SC enters each invoice online and enters the Vendor, invoice date and #, participant, and then selects appropriate service code and funding source (waiver or general). There is a field to enter comments if needed. SC then closes the invoice.*
- *LQ prints off the reimbursement report from GCES for each program and compares the GCES entries to the actual invoices from the SC’s.*
- *LQ batches the closed invoices for each program according to a set schedule. After LQ batches the invoices, the 837 files are downloaded to desktop and then uploaded on Medicaid’s website. Again – this takes about 5 minutes so it is a very quick process. LQ submits the files by Wednesday and is paid 2 days later on Friday. Medicaid pays every Friday for these services.*
- *LQ enters the payable information into our internal accounting software and processes checks.*

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LifeQuest – A Provider’s Story: User Benefits

- **For Families/ Participants:**
- *Can see their up-to-date plans and budgets online anytime.*
- *Can approve their provider’s hours/ time online.*
- *Can view current and past invoices and timecards.*
- **For Employees:**
- *Can fill out their timecards online.*
- *Can view current and past timecards so they know what they’ve submitted.*
- *Paychecks can be direct deposited.*
- *Get paid quicker because they are not waiting on the postal service to deliver their timecards to the family, then to the SC, then to LQ, and finally a check back to the employee.*
- **For Support Coordinators:**
- *Can view all plans of care online and any changes that have been made.*
- *Can view and track all invoices and timecards online.*
- *Can view up-to-date budget info for each specific individual, and GCES calculates those #'s.*
- *Information is compiled in one place – online. No more paper files to search through.*
- *More choices for reports available and the ability to manipulate those reports.*
- **For LifeQuest (& other agencies):**
- *No data entry on the payroll side with the integration capabilities of GCES.*
- *Can view the same information as Support Coordinators.*
- *Can pull reports whenever needed and manipulate those to add totals for programs, codes, individual months, or whatever it is that we are looking for.*
- *Can view and track all invoices and timecards online.*
- *Can view and track YTD budgets easier.*
- *Can bill Medicaid and get paid for claims weekly which has a huge impact on cash flow.*

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LifeQuest – A Provider’s Story: Improvements w/ GCES

- **CASH FLOWS:**
- *Before, LQ would total all the invoices for each participant for each service type and bill Medicaid monthly on paper 1500 forms and get paid about 2 weeks after the claims were submitted. As such, LQ was reimbursed anywhere from 30 to 60 days after LQ made the payment to the vendor/provider.*
- *Now, LQ uploads a simple file with the invoices that were entered into GCES, batched, and paid out that week, and LQ gets paid for those claims on the Friday of the week they are submitted – usually the same day vendor checks are sent out. LQ is working with 6 different family support programs, as well as functioning as the AWC Employer of Record. This represents a tremendous increase in cash flow and is a very big deal.*

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LifeQuest – A Provider’s Story: Improvements w/ GCES

- **REPORTS:**
- *Before, the SC’s used a database that LQ did not have access to where they input all of their information. Anytime a report was needed, LQ had to ask the SC to print a report and hoped they understood what it was that was needed.*
- *Now, LQ has access to the same info as the SC’s and are able to pull a report anytime for any time period. Reports can be in Excel format, a huge benefit allowing LQ to manipulate the report in the best format for what is needed. LQ can manipulate the worksheets to include totals for each program, as well as a total for all combined, or whatever is needed. Having this info easily accessible anytime and in any format makes balancing to the GL much easier as well. LQ is no longer dependent on SCs getting reports in as we are able to pull reports ourselves whenever needed.*

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LifeQuest – A Provider’s Story: Improvements w/ GCES

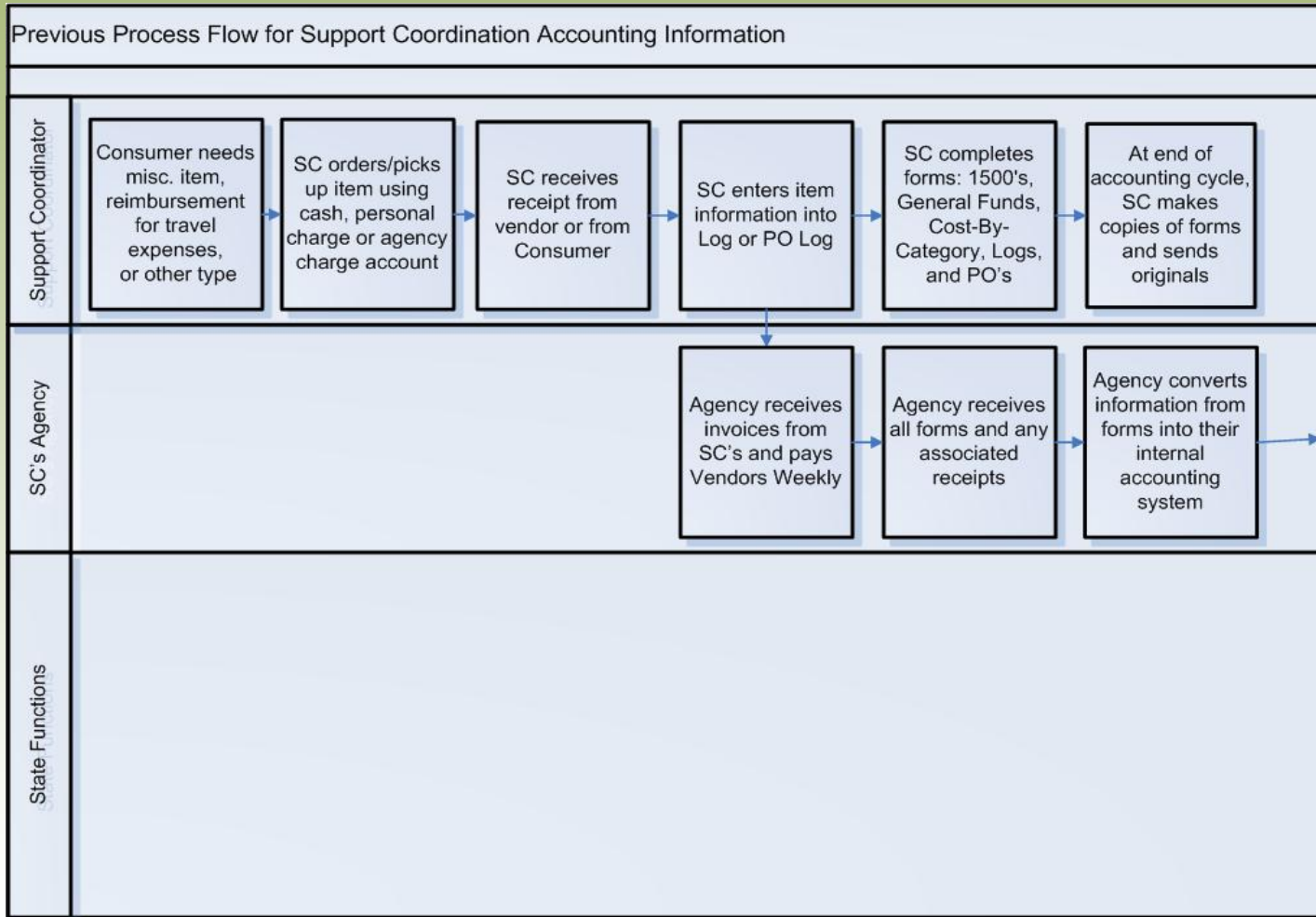
- **UP-TO-DATE INFORMATION:**
- *Before, SC’s entered the provider’s time via invoice to LQ. So we would have that invoice to review specific days worked and such, but in their database and in our accounting system, we would only have the total invoice charge entered.*
- *Now, LQ can access timecards with the specific days worked and hours, all accessible online. With GCES there is more specific information accessible online anytime, making accessing the information via reports very simple because we avoid digging through stacks of paper to find what we need. Also in GCES we have record of when an invoice was entered, closed, and batched and this makes the tracking and balancing with the GL easier and quicker.*

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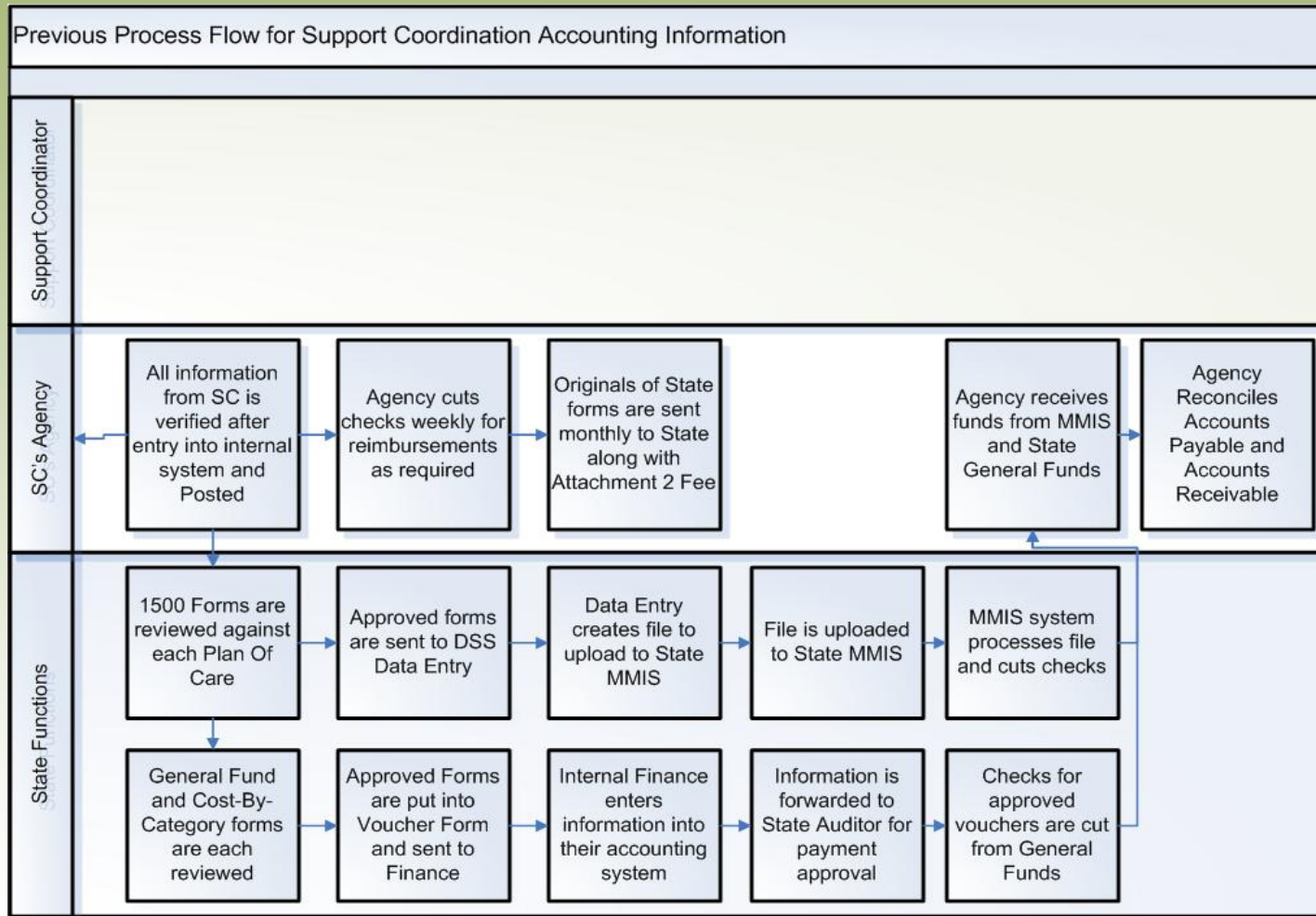
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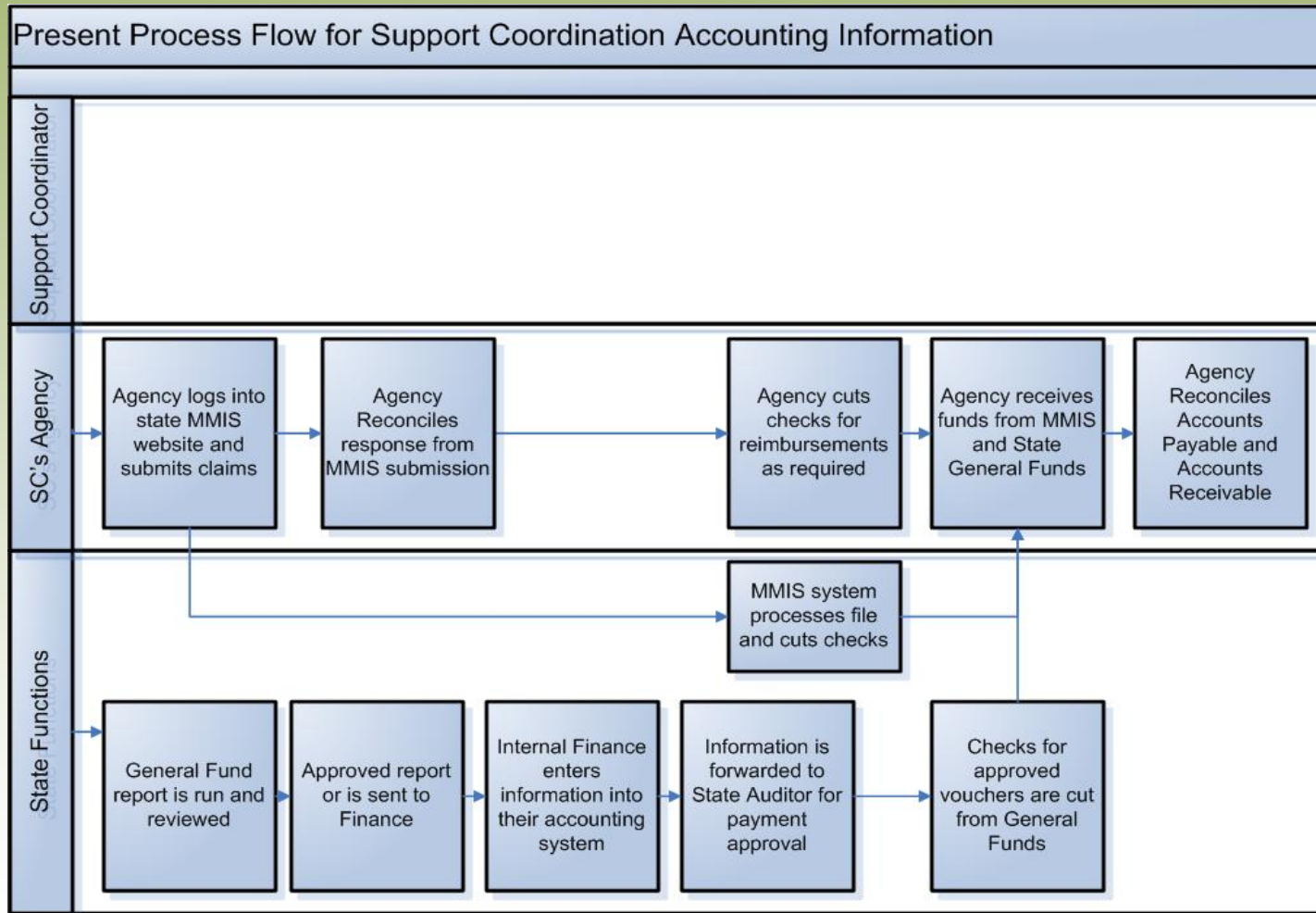
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