CDASS DXC TRAINING
For Case Management Agencies

Colorado interChange

DXC.technology

CDASS Task Worksheet/Allocation Training

Colorado InterChange

Welcome

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Welcome to the CDASS Task Worksheet/Allocation Training Session

Course Description

The goal of this training is to provide you with CDASS training.

- **Adding and editing a CDASS Task Worksheet**

- **Adding and editing a CDASS Allocation**

- **Adding CDASS Services to a line item**

- **Editing CDASS services**
  - Adjusting CDASS services to an existing line item.
  - End dating CDASS services

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Creating CDASS Services on a PAR.

There are two areas of CDASS Services that are needed to be completed for a client to receive these services on a waiver program PAR:

1. **CDASS Task Worksheet (WS**): This is where the user will enter the minutes per week for various activities under Personal Care, Health Maintenance, Enhanced Homemaker and Homemaker.

2. **CDASS Allocation**: This is where the user will attach the CDASS Task Worksheet and create service allocations for the PPA cert span.

CDASS Task Worksheet

Use these instructions to enter a CDASS Task Worksheet in the Bridge. This panel is located under the Client Information section of the Bridge.

Note: if your client has an existing CDASS PAR keyed by the LTHH inbox, STOP! You may only add a Task Worksheet for the next certification period.

Creating a CDASS Task Worksheet

Step 1. Search for the client

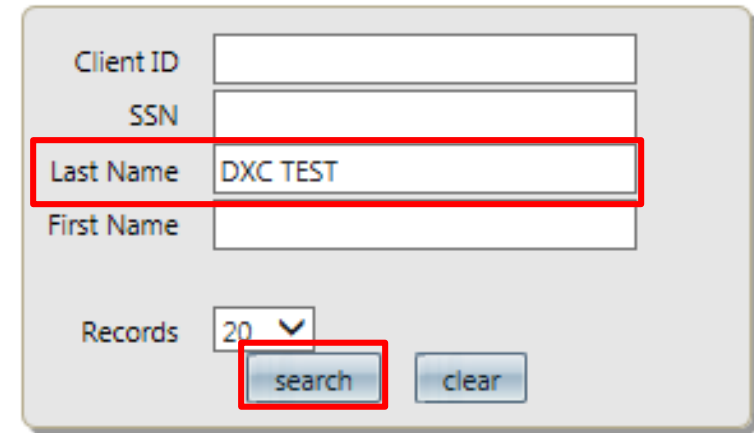Under Main Menu select the Bridge application and then select Client Search.
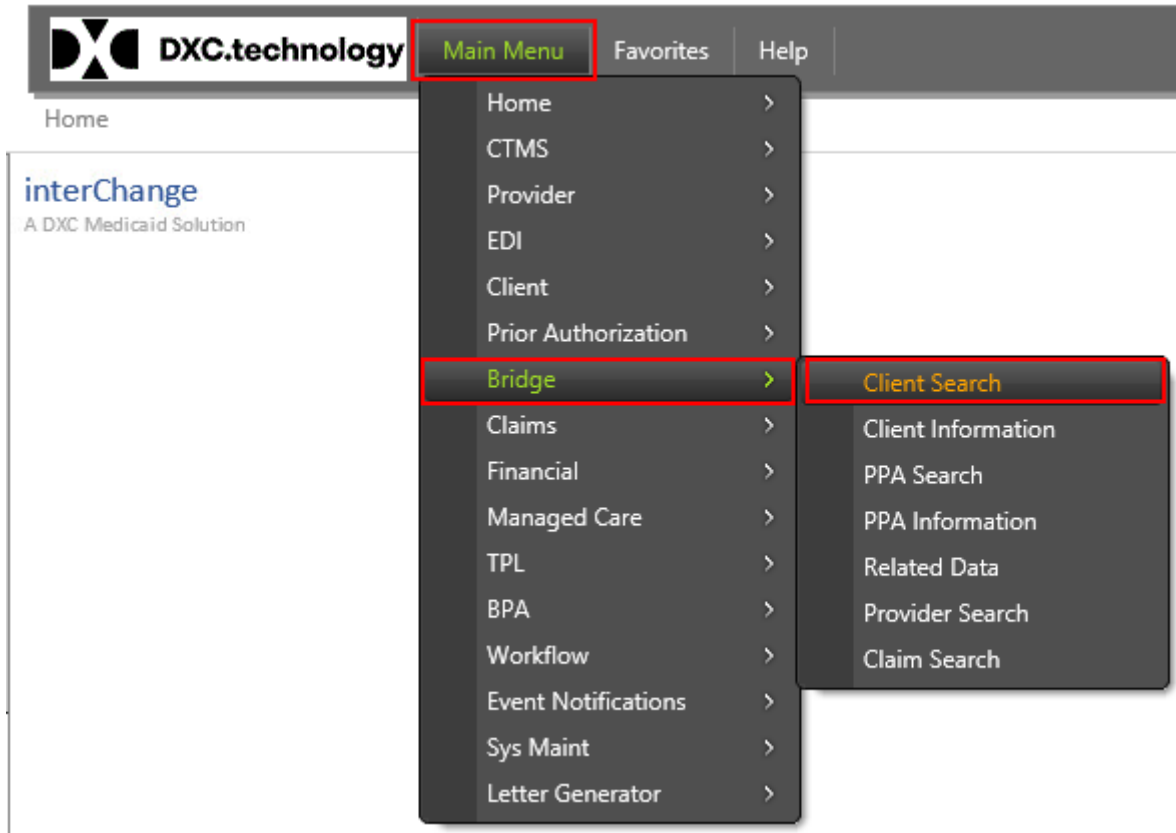
Creating a CDASS Task Worksheet

Step 2: Search for applicant in the Bridge.

Enter information to find a client's record
Don't have to use all search fields (at least 1):

- Client ID – Medicaid Client ID

- SSN – Client's Social Security Number
  - Enter the number with or without the dashes

- Last Name – User can enter full or partial last name
  - Recommended to enter the full name to reduce the number of records returned

- First Name - User can enter full or partial first name
  - At least 2 characters of the Last Name is needed

- Records – Search records are defaulted to 20 results
  - User can select to have 5, 10, 20, 50 or 100 records show

Press Search

Creating a CDASS Task Worksheet (Details)

Step 3. Creating a worksheet

- Display CDASS Task Worksheet (if not already visible)
  - Click open tab and go to client and select.
  - Check CDASS Task WS.
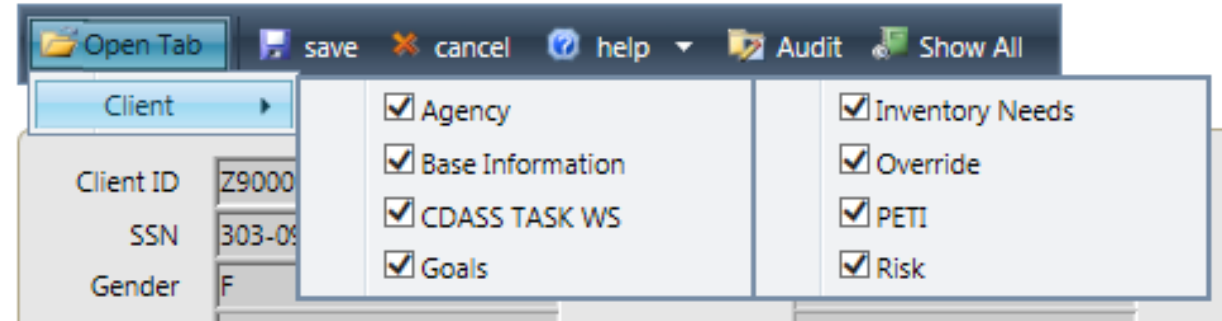
- If you only want to display the panel for the <u>current</u> session, click on the word next to a checkbox.

- ***Note**: Checking a box will keep that panel displayed for <u>future</u> sessions.

Creating a CDASS Task Worksheet (Details)

Step 4. Select CDASS Task Worksheet tab on the panel.

Locate the CDASS Task WS panel

Creating a CDASS Task Worksheet (Details)

Step 5. Fill in worksheet.

- Click the add button at the bottom Of the page.

- Enter CDASS start & end date.

Creating CDASS Task Worksheet (Details)

Step 6. Complete Worksheet

- Enter the number of minutes per activity.

- Hit the calculate button.

- Total Hrs/Wk will display at the bottom of each section

- Verify calculations are correct.

*Note:Total Hrs/Wk round up to the quarter of an hour

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Creating CDASS Task Worksheet (Details)

Step 7. Save worksheet

- Hit the save button at the top of the screen.

- Calculations will only show on the data panel.

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Creating CDASS Task Worksheet (Details)

Step 7. Complete Worksheet. (cont'd)

- Scrolling down will take you to the completed data panel.
- The data panel at the bottom displays the information for the CDASS Task WS.
- To view all data elements use the scroll bar and slide to the right.

***Note** Hours are rounding to the quarter of an hour based on calculations provided by HCPF.

		Total Hrs/Wk		4.75		Total Hrs/Wk

Update No.	Start Date of CDASS	End Date of CDASS	FloorCare	Bathroom	Kitchen	Trash	MealPrep	Dishwashing	BedMaking
1	03/01/2019	04/30/2019	75	45	35	35	0	0	35

Laundry	Dusting	Shopping	Homemaker Hours	Habilitative	Extraordinary	Enhanced Homemaker Hours	Eating	Respiratory
20	30	0	4.75	0	0	0.00	0	0

Skincare	Bladder	Hygiene	Dressing	Transfers	Mobility	Positioning	Medication	Equipment	Bathing
0	0	0	0	0	0	0	0	0	0

Accompanying	Protectiveoversight	MoneyManagement	Groceryshopping	PersonalCare Hours	Skincare	Nailcare
0	0	0	0	0.00	0	0

Mouthcare	HealthDressing	HealthFeeding	Exercise	HealthTransfers	HealthBowel	HealthBladder	MedicalManagement
0	0	0	0	0	0	0	0

Respiratory Care	MedicationAssistance	HealthBathing	Health Maintenance Hours	Positioning	Mobility	Accompanying
0	0	0	0.00	0	0	0

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Creating a CDASS Allocation

Use these instructions to create the CDASS Allocation in the Bridge.

Note: There must be a CDASS Task Worksheet generated prior to creating an allocation.

Creating a CDASS Allocation (Details).

Step 1. Create a PPA

- Select the Bridge from Main Menu

- Select PPA information

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Creating a CDASS Allocation (Details).

Step 2. Fill out Base Information

- Select base information panel

Creating a CDASS Allocation (Details).

Step 3. Client Search

- Select the search button next to Client ID box at the bottom of the page.

Creating a CDASS Allocation (Details).

Step 4. Select Client

- A Client ID box will open

- Enter in the Client ID# or other client criteria to search

- Hit Search

- Select Client from results list

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Creating a CDASS Allocation (Details).

Step 5. Enter Certification Dates

- The client's information will populate in the box under the base information tab

- Select desired benefit plan

- Enter certification start and end date

- Hit save at the top of the page

Creating a CDASS Allocation (Details).

Step 6. Select Allocation Tab

- Select the CDASS Allocation tab

- Select add

Creating a CDASS Allocation (Details)

Step 7. Fill in Allocation

- Select all relevant tabs on Affirmation form on top.

- Hit the sign tab and your name and date will populate.

- Select available CDASS worksheet in the drop down.

  (It will not display if there are no worksheets available)

- Hit calculate

- Panel will populate with totals

Creating a CDASS Allocation (Details)

Step 8. Saving the CDASS Allocation

- Select save at the top of the page.

- Allocation is saved.

- Calculations are displayed on the data panel below.

Add a CDASS line item.

Use these instructions to add the CDASS line items on a new PAR (T2025, T2040, etc.)

Adding CDASS services to a line item(Details)

Step 1. Add a line Item

- Select the line item tab.

- Hit add.

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Adding CDASS services to a line item(Details)

Step 2. Add a CDASS Service

- Select a CDASS service from the drop down.

- Attach a goal or ADL,IADL

- Units, dollars, Eff Date and End date will auto populate from the CDASS Allocation

Adding CDASS services to a line item(Details)

Step 3. Save Line Item

- Hit save.

- Service is displayed in the panel.

- Verify data is correct.

Adding CDASS services to a line item(Details)

Step 4. Add FMS Vendor Fees and other services

- Add FMS Vendor Fee service from the drop down.

- Enter units.

- Enter rate in dollars (this should be the rate per month)

- Enter effective and end date.

- Hit save at the top of the page.

- Add additional services as needed to finish the PPA

- **Note**: No ADL, IADL or goal is needed for this service.

Adding CDASS services to a line item(Details)

Step 5. Submit PAR

- Hit check limits

- Resolve any issues or error messages if applicable

- Submit PPA

- PAR status will be displayed in data panel.

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Revising a CDASS Task Worksheet.

Use these instructions when correcting an existing task worksheet <u>prior</u> to an allocation being created.

Note: A task worksheet cannot be revised after an allocation has been created and PPA has been submitted. Only the end date is editable.

Revising a CDASS Task Worksheet, Allocation and Line Item.

Correcting a CDASS Task WS Before an Allocation is added –

Steps 1.

- Select the CDASS Task WS panel from under Client Information

- Highlight the desired CDASS Task WS from the data list at the bottom of the panel

- Make the necessary corrections.

- Hit calculate and Save

*Note: If you want to start over hit delete and save. Refer back to slides 9-16 on creating a CDASS Task WS.

Revising CDASS PAR for an EBD Client

Use these instructions to complete a revision to an existing task worksheet. For example, if a client's needs change and their task worksheet and allocation must be updated.

Revising CDASS PAR for an EBD Client

Step 1. Revise CDASS Task WS and add new Task WS

- Select corresponding worksheet

- End date it

- Hit save.

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Revising CDASS PAR for an EBD Client

Step 2. Add CDASS Task WS

- Add a new task worksheet (refer back to slide 9,10)

- Hit Save

- CDASS changes will show on the panel.

*Note: Revised CDASS Task WS start date cannot overlap with prior end date.

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Revising CDASS PAR for an EBD Client

3. Updating the CDASS Allocation

- Locate the desired PAR

  - Do not select "sync" under base information panel if message populates when accessing desired PAR

- Select the Allocation tab

- Select the last CDASS Allocation

- A message will populate that a change was made to CDASS Task WS.

- Hit OK

Revising CDASS PAR for an EBD Client

4. Sync Allocation

- Hit Sync

- Hit Save.

- **Note:** Only sync CDASS changes in allocation tab.

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Revising CDASS PAR for an EBD Client

5. Add Allocation

- Create new allocation (refer to slides 19,20)

- Calculate and Save

- Both allocations are updated in the data panel.

- **Note:** Affirmation form and Case Manager signature needs to be completed.

Revising CDASS PAR for an EBD Client

6. Add an additional CDASS line Item

- Add new CDASS services from drop down
  - Refer back to slides 28, 29 for adding lines

- It will display multiple CDASS lines

- **Note:** Line for T2040 does not need to be added or changed unless changing FMS provider with a different unit rate

Revising CDASS PAR for an EBD Client

7. Merge CDASS Lines

- Hit save and line will merge into one.

- **Note:** New total units merged in line's calculation can be checked by adding the total units for each allocation line at the bottom of allocation tab.

Creating Task Worksheet, Allocation, and PAR for a (SLS Client)

Use these instructions to create a PAR for an SLS client that needs CDASS service.

Creating Task Worksheet, Allocation, and PAR for a (SLS Client)

- **Creating CDASS Task Worksheet (refer back to slides 9-16)**

- **Creating CDASS Allocation (refer back to slides 17-25)**
  - Allocation identifies total amounts separate for CDASS services against SPAL, Health Maintenance is outside of the SPAL, and total is for both.

- **Adding CDASS line item (refer back to slides 27-31)**
  - **Note:** SLS has an additional line item T2025 U8 SE for Health Maintenance to add, if services are allocated.

- **Note:** Existing PARs with agency homemaker services and/or PC cannot have overlapping dates with CDASS.

Revise a CDASS PAR for a (SLS Client).

Use these instructions when an existing task worksheet, allocation or line item must be changed. For example, if a client's needs change and their task worksheet and allocation must be updated.

Note: Many of the steps used for creating a PAR and revisions are the same as non-SLS clients. The difference to pay attention to are services that impact the SPAL (T2025 U8) and service that is outside of SPAL (T2025 U8 SE).

Revising a CDASS PAR for a SLS Client.

Step 1. Revise CDASS Task WS and add new Task WS

- Select corresponding worksheet

- End date it

- Hit save.

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Revising a CDASS PAR for a SLS Client.

Step 2. Add CDASS TASK WS

- Add a new CDASS TASK WS (refer back to slide 9,10)

- Calculate and Save

- Both WS are listed at the bottom panel with changes

- **Note:** CDASS Task WS start and end dates cannot overlap

Revising a CDASS PAR for a SLS Client.

Step 3.

- Locate the desired PAR
  - Do not select "sync" under base information panel if message populates when accessing desired PAR

- Select the Allocation tab

- Select the last CDASS Allocation

- A message will populate that a change was made to CDASS Task WS.

- Hit OK

Revising a CDASS PAR for a SLS Client.

Step 4.

- Hit the sync button.

- Message will populate that sync is complete to hit save button.

- Hit ok.

- Hit Save

- **Note:** Only sync CDASS changes in allocation tab and not base information.

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Revising a CDASS PAR for a SLS Client.

Step 5. Add Allocation

- Create new allocation (refer to slides 19,20)

  - (Refer to slide 42 for example for location of totals for services against SPAL and outside of SPAL)

- Calculate and Save

- Both Allocations are listed at the bottom of the panel.

- **Note:** Affirmation form and Case Manager signature needs to be completed.

Revising a CDASS PAR for a SLS Client.

Step 6. Line items are updated

Image 1. Before Revision

Image 2. After Revision end dating 1st task worksheet

- Updated lines reflect the last end date change and not the additional allocation.

- Notice the "Total SPAL Spend" amount changed.

Revising a CDASS PAR for a SLS Client.

Step 7. Add new line items.

- Add additional CDASS Services
    - (T2040 U8 does not need to be updated unless changing providers with a different rate)

- Hit save

Message Description	Panel	Field	Row
✅ Save was successful	Base Information		

Line	Status	Service Description
01	INACTIVE	T2025 -CDASS Services U8
02	INACTIVE	T2025 -CDASS Services - Health Maint. U8 SE
03	INACTIVE	T2040 -CDASS FMS Vendor Fees U8

Base Information | Line Item | Attachments | External Text | Internal Text | Claim List

Messages | CDASS Allocation

Units	Dollars	Eff Date	End Date	ADL	IADL
2575664.000	$0.01	03/01/2019	06/30/2019	Y	N
2493863.000	$0.01	03/01/2019	06/30/2019	Y	N
4.000	$103.21	03/01/2019	06/30/2019	N	N

Revising a CDASS PAR for a SLS Client.

Step 8. Line Item updates

- Line Items are updated

- Two lines merge into one reflecting entire date span.

- "Authorized SPAL Limit" will update

MMIS PA Number		Client ID	Z900058
Bridge PPA Number	154094	Client Last Name	DXC TEST
PA Status	APPROVED	Client First Name	ZOIE
Process Status	WORK IN PROGRESS	Client Birth Date	09/25/1997
Amendment Status		Support Level	3
Process Status Date	11/03/2019	Receive Alert	NO
Selected Benefit Plan	HCBS-Supported Living Services (SLS)	Cert Start Date	03/01/2019
Provider ID	63407752	Cert End Date	06/30/2019
Current Benefit Plan	BHO+B 12/01/2018-12/31/2299	Authorized SPAL/CES Limit	$20,777.16
Claims Activity	☐	Total SPAL/CES Spend	$25,756.64
		HCBS AVG Daily Cost	$0.00
		LTHH AVG Daily Cost	$0.00
		Total AVG Daily Cost	$0.00

Sync   Check Limits   Submit PPA   Delete   Print

Adjusting the Units down and changing the end date on a line item for CDASS Services
(SLS Client)

Use these instructions when a client is ending CDASS prior to the end of the certification period and there is a need to free up unused CDASS units for other services. Work with the FMS vendor to ensure you have the exact number of units that should remain on the PAR based on client billing activity. You cannot lower the units past what the vendor has submitted claims for.

Adjusting the Units down and changing the end date on a line item for CDASS Services (SLS Client)

Step 1. Enter a lower unit amount

- Select the line item you want to adjust

- Enter in ADJ Units

- Change the end date
  - Verify units entered are correct before saving. Units <u>cannot</u> be adjusted again once saved.

- Hit save

*Note: Verify all claims have been processed prior to lowering units. Delayed claims will be denied if claims exceed units remaining.

Adjusting the Units down and changing the end date on a line item for CDASS Services
(SLS Client)

Step 2.

- Select the FMS vendor fee line item you want to adj.

- Enter any unit amount that is lower

- Change the end date

- Hit save

Adjusting the Units down and changing the end date on a line item for CDASS Services
(SLS Client)

Step 3.

- Save and submit PPA

- Changes are displayed in the data panel

*Note:** Units can only be adjusted down. CDASS Service line items can only be modified after a claim has been processed.

SPAL Spending Exceeds Limits.

Use these instructions when you receive an error code B015. This error code will display when you have exceeded the client's Authorized SPAL Limit.

SPAL Spending Exceeds Limits

Step 1. Select the client that has the B015 Error code

- B015 error code displays in message panel

- Verify the total SPAL amount has exceeded the authorized limit.

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SPAL Spending Exceeds Limits

Step 2. Edit CDASS Task WS

- Go to the bridge and select the client

- Go to CDASS Task Worksheet

SPAL Spending Exceeds Limits

Step 3. Edit CDASS Task WS

- Select the last WS to edit

- Change the end date (if applicable)

- Edit the mins (if applicable)

- Hit calculate

- Hit save

- Verify changes made are displayed in the data panel

SPAL Spending Exceeds Limits

Step 4. Sync Allocation

- Go to PPA Search in the Bridge and select the client

- Go to the allocation tab

- Select the Allocation for the corresponding TASK WS

- A message will pop up that says changes made to WS please hit sync

- Hit OK

- Hit Sync
  - Do not sync in base information

SPAL Spending Exceeds Limits

Step 4. Sync Allocation (Continued)

- Sync complete message pops up

- Hit ok

- Hit save

SPAL Spending Exceeds Limits

Step 5. Check Limits

- Updates will be applied

- Hit check limits

- Submit PPA button is populated

- SPAL Spending no longer exceeds Limits

- Error Code B015 no longer shows in the Messages panel

Deleting a CDASS Task Worksheet, Allocation and Line Item.

Use these instructions when there's not a MMIS PA number already attached to the PAR, and the user wants to correct universal changes to CDASS services.

Deleting a CDASS Task Worksheet, Allocation and Line Item.

Step 1. Delete Line Items

- Select CDASS PAR you want to Delete

- Go to the Line item

- Highlight the desired line item

- Hit delete.

- A message will pop up saying are you sure, hit ok.
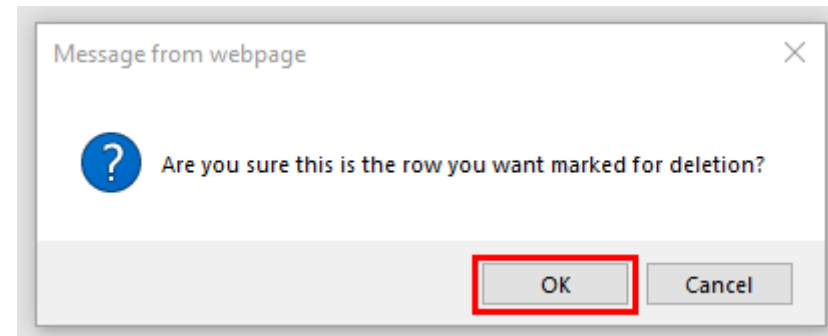
Deleting a CDASS Task Worksheet, Allocation and Line Item.

Step 1. Delete Line Items

- Hit Save

- Row is deleted

*Note: Repeat steps for multiple line items.

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Deleting a CDASS Task Worksheet, Allocation and Line Item.

Step 2. Delete Allocations

- Select CDASS PAR you want to Delete

- Go to the Allocation tab

- Highlight Allocation you want to delete.

- Hit Delete

- A message will pop up saying are you sure, hit ok.

*Note: Repeat steps for multiple Allocations.

Deleting a CDASS Task Worksheet, Allocation and Line Item.

Step 2. Delete Allocations

- Hit Save

- Row is deleted

***Note**: Repeat steps for multiple Allocations.

Deleting a CDASS Task Worksheet, Allocation and Line Item.

Step 3. Delete CDASS Task Worksheets

- Select CDASS PAR you want to Delete

- Go to the CDASS Task WS tab

- Highlight the CDASS Task WS you want to delete.

- Hit Delete

- A message will pop up saying are you sure, hit ok.

Deleting a CDASS Task Worksheet, Allocation and Line Item.

Step 3. Delete CDASS Task Worksheets

- Hit Save

- Row is deleted

***Note**: Repeat steps for multiple CDASS Task WS

CDASS Error Codes

B015
SLS CDASS-SPAL Spending Exceeds Limits
-Resolution is to edit last task worksheet or lower units from other services.

B075
CDASS- Affirmation Form incomplete
-Resolution is to Complete the Allocation form and hit save.

B076
CDASS- FMS Vendor not selected
-Resolution is to select T2040 procedure code.

B077
CDASS- Procedure code missing
-Resolution is to add one of the CDASS Services to the line item.

FAQ:

1. Can I delete a CDASS Task Worksheet, Line Item, or PAR?
   a. You may only delete these items if the PPA has not been submitted. After the PPA is submitted, you must revise the specific line to make corrections. Corrections to CDASS information must always start with the Task Worksheet. If you need help, please contact the DXC CCM helpdesk.

2. I am revising a Task Worksheet and cannot change the times for a service.
   a. When revising a Task Worksheet, please change the end date of the current task worksheet. Add Task Worksheet and enter the new start/end date and adjusted times. The two Worksheets will merge into one line when the allocation is synced and PPA line item is created. Lines will not merge into one if the dates aren't consecutive. Start/end dates must not overlap.

3. My client is ending CDASS. What do I do?
   a. Non-SLS clients: End date the CDASS line items on the PPA.
   b. SLS clients: End date the CDASS line items on the PPA if remaining units aren't needed for other services. If remaining units are required for other services, lower units and end line items. **Verify all claims have been billed before lowering units, or claims will be denied and are unable to be changed later.

4. When revising a CDASS PPA, I received a message to "Sync". Which Sync button do I use?
   a. Only "sync" in the allocation tab. Do **not** "sync" in base information tab.

FAQ continued…..

5. Can I revise a CDASS PPA that was entered through the LTHH Inbox?
   a. No. You must send the revision to the LTHH inbox to be manually keyed through the end of the certification period. You can begin entering the CDASS task worksheets and PPAs at the start of the new certification period.

6. I am revising a CDASS PPA and noticed that there are two CDASS T2025 lines. What do I do?
   a. Non-SLS clients: Contact the DXC CCM Helpdesk. The lines should always collapse if end/start date are consecutive.
   b. SLS clients: There will be a T2025 U8 and T2025 U8 SE line, this is normal. Same line code/modifier should collapse if end/start date are consecutive. Contact DXC CCM Helpdesk if not collapsing.

7. I added the Task Worksheet but the allocation drop down says there isn't one?
   a. Return to the client's profile and double check that the Task Worksheet saved and date span is correct.

8. I am trying add or revise a task worksheet and a message says that I am required to add a task when saving (ex: meal prep). What do I do when that task shouldn't have time entered?
   a. Make sure that the box has "0" and not blank. You will need to either click on the task worksheet and add the "0" or delete the specific task worksheet, save, and add the task worksheet with time again.

CCM Help Desk Tier level Support:

If you have any questions please contact the CCM Help Desk by email with the following guidelines to CCMHELPDESK@DXC.com:

- Subject line must contain at minimum "Bridge CDASS Training"
- Body of the email must contain:
    - Case Manager name
    - Contact phone number
    - Desired information
        - Available times to receive a phone call. If applicable to your work load.
        - Example: Tuesday 1-2 or Thursday 8-10

***Note**: These instructions are strictly for the Bridge CDASS Training questions only. Agents have been advised to inform callers for non-CDASS related issues to be emailed to the traditional CCM Help Desk.

Thank you