Department of Health Care Services
Children's Medical Services Network

CMS Net Medical Therapy Program
DRAFT

User Manual
(Step-by-Step)
Revised: 02/17/09

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1 INTRODUCTION

1.1 OVERVIEW

Children's Medical Services Network (CMS Net) Medical Therapy module is used to search, track, enter, modify, and report data related to Medical Therapy Program (MTP). Listed are features and functionalities of the MTP module:

- Add, modify, track and view a client's medical therapy eligibility, referral, case status, Medical Therapy Unit assignment, durable medical equipment, therapist assignment, therapy frequency, school related information, demographic and consents.
- Schedule and track conferences and add clients.
- History maintained in some of the modules.
- Create and batch Patient Therapy claims in the HIPAA format for transmitting to the fiscal intermediary.
- Generate Medical Therapy reports

1.2 DEFINITIONS, ACRONYMS AND ABBREVATIONS

Table 1-2 lists the definitions, abbreviations and acronyms that may be used within this document:

Table 1-2 Definitions, Abbreviations and Acronyms

abbreviation or acronym	Definition
CCS	California Children's Services
CIN	Client Index Number
CMS	Children's Medical Services
DHCS	Department of Health Care Services
DME	Durable Medical Equipment
DX	Diagnosis
IEP	Individual Education Program
IFSP	Individual Family Service Plan
LEA	Local Education Agency
MEDS	Medi-Cal Eligibility Data System
MTP	Medical Therapy Program
MTU	Medical Therapy Unit
OT	Occupational Therapy
PT	Physical Therapy
PTR	Patient Therapy Record
SAR	Service Authorization Request
SELPA	Special Education Local Program Agency
SMCR	System Maintenance Change Request
SOAP	Subjective, Objective, Assessment, Plan (standard clinical encounter record)

2 ACCESSING CMSNET MTP MODULES

2.1 USING MTP MODULE MENU

The MTP module can be accessed by hovering the mouse pointer over the 'CCS Modules' option to display the menu drop-down list. Click on the 'MTP' options as shown in Figure 2-1.

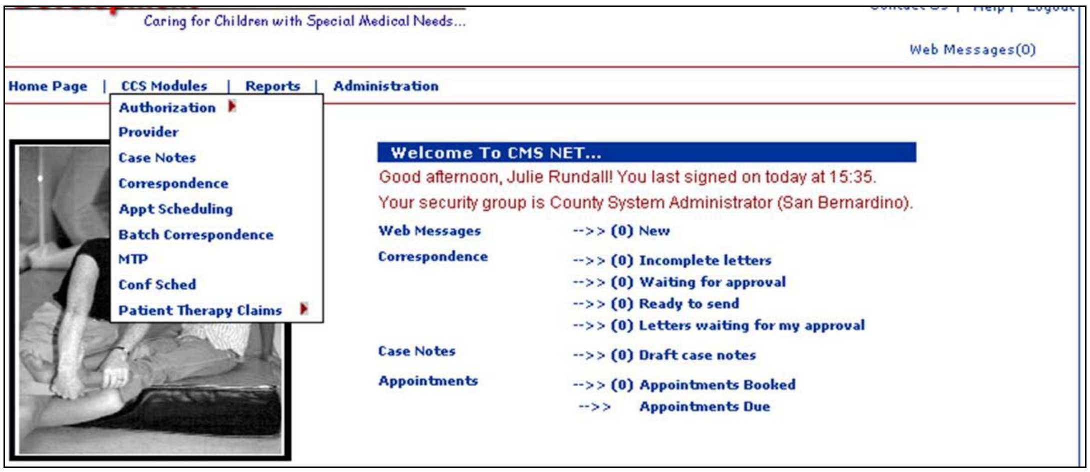


Figure 2-1, Access the MTP module

2.2 SECURITY REQUIREMENTS

- A County System Administrator or State System Administrator updates a user's profile in User Security SAR Security screen to allow access to the MTP module by checking the box next to MTP User and saving the record.

- The MTU Name field in the in Legacy (CMSFS-40) screen is no longer the field used to assign the MTP case to another county other than the client's legal county.

- The Caseload ID will be used to redirect a MTP case ownership to another MTU assigned outside the client's legal county.

2.3 CASELOAD TYPES AND ID

CMS Net Caseload Distribution is a feature that allows a county to establish caseload distribution rules for new referrals and existing cases. Counties may restrict caseload assignments, transfer individual cases or entire caseloads from one to another, view caseload assignments, run reports and establish carve out business rules for Medical Therapy Program (MTP), Orthodontia, and Administrative Lock Cases. For more information relating to Automated Caseload Distribution see CMS Net Web Manual Section: 38.

Every case in the CMS Net system is assigned a Generic Caseload type and Caseload ID except where a Proposed MTU is assigned. Proposed MTU assignment is created by entering a MTU in the MTU Name field in CMSFS-40 screen in Patient Registration. The entry of the MTU automatically changes the Caseload Type to MTU and the Caseload ID designation will be MTP on the CMSFS-50 screen.

In the unique case where the MTU is located in a different county than the client's Legal County the Caseload ID allows the MTU County access to the MTP record. The legal county will have view only access to the MTP record.

2.4 MENU SEQUENCING

The MTP menus are displayed in case management entry order.

The Conference Scheduling and PTR menus are accessible from the main screen for quick access.

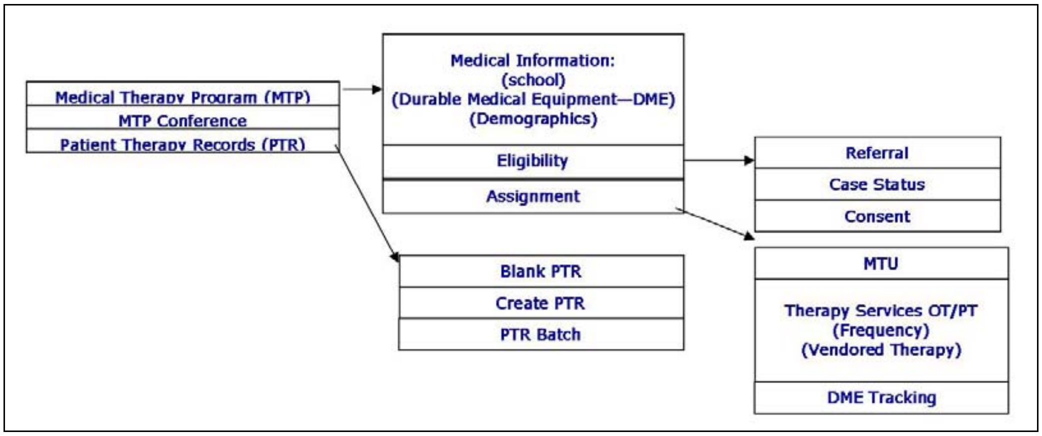


Figure 2-2, Logical Menu Sequence

- Listed below is the screen entry order and number of fields' **required** to complete minimum enrollment. Example: If the Referral screen has not been completed and the user attempts to access the MTU Assignment or the Therapy Services a pop up message will display not allowing entry to the screen. If the required fields are not completed then a PTR cannot be generated.

1. Medical Information (1)
2. Referral (1)
3. Case Status (3)
4. MTU Assignment (4)
5. Therapy Services (7)

2.5 SCREEN LAYOUT

Many of the screens display the standard “Patient Header” which serves as a reference to ensure the correct patient is selected and modified. There are three additional fields in the header which are specific to the MTP module. A user enters the information on the Case Status screen and the MTP Annual Rvw Date, Next Rvw Dt, MTP Elig Status displays on the header.

Figure 2-3, Screen Layout

2.6 SUB MENUS

After selecting MTP from the CCS Modules menu option; the Client Search menu will appear. Select client on the MTP Client Search screen and the MTP sub menu displays the following menu options: Medical Information, Eligibility, and Assignment.

Figure 2-4, Sub Menus

Medical Information and OT/PT Therapy Service include buttons of the bottom of the screen to access to additional screens.

Pop up screens

Note: Access to additional screens.

The Medical Information screen includes both the Demographics screen and the School screen.

The OT/PT Therapy Services screen includes both the Frequency screen and the Vendor Therapy screen.

3 CLIENT SEARCH

Figure 3-1 displays the client search screen. Only a single client's data maybe added and/or modified at a time. The Client Search screen allows users to search multiple ways such as CCS number, CIN number or Name. Combinations searches may be performed such as Name+DOB+gender or county+MTU.

Figure 3-1, Client Search screen

4 CLIENT INFORMATION

The Client Information sub sections include any medical therapy case management activities such as tracking, enrollment, eligibility or assignment.

4.1 MEDICAL INFORMATION

The Medical Information screen is accessed by selecting the MTP option under the CCS Modules. When the MTP menu option is select the Medical Therapy Program Client Search screen will appear. Select a single client and click on continue and the Medical Information screen will appear.

The Medical Information screen allows a user to track the medical therapy eligibility for a client, to select and track the current managing physician and medical reports. Two buttons are included to view and update the client's demographics and school related information. See illustration in Figure 4.1

4.2 MEDICAL INFORMATION PROCESSING RULES

- These clients are in Patient Registration and assigned a case number through the CMS Net Legacy system.

- MTP Primary DX: Required (specific medical eligible condition for the MTP per Title 22 CA Dept of Health Care Service Section 41832)

- Med Elig basedUnder Age 3 Criteria is the initial date that the County Medical Consultant/Designee states the child has a MTP eligible condition. For children initially determined suspect for a MTP eligibility condition as "less than 3 years of age", the date that MTP eligible condition is confirmed by the Medical consultant/designee.

- Managing Physician: oversees/manages therapy and writes the prescriptions for therapy. This can either be a CCS Conference MD or a private MD

- Supporting Physician Name: the MTC Physician is the CCS Conference MD. This can either be the Managing Physician or the Supporting Physician

- Primary CarePhysician name: the MD the child sees in the community, not in the CCS Conferences.

- Requested Next Med Report: is the most recent date that MTU has sent a signed Release of Information requesting a current medical report from the prescribing physician.

- Date of Medical Report: the date of the most current medical examination/report from the managing physician.

- Next Medical Report Due: date the next medical report from the managing physician is due to maintain currency of the medical record and on-going therapy services. 6 months – treatment and 1 year - monitor

- If the therapy is for OT and PT services a date of 6 months from the Medical Report Due Date will appear in the Next Medical Report date field.

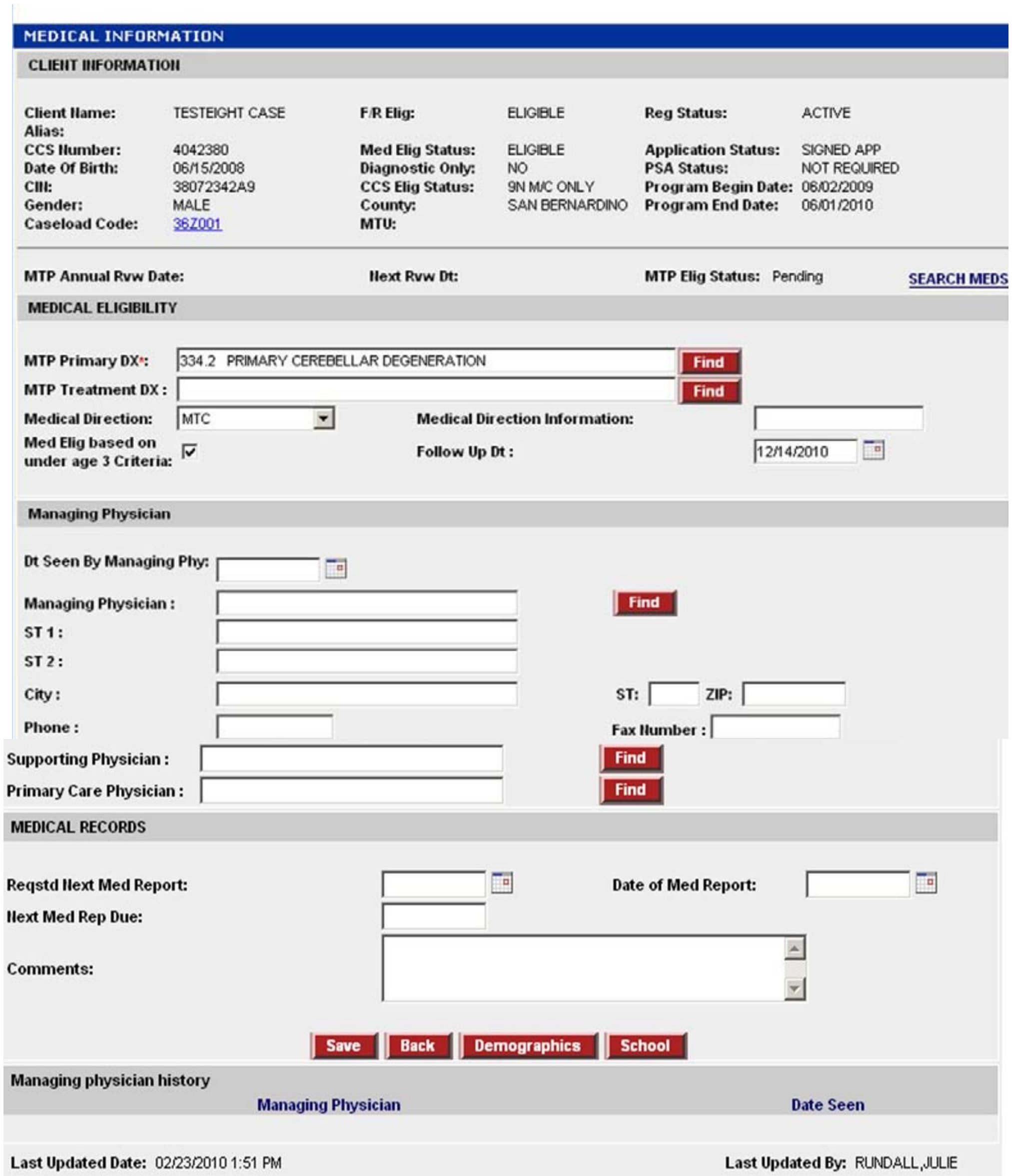


Figure 4-1, Medical information screen

4.2.1 STEPS TO ENTER MEDICAL INFORMATION

1. MTP Primary DX: Select a primary diagnosis from the drop down list. (Required)
2. MTP Treatment DX: Select a treating diagnosis. (Not required)
3. Medical Direction: Enter provider providing medical direction for medical therapy program services and related medical follow up.
4. Med Elig based Under Age 3 Criteria. When the Med Elig based on under age criterion is check marked, the follow up date will auto-populated with the date of birth plus six month prior to 3 years with the ability to change. If the child's birthday is older than three the field will remain blank.
5. Dt Seen By Managing Physician: Enter the date the managing physician sees the client.
6. Managing Physician: enter either a CCS Conference MD or a private MD.
7. Supporting Physician: enter either be the Managing Physician or the Supporting Physician.
8. Primary Care Physician: enter a medical doctor the child sees in the community, not in the CCS Conferences.
9. Reqstd Next Med Report: enter the most recent date that MTU has sent a signed Release of Information requesting a current medical report from the prescribing physician.
10. Date of Medical Report: enter the date of the most current medical examination/report from the managing physician.
11. Next Med Rep Due: the date the next medical report from the managing physician is due to maintain currency of the medical record and on-going therapy services. Automatically calculated date based on frequency of therapy.

12. Medical Report Due Date appears with a date 6 months from Medical Report date for treatment or 1 year for monitor based on what is entered in the frequency screen.

13. Click on the Save button

***Important The data entered the Medical Information screen will not be saved unless you click on save button prior to accessing the Demographics, School or Back button.**

4.3 DEMOGRAPHICS

The Demographics screen is accessed through the Medical Information screen. This screen does not have any required entry fields, although, the physical address, primary addressee and Other addressee information may be updated and displays in the Patient Registration Face sheet in legacy.

4.3.1 DEMOGRAPHICS SCREEN PROCESSING RULES

- The Managing Physician information is populated from the Medical information screen in MTP and cannot be changed here.

- Client may have one or more "Known to Agencies." User can select or deselect multiple agencies from the list.

> **Known to Agencies**
>
> To select Know to Agency values, hold the "ctrl" key and click on the values you would like to select. Likewise, to deselect values from the Known to Agency list, hold the "ctrl" key and click on the highlighted values.

- User may add other agencies as free text in addition to what is listed in the table in the Other Agencies field.

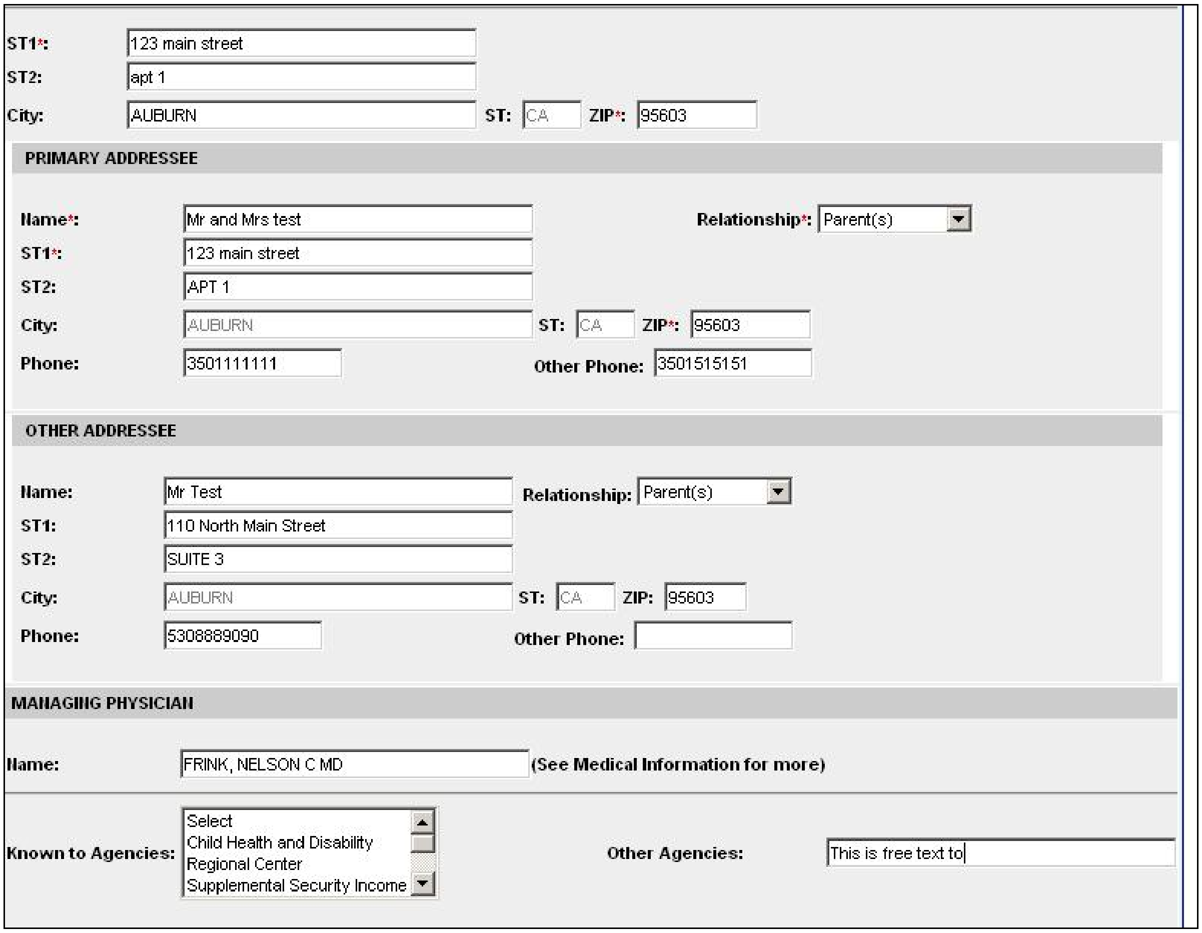


Figure 4-2, Demographics

4.3.2 STEPS FOR ADDING OR UPDATING DEMOGRAPHICS

1. Delete the existing data in the address fields and re enter the correct information to update existing demographic. Zip Code pop up screen will appear when clicking outside the zip code field.

2. Select or deselect agencies from the Known to Agencies listed.

3. Click on the Save button.

4.4 SCHOOL

The School Information screen is accessed by clicking on the School button at the bottom of the Medical Information screen. This screen allows a user to display and edit school related data.

School and Contact Update
A County Administrator or System Administrator may update school and agency related data through the Provider Registration screens. See section 35

4.4.1 ADDING SCHOOL/IEP CONTACT INFORMATION

User may select a county and school district for cases where the client attends a different school than the school district.

This school information will not update in legacy registration.

When entering an agency or LEA the contact and contact related fields will auto populate if only one contact exists. If more than one contact is associated to the agency or LEA then a pop up screen will appear for the user to select.

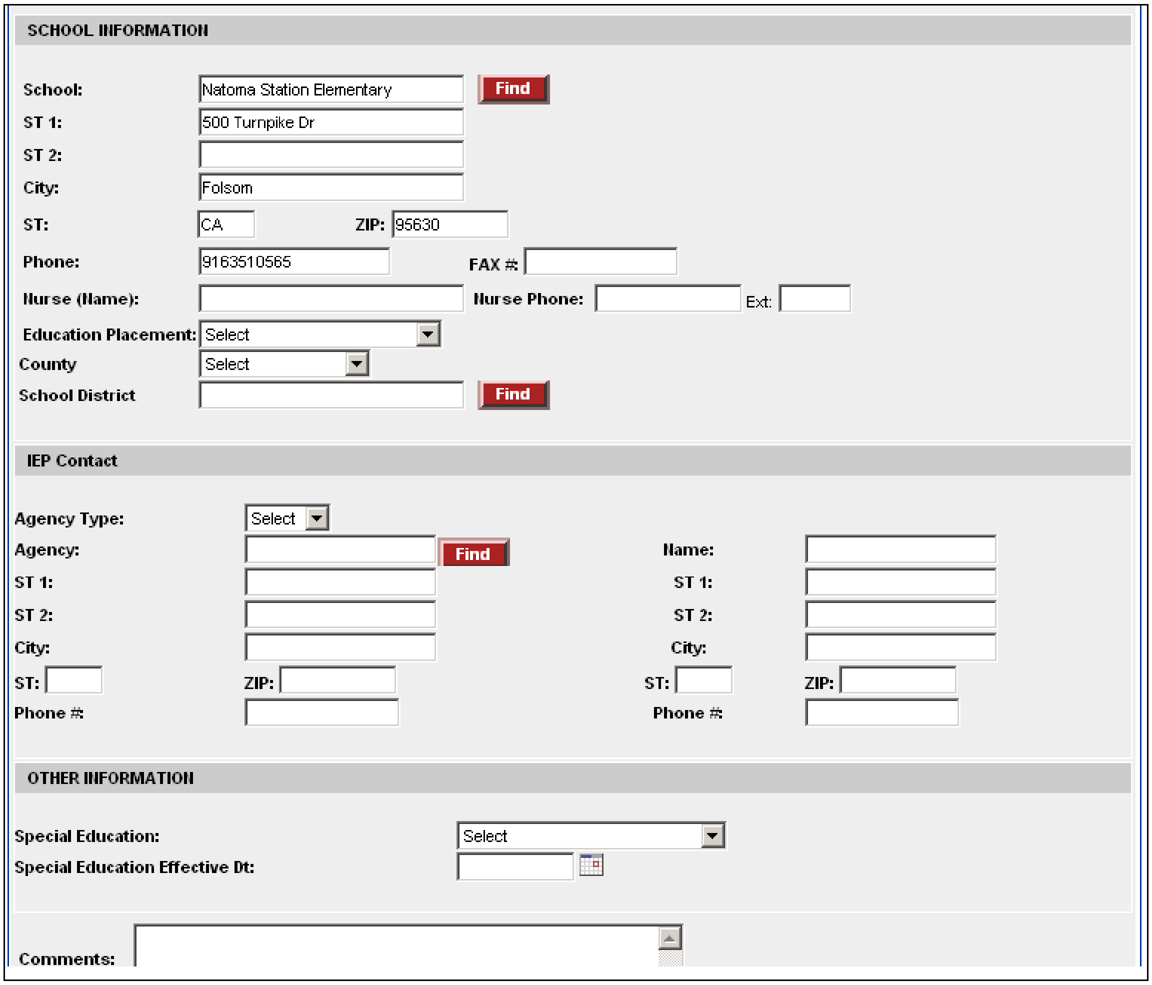


Figure 4-3, School information

4.4.2 STEPS TO ENTER SCHOOL INFORMATION

1. Enter the school name and click the Find button.

2. Select the school and related information will populate in the associated fields.

3. Select the education placement from the drop down.

4. Select the county the district list located.

> **County and District selection**
> School may not be in the district the child resides. The District field will allow you to select the county/district of the school.

4.4.3 STEPS TO ENTER IEP CONTACT/OTHER INFORMATION

1. Select the Agency type from the drop down. The available choices are LEA, SELPA and School. The table automatically filters the SELPA/LEAs based on the county/district selected in the County and District field.

2. Enter the name of the Agency and click the Find button or press enter. Select the name of the Agency from the list found by clicking on the hyperlink.

3. Select the special education from the drop down list.

4. Enter the effective date for the Special education.

5. Enter the comments in the comments field.

6. Click on the save button.

Figure 4-4, List of Agency

4.5 MEDS SEARCH

The Medi-Cal Eligibility Data System (MEDS) screen is accessed through the Medical Information screen. This screen allows the user to perform a Medi-Cal Online Provider Inquiry (MOPI) real time for the current date via a MEDS inquiry.

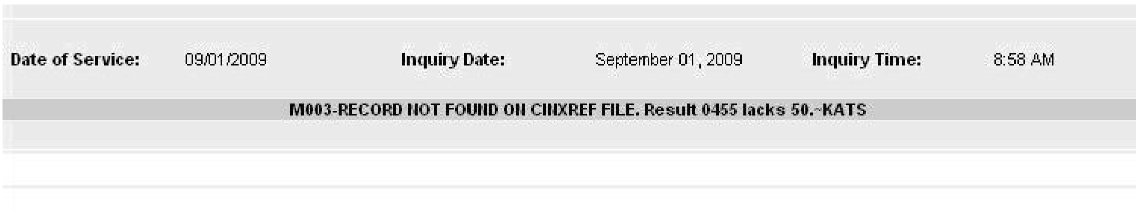


Figure 4-5, MEDS search screen

4.5.1 STEPS TO PERFORM AS MEDS INQUIRY

1 To access this page click on client info.

2 Upon entry to this screen, the user is shown the client’s eligibility for the current date and time.

3 This is a real time/display only screen and will not save.

5 ELIGIBILITY

MTP Eligibility menu option includes the sub menus: Referral, Case Status and Consent. These screens allows a user to add, modify, track, and retain client's medical therapy eligibility referral to the program, case management tracking, and consents.

5.1 REFERRAL

The Referral screen is accessed through the Eligibility menu option. When a client is referred to the MTP program the user tracks the initial referral date and any future re-referral information from this screen. Prior to receiving the medical report, this screen allows tracking of a proposed DX and MTU. All referral/transfer inter county history is tracked from this screen.

> **Referral screen access**
> The Medical Information screen must be completed prior to accessing the referral screen. A user will be restricted access to the screen until the referral screen is complete.

5.1.1 REFERRAL PROCESSING RULES

- Referrals must include a written medical report and treatment plan for therapy.
- All referrals must be screened through a medical consultant prior to therapy services being initiated.
- Current referral date cannot be prior to the 1^{st} referral date on the Patient Registration Face sheet CMSFS-01.
- Current referral date cannot be prior to the 1^{st} MTP referral date.
- 1^{st} MTP Referral Dt is display only. It is populated upon the first 1^{st} referral to the program and never changes.
- When the MTP case is closed, the following fields are saved only in the history:
    - Date
    - Type
    - County
    - Comments
- When a new MTP referral date is entered in the Current MTP Referral Date, the following fields are required.
    - MTP Referral source
    - Type

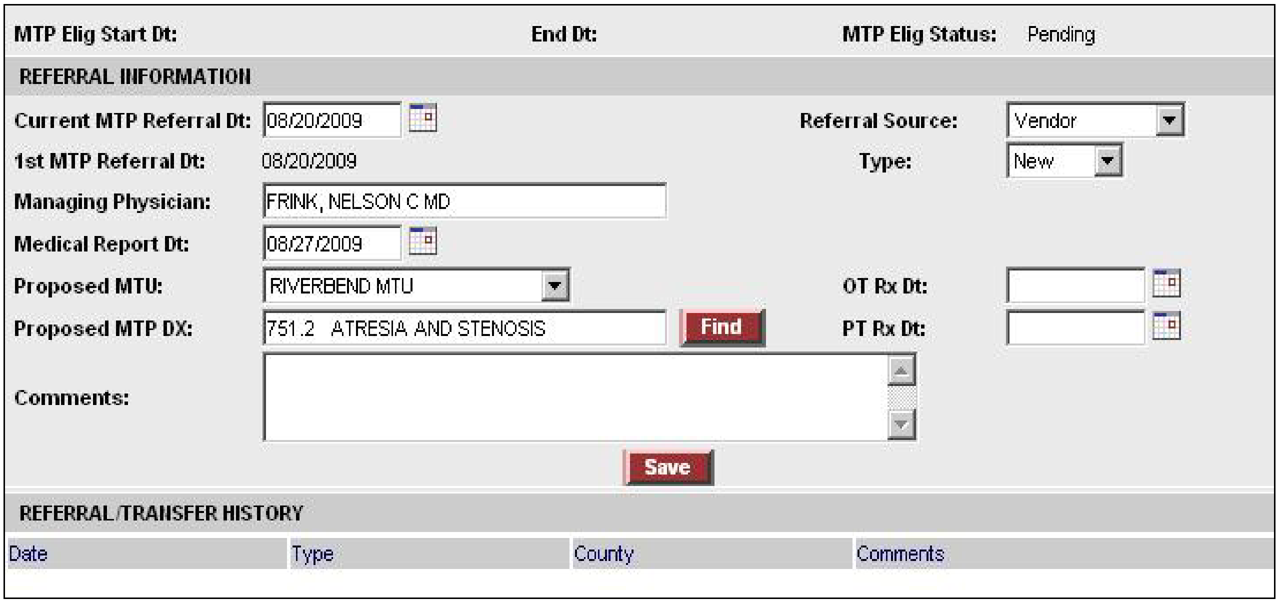


Figure 5-1, Referral Screen

5.1.2 STEPS TO ENTER A REFERRAL

1. Current Referral Dt: enter the date a client was referred to the Medical Therapy Program. Typically the CCS Administrative Therapist or designee will determine this date.

2. 1st MTP Referral Dt: enter date the client was 1st referred to the program. This date allows history to be tracked for referrals.

3. Managing Physician: pre populated from the Medical Information screen. Oversees/manages therapy and writes the prescriptions for therapy. This can either be a CCS Conference MD or a private MD.

4. Medical Report Dt: pre populated from the Medical Information screen. The date of the most current medical examination/report from the managing physician.

5. Proposed MTU: enter a proposed MTU. Prior to receiving the medical report, this field allows tracking a proposed MTU.

6. Proposed DX: enter a proposed diagnosis. Prior to receiving the medical report, this field allows tracking a proposed diagnosis.

7. Referral Source: enter who referred client to the program.

8. Type: enter the type of referral. Indicate if it a new, reopen or transfer referral.

9. OT RX Dt: enter date of the occupational therapy prescription

10. PT RX Dt: enter date of the physical therapy prescription..

5.2 CASE STATUS

The Case Status screen is accessed through the Eligibility menu option. This screen allows a user to track medical therapy eligibility for a client. Users may use this screen to assist in the annual review process. In addition, a user may indicate when a MTP case is closed or ineligible including the reason, date and determined by information and tracked accordingly.

> **Case Status screen access**
> The Medical information and Referral screens must be completed prior to accessing the case status screen. A user will be restricted access to the Case Status screen until all pre required screens are completed.
>
> **If the case status is changed to closed; the case may be reopened through the Medical Information screen.**

5.2.1 CASE STATUS PROCESSING RULES

- The MTP Case status and MTP Annual Review Date and Next Review Date display on the following screens:

- Medical Information
- Referral
- Consent tracking
- DME
- Case Status
- Therapy Services
- The MTP Case status, MTP Annual Review Date, or the Next Review Date changes are added/updated from the Case Status screen

Below is a matrix which lists the case statuses available for selection in the Case Status field depending on the current case status

IF Current Status is:	**Case Status options available.**
Pending	Open, Ineligible, Open Infant Criterion
Open	Closed, Ineligible
Open Infant criterion	Closed, Ineligible, Open
Closed	Reopen Pending, Open(State admin), Open Infant Criterion (State admin).
Reopen Pending	Open, Ineligible, Open infant criterion.

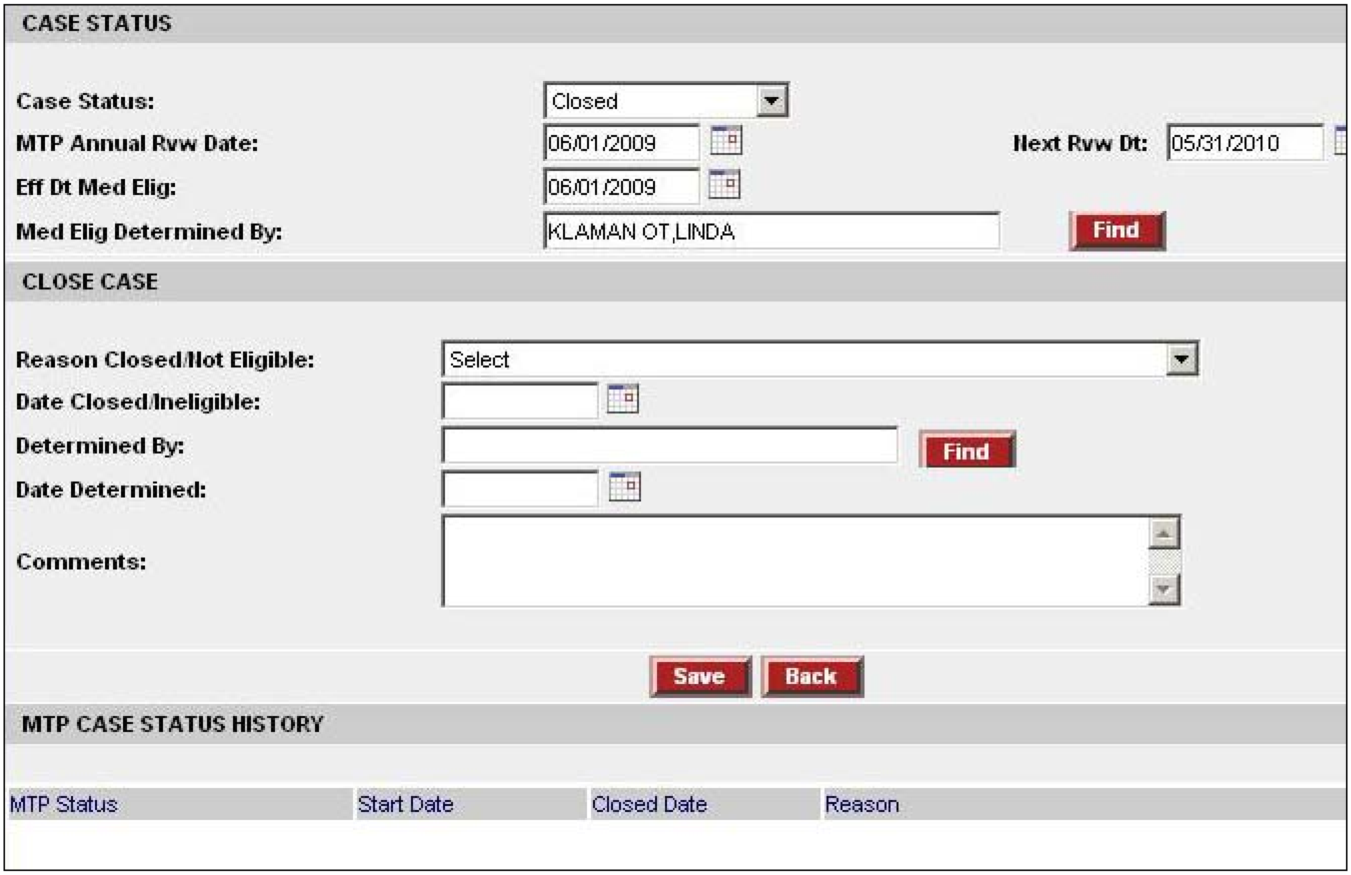


Figure 5-2, Case Status

- MTP Annual Review Date: enter the date the patient is reviewed for eligibility to the MTP program and will be re reviewed annually. The MTP annual review date cannot be prior to the Current Referral Date.

- The Next Review Date is date the MTP annual eligibility ends and must be greater then the MTP Annual Review Date. This date is auto populated 364 days from the annual review date but maybe changed by the user.

- Eligible dates cannot overlap from one period to the next.

- Eff Med Elig Dt is the date the initial date that the county Medical Consultant/Designee states the child has a MTP eligible condition. For children initially determined suspect for a MTP eligibility condition as "under 3 years of age", the date that MTP eligible condition is confirmed by the Medical consultant/designee shall be used.

Med Determined by: Enter the person that determined the medical eligibility.

- When the case is changed from any status to closed or ineligible, the following fields are required:

  Reason closed/ineligible
  Date Closed or Date ineligible
  Determined by
  Determined date

- When a case is closed or ineligible, the closure data is saved to history, the closure fields are cleared. If the closure data is entered and no Next Review Date End Date is on file, the closure date is copied to the Next Review Date End Date.

MTP STATUS	MTU STATUS				
		OPEN	**NEW REFERRAL**	**HOLD**	**CLOSED**
	PENDING	NO	NO	NO	NO
	REOPEN PENDING	NO	NO	No	YES if previously open
	OPEN	YES	YES	YES	YES
	CLOSED	NO	NO	NO	YES
	INELIGIBLE	NO	NO	NO	YES only if previously Open
	OPEN INFANT CRITERION (UNDER THREE)	YES	YES	YES	YES

5.2.2 STEPS TO ENTER A CASE STATUS

1. Case Status: enter MTP case status for tracking MTP eligibility
2. MTP Annual Review: enter a period the eligibility based on the current prescription
3. Next Review Dt: enter date when the next prescription is due.
4. Eff Dt Med Elig: enter date the medical eligibility is determined.
5. Med Elig Determined by: select he individual who determined the medical eligibility.
6. All medical therapy program eligibility history is tracked from this screen. Because a case can be made active and closed multiple times the tracking of the case status is necessary.

5.3 CONSENT

The Consent Tracking screen is accessed through the Eligibility menu option.

This screen allows a user to track consents entered. This includes Consents to Release and Consents to Obtain. The name of the agency, effective date of the consent, and the follow up date are collected and displayed. History is maintained to allow the user to see and modify previously entered/received consents.

5.3.1 CONSENT PROCESSING RULES

- The Name/Agency table is currently populated with known agencies.

> **Agency Add or Update**
> A County Administrator or System Administrator may update agency related data through the Provider Registration screens. See section:

- The LEA menu option is utilized to enter the Local Education Agency (LEA) agency assigned to the case.

- The Effective Date is the date of the agreement is signed between the LEA and CMS.

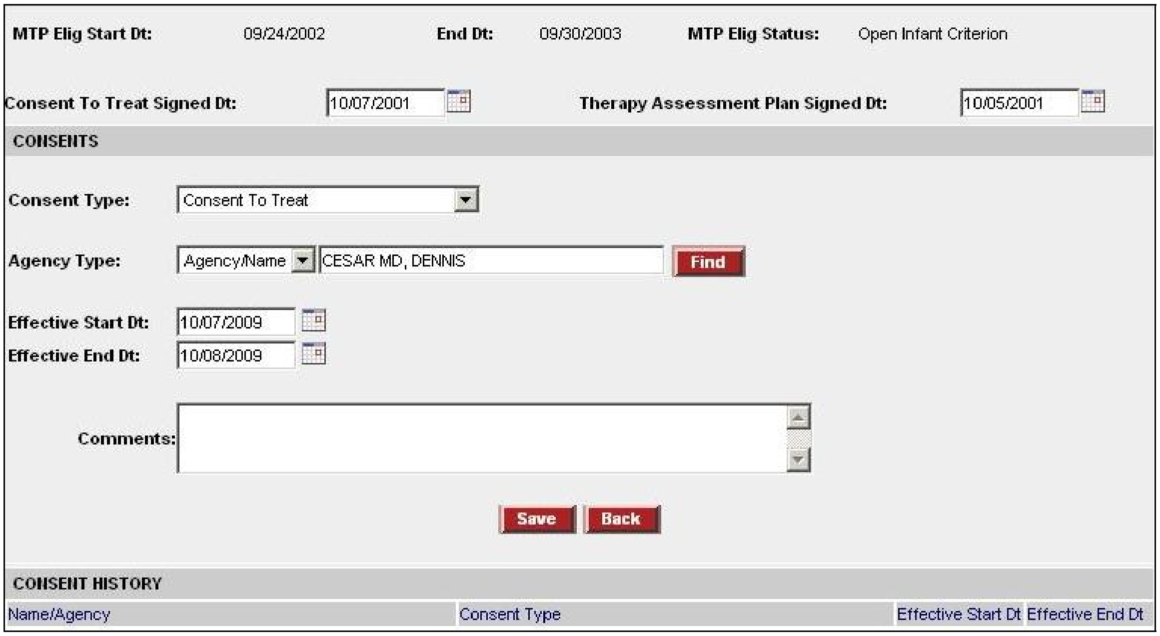


Figure 5-1, Consent

5.3.2 STEPS TO ADD A CONSENT

1. Consent to Treat Signed Dt: enter date the consent was signed.

2. Therapy Assessment Plan Signed Dt: enter date the therapy assignment plan was signed.

3. Consent Type: select if the consent is either release or obtain. Several types of consents for selection: Generic, LEA, Provider, Photo and Video

4. Agency Type: LEA or Agency/Name. After selecting the LEA from the menu option the name maybe entered and click on Find button to display list of LEAs.

5. Effective Start Dt: enter date of the agreement signed between the LEA/Agency and CMS.

6. Effective End Dt: enter end date of the agreement signed between the LEA/Agency and CMS.

7. Click on the Save button.

6 ASSIGNMENT

The Assignment menu option includes the following sub menus: MTU Assignment, Therapy Services and DME. Included in the Therapy Services screen includes buttons on the bottom of the screen to access the Vendored Therapy and the Frequency screen. This menu option is used to assign, modify and track data related to the medical therapy unit (physical site), OT/PT therapist, frequency of therapy or a vendor.

6.1 MEDICAL THERAPY UNIT ASSIGNMENT

Medical Therapy Services Unit Assignment screen is accessed through the Assignment menu option. MTU Assignment screen allows the user to add, modify and track MTU assignment and store to history.

6.1.1 MEDICAL THERAPY UNIT ASSIGNMENT PROCESSING RULES

- Only one MTU can be assigned to a patient at one time.
- The MTU assignment date must be equal to or greater than the MTP referral date. Assignment date cannot be in the future.
- The MTU may only be changed if the current MTU status is changed to closed and reopened with another date.
- Date Assigned to MTU cannot be prior to the MTP Referral Date.
- Date Opened to MTU is equal or greater than the Date Assigned to the MTU. The Date Opened cannot be in the future.
- New Referral status is used when the parents have not signed consents yet.
- Date closed to MTU cannot be prior to the Date Opened to the MTU.
- Hold allows services to be temporarily postponed until additional action is taken. This status will still allow this case to be counted in reports
- Determined Date cannot be prior to Opened Date.
- When Date Closed to MTU is populated, Reason Closed is required.

- When the MTU is closed, move to history and clear fields.
- When MTU status is Hold, the hold reason is require.
- Date Opened to the MTU: date the case was opened to the MTU. Only allowed to select open if MTP status is Open or Infant.
- Signed App Date: the date the application was signed. This field is pulled from the Application Status screen in legacy.

Figure 6-1, MTU Assignment

6.1.2 STEPS TO ADD A CLIENT TO A MTU

1. Date Assigned to MTU: enter a date in Date Assigned to the MTU. May be used for quality assurance to determine how long it takes to open the case to an MTU.
2. MTU: select an MTU from the drop down. All MTUs are listed the client including MTUs outside your county.
3. MTU Status: enter a status indicating the client's association to the MTU.
4. Dt Opened to MTU: Required if the Consent to Treat was signed.
5. Signed App Dt: Auto populates from Application Status option.
6. Follow up date: Enter the date you would like to follow up on the application process.
7. Click on the save button.
8. The data entered will display in the MTU Assignment History at the bottom of screen.

MTU Status
See the matrix to determine if MTU services can begin based on MTP status entered on the MTP case status field.

		MTU STATUS			
		OPEN	**NEW REFERRAL**	**HOLD**	**CLOSED**
MTP STATUS	**PENDING**	NO	NO	NO	NO
	REOPEN PENDING	NO	NO	No	YES if previously open
	OPEN	YES	YES	YES	YES
	CLOSED	NO	NO	NO	YES
	NOT ELIGIBLE	NO	NO	NO	YES only if previously Open
	NOT OPENED	NO	NO	NO	YES only if previously Open
	INFANT (UNDER THREE)	YES	YES	YES	YES

6.1.3 STEPS TO CLOSE CLIENT'S CASE TO THE MTU:

1. Select client from Search Results screen.
2. Select MTU Assignment from the menu.
3. Case Status: change the status from open to closed.
4. Dt Closed to MTU: enter the date closed.
5. Click the Save button.

6.1.4 Therapy Services OT/PT (Occupational/Physical therapy)

Therapy Services OT/OP screen is accessed through the Assignment menu option. The Vendor Therapy and Frequency screens are access through the Therapy Services OT/PT screen.

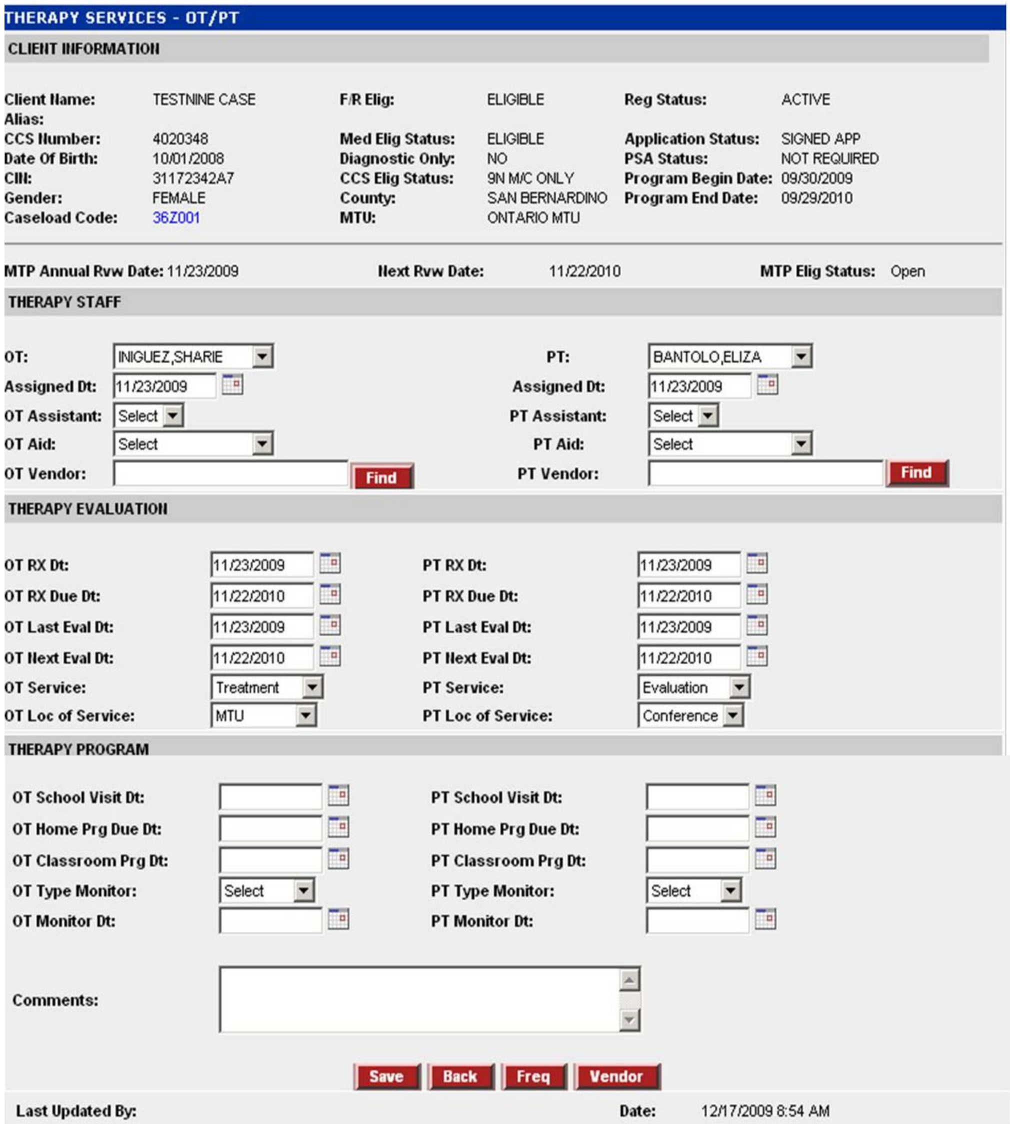
MTP Therapy Services allows the user to enter details about OT and PT services, track treatment hours and other dates for monitoring the client's progress. Vendored therapy data can be entered in order to track and monitor all therapy services even when it is Vendored.

Adding a therapist versus a Vendor
You may **NOT** add a therapist and a vendor at the same time

6.1.5 THERAPY SERVICES PROCESSING RULES

- When a therapist is entered an Assigned Date is required.
- The MTU assignment must be completed prior to selecting the therapist.
- The Assigned date cannot be prior to the Referral date.
- When Service is entered, the Location of Service is required.
- Last Evaluation Date must be prior to the Next Evaluation Date.
- Therapy Rx Date displays on or populates in this field from the Referral screen.
- When the user enters a Monitor Type, the Monitor Date is required.
- Only one CCS Therapist or Vendor can be add per therapy type.

MTU STATUS				
	OPEN	**NEW REFERRAL**	**HOLD**	**CLOSED**
PT SERVICE	YES	NO	NO	NO
OT SERVICE	YES	NO	NO	NO
ASSIGNED THERAPIST	YES	NO	NO	NO



THERAPY SERVICES - OT/PT

CLIENT INFORMATION

Client Name:	TESTNINE CASE	**F/R Elig:**	ELIGIBLE	**Reg Status:**	ACTIVE
Alias:					
CCS Number:	4020348	**Med Elig Status:**	ELIGIBLE	**Application Status:**	SIGNED APP
Date Of Birth:	10/01/2008	**Diagnostic Only:**	NO	**PSA Status:**	NOT REQUIRED
CIN:	31172342A7	**CCS Elig Status:**	9N M/C ONLY	**Program Begin Date:**	09/30/2009
Gender:	FEMALE	**County:**	SAN BERNARDINO	**Program End Date:**	09/29/2010
Caseload Code:	36Z001	**MTU:**	ONTARIO MTU		

MTP Annual Rvw Date: 11/23/2009 **Next Rvw Date:** 11/22/2010 **MTP Elig Status:** Open

THERAPY STAFF

OT:	INIGUEZ,SHARIE	**PT:**	BANTOLO,ELIZA
Assigned Dt:	11/23/2009	**Assigned Dt:**	11/23/2009
OT Assistant:	Select	**PT Assistant:**	Select
OT Aid:	Select	**PT Aid:**	Select
OT Vendor:	Find	**PT Vendor:**	Find

THERAPY EVALUATION

OT RX Dt:	11/23/2009	**PT RX Dt:**	11/23/2009
OT RX Due Dt:	11/22/2010	**PT RX Due Dt:**	11/22/2010
OT Last Eval Dt:	11/23/2009	**PT Last Eval Dt:**	11/23/2009
OT Next Eval Dt:	11/22/2010	**PT Next Eval Dt:**	11/22/2010
OT Service:	Treatment	**PT Service:**	Evaluation
OT Loc of Service:	MTU	**PT Loc of Service:**	Conference

THERAPY PROGRAM

OT School Visit Dt:		**PT School Visit Dt:**	
OT Home Prg Due Dt:		**PT Home Prg Due Dt:**	
OT Classroom Prg Dt:		**PT Classroom Prg Dt:**	
OT Type Monitor:	Select	**PT Type Monitor:**	Select
OT Monitor Dt:		**PT Monitor Dt:**	

Comments:

Save Back Freq Vendor

Last Updated By: **Date:** 12/17/2009 8:54 AM

Figure 6-2, Add Therapist

6.1.6 STEPS TO ADD THERAPY STAFF BY OT/PT

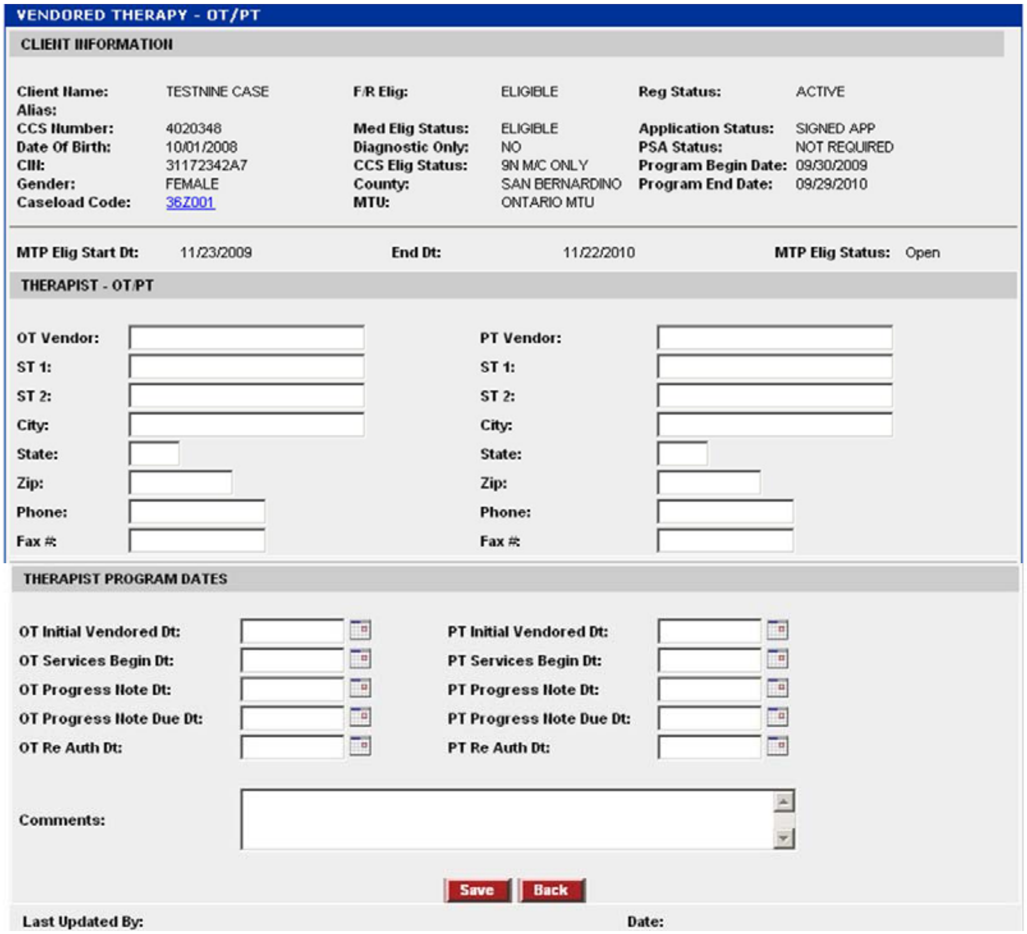
- MTU Assignment Status must be open in order to add a therapist.
- OT/PT: enter the OT or PT therapist from the drop down.
- Assigned Dt: enter the Assigned date.
- PT/OT Assistant: enter the OT or PT aide/asst from the drop down
- PT/OT Aid: select the OT or PT Service from the drop down.
- OT/PT RX Dt: enter the date from the OT RX dt.
- OT/PT RX Due Dt: enter the date for the OT or PT RX due date.
- OT/PT Last Eval Dt: enter the dates for the last evaluation and next evaluation
- OT/PT Next Eval Dt: enter the date for the next evaluation.
- OT/PT School Visit Dt: enter the date for school visit.
- Home Program Due Dt: enter the date home program due.
- OT/PT Type Monitor type: If monitor is entered, select the type of monitor from the drop down.
- ***Click on the Save button*** *__IMPORTANT__* The data entered the Therapy Services OT/PT screen will not be saved if you click on the Frequency, Vendor or Back button.

6.2 VENDOR THERAPY

Therapists do not have to be added if therapy services are being performed by a outside vendor. The vendor therapy screen allows tracking of information related to a vendor. The Vendor Therapy and Frequency screens are access through the Therapy Services OT/PT screen. Vendored therapy data can be entered in order to track and monitor all therapy services even when it is Vendored.

6.2.1 VENDORED THERAPY PROCESSING RULES

- MTP Case status must be: Open or Open Infant criteria.
- The initial Vendored Dt must be prior to the OT/PT Re Eval Dt
- The OT/PT Services Begin Dt must be after the OT/PT last Eval Dt (Therapy Services OT/PT screen)
- The current RX date must prior to the OT/PT Service Begin Dt
- The OT/PT Re Eval Due Dt must be after the OT/PT Service Begin Dt



VENDORED THERAPY - OT/PT

CLIENT INFORMATION

Client Name:	TESTNINE CASE	**F/R Elig:**	ELIGIBLE	**Reg Status:**	ACTIVE
Alias:					
CCS Number:	4020348	**Med Elig Status:**	ELIGIBLE	**Application Status:**	SIGNED APP
Date Of Birth:	10/01/2008	**Diagnostic Only:**	NO	**PSA Status:**	NOT REQUIRED
CIN:	31172342A7	**CCS Elig Status:**	9N M/C ONLY	**Program Begin Date:**	09/30/2009
Gender:	FEMALE	**County:**	SAN BERNARDINO	**Program End Date:**	09/29/2010
Caseload Code:	36Z001	**MTU:**	ONTARIO MTU		

MTP Elig Start Dt: 11/23/2009 **End Dt:** 11/22/2010 **MTP Elig Status:** Open

THERAPIST - OT/PT

OT Vendor:	**PT Vendor:**
ST 1:	**ST 1:**
ST 2:	**ST 2:**
City:	**City:**
State:	**State:**
Zip:	**Zip:**
Phone:	**Phone:**
Fax #:	**Fax #:**

THERAPIST PROGRAM DATES

OT Initial Vendored Dt:	**PT Initial Vendored Dt:**
OT Services Begin Dt:	**PT Services Begin Dt:**
OT Progress Note Dt:	**PT Progress Note Dt:**
OT Progress Note Due Dt:	**PT Progress Note Due Dt:**
OT Re Auth Dt:	**PT Re Auth Dt:**

Comments:

Save Back

Last Updated By: **Date:**

Figure 6-3, Vendored Therapy

6.2.2 STEPS TO ADD VENDORED THERAPY

Adding a Vendor
Do **NOT** add OT/PT therapist related data on the Therapy Services screen.

1. Begin entry by entering a vendor in Therapy Services OT/PT screen.
2. OT/PT Vendor: enter the full or partial name of the OT or PT vendor. Click on the find button. Select vendor from the vendor list.
3. *Click the Save button* ***Important* The data entered the Therapy Services OT/PT screen will not be saved if you click on the Vendor or Back button.**
4. Click on the Vendor button on the bottom of the screen. All the vendor address information populates on this Vendored Therapy OT/PT screen.
5. OT/PT Initial Dt: enter the OT or PT initial date for vendor therapy. The effective date for the authorization as requested by the MTP supervisor.
6. OT/PT Service Begin Dt: enter the date OT or Pt Vendor services began.
7. OT/PT Progress Note Dt: enter the OT or PT progress note date of the most current OT report from the vendored therapist.
8. OT/PT Progress Note Due Dt: enter date the OT or PT progress is due from vendor to the MTU (ie. 3 months after the date in #7)OT/PT Re Auth Dt: enter the OT or PT re authorization date.
9. OT/PT Re Auth Dt: enter the OT or PT re authorization date. Next potential re-authorization date.
10. Click the Save button.

6.2.3 THERAPY FREQUENCY OT/PT

Therapy Frequency OT/OP screen is accessed through the Therapy Services OT/PT screen.

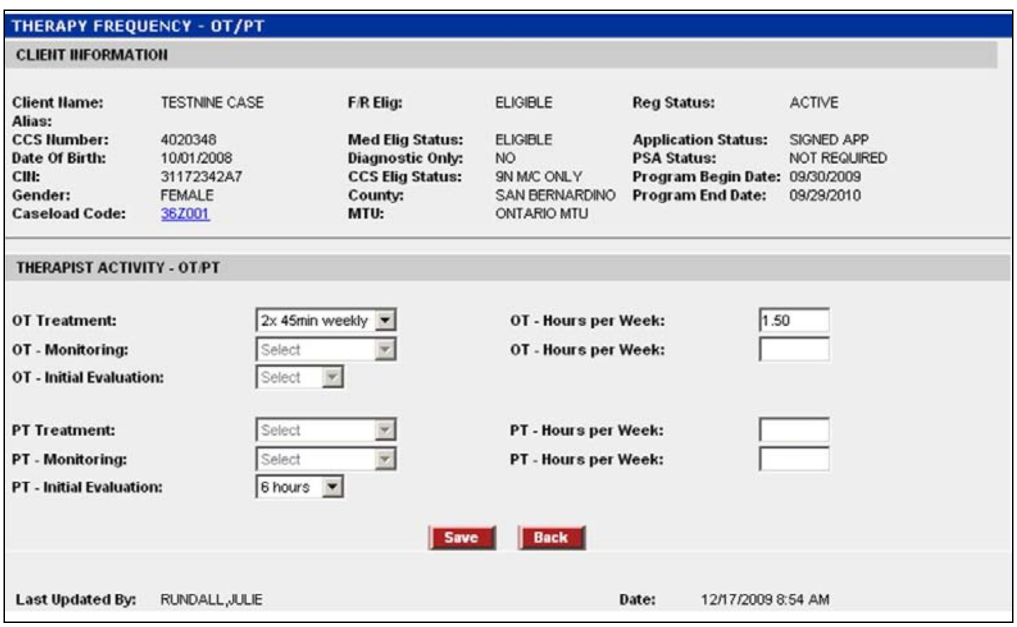
This screen allows a user to enter the frequency hours by therapist by Active or Monitor status. The field automatically calculates the hours worked per week for each event.

6.2.4 THERAPY FREQUENCY OT/PT PROCESSING RULES

- Treatment/Active therapy services would include a frequency equal to 1x/wk or greater

- Monitor is if a client only needs an annual evaluation, it would be considered 1x/year monitor. This is because active and monitor services also includes consultation PRN

- Evaluation for those clients who are either new to the MTU and need an initial evaluation or clients who have not had PT or OT services at all, or for some time and now need an evaluation. This frequency would **<u>not</u>** include any consultation. After the evaluation is completed and the therapy plan is signed, then the frequency would change to either monitor or active or no therapy indicated. Entered in hours – no calculation.



THERAPY FREQUENCY - OT/PT

CLIENT INFORMATION

Client Name:	TESTNINE CASE	F/R Elig:	ELIGIBLE	Reg Status:	ACTIVE
Alias:					
CCS Number:	4020348	Med Elig Status:	ELIGIBLE	Application Status:	SIGNED APP
Date Of Birth:	10/01/2008	Diagnostic Only:	NO	PSA Status:	NOT REQUIRED
CIN:	31172342A7	CCS Elig Status:	9N M/C ONLY	Program Begin Date:	09/30/2009
Gender:	FEMALE	County:	SAN BERNARDINO	Program End Date:	09/29/2010
Caseload Code:	36Z001	MTU:	ONTARIO MTU		

THERAPIST ACTIVITY - OT/PT

OT Treatment:	2x 45min weekly	OT - Hours per Week:	1.50
OT - Monitoring:	Select	OT - Hours per Week:	
OT - Initial Evaluation:	Select		
PT Treatment:	Select	PT - Hours per Week:	
PT - Monitoring:	Select	PT - Hours per Week:	
PT - Initial Evaluation:	6 hours		

Save Back

Last Updated By: RUNDALL,JULIE Date: 12/17/2009 8:54 AM

Figure 6-4, Frequency

6.2.5 STEPS TO ADD THERAPY FREQUENCY

1. OT/PT Treatment: select the OT or PT Treatment frequency from the drop down. This is field will be enabled for entry only if Treatment is selected on the Therapy Services OT/PT screen.
2. OT/PT Monitor: select the OT or PT Monitor frequency from the drop down. This is field will be enabled for entry if Monitor is selected on the Therapy Services OT/PT screen.

> **Adding an initial evaluation**
> The initial evaluation automatically populate with 120 units for every client if Evaluation is selected on the Therapy Services OT/PT screen and the field is disabled when the treatment or monitor is entered

3. OT/PT Initial Evaluation: verify the evaluation is populated correctly. If Evaluation selected on the Therapy Services OT/PT screen.
4. Click the Save button

6.3 DME TRACKING

DME Tracking screen is accessed by selecting the Client Info menu option. This screen order tracking allows a user to track equipment repairs and/or orders for a specific client. If the order was cancelled this data is also tracked. All equipment is stored in a history log with a unique number on this screen and sorted by number for future reference. Upon entry to this screen, the user automatically views the details related to client's DME order.

Figure 6-5, Access the DME Screen

6.3.1 DME TRACKING PROCESSING RULES

- Item: what the item is. Example: Wheelchair spring
- Payor is identified as the source of payment: CCS, Medi-Cal, Regional Center, Insurance, other.
- Rx Recvd Dt the date when prescription is received for the item.
- DME Provider the name of the provider who will be providing the equipment. Auto populate when the SAR # is entered.
- Spec Appt Dt is the date met with vendor, child, parents to discuss and decide upon the specifications for the DME.
- Spec Rcvd Dt is the date received the written detailed quote from the provider of what was determined at the previous meeting.
- MTU Review Dt is the date someone at the MTU review the quote for appropriateness prior to the review for authorization.
- Approved Dt is the date equipment was approved for authorization by person who has authority in the county to do this
- PT/OT Therapist is either the client's occupational or physical therapist. Not both.

- Justification Recvd Dt: is the date the justification for the equipment received or completed

- HCPCS Code is procedure code associated to the item

- Category of Services is the action taken for the item such as initial order, New order, replace, repair or modify.

- Auth # is the SAR number associated to the authorized item.

- Item Revd Dt is the date the equipment was delivered and accepted by the child

- Cancellation Date is the date the item request is cancelled.

- Cancellation Reason is the reasons for cancellations such as child moved, change of needs, not financially eligible, not interested in services, reached 21 years of age, other

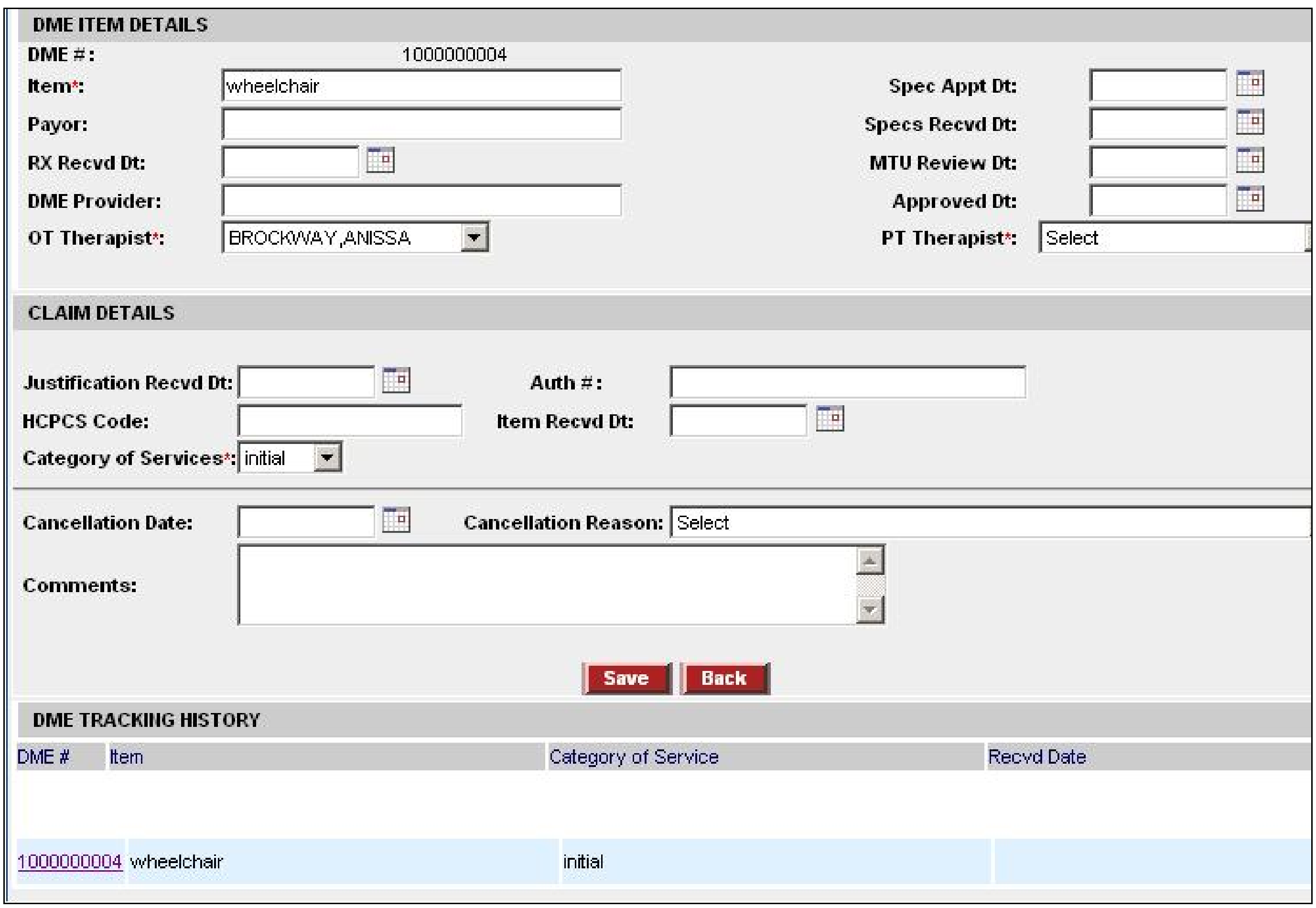


Figure 6-6, DME item Details

6.3.2 STEPS TO ENTER DME TRACKING DETAILS

1. Enter the item name and the required fields and click the Save button.

2. A system generated DME order tracking number is assigned to every item.

3. The details can be modified or deleted on every item entered.

4. Item: what the item is. Example: Wheelchair part

5. Payor: identify who could be paying for the item: CCS, Medi-Cal, Regional Center, Insurance, other.

6. Rx Recvd Dt: enter the date when prescription is received for the item.

7. DME Provider: name of the provider who will be providing the equipment. Auto populate when the SAR # is entered.

8. Spec Appt Dt: date met with vendor, child, parents to discuss and decide upon the specifications for the DME.

9. Spec Rcvd Dt: date received the written detailed quote from the provider of the what was determined at the previous meeting.

10. MTU Review Dt: date someone at the MTU review the quote for appropriateness prior to the review for authorization.

11. Approved Dt: enter the date equipment was approved for authorization by person who has authority in the county to do this

12. PT/OT Therapist: select either the client’s occupational or physical therapist. Not both.

6.3.3 STEPS TO ENTER CLAIM DETAILS

1. Justification Recvd Dt: enter the date the justification for the equipment received or completed

2. HCPCS Code: select procedure code associated to the item

3. Category of Services: select the service related to the item such as initial order, New order, replace, repair or modify.

4. Auth #: enter the SAR number associated to the authorized item.

> **SAR # and DME provider fields**
> The DME Provider will auto populate based on the SAR number entered in the Auth# field.

5. Item Revd Dt: enter the date the equipment was delivered and accepted by the child

6. Cancellation Date: enter the date the item request is cancelled.

7. Cancellation Reason: select the reasons for cancellations such as child moved, change of needs, not financially eligible, not interested in services, reached 21 years of age, other

8. Comments: Any comments related to the DME order.

9. Click the Save button.

- Click the Print DME button to print the DME tracking details for the client.

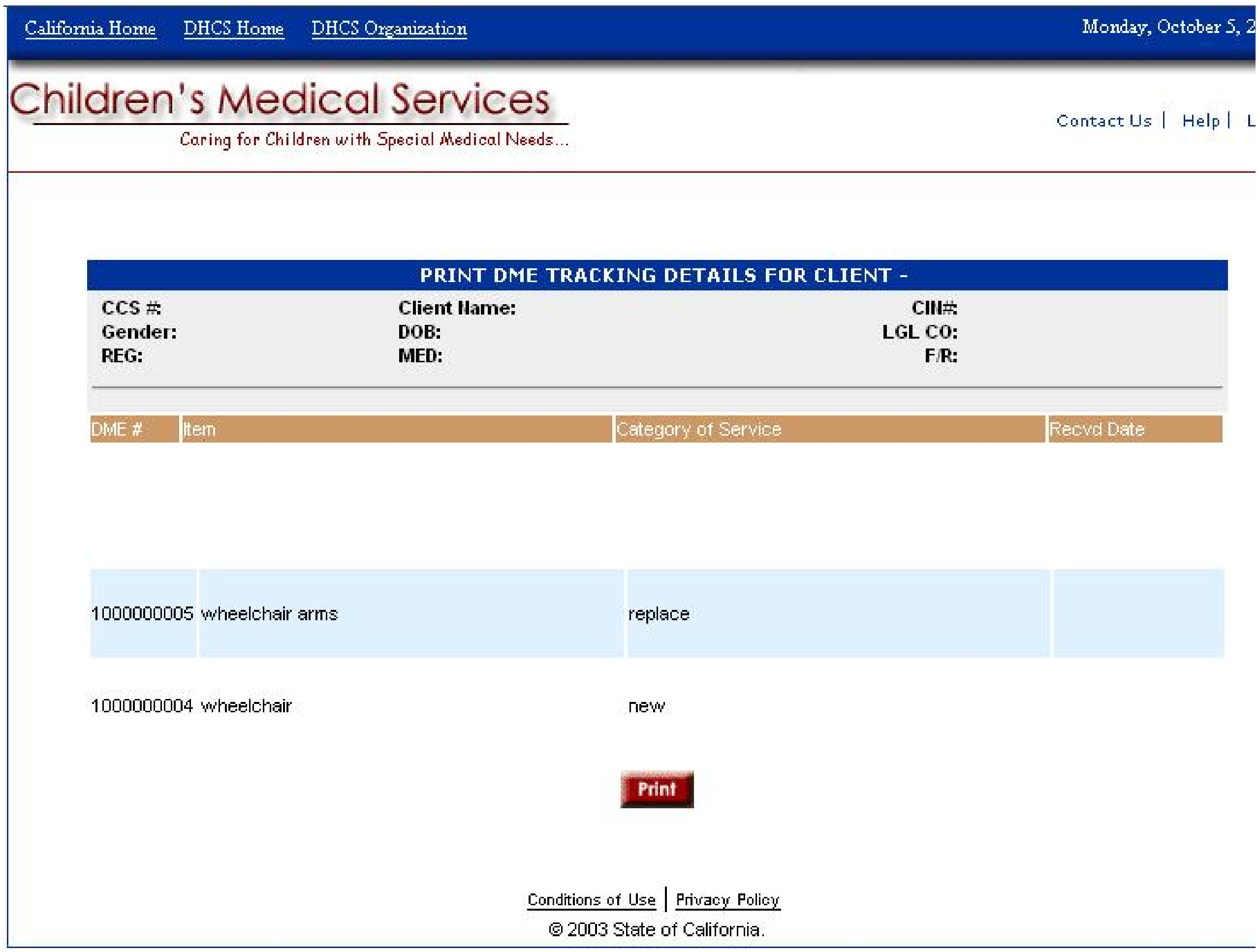


Figure 6-7, Print DME tracking details

7 CONFERENCE SCHEDULING

The MTP Conferencing Scheduling module allows a user to search for an existing conference, add a new conference, modify an existing conference, delete an existing conference and print out a conference report.

7.1 CONFERENCE SCHEDULING

The MTP Conference Scheduling module is access by hovering the mouse pointer over the 'CCS Modules' option to display the menu drop-down list.

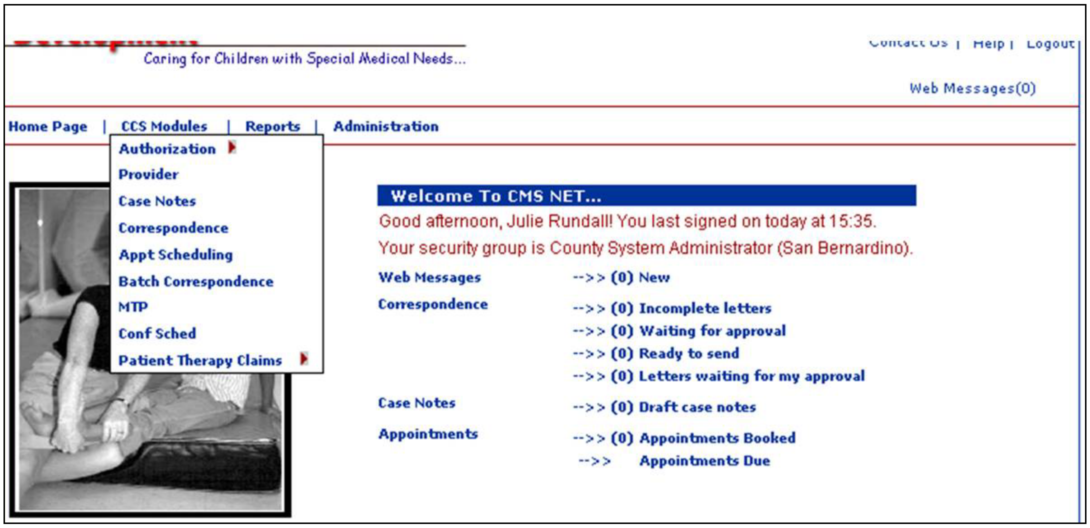
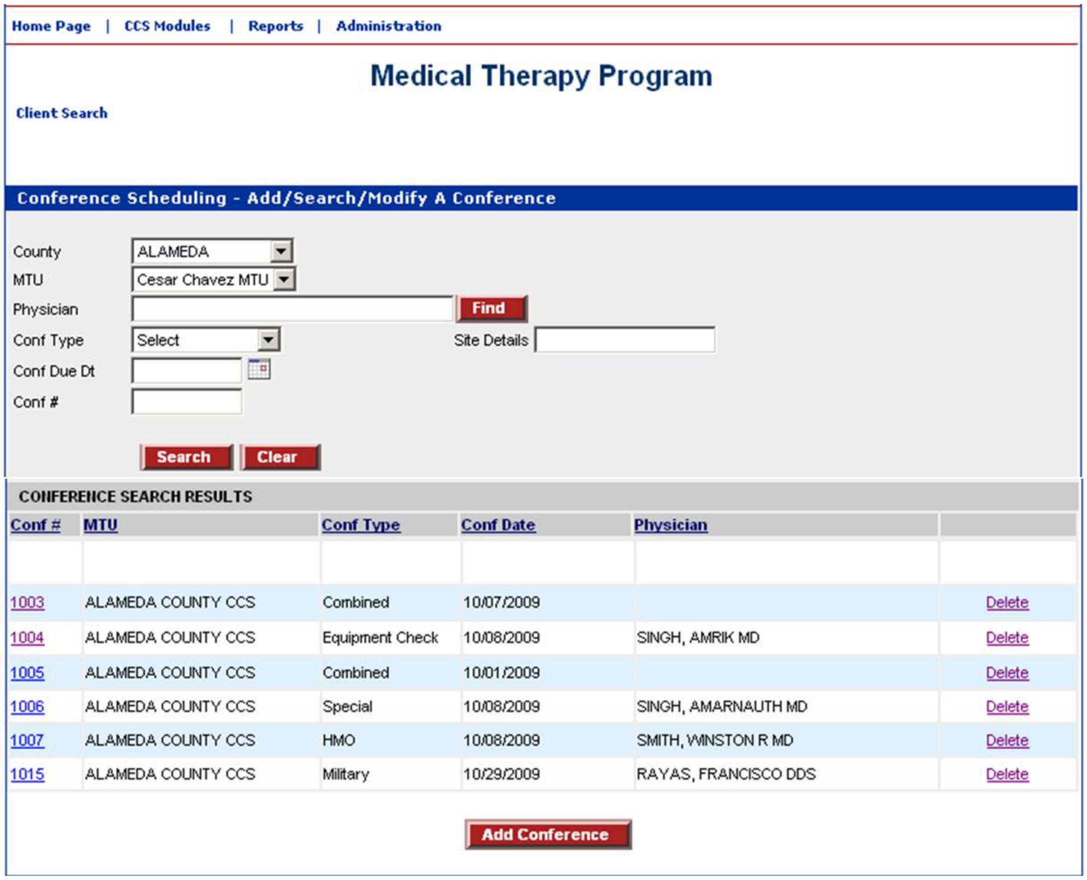


Figure 7-1, Add a new conference

7.1.1 CONFERENCE SCHEDULING PROCESSING RULES

- Once the conference has been selected or set, the user has the ability to add clients to the set conference.
- The time is specific to selected client for the specified conference.
- A client may be deleted from a scheduled clinic.
- A conference may be deleted and all of the associated client's will be removed.
- A client may have more than one appointment in any given conference.



7.1.2 STEPS TO SEARCH FOR AND OR ADD A CONFERENCE

Enter one or more of the following search criteria:

1. County: select county from the drop down menu.

2. MTU: select a MTU from the drop down menu.

3. Physician: enter a partial first and last name of the physician and press find. Select the physician.

4. Conf Type: select conference type from the drop down menu.
5. Site Details: enter site details. (Optional).
6. Conf Due: enter Conference date
7. Conf #: the conference number is system generated.
8. Click on the search button, if the conference does not appear in the Conference Search Results then click Add Conference button to add a new conference.
9. To access the client details click on the highlighted conference number on the bottom of the screen.

Adding/Searching a Conference
The fields will clear allowing additional criteria to be entered to add or search for a new conference

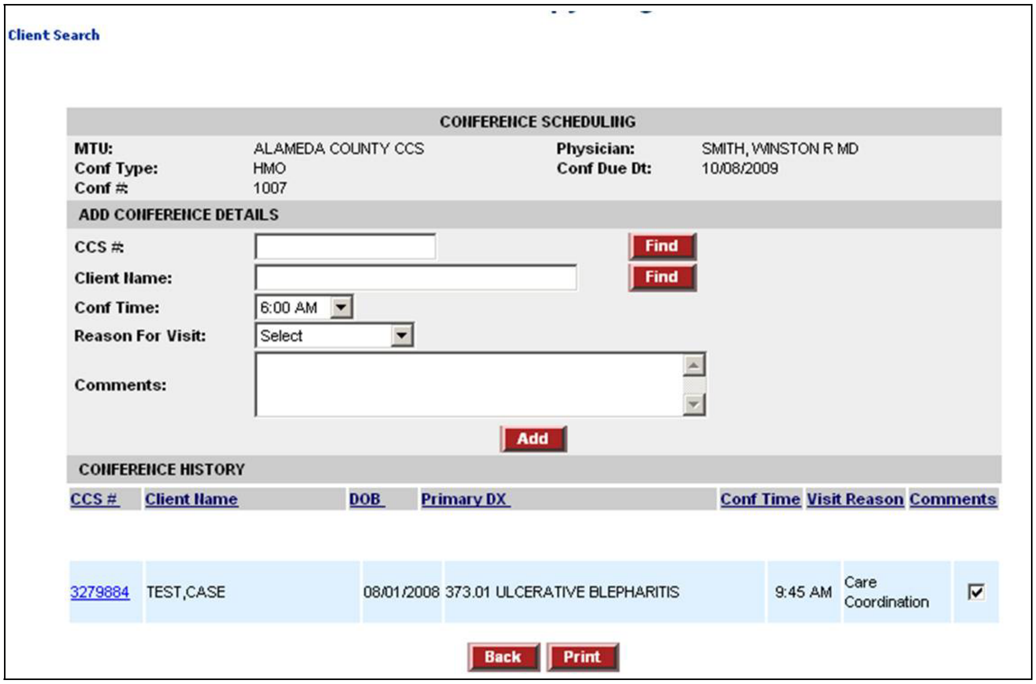


Figure 7-2, Add a new client to a conference

7.1.3 STEPS TO ADD A CLIENT TO A CONFERENCE

1. CCS #: enter a case number and press enter or click on the Find button.
2. Client Name: enter last,first name and press enter or click on the Find button.
3. The standard search results screen will appear for selection.
4. Conf Time: select from available times between 6 a.m. – 8 p.m. from the drop down.
5. Reason select from the available reasons for visit:
6. Click the Add button.

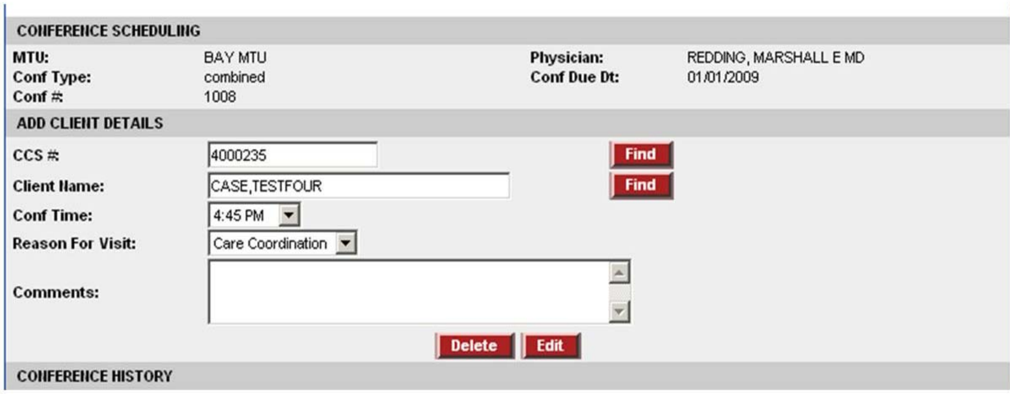


Figure 7-3, Delete a client from a conference

7.1.4 STEPS TO DELETE A CLIENT FROM A CONFERENCE

1. Select the conference from the Conference Scheduling Search screen.
2. Click on the CCS # you want deleted from the Conference History.
3. The client details will display.
4. Click on the Delete button.
5. A message will display confirming your delete request.

7.1.5 STEPS TO SEARCH OR VIEW AN EXISTING CONFERENCE.

Enter one or more of the following search criteria:

1. County: Select a county from the drop down and/or
2. MTU: Select a MTU from the drop down menu or
3. Physician: Enter a partial first and last name of the physician and press find. Select the physician. Or
4. Conf Type: select conference type from the drop down menu or
5. Conf Due Dt: Enter the conference due date.
6. Click the Search button to search for an existing conference.
7. The conference associated to the search criteria will display at the bottom of the screen. To add a client to the conference click on the highlighted conference number. The conference detail screen will appear.

7.1.6 STEPS TO MODIFY CLIENT DETAILS WITHIN A CONFERENCE

1. Search for and select conference details by search clicking on the highlighted conference number on the bottom of the screen:
2. Existing clients added to the conference will display at the bottom of the screen.
3. Click on the CCS # to modify the details associated to the client and click the Edit button.
4. The client will display at the bottom with the most recent revision.

7.1.7 STEPS TO DELETE A CONFERENCE

1. Select the existing conference by entering the search criteria. The list of associated conferences will appear at the bottom of the screen.
2. Select the conference you wish to delete and click on the “Delete” option under the conference search results.

The following message will appear:

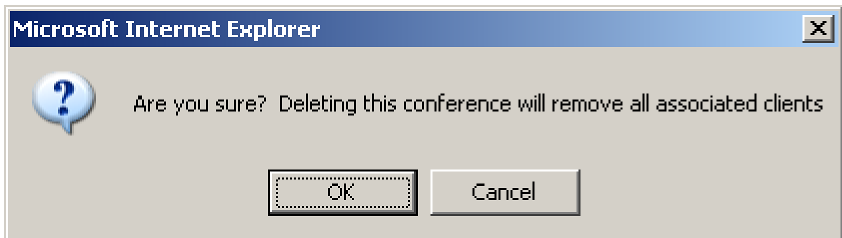


Figure 7-4, Deleting an existing conference

Click the OK button and the conference and associated clients will be deleted.

Deleting a Conference
A deleted conference cannot be restored.

7.1.8 STEPS TO PRINT A CONFERENCE

1. Select the existing conference by entering the search criteria. The list of associated conferences will appear at the bottom of the screen.
2. Select conference details by search clicking on the highlighted conference number on the bottom of the screen.
3. Verify the conference header to ensure you have selected the correct conference. All of the clients associated to this conference will be listed at the bottom of the screen.
4. Click the Print button.

CONFERENCE SCHEDULE

MTU:	KERN COUNTY CCS	**Physician:**	CHANG, RICHARD M
Conf Type:	Pediatric	**Conf Due Dt:**	11/16/2009
Conf #:	1061		

CCS#	Client Name	DOB	Primary DX	Conf Time	Visit Reason	Site Details
4086271	CASE,FIRST	11/01/2008	343.0 DIPLEGIC	1:00 PM	Eligiblity	Site details here

Figure 7-5, Print a conference

8 PATIENT THERAPY CLAIMS

The Patient Therapy Claims module is access by hovering the mouse pointer over the 'CCS Modules' option to display the menu drop-down list. This Patient Therapy Claims module is used to enter, modify, print and track details relating to PT and OT services provided by a therapist to a client. This module also allows the user to create a HIPAA compliant record layout to upload to the fiscal intermediary for processing for payment for services.

> **Transmission processing**
> Patient therapy claims are created and batched through the Patient Therapy Web module but the transmission process will remain in the CMS Net Legacy system.

8.1.1 STEPS TO CREATE AN ELECTRONIC CLAIM

1. Enter required client details in Medical Information, Referral, Case Status, MTU Assignment, Therapy Services and Frequency screens.

2. Enter one or more PTR days from the Create PTR screen.

3. Select PTR Batch option from the menu and enter a county and MTU. Select Create Batch.

4. Select the PTR month/year you want included in the batch. A message will tell you the new batch number.

5. Search for your batch and from the search results screen and click on the close button. Now the batch(s) will appear in legacy for transmission

6. The transmission process has not changed from before. Select Create and Transmit PTR claim. Enter the number 1. Enter the batch number(s).

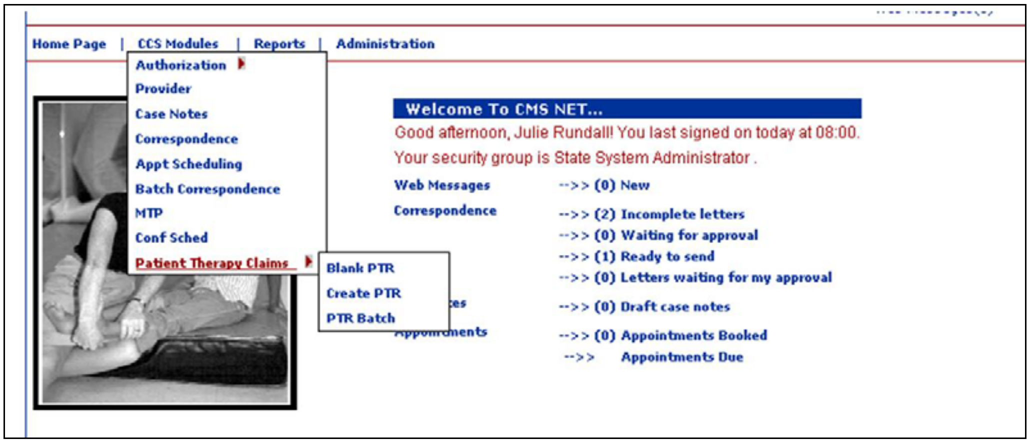


Figure 8-1 Create a PTR

8.2 GENERATE A BLANK PTR

Generate a Blank PTR screen is accessed by selecting the Patient Therapy Claims menu option. Generate quarterly blank PTR allows a user to manually enter and track therapy services on a form. In addition, this form can be used for key entry purposes.

8.2.1 GENERATE A BLANK PTR PROCESSING RULES

- Client must be assigned to an MTU in order to generate a blank PTR.

Figure 8-2 Generate a blank PTR

8.2.2 STEPS TO GENERATE AN INDIVIDUAL BLANK PTR

1. PTR Criteria: select individual PTR.
2. Quarter: enter the Quarter by month and year.
3. Click the Submit button.
4. Select client from the Client Search screen. Click on the Continue button.
5. All PTR for the specified criteria will print to your designated printer.

Figure 8-3 Generate a blank OT/PT BatchPTR

8.2.3 STEPS TO GENERATE AN OT/PT BATCH PTRS

1. PTR Criteria: select PT Batch or OT Batch.
2. County: enter the county associated with the PTRs.
3. MTU: enter the MTU.
4. Quarter: enter the Quarter by month and year.
5. Click the Submit button.
6. All PTR for the specified criteria will print to your designated printer.

PATIENT THERAPY RECORD

1-15 minutes = 1 unit
16-37 minutes = 2 units
38-52 minutes = 3 units
53-67 minutes = 4 units
68-82 minutes = 5 units
83-97 minutes = 6 units
98-112 minutes = 7 units
113-120 minutes = 8 units

"T"–Therapist not available:
(1) Ill
(2) Medical appointment with another child
(3) Meeting
(4) Other

"P"–Patient not available:
(1) Ill
(2) School cancelled
(3) Parent cancelled
(4) Failed appointment
(5) Holiday
(6) Other

S–Patient cooperation was:
(A) Good
(B) Fair
(C) Poor

O–Direct/Indirect

A–Response to treatment:
(A) Good
(B) Fair
(C) Poor

P–Plan:
(A) Continue
(B) Modify
(C) Re-evaluate

(1) MTU conference
(2) Private
(3) CCS special center

	Month: 1	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	Total	
	S:																																	
	O: Treatment																																	A
DIRECT	Evaluation																																	B
	Case Conference																																	C
	Field Visit																																	D
	Mileage																																	E
	Consultation																																	F
INDIRECT	Documentation																																	G
	Other																																	H
	A:																																	
	P:																																	

	Month: 2	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	Total	
	S:																																	
	O: Treatment																																	A
DIRECT	Evaluation																																	B
	Case Conference																																	C
	Field Visit																																	D
	Mileage																																	E
	Consultation																																	F
INDIRECT	Documentation																																	G
	Other																																	H
	A:																																	
	P:																																	

	Month: 3	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	Total	
	S:																																	
	O: Treatment																																	A
DIRECT	Evaluation																																	B
	Case Conference																																	C
	Field Visit																																	D
	Mileage																																	E
	Consultation																																	F
INDIRECT	Documentation																																	G
	Other																																	H
	A:																																	
	P:																																	

Signature(s)	Date
☐ Physical Therapy ☐ Occupational Therapy	

Treatment diagnosis	Primary diagnosis
373.02 - SQUAMOUS BLEPHARITIS	373.01 - ULCERATIVE BLEPHARITIS

Patient Name	Date of birth	CIN	CCS number
TEST,CASE	08/01/2008	32563932A5	3279884

Year	Quarter	Medical direction	County of legal residence	MTU and county number
2010	1	KAISER	Imperial	ONTARIO MTU 13

Therapy D/C

Figure 8-4 Blank PTR

8.3 CREATE PTR

Create PTR screen is accessed by selecting the Patient Therapy Claims menu option. PTRs are entered in a month/year format. Users create a month/year PTR and add individual service days to the month/year PTR. This module allows a user to enter PTRs for client therapy services, by MTU and PT/OT therapist.

> **Create PTR**
> PTR and batch process is started in the web module and the transmission process is finished in the Legacy system.

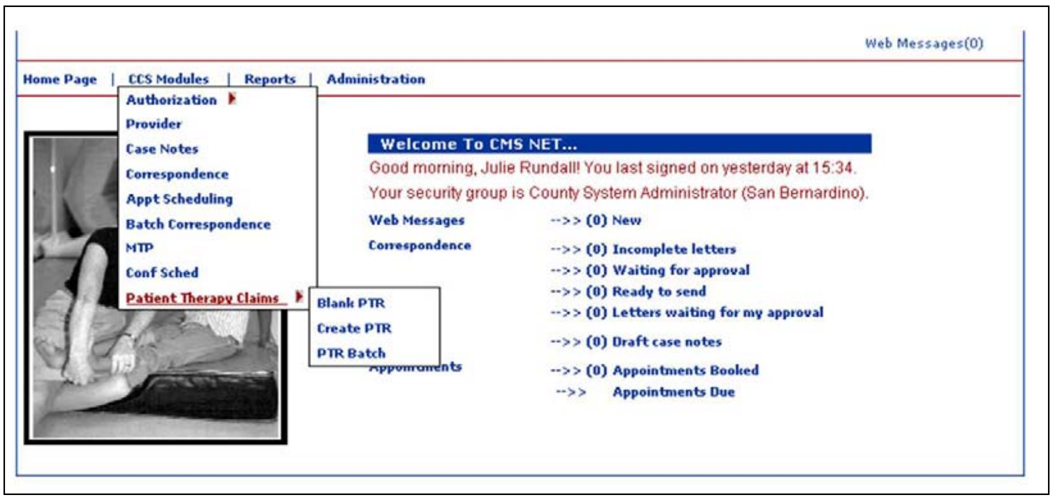


Figure 8-5 Create PTR

8.3.1 PTR SEARCH – CLIENT SCREEN

PTR Search – Client screen is accessed by selecting the Patient Therapy Claims menu option. Users may search in a combination on ways. This module allows a user generate a report of all un-reviewed PTRs as well.

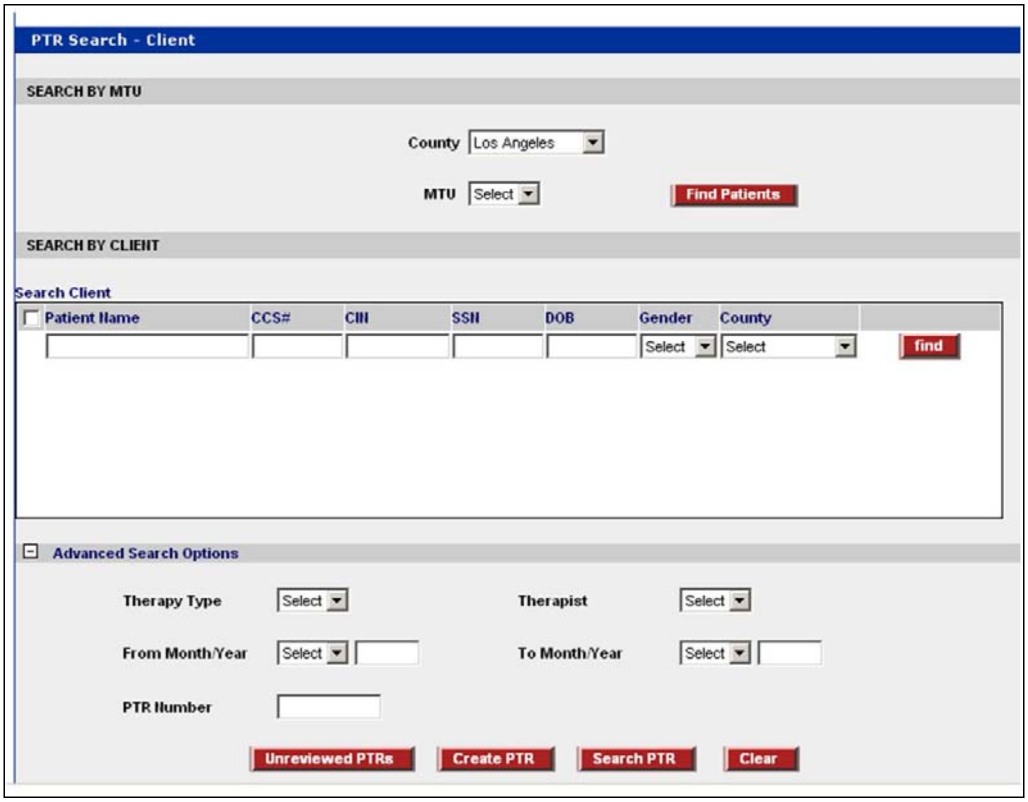


Figure 8-6 PTR Search - Client

- Search by an individual client. To add a PTR click on the Create PTR.
- Search for all clients by County and MTU. Click on the Advance search option and select a date range to see all PTRs by county, MTU and date range.
- Advance search option: first select the county and MTU; click on the plus sign next to the Advance Search Options. Select the therapy type and therapist for more specific results. Enter the From Month/Year and the To Month/Year and click on the Search PTRs. You may also search by the exact PTR number if you have it as well.
- Click on Un-reviewed PTRs button to display a report of all PTRs un-reviewed by County, MTU and date.
- Click on the Clear button to clear previously entered search criteria.

8.4 ACTIONS FROM THE PTR SEARCH RESULTS SCREEN

8.4.1 ADD AN EXCEPTION CODE

1. Select a client from the PTR Search screen.
2. Click on the Search PTR button.
3. On the Search Results screen check the box next to the PTR you would like to add an exception.
4. Enter an Exception Code from the drop down list at the top of the screen.
5. Click on Add Exception Code.
6. The selected Exception Code will be listed next to the PTR# field on the Search Results screen.

8.4.2 REMOVE AN EXCEPTION CODE

1. Select a client from the PTR Search screen.
2. Click on the Search PTR button.
3. On the Search Results screen check the box next to the PTR you would like to remove the exception from.
4. Click on Remove Exception Code.
5. The Exception Code will be removed from the PTR# field on the Search Results screen.

8.4.3 STEPS TO DELETE A MONTH/YEAR PATIENT THERAPY RECORD

1. Select a client from the PTR Search screen.
2. Click on the Search PTR button.
3. On the Search Results screen check the box next to the PTR to delete.
4. Click the delete button and the PTR will be deleted.

> **Deleted PTR**
> Be very careful using this function. Once the month/year PTR is deleted there is no way to restore the PTR record.

8.4.4 PRINT PTR

1. Select a client from the PTR Search screen.
2. Click on the Search PTR button.
3. On the Search Results screen check the box next to the PTR to print.

8.4.5 BACK

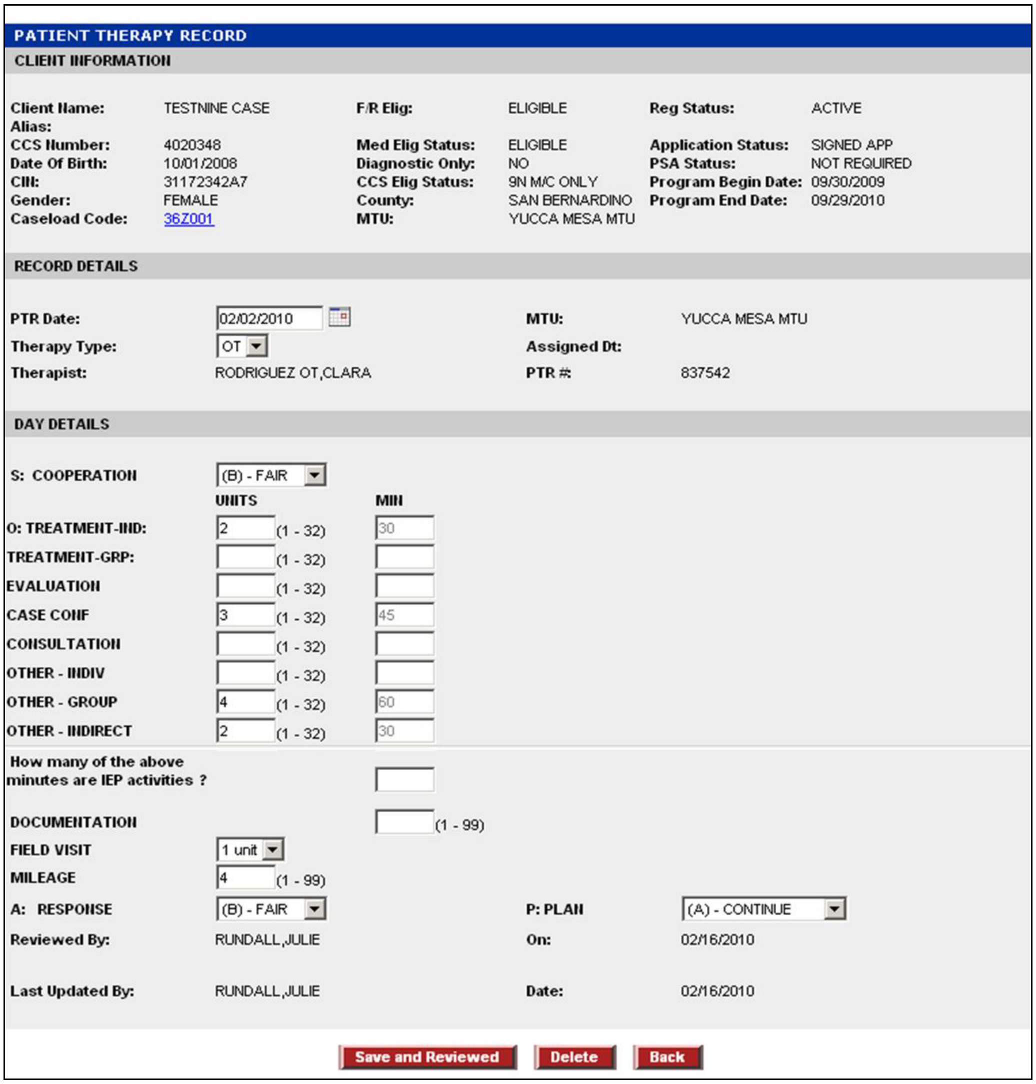
1. Select a client from the PTR Search screen.
2. Click on the Search PTR button.
3. On the Search Results screen click on the back button at the bottom of the screen.

8.4.6 CREATE PTR PROCESSING RULES

- PTRs are entered by Month/Year, County and MTU.
- Multiple PTRs may be entered for a client.
- Multiple services may be entered (1 to 31) per month per PTR.
- A client may have more than one therapist per month.

Therapy Assignment
To use a different therapist then assigned therapist a user may update the therapist on the day PTR screen.

- A user may enter an exception indicator at the PTR level and the batch level.
- When an exception indicator has been entered, allow remarks to be entered explaining the delay.
- Allow one optional exception code to be entered covering all days of the PTR.
- A user may view/modify any PTR which is not assigned to a batch.
- A user selects PTRs by county and MTU to add to a batch.
- An optional Patient (P) or Therapist (T) reason code (maximum 1) per day can be entered on each PTR.
- A PTR number is assign to each entry.
- When Treatment is entered, require entry of Cooperation, Response and Plan.
- When the client was scheduled but cancelled or not seen by the therapist, the appropriate “missed appointment code” must be entered and the reason code becomes required.
- PTRs may include and exclude PTRs from a batch prior to transmitting.
- PTRs may be printed to verify prior closing the batch.



PATIENT THERAPY RECORD

CLIENT INFORMATION

Client Name:	TESTNINE CASE	F/R Elig:	ELIGIBLE	Reg Status:	ACTIVE
Alias:					
CCS Number:	4020348	Med Elig Status:	ELIGIBLE	Application Status:	SIGNED APP
Date Of Birth:	10/01/2008	Diagnostic Only:	NO	PSA Status:	NOT REQUIRED
CIN:	31172342A7	CCS Elig Status:	9N M/C ONLY	Program Begin Date:	09/30/2009
Gender:	FEMALE	County:	SAN BERNARDINO	Program End Date:	09/29/2010
Caseload Code:	36Z001	MTU:	YUCCA MESA MTU		

RECORD DETAILS

PTR Date:	02/02/2010	MTU:	YUCCA MESA MTU
Therapy Type:	OT	Assigned Dt:	
Therapist:	RODRIGUEZ OT,CLARA	PTR #:	837542

DAY DETAILS

S: COOPERATION (B) - FAIR

	UNITS		MIN
O: TREATMENT-IND:	2	(1 - 32)	30
TREATMENT-GRP:		(1 - 32)	
EVALUATION		(1 - 32)	
CASE CONF	3	(1 - 32)	45
CONSULTATION		(1 - 32)	
OTHER - INDIV		(1 - 32)	
OTHER - GROUP	4	(1 - 32)	60
OTHER - INDIRECT	2	(1 - 32)	30

How many of the above minutes are IEP activities ?

DOCUMENTATION (1 - 99)

FIELD VISIT 1 unit

MILEAGE 4 (1 - 99)

A: RESPONSE	(B) - FAIR	P: PLAN	(A) - CONTINUE
Reviewed By:	RUNDALL,JULIE	On:	02/16/2010
Last Updated By:	RUNDALL,JULIE	Date:	02/16/2010

Save and Reviewed | Delete | Back

Figure 8-7 Enter PTR

8.4.7 STEPS TO ADD A PATIENT THERAPY RECORD

1. MTU: the MTU will default from the MTU Assignment screen.

2. Therapy Type: select OT or PT.

3. Therapist: the assigned therapist will default from the therapist screen. If the client sees another therapist other than his or hers assigned therapist, the user may select another therapist from the drop down table.

4. PTR Date: the day in the month of services.

5. Assigned Dt: defaults from the Patient Therapy Screen. This is the date the therapist is assigned to the client's case.

6. Cooperation: select the Cooperation value of: Good, Fair, Poor. This field may be left blank if the Therapist or Client is unavailable. Or the service is Evaluation.

> **Units versus minutes**
> Units are converted to minutes. 1 unit = 15 minutes

7. Treatment –Ind: This is required ***unless*** the service is Evaluation. Enter number of units. Enter a number between 1-32 or P (patient not available) or T (Therapist not available) and the associated reason code. The reason codes are listed at the top of the PTR.

8. Treatment-Grp: Enter a number between 1-32. This data is not required and will not be included in the transmitted claim record.

9. Evaluation: Enter a number between 1-32 or P (patient not available) or T (Therapist not available) and the associated reason code. If evaluation is entered the Cooperation, Response and Plan fields are disabled because they are not required for an evaluation.

10. Case Conference: Enter a number between 1-32 or P (patient not available) or T (Therapist not available) and the associated reason code.

11. Consultation: Enter a number between 1-32. This data is not required and will not be included in the transmitted claim record.

12. Other – Ind: Enter a number between 1-32. This data is not required and will not be included in the transmitted claim record.

13. Other –Grp: Enter a number between 1-32. This data is not required and will not be included in the transmitted claim record.

14. Other –Indirect: Enter a number between 1-32. This data is not required and will not be included in the transmitted claim record.

15. How many of the above activities are IEP activities? Total of activities which can be tracked as IEP. This data is not required and will not be included in the transmitted claim record.

16. Field Visit: Enter a number between 1-32. This data is not required and will not be included in the transmitted claim record.

17. Mileage: Select a number between 1-99. This equates to miles not minutes.

18. Documentation: Enter a number between 1-99. This data is not required and will not be included in the transmitted claim record. This equates to minutes not units.

19. Response: Select the response to treatment from the drop down options: Good, Fair, Poor.

20. Date signed: enter the date the PTR was signed in the Date Signed field. This is a required entry.

21. Plan: select the plan for future treatment from the down options: Continue, Modify, Re Evaluate.

22. The Save and Reviewed button appears for all counties except Los Angeles. The Review by and Last Updated date auto populates the current date and users name in both the reviewed by when the button is clicked. Note: LA County users are required to take two steps to review a PTR. In LA another user takes a separate action is required to review and update PTRs.

23. The Delete button allows a user to delete an individual day from the month long PTR.

8.5 CREATE PTR BATCH

The PTR Batch screen is accessed by through the Patient Therapy Claims menu option. This module allows PTRs to be grouped together by County, MTU, month, year and therapist and assigned a unique number called a Batch Number. The user creates, opens and closes the batch in the web but will log into CMS Net legacy system, transmit the batch and generate a transmission report. The final task will be sending a transmission notification to the CMS Net Help desk.

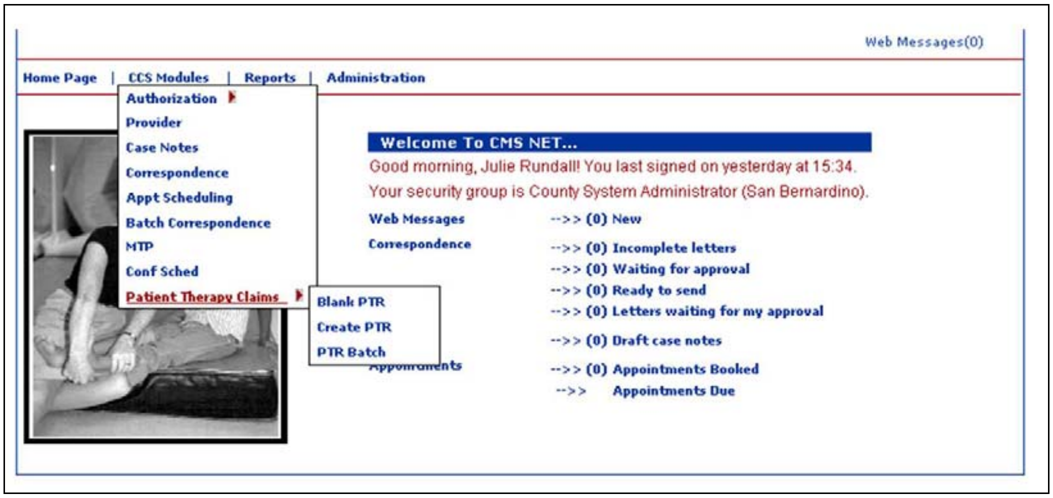


Figure 8-8 PTR Batch

8.5.1 PTR BATCH SEARCH SCREEN

Figure 8-9 PTR Batch Search

- Search by a begin date and end date.
- Search for all batches by County and MTU.
- Advanced Search options allow the search to be narrowed by Batch Id and Batch status.
- Create batch button allows unassigned PTRs to be added to a **new** batch.
- Search buttons allows a user to look for an **existing** batch to add PTRs.
- Reset clears all search criteria.

8.6 ACTIONS FROM THE PTR BATCH SEARCH RESULTS SCREEN

8.6.1 STEPS TO REOPEN A CLOSED BATCH

1. From the search result screen, check the box next to the closed batches you wish to reopen.
2. Click on the Re Open Batch button.
3. By reopening the batch, additional PTRs maybe added.
4. The status will appear in the results screen as open
5. A confirmation message will appear confirming the records have been updated successfully.

8.6.2 STEPS TO CLOSE AN OPEN BATCH

1. From the search result screen check the box next to the open batches you wish to reopen.
2. Click on the Close Batch button.
3. Once the batch is close it will appear in the legacy system for transmission. Contact the helpdesk if the batch does not appear in Create Transmit PTR Batch in legacy.
4. The status will appear in the results screen as closed
5. A confirmation message will appear confirming the records have been updated successfully.

8.6.3 STEPS TO PRINT BATCH

1. From the search result screen check the box next to the batches you wish to print.
2. Click on the Print button.
3. A PDF screen will display with all PTRs in the batch.

8.6.4 STEPS TO ADD AN EXCEPTION

1. Select a client from the PTR Search screen.
2. Click on the Search PTR button.
3. On the Search Results screen check the box next to the PTR you would like to add an exception.

4. Enter an Exception Code from the drop down list at the top of the screen.

5. Click on Add Exception Code.

6. The selected Exception Code will be listed next to the PTR# field on the Search Results screen.

8.6.5 REMOVE AN EXCEPTION CODE

1. Select a client from the PTR Search screen.

2. Click on the Search PTR button.

3. On the Search Results screen check the box next to the PTR you would like to remove the exception from.

4. Click on Remove Exception Code.

5. The Exception Code will be removed from the PTR# field on the Search Results screen.

8.6.6 CREATE BATCH PROCESSING RULES

- A unique batch number is assigned to every PTR prior to transmitting.
- No restrictions on how many batches may be created.
- A new batch may only be created if one or more PTRs exist for the County and MTU.
- Batches are group together by County, MTU, month/year and therapist.
- Each batch will have a status of closed, open or transmitted.
- Batches may be open, closed and reopened and reclosed again until transmitted.
- Users may add PTRs to an open batch and remove PTRs from an existing open batch.
- Once a batch is transmitted the PTRs may still be printed from the web but the transmission report and activities are done through legacy.
- PTRs may be added to an existing batch or a new batch may be created to add.

8.6.7 STEPS TO CREATE PTR BATCH

1. From the Search PTR Batch screen enter County and MTU.
2. Click on the Create Batch button.
3. From the PTR Batch Search Results screen select the PTRs you would like to include in a new batch.
4. The system automatically assigns a new batch number.
5. Click on Create Batch for adding PTRs to a batch.

8.6.8 ASSIGNING PTRS TO AN EXISTING OPEN BATCH

1. Under the Advanced Search Options: Enter the Batch ID
2. Search –Click on the Search button to view existing batches with PTRs assigned.
3. Reset – Clears the search criteria.

8.6.9 STEPS TO REMOVE PTRS FROM A BATCH

1. From the search result screen, click on the Batch ID and another screen will appear.
2. Click on the Select box next to the PTRs you would like to remove.
3. Click on Remove PTRs from Batch

8.6.10 STEPS TO PRINT A PTRS FROM A BATCH

1. From the search result screen, click on the Batch ID and another screen will appear.
2. Click on the Select box next to the PTRs you would like to print.
3. Click the Print button.

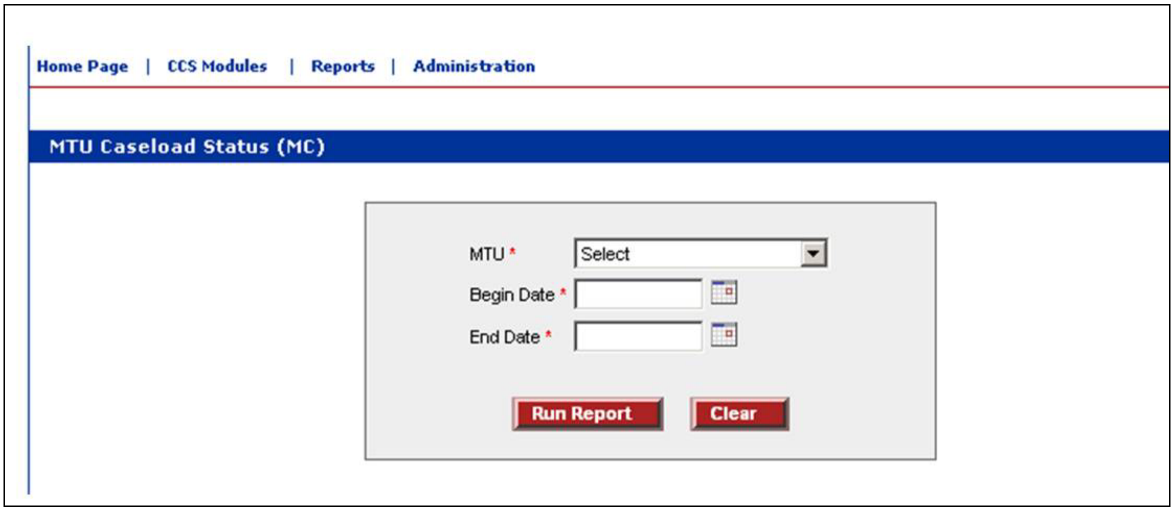
9 REPORTS

9.1 MONTHLY STATISTICS

9.2 MTU CASELOAD STATS

The MTU Caseload Stats report provides a list of all caseload status and movement in the previous month.

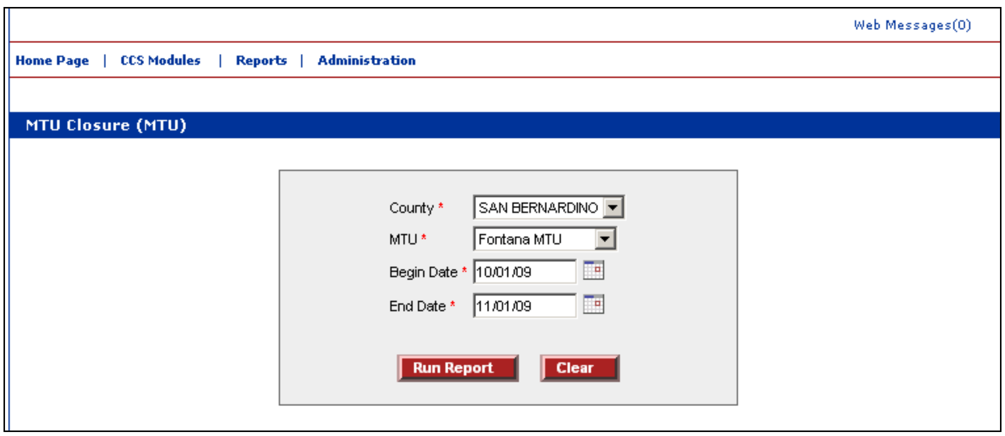
Name	Description
MTU	Select an MTU
Begin Date	Enter the begin date for the MTU.
End Date	Enter the end date for the MTU.



9.3 MTU CLOSURE

The MTU Closure report is utilized to track all cases that are closed to an MTU within a specified county.

Name	Description
County	Select County from drop down list
MTU	Leave blank to display all MTUs on the report or select a single MTU.
Begin Date	Enter the begin date for the MTU closures.
End Date	Enter the end date for the MTU closures.



9.4 CONFERENCE

9.5 CLINIC ROSTER

This Clinic Roster report is utilized to track all scheduled clinic dates

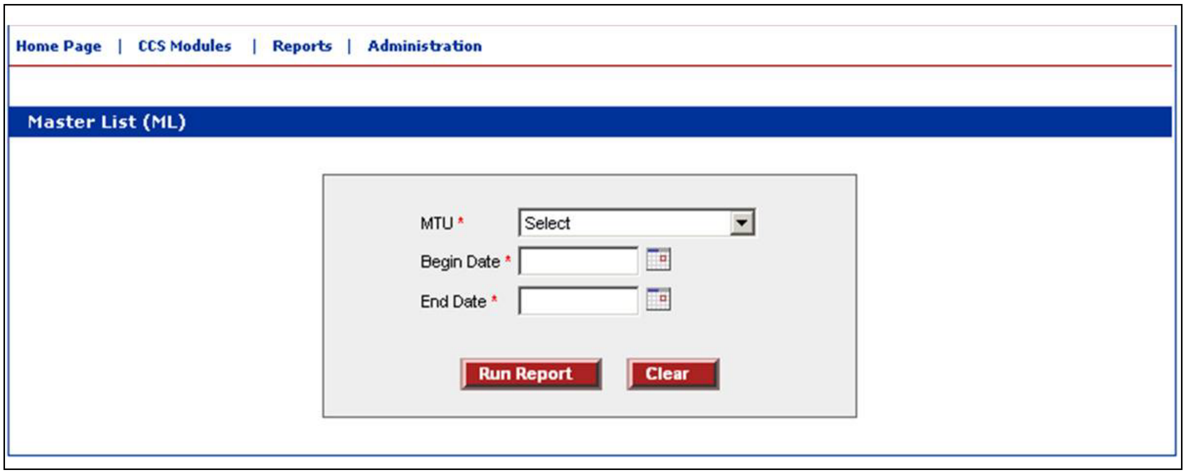
Name	Description

9.6 CASELOAD

9.7 MASTER LIST (ML)

The Master List report gives list of all the open cases for the selected MTU

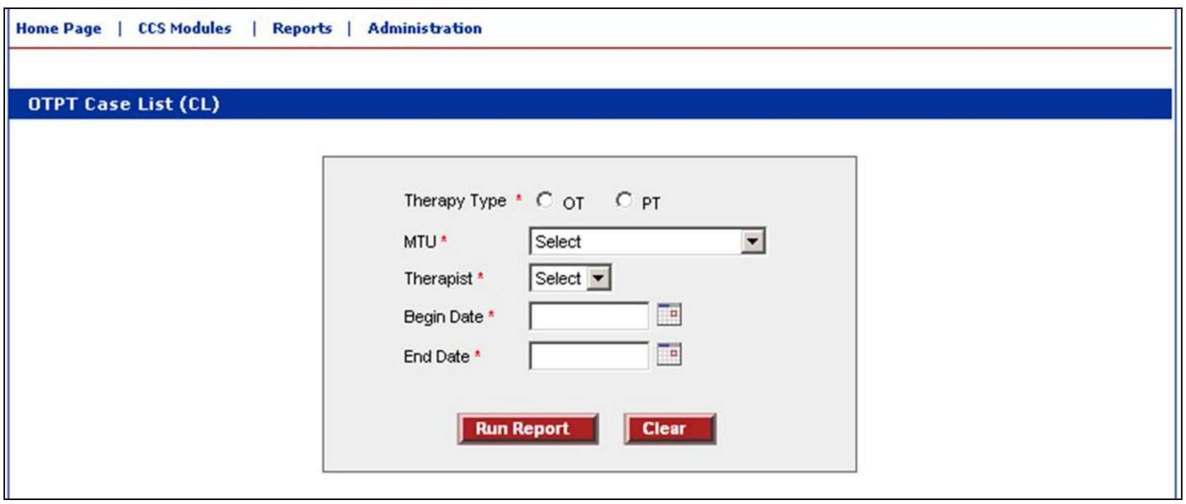
Name	Description
MTU	Leave blank to display all MTUs on the report or select a single MTU.
Begin Date	Enter the begin date for the period of open cases.
End Date	Enter the end date for the period of open case.



9.8 CASE LIST (PT/OT) (CL)

The Case List report allows each therapist to track case assignment, prescriptions and evaluation due dates

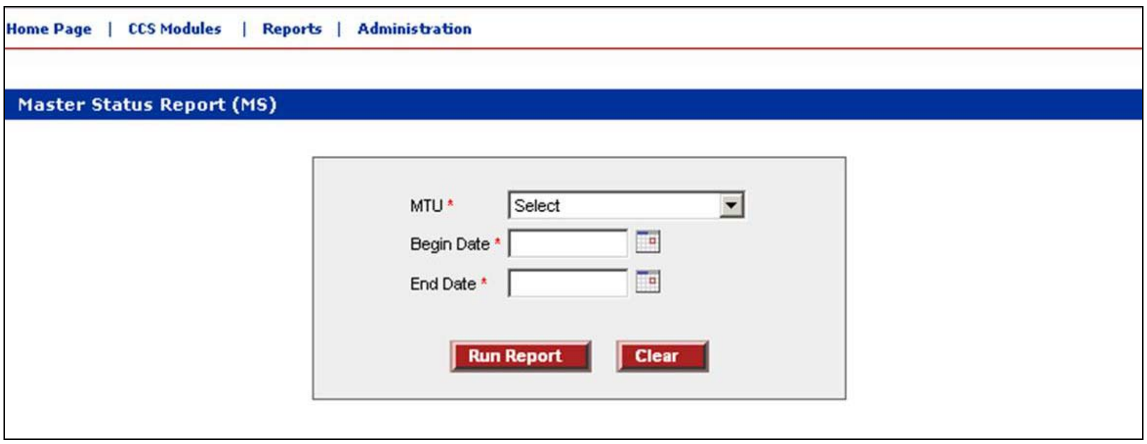
Name	Description
Therapy Type	Click on a radio button OT or PT
MTU	Select a MTU.
Therapist	Select a Therapist
Begin Date	Enter the begin date.
End Date	Enter the end date.



9.9 MASTER STATUS REPORT

The Master Status Report gives a report of all the caseload by MTU and status

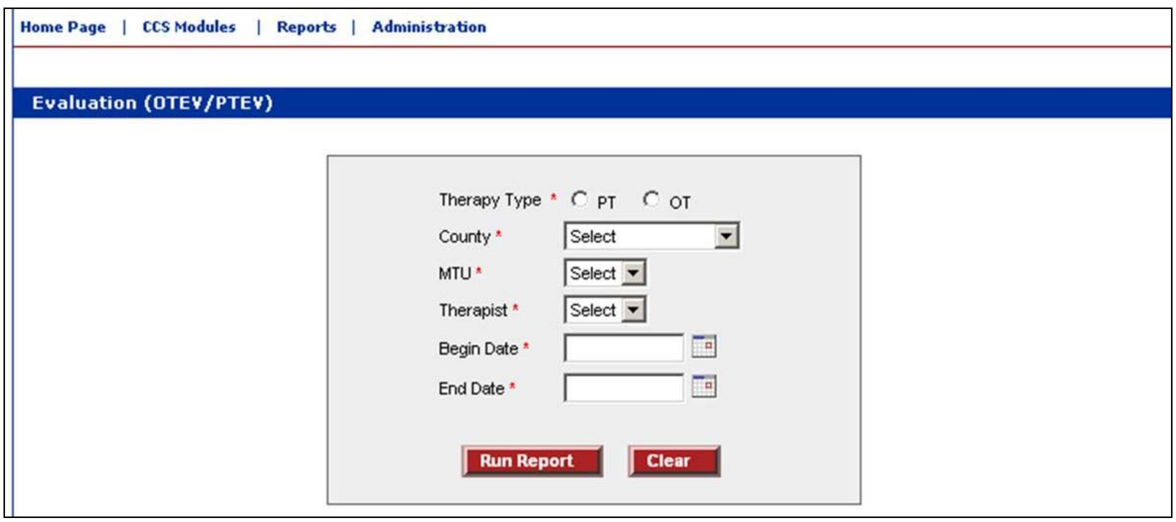
Name	Description
MTU	Leave blank to display all MTUs on the report or select a single MTU.
Begin Date	Enter the begin date.
End Date	Enter the end date.



9.10 EVALUATION (PT/OT)

The Evaluation (PT/OT) report is utilized to track all cases that have an evaluation due.

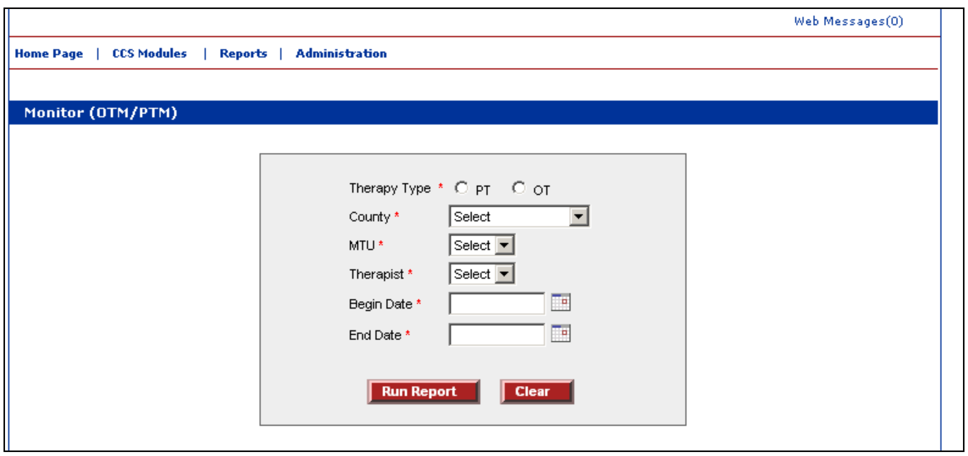
Name	Description
Therapy Type	Click on a radio button OT or PT
County	Select County
MTU	Select a MTU.
Therapist	Select a Therapist
Begin Date	Enter the begin date.
End Date	Enter the end date.



9.11 MONITOR

The Monitor report is utilized to track all cases that have indicated Monitor in the OT service field.

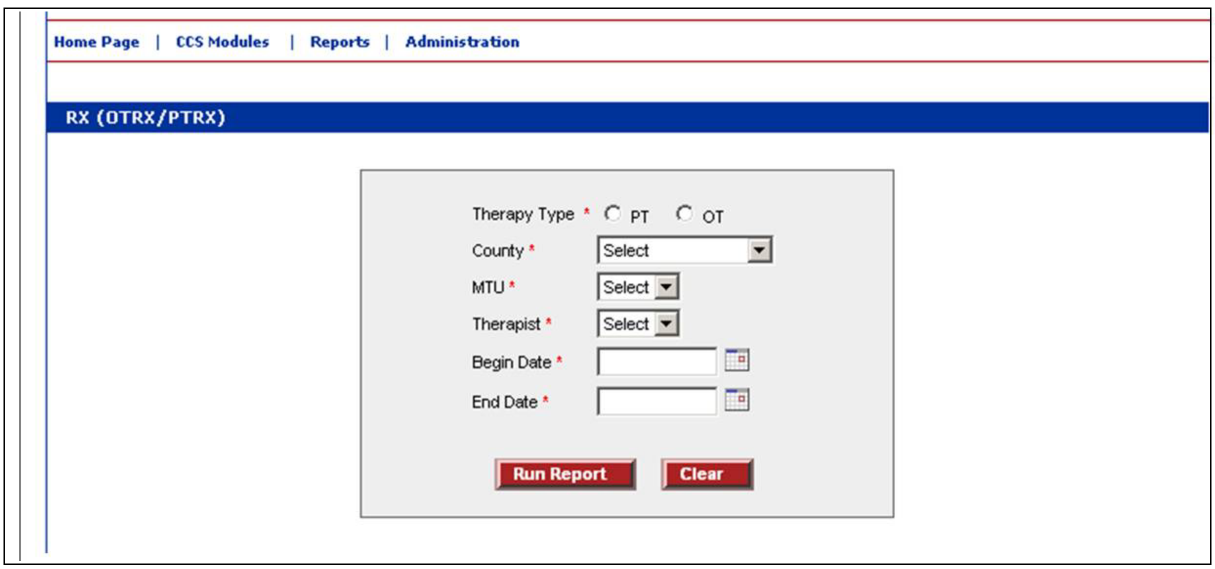
Name	Description
Therapy Type	Click on a radio button OT or PT
County	Select County
MTU	Select a MTU.
Therapist	Select a Therapist
Begin Date	Enter the begin date.
End Date	Enter the end date.



9.12 RX (PT/OT)

This RX (PT/OT) report is utilized to track all cases that have indicated RX due date.

Name	Description
Therapy Type	Click on a radio button OT or PT
County	Select County
MTU	Select a MTU.
Therapist	Select a Therapist
Begin Date	Enter the begin date.
End Date	Enter the end date.

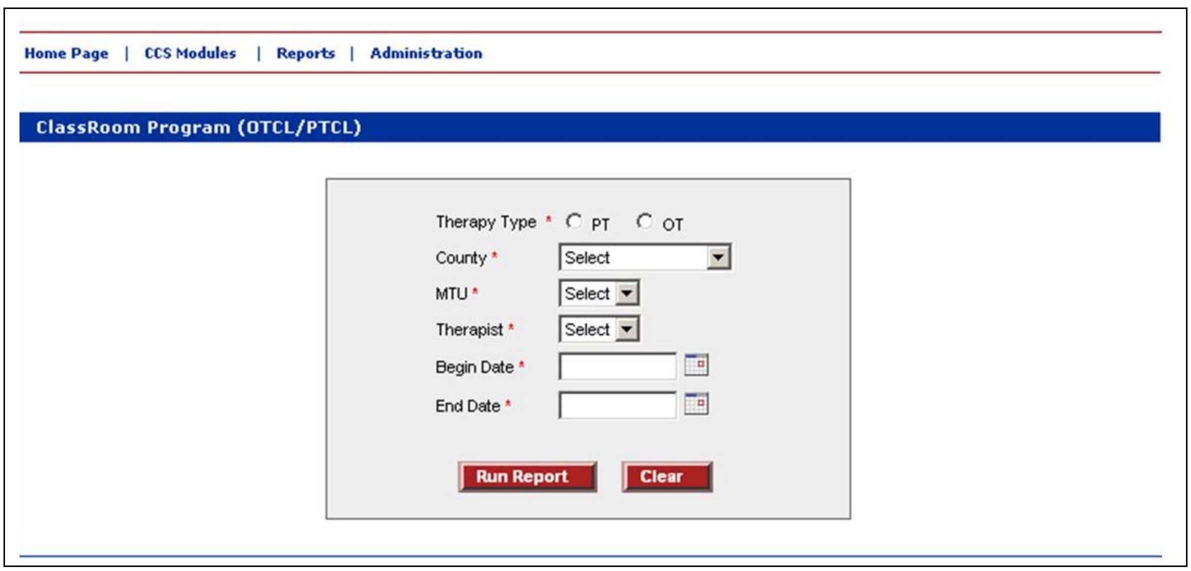


9.13 CASE MANAGEMENT

9.14 CLASSROOM PROGRAM (PT/OT)

The Classroom Program (PT/OT) report captures the date of when the program was written if indicated in the record.

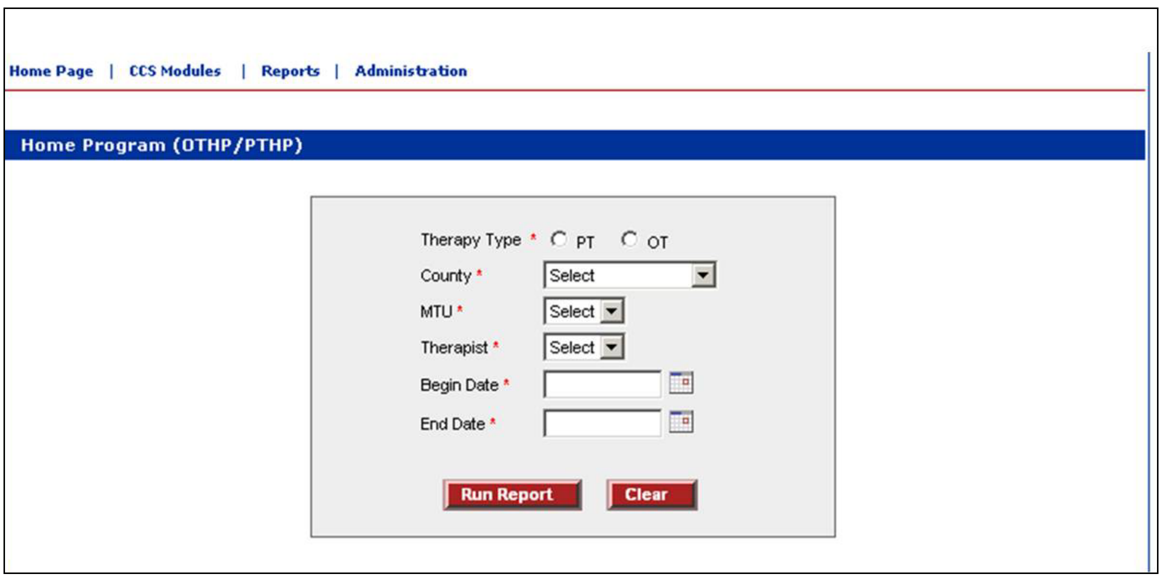
Name	Description
Therapy Type	Click on a radio button OT or PT
County	Select County
MTU	Select a MTU.
Therapist	Select a Therapist
Begin Date	Enter the begin date.
End Date	Enter the end date.



9.15 HOME PROGRAM (PT/OT)

The Home Program (PT/OT) report is utilized to track all cases that have a Home Program due.

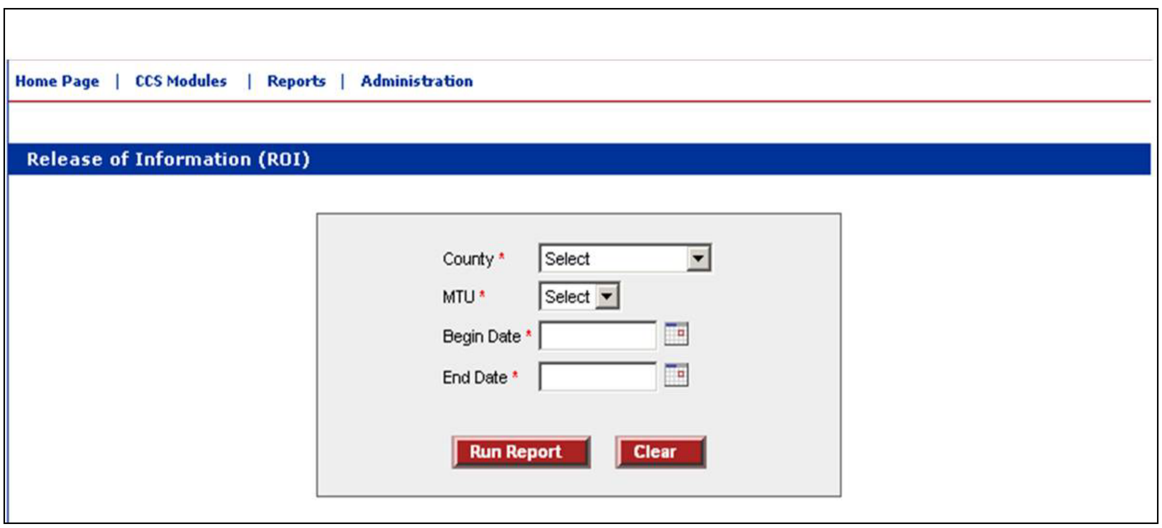
Name	Description
Therapy Type	Click on a radio button OT or PT
County	Select County
MTU	Select a MTU.
Therapist	Select a Therapist
Begin Date	Enter the begin date.
End Date	Enter the end date.



9.16 RELEASE OF INFORMATION

The Release of Information report is utilized to track all cases that have indicated Release of Information.

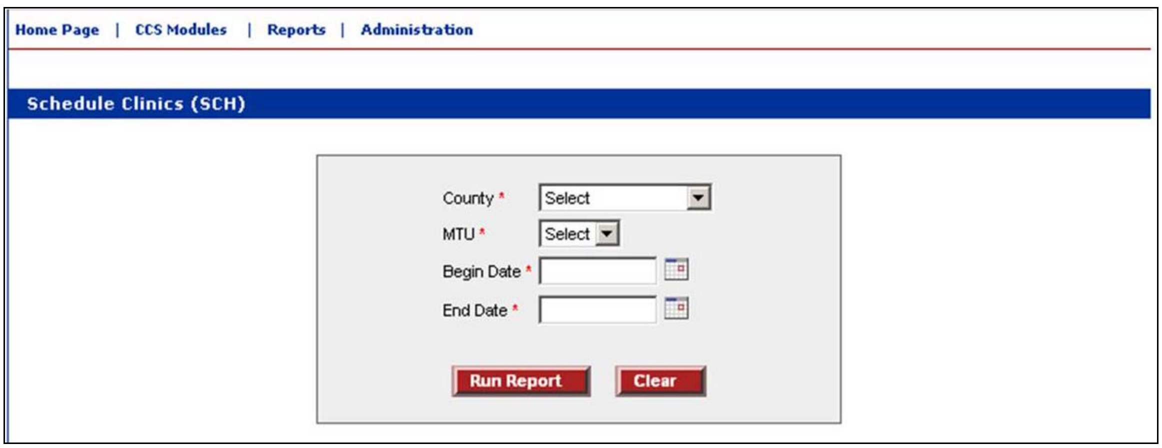
Name	Description
County	Select County
MTU	Leave blank to display all MTUs on the report or select a single MTU.
Begin Date	Enter the begin date.
End Date	Enter the end date.



9.17 SCHEDULE CLINICS

The Schedule Clinic report is utilized to track all clients scheduled for a clinic and what date.

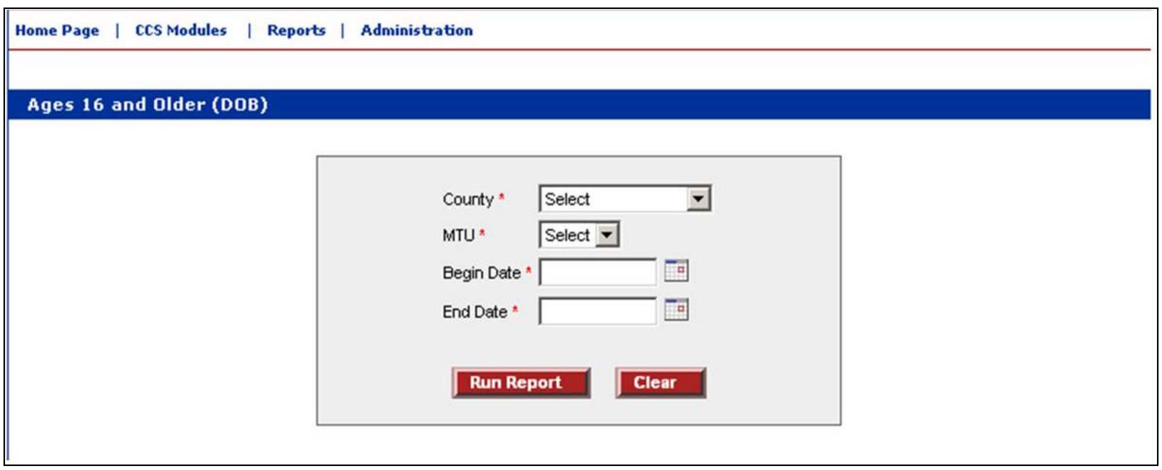
Name	Description
County	Select County
MTU	Leave blank to display all MTUs on the report or select a single MTU.
Begin Date	Enter the begin date.
End Date	Enter the end date.



9.18 AGE 16 AND OLDER

The Age 16 and Older report is utilized to find children ages 16 and older. It can also be used to find children less than 3 years of age for Early Start reasons. Or for any other age range (list is helpful for any reason you need a list of children of a specific age, i.e. transition planning, eligibility determination for under 3, etc.)

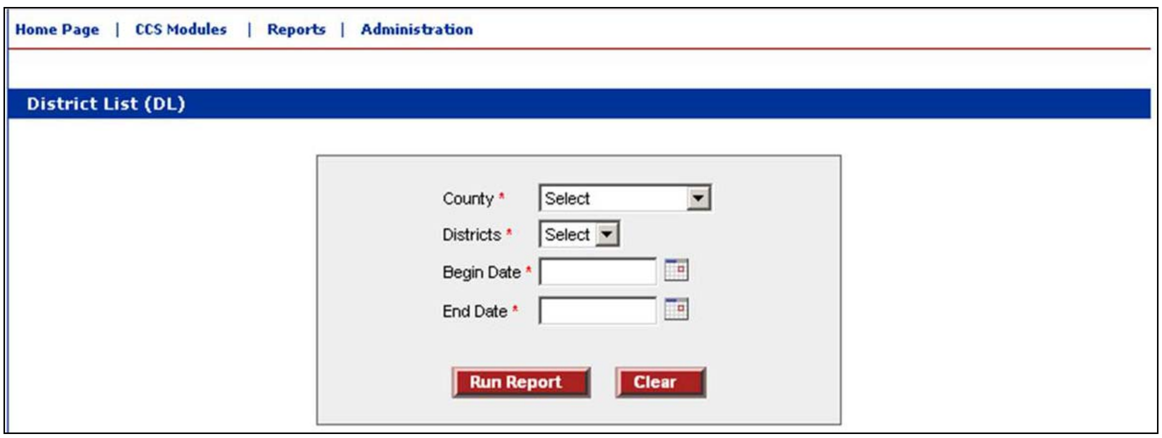
Name	Description
County	Select County
MTU	Leave blank to display all MTUs on the report or select a single MTU.
Begin Date	Enter the begin date.
End Date	Enter the end date.



9.19 DISTRICT LIST

The District List report provides names and numbers of children for the various school districts (LEA) and is used to communicate and coordinate services with the districts.

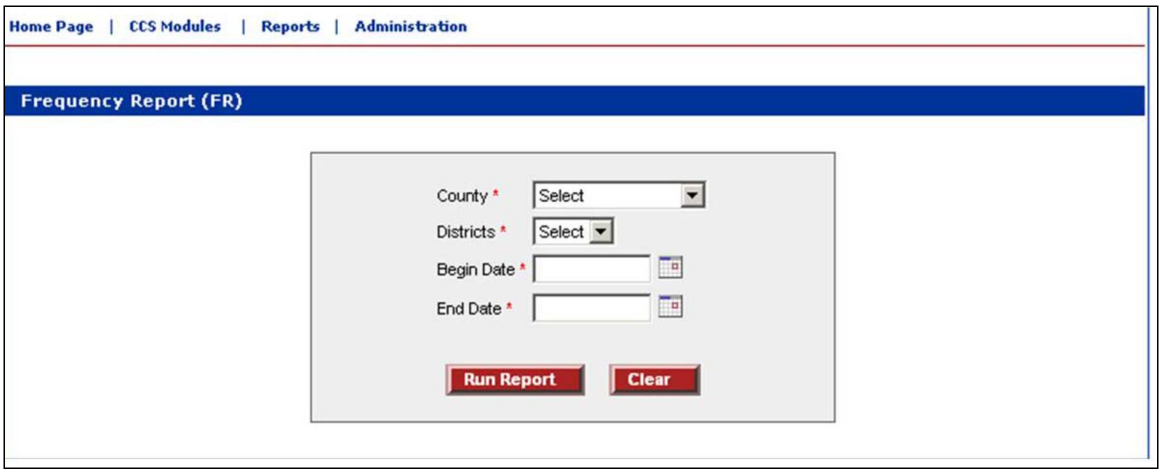
Name	Description
County	Select County
District	Select District associated to the county
Begin Date	Enter the begin date.
End Date	Enter the end date.



9.20 FREQUENCY REPORT

The Frequency report lists the frequency of prescribed treatment for each child and how many hours of staff coverage are needed at the MTU to provide prescribed treatment.

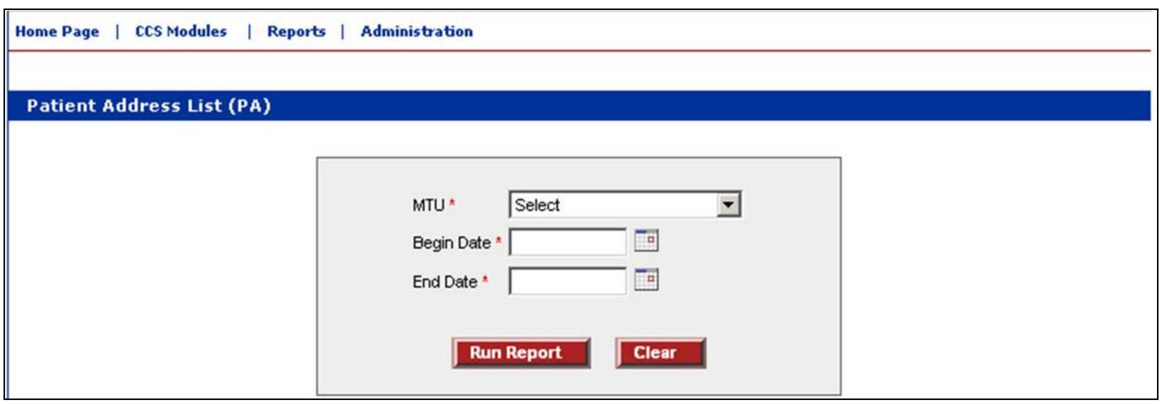
Name	Description
County	Select County
MTU	Leave blank to display all MTUs on the report or select a single MTU.



9.21 MTU PENDING CASE NO PT/OT

The MTU Pending Case No PT/OT report is utilized to track children referred to, but not yet open for MTP services.

Name	Description
Therapy Type	Click on a radio button OT or PT
County	Select County
MTU	Select a MTU.
Therapist	Select a Therapist
Begin Date	Enter the begin date.
End Date	Enter the end date.



9.22 PATIENT ADDRESS LIST

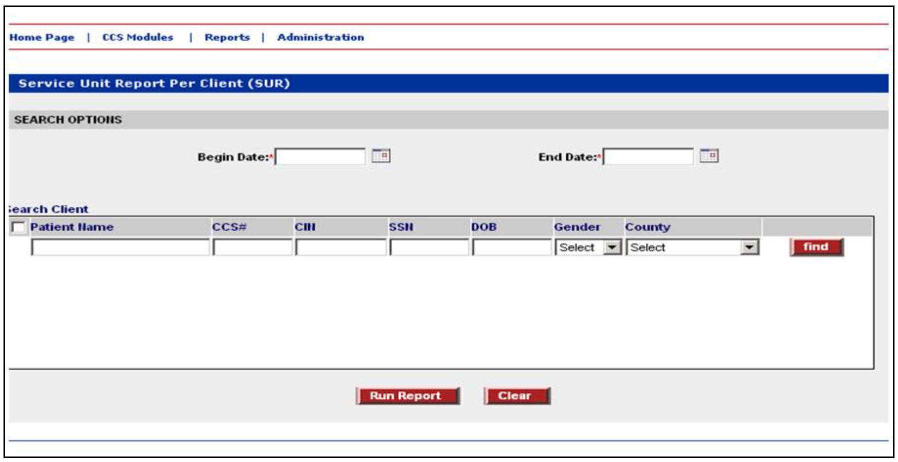
This Patient Address List report identifies for a specific MTU where the clients live.

Name	Description
MTU	Select a MTU.
Begin Date	Enter the begin date.
End Date	Enter the end date.

9.23 SERVICE UNIT REPORT (BY CLIENT)

The Service Unit Report (By Client) counts the total number in service units within service type between the dates specified in the Most Recent and Prior FISC dates on all PTRs regardless of batch number.

Name	Description
Begin Date	Enter the begin date.
Begin Date	Enter the begin date.
Client	Select a client



10 PROVIDER REGISTRATION

The Provider Registration module may be accessed through the “Administration” option. The Provider Registration module is enhanced to allow a System Administrator or County System Administrator to add a new address or contact to an existing agency/school or to add a school, SELPA, LEA or Satellite. Refer to the Web Provider Registration manual – Section 35 for more detailed instructions.