



# HCBS Services

## AWARDS INSTRUCTION SHEET

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This document outlines AWARDS components that are required for HCBS programs. To ensure AWARDS users have correct and consistent documentation and billing of HCBS services there are new forms and features in the Services module. There are several forms required for the documentation of HCBS services, a new service plan type, and new billing authorizations and alerts.

*For information on the intake/admission and discharge processes that move individuals in and out of AWARDS programs, refer to the [Intake/Admission](#) and [Discharge](#) areas of Online Help.*

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### REQUIRED PERMISSIONS

Permissions required to enter or view HCBS services information are as follows:

- **Chart Access** – You must have chart access permission for the program associated with the consumer(s) for HCBS service information is to be entered, updated, and/or viewed.
  - **Data Entry/Access** – HCBS service information is accessed from within the Services and Discharge modules. In order to see these modules on your AWARDS Opening Menu page, you must have the “Display Chart Records Services Button,” “Display Chart Records Discharge Button,” and “Display Any Chart Records Buttons” data entry/access permissions.
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### ABOUT THIS DOCUMENT

This document is intended to guide you through the process of entering and viewing HCBS service information. Specific topics covered are:

- **Privacy Protections for HCBS Recipients – Protected Programs** – Learn how to designate a program as “protected” within AWARDS. Page **1**
  - **Forms** – Learn which forms should be completed for an individual, and where they are located in AWARDS. Page **4**
  - **Billing Authorizations & Alerts** – Learn how to view Billing Authorizations and Alerts. Page **4**
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## PRIVACY PROTECTIONS FOR HCBS RECIPIENTS – PROTECTED PROGRAMS

Information about a client's enrollment in an HCBS program should be available only to agency staff with chart records access permission to view that program. AWARDS protects this information with the use of a program setting that blocks access to Consumer Lookup search results related to the program.

## SETTING A PROGRAM AS "PROTECTED"

When a program is designated as protected within AWARDS, users without chart access to the program do not see that program's clients when using the Client Search feature located in the navigation bar. Additionally, in such cases if a client has a record in multiple programs, one of which the user has chart access to and one to which he/she does not, only the record for which access is granted is shown in the Search results. Programs that are not protected will always display in the Search results.

To designate a program as protected within AWARDS, complete the following steps:

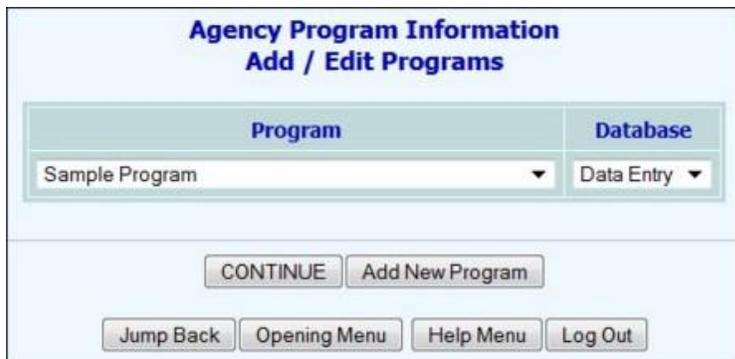
1. From the AWARDS Home screen, click **Administration** from the left-hand menu, and then click **System Setup**. The *System Setup Menu* page is displayed.



2. Click **Agency Program Information**. The *Agency Programs Update Menu* page is displayed.



3. Click **Add/Edit Entire Program**. The *Add/Edit Programs* page is displayed.



- Confirm that the **Database** option is set to its default value - "Data Entry."
- Click the **Program** drop-down arrow, select the program to be designated as protested, and then click **CONTINUE**. The *Agency Program Information* page is displayed.

The screenshot shows the 'Agency Program Information' form with the following fields and options:

- General Settings | **HMIS Settings** | Optional Settings | Address/Contact Information
- \*Program Name (text input)
- \*Program Group (dropdown menu)
- Division (dropdown menu)
- Use HMIS Data Elements (checkbox)
- \*Intake Form (dropdown menu)
- Projected # of Units (text input)
- Monthly Service Units (text input)
- AIDS Housing Capacity (text input)
- Homeless Housing Capacity (text input)
- Drop In Capacity (text input)
- Projected # of Beds (text input)

Buttons at the bottom: CONTINUE, Add/Edit Menu, Jump Back, Opening Menu, Help Menu, Log Out

- Click the "Optional Settings" tab.
- In the **Recipient Lookup Record Sharing** field, select the **No Sharing – Nothing At All Shows** check box.

The screenshot shows the 'Agency Program Information' form with the 'Optional Settings' tab selected. The title is 'Adult HCBS Community Psychiatric Support and Treatment'. The 'Recipient Lookup Record Sharing' field is checked with 'No Sharing - Nothing At All Shows'.

- General Settings | **HMIS Settings** | **Optional Settings** | Address/Contact Information
- Households Share One Common Sleeping Area (checkbox)
- Recipient Lookup Record Sharing** (checkbox checked) No Sharing - Nothing At All Shows
- NYS Developmental Disabilities (DD) Program (checkbox)
- Central Intake Program (dropdown menu set to No)

Buttons at the bottom: CONTINUE, Add/Edit Menu

- Click **CONTINUE**. A read-only report version of all information for the program is displayed.

**IMPORTANT!** Do not click your browser's back button upon completion of the data entry process. Instead, move forward by clicking one of the available navigation buttons at the bottom of the page. If it is necessary to make additional changes to the program information for example, click **Return to Data Entry**.

The process of protecting a program within AWARDS is now complete.

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## FORMS

As part of HCBS service documentation, certain forms need to be completed for the client. These forms are located within the following modules of AWARDS:

- **Services Menu** - appearing as buttons on the menu:
  - Abuse/Neglect/Exploitation Info
  - Adult HCBS ADDL/EXT Service Request
  - Adult HCBS Assessment
  - Adult HCBS Service Auth Approved
  - Approval/Denial of Services
  - Prior/Cont. Authorization Request
  - Rights for Individuals – BH HCBS
- **Services > Progress Notes** – To be included in the header of a Progress Note:
  - Adult HCBS Individual Progress Note

*For step-by-step directions on completing a form within a progress note, refer to the "[Entering/Updating a Progress Note](#)" procedure.*

- **Services > Group Notes** – To be included in the header of a Group Note:
  - Adult HCBS Group Note

*For step-by-step directions on completing a form within a group note, refer to the "[Entering/Updating a Group Note](#)" procedure.*

- **Discharge** – To be included within a discharge form:
  - Adult HCBS Discharge Plan

*For step-by-step directions on completing a form within the discharge form, refer to the "[Processing a Discharge](#)" procedure.*

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## BILLING AUTHORIZATIONS & ALERTS

The features described below are turned on for programs by Foothold Technology, and may not be on for your database. To request these items, please contact the Help Desk.

### BILLING AUTHORIZATIONS

A count of Total Authorizations and Authorizations Remaining under a client's insurance coverage can be seen in two places within AWARDS: within the client view under the Search feature, and within the Entitlements > Certified Entitlements feature.

To view the total and remaining authorizations within the Search feature, complete the following steps:

1. From the navigation bar, click in the **Client Search** box (or click the **Search icon**). The *Advanced Search* window is displayed.
2. Enter search criteria in one or more of the client identifier fields in this window. These fields may include:

SSN	First Name	Last Name	Birthdate	Personal ID
Medicaid CIN	AWARDS ID	Chart ID	Member ID	TABS ID

3. Click the **Number of Results** drop-down arrow and select the number of matches that should be displayed in the search results.
4. Click **Search**. All agency program records are searched for the identifying information entered, and the search results are displayed on the *Client Search Results* page. Depending on the programs that have been protected, not all program histories may be seen by all users. Program stays within protected programs will only appear for users who have access to those programs.

This page contains a list of clients for whom all or part of the identifying information entered on the previous page is a match.

*On this page, the status of each client is listed next to his or her identifying information, and is a useful reference for determining which programs a client has been admitted or referred to. Keep in mind that protected programs will only appear for users who have access to those programs.*

*Users are encouraged to complete a census search prior to entering new records as part of the intake/admission process. In order to aid in that, users with the "Referrals Data Entry" and "Display Chart Records Intake Button" permissions see an Intake/Admission Menu button at the bottom of the search results page. This button will take users directly to the Intake/Admission module.*

5. Click the name link of the client being searched for.

*Consumers in those programs for which the user does not have access are NOT available for selection.*

*In some instances it is the program name that is linked and must be clicked in this step rather than the client name. Specifically, if under System Setup, Agency Program Information, [Add/Edit Entire Program](#) the agency has any programs set to use the client search record sharing "No Sharing - Nothing At All Shows" option, the results in Client Search have links on the program name. If no programs at an agency are set to use this protected status, then the results in Client Search have links on the client name.*

6. If the selected consumer has NOT yet been admitted to an agency program, his or her referral record is displayed. If the consumer HAS been admitted to an agency program, the *Consumer Information* page is displayed for him or her.

The screenshot displays the 'Josie Toes Information' page. At the top, there is a 'Recipient E-Signature Settings' button. Below it are three buttons: 'Entitlements', 'Employment', and 'Hospitalization'. The main section is titled 'Current Insurance Authorizations' and contains a table with the following data:

Entitlement Type	Effective Date	Expiration Date	Procedures	Billing Type	Total Authorizations	Authorizations Remaining
MEDICAID	05/01/2016	05/01/2017	7800 - HARP HCBS Family Support / Trn (group of 2 - Client Present)	HCBS	10	10

At the bottom of the page, there is a section for 'Adult HCBS Psychosocial Rehabilitation' with several buttons: 'Face Sheet', 'Progress Notes', 'Service Plans', 'Timetable', 'Contacts Log', and 'Billing Dashboard'.

From this page, key components of the consumer's chart records can be centrally accessed, including entitlements, and a table of Current Insurance Authorizations which includes the Entitlement Type, Effective Date of the Authorization, Expiration Date of the Authorization, Procedures, Billing Type, the number of Total Authorizations and the number of Authorizations Remaining.

The processing of viewing authorizations within the Search feature is now complete.

For instructions on viewing, entering or editing Authorizations within the Certified Entitlements feature, refer to the ["Entering a Certified Entitlement"](#) procedure.

## BILLING ALERTS

For reinforcement of the billing rules, an alerts table is displayed on the Progress Notes Editing Index page within the Services module Progress Notes feature. These can be reviewed during the note writing process.

**Individual Progress Notes Editing Index**

Recipient	Program	Note Writer	Date Range	Admission
Test Client	Adult HCBS Community Psychiatric Support and Treatment	Tanya Coraci	Last 10 Days	05/18/2016

Select the Note Section to Add / Edit / Remove

Selected	Date	Time	Note Type	SVC	Duration	Face2Face	Writer
<input checked="" type="radio"/>	99/99/99	?	New Note (Section)	?	XX:XX	?	Tanya Coraci
	<a href="#">05/24/2016</a>	?	General Chart Note*	CPST-CI	15 Mins	yes	Alex Atkinson

General Chart Notes with matching Contact Log Records indicated by \*

Only one rate code should be used on the same day of service.

<p><b>If you are billing:</b></p> <ul style="list-style-type: none"> <li><b>HARP HCBS Psychosocial Rehabilitation - Individual Per Diem</b></li> <li><b>HARP Short-Term Crisis Respite</b></li> <li><b>HARP Intensive Crisis Respite</b></li> <li><b>HARP HCBS Family Support / Training (Individual)</b></li> <li><b>HARP HCBS Family Support / Training (Group)</b></li> <li><b>HARP HCBS Pre-Vocational</b></li> <li><b>HARP HCBS Transitional Employment</b></li> <li><b>HARP HCBS Intensive Supported Employment</b></li> <li><b>HARP HCBS On-going Supported Employment</b></li> </ul>	<p><b>Then you cannot bill on the same day:</b></p> <ul style="list-style-type: none"> <li>• HARP HCBS Psychosocial Rehabilitation - Individual On-Site</li> <li>• HARP HCBS Psychosocial Rehabilitation - Individual Off-Site</li> <li>• HARP HCBS Psychosocial Rehabilitation - Group</li> <li>• HARP Intensive Crisis Respite</li> <li>• HARP Short-Term Crisis Respite</li> <li>• HARP HCBS Family Support / Training (Group)</li> <li>• HARP HCBS Family Support / Training (Individual)</li> <li>• HARP HCBS Transitional Employment</li> <li>• HARP HCBS Intensive Supported Employment</li> <li>• HARP HCBS On-going Supported Employment</li> <li>• HARP HCBS Pre-Vocational</li> <li>• HARP HCBS Intensive Supported Employment</li> <li>• HARP HCBS On-going Supported Employment</li> <li>• HARP HCBS Pre-Vocational</li> <li>• HARP HCBS Transitional Employment</li> <li>• HARP HCBS On-going Supported Employment</li> <li>• HARP HCBS Pre-Vocational</li> <li>• HARP HCBS Transitional Employment</li> <li>• HARP HCBS Intensive Supported Employment</li> </ul>
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For a full list of this Recipient's progress notes, use the Services module Progress Notes feature in report mode.

CONTINUE
Recipient
Services Menu
Recipient View

For instructions on entering Progress Notes, refer to the ["Entering / Updating a Progress Note"](#) procedure.