

CDM

CONSUMER DIRECTION MODULE

Master User Manual

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Released concurrently with CDM v.1.0

All information in this manual referring to individuals or organizations (names, addresses, company names, telephone numbers, social security numbers, etc.) is fictitious and used strictly for illustration. Any reference to an actual individual or organization is coincidental and completely unintentional.



National Resource Center for Participant-Directed Services

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Introduction

This manual walks you through most of the tasks that can be completed by a CDM user. It is recommended that you first read and understand **CDM Basics: Introductory Manual for Staff and Administrators** before you continue with this manual. The **CDM Basics** manual introduces you to the navigation and tools of the CDM.

The instructions for the tasks may be slightly different in your program, depending on any customizations made by your program administrator. You are free to change this manual to better reflect those customizations and to share your changes with your colleagues (please see the Terms of Use below).

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Version and Attribution History

Date	General description of changes	Primary author(s)	Author contact information (optional)
05/2010	Original creation of manual	Zak Arthur Edited by Buddy Rutzke (NRCPDS)	cdm@bc.edu
08/2010	Updated with financial processes and new enhancements released 08/2010 as CDM v 1.0. Source code for that release is available at www.cdm.codeplex.com	Buddy Rutzke (NRCPDS)	cdm@bc.edu

Working with Participants' Non-Financial Information

Creating a New Participant File

There are two ways to create a new participant file. You can enter them online through the **File** section, or you can fill out and upload a Participant Form.

From the File Section

Go to the CDM Homepage and click on the **File** icon. Next, click the **Create File** tab, which is below the File icon. Now, enter the new participant's personal information into the appropriate fields in all of the tabs (Personal, Program, etc.). When finished click **Save File**.

The screenshot shows the 'File - Personal' form in the CDM system. The 'File' icon in the top navigation bar is highlighted with a red box. Below it, the 'Personal' tab is selected and highlighted with a red box. A red line points from the 'Personal' tab to the form fields, with the annotation '1. Go to this tab'. Another red line points from the top of the form to the input fields, with the annotation '2. Enter the new participant's personal information into the fields below'. A red box highlights the 'Save File' button at the bottom right of the form, with the annotation '3. Click Save File'. The form fields include: Last Name*, First Name*, Address 1, Address 2, City*, Zip Code, Telephone Number, Email Address, County (dropdown menu), Emergency Contact Name, Emergency Contact Phone, and Local Case Number. The status is 'None Selected' and there is a 'Print File' link. The footer contains 'Cash and Counseling', 'Application Version', and 'Click'.

From the Participant Form

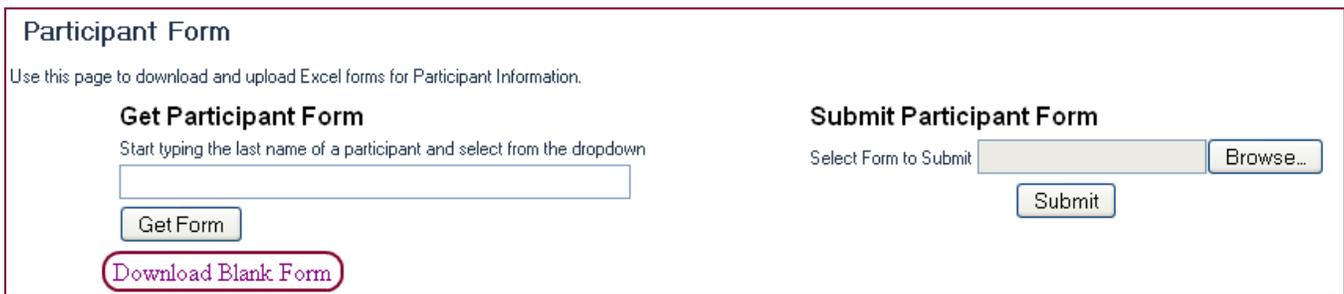
To enter a new participant into the CDM using the Participant Form, you must download a blank form, add the participant's information, then upload the form and verify the information is correct before saving.

Download a Blank Participant Form

To download a blank Participant Form, go to the Participant Form page, either through the QuickLinks section on your homepage or from any section of a participant file (except the **Financial** section). If neither of these links is available, you do not have permission to view the Participant Form and you must create the new participant file from the **File** section.



Once you click on the link, you will see the page below. Click on the **Download Blank Form** link. Save the blank Participant Form somewhere on your computer.



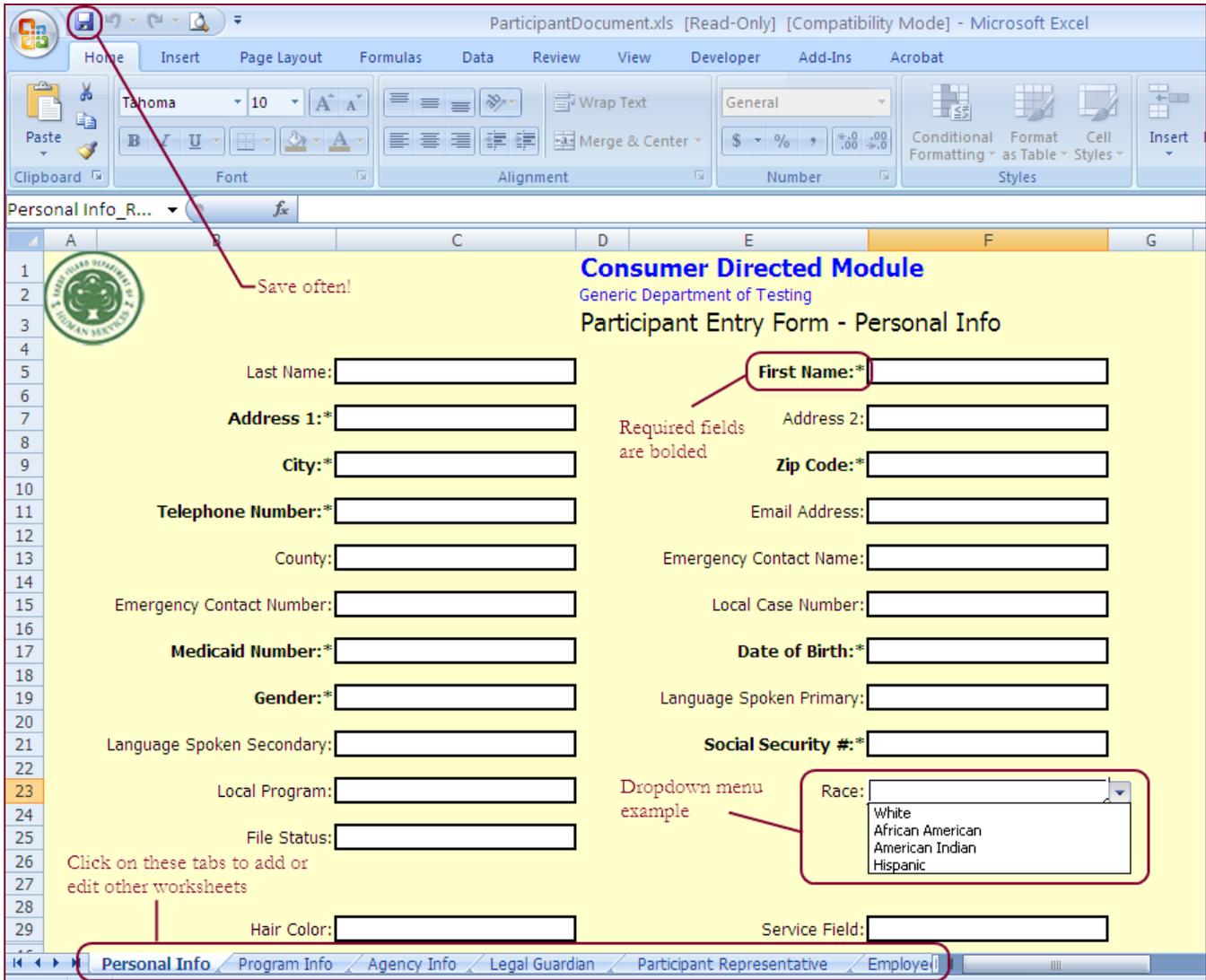
NOTE
If you will often be creating new participant files in the CDM using the Participant Form, it is a good idea to keep a copy of this blank form file on your computer.

Add Information to the Participant Form

Open the blank Participant File. You will see a page that corresponds to the **Personal** section of the participant file in the CDM. Enter all the information you can into this page. If a field has a label that is bolded with an asterisk, this means that it is a required field. Also, several of the fields will be dropdown menus, so it is easy to enter the correct information quickly.

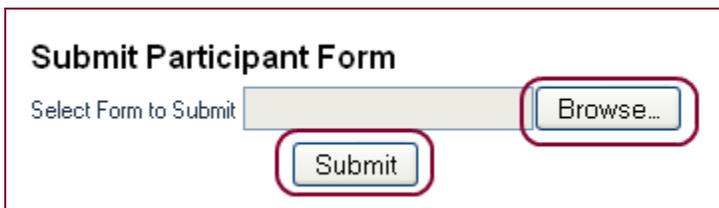
Once you have entered all of the personal information, move on to the next worksheet by clicking on the **Program Info** tab at the bottom of the Excel spreadsheet. The different worksheets in this file correspond roughly to the different tabs within the CDM participant file. Go through all of these tabs and enter all the necessary information.

Save the file.



Upload the Participant Form

After you have completed and saved the Participant Form, return to the page in the CDM from where you downloaded the blank form. Click **Browse**, locate the form that you saved and click **Open**, then click **Submit**.



Now you see the new participant file. However, the changes have not yet been saved. Verify that the uploaded information is correct, the click **Save File**. If you see a confirmation message that says “File has been saved”, then you are done. If there is required information missing or some information is not valid, you will see a user message that will tell you which information you must check before you can save.

Finding a Participant's File

NOTE

Finding a participant's file is crucial! You will often have to find a participant's file in order to complete many of the tasks in the CDM.

- Advanced Search
- Participant Quick Search
- Master Participant Search

Advanced Search

To conduct an Advanced Search, go to **File**. Each field is searchable, so you do not need to fill out each field. Also, you do not have to fill in an entire field; for example, you can enter "S" in the Last Name field to return all participants with a last name beginning with "S." Once you have entered the information you want to search by, click **Search**. To clear all the fields you have entered, click **Reset**.

The screenshot shows the 'File - Search' page in the Consumer Direction Module. The page header includes the CDM logo and navigation links for 'Change Password', 'Help', and 'Logout'. A secondary navigation bar contains icons for 'Home', 'File', 'Forms\Reports', 'Broadcast', 'Notifications', and 'Admin'. The 'File' icon is circled in red, with an arrow pointing to it and the text '1. Click on File'. Below the navigation bar, there are links for 'Create File' and 'File Search'. The main content area is titled 'File - Search' and contains a search form. The form has two columns of input fields. The first column includes 'Last Name' (with 'Smith' entered), 'First Name' (with 'Steven' entered), 'County' (a dropdown menu), 'Primary Language', 'File Status' (a dropdown menu), 'FMSA Admin' (a dropdown menu), 'Support Broker Agency' (a dropdown menu), and 'Employee Last Name'. The second column includes 'SSN', 'Medicaid #', 'D.O.B.' (with month and year dropdowns), 'Secondary Language', 'Spending Plan Status' (a dropdown menu), 'Service Type' (a dropdown menu), 'Support Broker' (a dropdown menu), and 'Employee First Name'. A red box surrounds the 'Last Name' and 'First Name' fields, with an arrow pointing to it and the text '2. Enter the First and Last Name of the participant that you want to locate.' At the bottom of the form, there are 'Search' and 'Reset' buttons. The 'Search' button is circled in red, with an arrow pointing to it and the text '3. Click Search'. The footer of the page contains 'Cash and Counseling', 'Application Version', and a link for 'Click here with bugs or feedback'.

Participant Quick Search

Use this box to find a participant's file quickly. Go to the homepage. Begin typing all or part of a participant's last name and it will display all names that match your criteria. For example, if you enter "sm," then all participants with a last name beginning with "sm" will display. Scroll down to the correct name and hit **View File**. Your browser will navigate to the page shown below.

Consumer Direction Module
National Resource Center for Participant-Directed Services

CDM
CONSUMER DIRECTION MODULE

Change Password | Help | Logout

Home | File | Forms\Reports | Broadcast | Notifications | Admin

Quick Links

- Modify Support Brokers
- Modify Support Broker Agencies
- Modify FMSA Admin Agents
- Modify FMSA Admin Agencies
- Advanced Search
- Broadcast Message
- Reports
- Pending Spending Plans
- Expenditure Batch Processing
- Data Load Tool

Participant Search

Smith
View File

1. Enter the last name of the participant you want to locate.

2. Click View File.

Cash and Counseling | Application Version | Click here with bugs or feedback

Locate the participant you are searching for and click **View File**.

Create File | File Search | Files returned: 9

File - Search Results

Individual	SS #	Medicaid #	ID	Status	
Smith, Adam	555-87-8975	889900	asmith2	Active	View File
Smith, Angela	123-45-6554	021345	asmith	Inactive	View File
Smith, Calvin	182-98-6532	4563897645	csmith	Active	View File
Smith, Deb	417-55-6978	5000001259	dsmith	Active	View File
Smith, Freddy	123-66-1032	132000	fsmith	Inactive	View File
Smith, Joseph	123-12-1231	32314	jsmith3	Active	View File
Smith, Lucy	124-44-5006	23459	lsmith	Special Case	View File
Smith, Stan	555-43-2343	2334	ssmith	Active	View File
Smith, Steven	324-54-7777	123445	ssmith2	Re-enrolled	View File

3. Click View File

Cash and Counseling | Application Version | Click here with bugs or feedback

Master Participant List Search

Navigate to the homepage and click on the **Master Participant List**.

Note: If you don't have this table on your homepage, just use one of the other methods for locating a participant file.

A table will open up with the names of the participants. Click **View File** in order to go to a participant's file. Or, you can click **Details** to quickly view a few key bits of information, such as the participant's support broker's name. Please note that you may have to search through the pages in order to locate the participant, as shown below in step three.

Consumer Direction Module
National Resource Center for Participant-Directed Services

CDM
CONSUMER DIRECTION MODULE

Change Password | Help | Logout

Home | File | Forms\Reports | Broadcast | Notifications | Admin

Quick Links

- Modify Support Brokers
- Modify Support Broker Agencies
- Modify FMSA Admin Agents
- Modify FMSA Admin Agencies
- Advanced Search
- Broadcast Message
- Reports
- Pending Spending Plans
- Expenditure Batch Processing
- Data Load Tool

Participant Search

Notifications

Master Participant List

1. Click on Master Participant List

2. Click View File or Details

Display: 10 Rows | Go

Individual	Medicaid Number	View File	Details
C, S	002020002	View File	Details
Calahan, Francis	434225	View File	Details
Carlson, Catherine	5487956848	View File	Details
Carlton, Steve	443234	View File	Details
Carson, Cathy	2354833679	View File	Details
Carter, Nancy		View File	Details

Cash and Counseling | Application Version | Click here with bugs or feedback

Carson, Cathy	2354833679	View File	Details
Carter, Nancy		View File	Details
Carver, Arlene	837201	View File	Details
Cascio, Marie	342118	View File	Details
Charles, Otto	3545288765	View File	Details
Churchman, Peter	4325689	View File	Details

1 2 3 4 5 6 7 8 9 10 ...

3. Search through the pages to locate participant.

Changing a Participant's File Status

Go to the participant's file. Scroll down to the bottom of the page. Go to the **Status** drop-down menu and select the appropriate new status for the participant. When finished, click **Save File**.

For some file statuses, after this step you will simply see a confirmation message. For other statuses, such as **Closed**, a new window will open where you will enter the reason for the status change. Choose the reason from the dropdown menu, enter an estimated date of return (if appropriate, otherwise leave it blank), and click **Save**.

File - Change Status
File has been saved, with a change in status. Use this form to enter more details.

New Status: Closed

Status Reason:

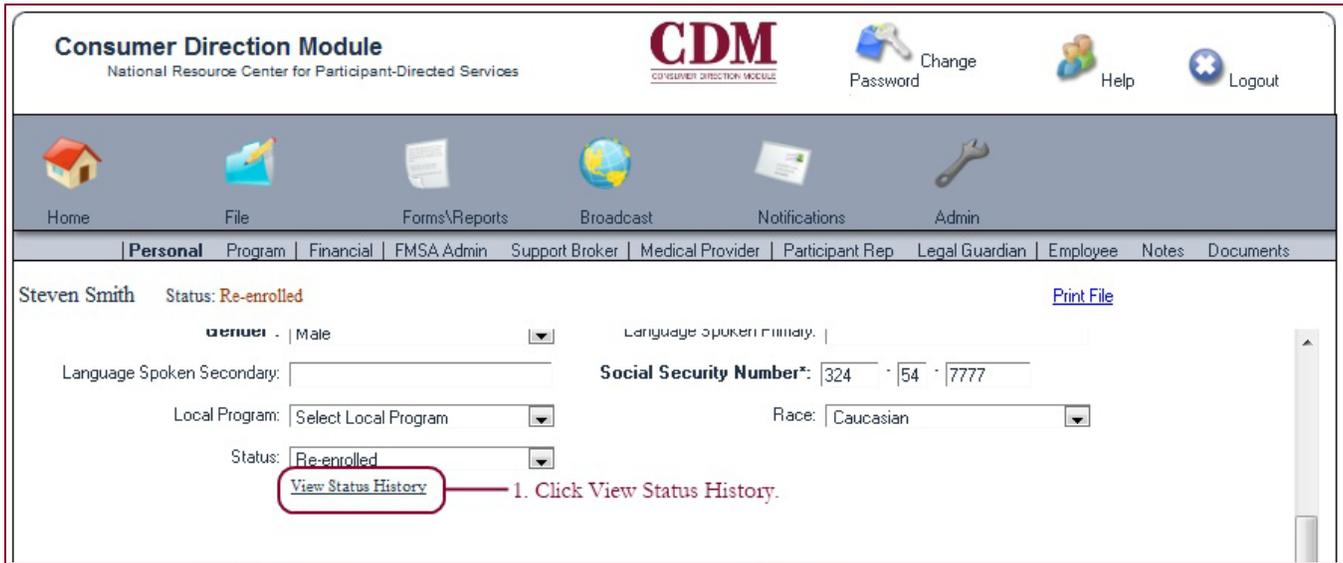
Estimated Return Date: / /

Comments:

NOTE

If the **Status Reason** pull-down menu does not include the right status change reason, be sure to suggest to your program administrator that a new reason be added.

Viewing a Participant's File Status History



Consumer Direction Module
National Resource Center for Participant-Directed Services

CDM
CONSUMER DIRECTION MODULE

Change Password | Help | Logout

Home | File | Forms\Reports | Broadcast | Notifications | Admin

Personal | Program | Financial | FMSA Admin | Support Broker | Medical Provider | Participant Rep | Legal Guardian | Employee | Notes | Documents

Steven Smith Status: **Re-enrolled** [Print File](#)

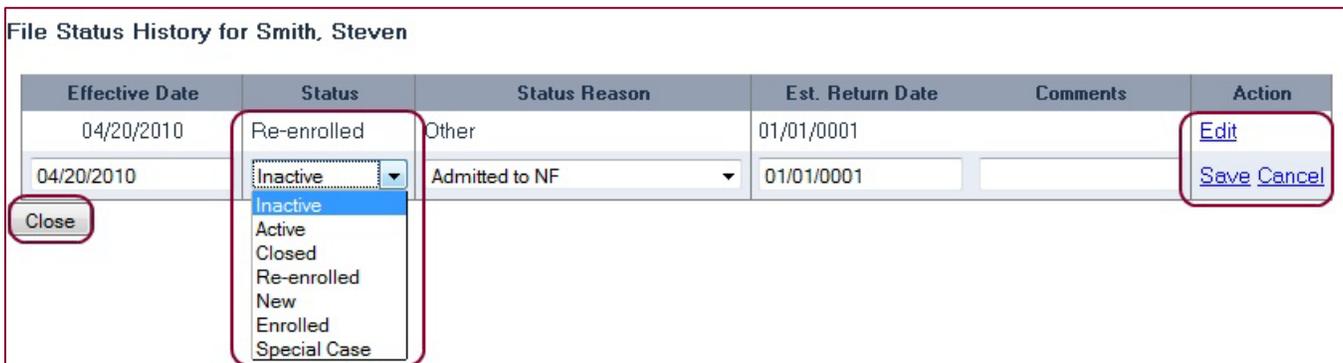
Gender: Male | Language Spoken Primary: | Language Spoken Secondary: | Social Security Number*: 324 54 7777

Local Program: Select Local Program | Race: Caucasian

Status: Re-enrolled

View Status History — 1. Click View Status History.

Go to the participant's file. Click **View Status History**. Your web browser will navigate to the page below.



File Status History for Smith, Steven

Effective Date	Status	Status Reason	Est. Return Date	Comments	Action
04/20/2010	Re-enrolled	Other	01/01/0001		Edit
04/20/2010	Inactive	Admitted to NF	01/01/0001		Save Cancel

[Close](#)

If your user role has the correct permissions, you can also edit the participant's **File Status** from here by clicking on **Edit**. If you opt to change the participant's file status from here, your browser will navigate to the page below. If you do not need to edit the participant's file, click **Close**.

To change the participant's file status, click on the drop-down menu. When you are finished, click **Close**.

Creating a New Note in a Participant's File

From the participant's file, go to the **Notes** section and click **Add Note**. Your Web browser will navigate to the page shown below.

The screenshot displays the 'Consumer Direction Module' (CDM) interface. At the top, there is a header with the CDM logo and navigation links for 'Change Password', 'Help', and 'Logout'. Below this is a main navigation bar with icons for 'Home', 'File', 'Forms/Reports', 'Broadcast', 'Notifications', and 'Admin'. The 'File' icon is highlighted with a red box. Underneath, a sub-menu is visible with 'Notes' highlighted in red. The main content area shows the participant's name 'Steven Smith' and a 'Status: None Selected'. There are 'Fill-in fields' for 'Subject' and 'Note'. The 'Subject' field contains 'Support Broker question regarding Mr. Smith'. The 'Note' field contains 'I would like to know x, y, and z about Mr. Smith's records in your files. Please advise. Thank you. Fred Jones'. Below these fields is a 'Type' dropdown menu set to 'Appeal'. To the right of the dropdown is the instruction 'Indicate Type of message.' and a note: 'Enter the appropriate information into the Subject and Note fields.' Below the dropdown is a 'Send Notifications To' section with checkboxes for 'Participant', 'FMSA Agent', 'FMSA Admin', and 'Support Broker'. The 'Support Broker' checkbox is checked. Below this is the instruction 'Check your recipient(s) box, scroll to the bottom of the page and click Save Note.' At the bottom of the page, there are links for 'Cash and Counseling', 'Application Version', and 'Click here with bugs or feedback'.

Fill-in the **Subject** and **Note** fields, just as you would with an e-mail. Using the drop-down box, indicate the **Type** of message. Check the box in front of the recipient(s) that you want to **Send Notifications To**. Finally, don't forget to scroll down to the bottom of the page and click **Save Note**.

Viewing a Note in a Participant's File

Go to the participant's file. Next, click on the **Notes** tab. Find the correct note and click **View**.

The screenshot shows the Consumer Direction Module (CDM) interface. At the top, there is a navigation bar with icons for Home, File, Forms/Reports, Broadcast, Notifications, and Admin. Below this is a sub-navigation bar with tabs for Personal, Program, Financial, FMSA Admin, Support Broker, Medical Provider, Participant Rep, Legal Guardian, Employee, Notes, and Documents. The 'Notes' tab is selected and highlighted with a red box. The main content area displays the participant's name 'Steven Smith' and status 'Re-enrolled'. Below this is a section titled 'File - Notes' with an 'Add Note' button. A table lists notes with columns for Subject, Author's Role, Date, Type, Response, Status, and a 'View' button. The 'View' button is highlighted with a red box, and a red arrow points to it with the text '1. Click on View'. At the bottom of the page, there are links for 'Cash and Counseling', 'Application Version', and 'Click here with bugs or feedback'.

Subject	Author's Role	Date	Type	Response	Status	View	Respond
Please advice about Mr. Smith's file status	State Admin	4/16/2010	General	Available	Open	View	Respond

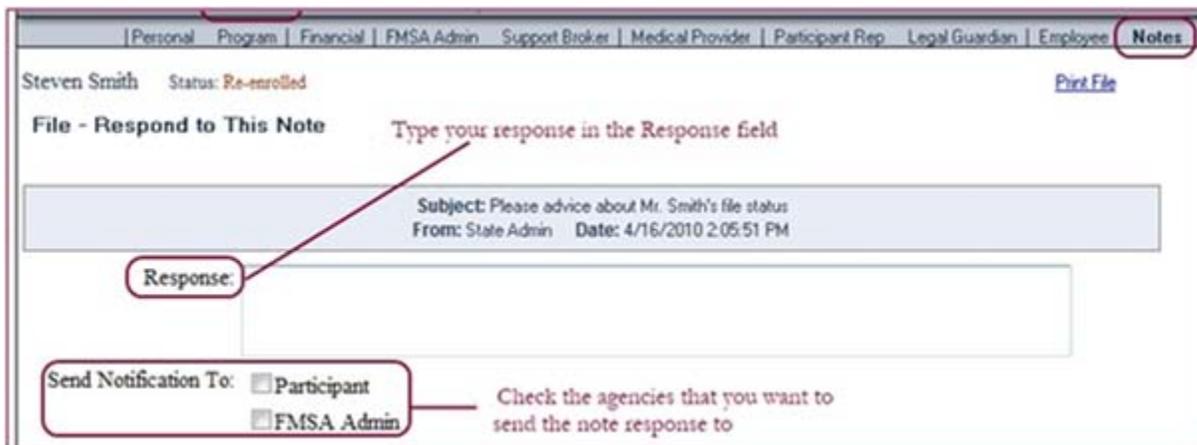
You will now see the text of the original note and any responses that have been made. You can also respond to a note by clicking **Respond**, or navigate back to the list by clicking **Back to List**.

Responding to a Note in a Participant's File

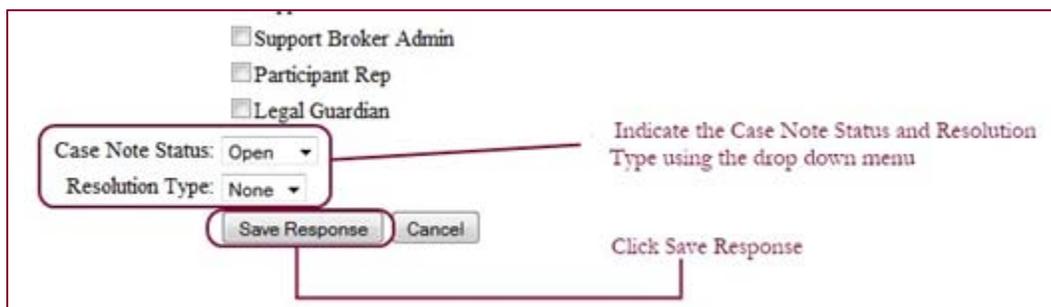
Go to the participant's file. Next, click on the **Notes** tab. Notes regarding the participant will be stored here. Now, click **Respond**.



Type your response in the **Response** field. Next, check the user role that you want to **Send Notification To**. Your web browser will navigate to the page below.



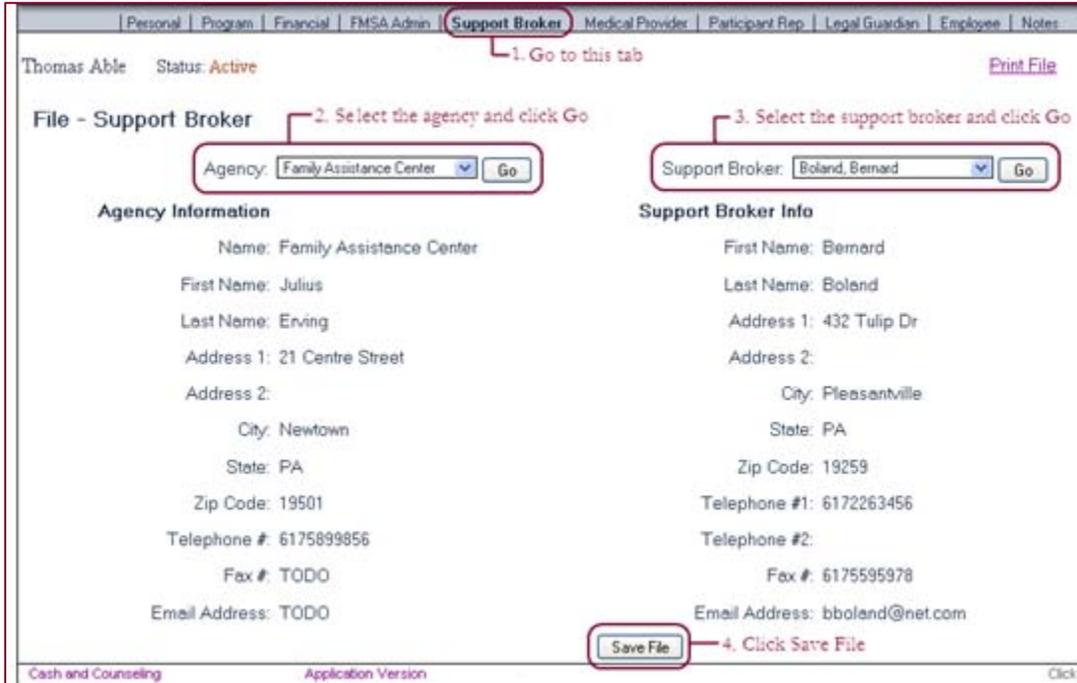
Indicate the **Case Note Status** and the **Resolution Type**. Finally, click **Save Response**.



Assigning a Support Broker

Prerequisites: participant file must already be created and the support broker must be added as a user in the CDM.

Go to the participant’s file > Support Broker tab.



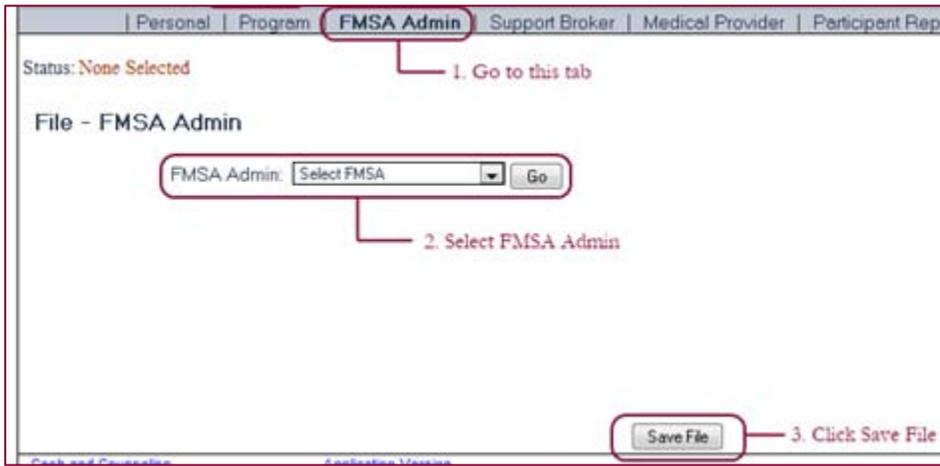
From the **Agency** pull-down menu, select the agency of the support broker. If the support broker does not work for an agency, choose **“None Selected.”** Once you have selected the agency, click **Go**. The contact information for the agency you selected will be displayed below the **Agency** pull-down menu.

Next, from the **Support Broker** pull-down menu, which now displays the names of all the support brokers working for the agency you selected. Find the name of the support broker you want to assign to this participant and then click **Go**. The support broker’s contact information is now displayed below the **Support Broker** pull-down menu.

Click **Save File**. The support broker will now have access to appropriate parts of this participant’s file and will receive alerts and notifications about this participant.

Assigning an FMS Entity

Go to the participant's file > **FMSA Admin** tab.



From **the FMSA Admin** pull-down menu, select the FMSA administrator. Once you have selected the administrator, click **Go**. The contact information for the administrator you selected will be displayed below the **FMSA Admin** pull-down menu.

Click **Save File**. The FMSA administrator will now have access to appropriate parts of this participant's file and will receive alerts and notifications about this participant.

Assigning a Medical Provider

Go to the participant's file > **Medical Provider** tab.

The screenshot shows the top navigation bar of the Consumer Direction Module (CDM) with the title "National Resource Center for Participant-Directed Services". The main navigation menu includes Home, File, Forms\Reports, Broadcast, Notifications, and Admin. A secondary menu below it contains Personal, Program, FMSA Admin, Support Broker, **Medical Provider** (highlighted with a red box and labeled "1. Go to this tab"), Participant Rep, Legal Guardian, Employee, and Documents. The main content area displays "Status: None Selected" and a "Print File" link. Below this is a section titled "File - Medical Provider" containing a message: "Participant does not yet have a Medical Provider." A red box highlights the "Add Medical Provider" button, with a callout stating "2. If the participant does not have a Medical Provider, or if you want to change providers, click Add Medical Provider". At the bottom of the page, there are links for "Cash and Counseling", "Application Version", and "Click here with bugs or feedback", along with a "Save File" button.

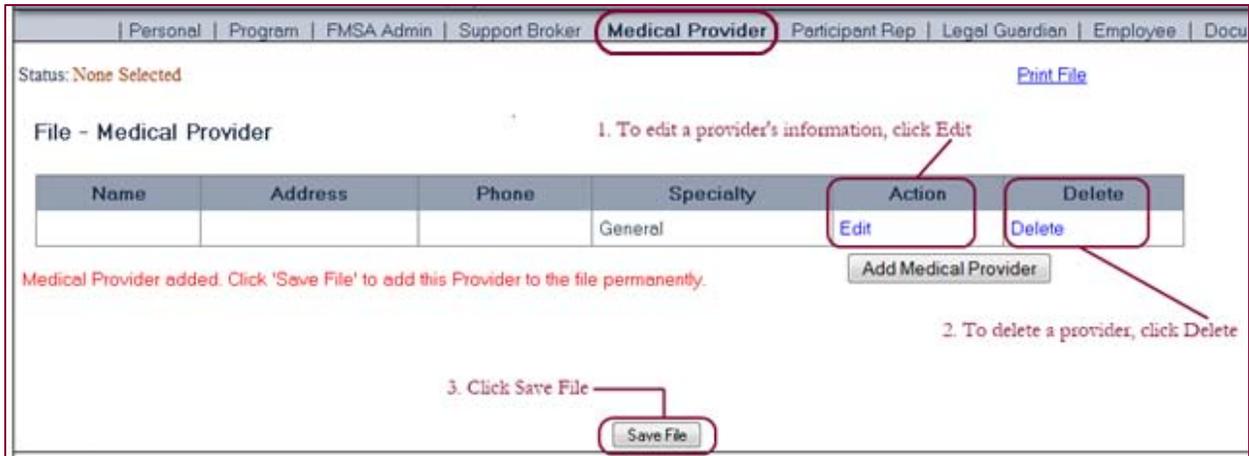
To add a new medical provider, or to edit a provider's personal information, click **Add Medical Provider**.

The screenshot shows the "Add Medical Provider" form. It includes fields for State, Zip, Phone, Fax, Specialty (a dropdown menu currently set to "General"), Medical License No., Language (a dropdown menu currently set to "English"), Specialist (a checkbox), ICD-9 Code (a dropdown menu currently set to "BI: ICD-9 MI Via not valid"), and Last Doctor Visit (a date selector currently set to 2010). A red box highlights the form fields, with a callout stating "3. Enter provider's contact information in the appropriate fields and select 'Specialty.'" Below the form, there are "Update Medical Provider" and "Cancel" buttons. A callout points to the "Update Medical Provider" button, stating "4. Click Update Medical Provider".

Fill in the fields as appropriate and select the provider's **Specialty**. When finished, click **Update Medical Provider**.

Editing or Deleting a Medical Provider

Go to the participant's file > **Medical Provider** tab.



To update and or edit a provider's personal information, click **Edit**. To delete a provider, click **Delete**. When finished, click **Save File**.

Assigning a Participant Rep

Go to the participant's file > **Participant Rep** tab.

Enter the participant representative's information into the fields. When finished, click **Save File**.

Assigning a Legal Guardian

Go to the participant's file > **Legal Guardian** tab.

File - Legal Guardian

Has Legal Guardian?

Last Name*:

First Name:

Address 1:

Address 2:

City:

State:

Zip Code:

Telephone Number: () -

Save File Click Save File

Fill in the personal information of the legal guardian. When finished, click **Save File**.

Documenting a Home Visit

1. Update Last In-Person Monitoring Date

Go to the participant’s file > **Program** tab. Change the date fields for **Last In-Person Monitoring Date**. Click **Save**.

Personal **Program** Financial FMSA Service Advisor Medical Provider Participant Representative Legal Guardian Employee No

Cleveland Amory Status: Active [Print File](#) [Form](#)

File - Program

Next Assessment Due: Aug 2011 Next In-person Monitoring Due: asap

Date of Enrollment: May / 1 / 2006 Disenrollment Date: ... / ... / 2010

Source of Enrollment: Select Enrollment Source Last Phone Monitoring: ... / ... / 2010

Prior Care Agency: Date of Last Plan of Care: ... / ... / 2010

Date of Last Assessment: Aug / 17 / 2010 **Last In-Person Monitoring Date: ... / ... / 2010**

Save File

2. Enter Visit Note

Go to the participant’s file > **Notes** tab. Click **Add Note**.

Personal Program Financial FMSA Admin Support Broker Medical Provider Participant Rep Legal Guardian Employee **Notes** Documents

Steven Smith Status: Re-enrolled [Print File](#)

File - Notes **Add Note** 2. Click Add Note.

1. Click on the Notes tab.

Subject	Author's Role	Date	Type	Response	Status		
Please advice about Mr. Smith's file status	State Admin	4/16/2010	General	Available	Open	View	Respond

The screen will refresh. Fill in the **Subject** and **Note** fields as appropriate. From the **Type** dropdown menu, select **Monitoring Visit**. Check the boxes next to the user roles that should receive notifications about this phone monitoring. Next, scroll down and click **Save Note**.

Personal | Program | Financial | FMSA | Service Advisor | Medical Provider | Participant Representative | Legal Guardian | Employee | **Notes**

Cleveland Amory Status: Active [Print File](#) [Forms](#)

Enter a **Subject:**

subject and the text of the note **Note:**

Type: Monitoring Visit

Send Notifications To:

- Participant
- FMSA Agent
- FMSA
- Service Advisor
- Advisement Agency
- State Office
- Participant Representative
- Guest
- State Admin
- Legal Guardian

Save

Set "Type" to "Monitoring Visit"

Documenting a Phone Call

1. Update Last Phone Monitoring Date

Go to the participant's file > **Program** tab. Update the date fields for **Last Phone Monitoring**. Click **Save**.

Personal **Program** Financial FMSA Service Advisor Medical Provider Participant Representative Legal Guardian Employee No

Cleveland Amory Status: Active [Print File](#) [Form](#)

File - Program

Next Assessment Due: Aug 2011 Next In-person Monitoring Due: asap

Date of Enrollment: May / 1 / 2006 Disenrollment Date: ... / ... / 2010

Source of Enrollment: Select Enrollment Source **Last Phone Monitoring: ... / ... / 2010**

Prior Care Agency: Date of Last Plan of Care: ... / ... / 2010

2. Enter Phone Call Note

Go to the participant's file > **Notes** tab. Click **Add Note**.

Personal Program Financial FMSA Admin Support Broker Medical Provider Participant Rep Legal Guardian Employee **Notes** Documents

Steven Smith Status: Re-enrolled [Print File](#)

File - Notes

Add Note 2. Click Add Note.

1. Click on the Notes tab.

Subject	Author's Role	Date	Type	Response	Status		
Please advice about Mr. Smith's file status	State Admin	4/16/2010	General	Available	Open	View	Respond

The screen will refresh. Fill in the **Subject** and **Note** fields as appropriate. From the **Type** dropdown menu, select **Phone Monitoring**. Check the boxes next to the user roles that should receive notifications about this phone monitoring. Next, scroll down and click **Save Note**.

Personal | Program | Financial | FMSA | Service Advisor | Medical Provider | Participant Representative | Legal Guardian | Employee | **Notes**

Cleveland Amory Status: **Active** [Print File](#) [Forms](#)

Enter a **Subject** and the text of the note **Note:**

Type: Phone Monitoring *Set "Type" to "Phone Monitoring"*

Send Notifications To:

- Participant
- FMSA Agent
- FMSA
- Service Advisor
- Advisement Agency
- State Office
- Participant Representative
- Guest
- State Admin
- Legal Guardian

Printing a Participant's File

There are three ways to print a participant's file. The first step in all of these methods is to go to the participant's file.

The screenshot shows a web application interface for managing participant files. At the top, there is a navigation bar with icons for Home, File, Forms/Reports, Broadcast, Notifications, and Admin. Below this is a sub-navigation bar with tabs: Personal (selected), Program, Financial, FMSA, Service Advisor, Medical Provider, Participant Representative, Legal Guardian, Employee, Notes, Documents, and Assessments. The main content area displays the participant's name 'Tonia Aglione' and status 'Active'. To the right of the name are two buttons: 'Print File' and 'Forms'. Below the name, the section is titled 'File - Personal' and shows the 'Participant ID: 30425'. The form contains several input fields: Last Name (Aglione), First Name (Tonia), Address 1 (53 Simmonsville), Address 2 (empty), City* (Johnston), and Zip Code (2919). There are also dropdown menus for Hair Color and MID No. At the bottom of the form, there is a 'Save File' button and a 'Print' button. The footer of the page includes 'Created by NRCPDS', 'Application Version', and 'Copyright 2009. All Rights Reserved. Rhode Island Department of Human Services'.

The first way is to click on **Print File**, located just below the **Employee** tab.

The second way is to download the Participant Form. To do this, click on the **Forms** link. This will bring you the Participant Form page. In the **Get Participant Form** box, enter the participant's last name then click **Get Form**. This will enable you to download a spreadsheet with most of the participant's information.

NOTE

The **Print File** and **Forms** links will always appear in the same location in the participant file, whether you are in the FMSA Admin tab, Support Broker tab, or Medical Provider tab, etc.

If you do not see the **Forms** link, then you do not have permission to use this feature.

The third way is to click on **Print** at the bottom of the page. This link is available from anywhere within the CDM. Clicking on it will open a new window. This window is a print-friendly version of the CDM. From this window, you can print directly from your browser, but you must print each tab within the participant file separately.

Working with Participants' Financial Information

Creating a Participant Budget

There are several ways to enter a budget for a participant, depending on how the budget amount is calculated in your program:

- If the budget amount is calculated before it is entered into the CDM, go to [Creating a Participant Budget: Enter a Dollar Amount](#).
- If the budget amount is calculated using the CDM's assessment module, go to [Creating a Participant Budget: Via the Assessment Module](#).
- If the budget amount is calculated at the same time that a spending plan is created, then go to [Creating a Participant Budget: Via the Spending Plan](#).

Creating a Participant Budget: Enter a Dollar Amount

Start from: Participant's file > **Financial** tab > **Budget** sub-tab.

Budget for Able, Thomas

Effective Date	Expiration Date	Budget Period	Budget Amount	Action	Delete
8/1/2009	7/31/2010	Monthly	\$1,200.00	Edit	Delete
7/1/2008	12/31/2008	Yearly	\$10,000.00	Edit	Delete
3/1/2008	6/30/2008	Yearly	\$10,000.00	Edit	Delete

Add Budget — Click here to enter a budget amount

Application Version

Click on the **Add Budget** button. A new screen will appear. Enter the required information and click **Insert**. New spending plans for this participant can now be created using this budget.

Budget for Able, Thomas

Effective Date*: 8/1/2009 / 7/31/2010

Expiration Date*: 8/1/2009 / 7/31/2010

Budget Amount*: \$1,200.00

Budget Period*: Daily

Insert Cancel

Creating a Participant Budget: Via the Assessment Module

After creating an assessment within the assessment module, when you click **Save**, the Calculated Budget Amount is automatically forwarded to the program administrator for approval. Once the program administrator approves that assessment and budget, then a spending plan can be created.

Refer to the assessment module instructions for more details.

Creating a Participant Budget: Via the Spending Plan

Prerequisite: Administrators must check the box for the setting **Spending Plan Download without Budget** in order to use this method. That setting is located in Admin > Application Settings > State Customization.

If the budget is developed at the same time as the spending plan, simply follow the instructions for downloading a spending plan (Participant File > Financial > Get Spending Plan) and check the box labeled “Let me enter budget on spreadsheet” before clicking **Download**.

When you open the spending plan spreadsheet, you will be able to edit the budget information at the top right that is normally not editable. Follow the directions for completing the spending plan and be sure to enter the appropriate information into the budget cells before uploading the spending plan.

Budget Amount:	\$0.00
Budget Effective Date:	1/1/2012
Budget End Date:	1/1/2013
Spending Plan Start Date:	1/1/2012
Spending Plan End Date:	1/1/2013
Days in Spending Plan:	367
Spending Plan Version	1

Viewing and Printing a Spending Plan

Go to the participant’s file > **Financial** tab > **View Spending Plans** sub-tab.

Personal	Program	Financial	FMSA	Service Advisor	Medical Provider	Participant Representative	Legal Guardian	Employee	Notes	Doc
Budget	View Spending Plans	Submit Spending Plan	Get Spending Plan	View Monthly Statement	Submit Monthly Statement	Get Monthly Statement				
List of Spending Plans for Armstrong, David										
Active	Submitted	Start Date	End Date	Status	Submitted By	Comments	Version	Action	View	
<input checked="" type="checkbox"/>	08/03/2010	08/03/2010	08/03/2011	Approved	Anderson, John	Comments	1	Edit	View	

You will see a table summarizing every spending plan ever drafted for this participant. Click **View**. The “Spending Plan Details” table will expand. At the top of the table is the budget and spending plan summary information. Within the table, each spending plan category is displayed, along with the category subtotal and a **Details** button. Click the **Details** button to view each line item within any spending plan category.

Spending plan and budget summary information		
Current Status: Overridden	Start Date: 9/1/2009	Approved Date of Plan: 8/18/2009
Budget Effective Date: 9/1/2009	Total Budget Amount for Period: \$1,000.00	
Category Name	Total Plan per Budget Period	
Details Direct Hire Services	\$822.41	
Details Emergency Back-Up Plan for Personal Care	\$1.00	
Details Savings for Purchases	\$100.00	
Financial Management Services Monthly Fee	\$50.00	
Support Broker Monthly Fee	\$25.00	
Balance	\$1.59	
Click to view category details	Category subtotals	Balance in plan

To print, click the **Print** link at the bottom of the page. A new window will open that is more print-friendly. Click **Expand** for all the categories you want to display in the printed version. Then, print your browser window. This is usually done by going into the **File** menu and clicking **Print**, or you can press **Ctrl + P**.

Support Broker Monthly Fee
Balance
Created by NRCPSD Application Version Licensing Info Print Copyright 2009. All Rights Reserved

Creating or Editing a Spending Plan

If you will have internet access while you are creating the spending plan, then follow the instructions for the [online spending plan](#). If you will not have internet access, such as if you will be bringing a laptop into the participant’s home, then follow the instructions for the [spending plan spreadsheet](#).

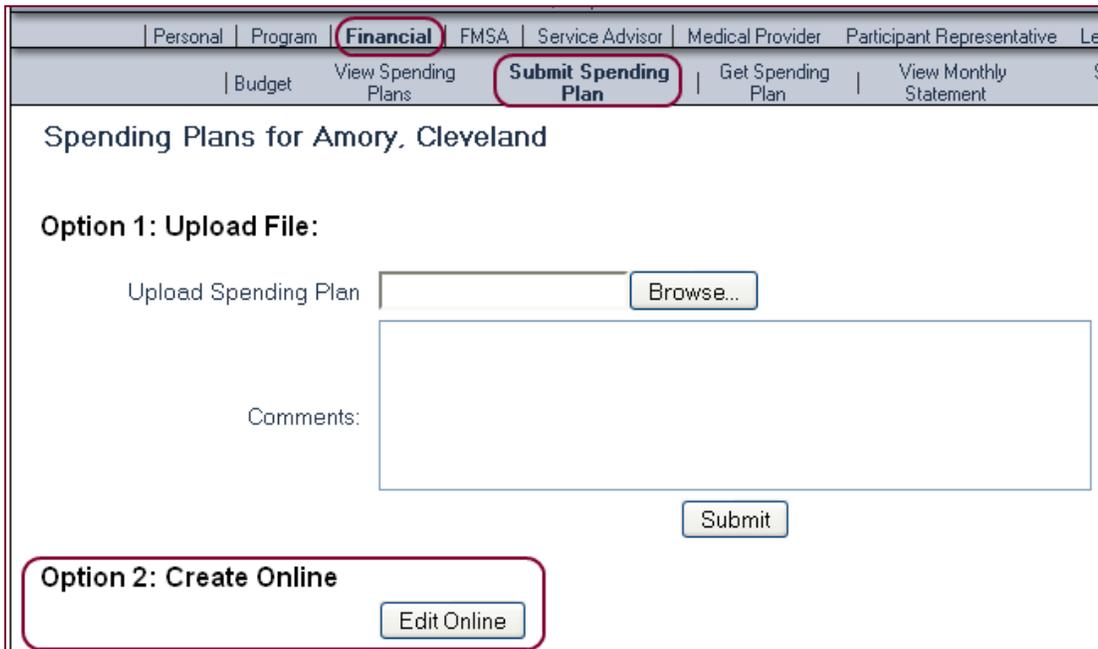
NOTE

Information within a spending plan can only be edited by submitting a new plan with changes made in order to replace the old one.

However, if you have administrative permission, you can edit the start date, end date, or status of a spending plan. To do this, go to the participant’s file > **Financial** tab > **View Spending Plans** sub-tab. Make your changes, then click **Save**.

Online Spending Plan

Go to the participant’s file and then click on the **Financial** tab then the **Submit Spending Plan** tab. On the bottom half of the page is “Option 2: Create Online”. In that area, click **Edit Online**.



A new window will open with three options:

1. **Edit this Plan (Valid for Drafted Status only)**

Choose this option if you have already started a spending plan and saved it, but did not submit it. You must also select the spending plan that you started from the Select Spending Plan dropdown menu. This option will only work if the spending plan you select shows “drafted” in parentheses.

NOTE

If you want to edit a spending plan that has already been submitted, then you must make a copy of the submitted spending plan, make your changes, then resubmit the new version.

2. **Make Copy of Plan, and select Budget and/or Date Range**

Choose this option if you want to work from a copy of a spending plan that was previously submitted. This is helpful if you want to submit a new version of a spending plan that has already been submitted, or if the participant's next spending plan will be similar to their previous one.

Once you select this option, new fields will appear. The **Budget** dropdown menu lists all available approved budgets for this participant. Choose the budget that covers the period for which you want to create a spending plan.

The **Spending Plan Date Range** is the period during which the spending plan, if approved, will be valid. Enter the beginning and end date, and be sure that the spending plan date range falls within the budget date range. For example, if the budget has a start date of July 1, 2010, then the spending plan start date must be July 1, 2010 or later.

3. **Create Blank Spending Plan**

Choose this option if you want to start fresh with a blank spending plan. If you select this option, you will be required to choose a budget and set the spending plan date range, just like in Option 2.

Spending Plan Selection

Select Spending Plan: Blank

Option 1 Edit this Plan (Valid for Drafted Status only)

Option 2 Make Copy of Plan, and select Budget and/or Date Range

Option 3 Create Blank Spending Plan

If copying to new plan, or creating a brand new one, select items below.

Budget: \$1,200.00 Monthly 7/1/2010-6/28/2011

Spending Plan Date Range: to

Get Spending Plan

Now that you have chosen one of the three options, click **Get Spending Plan**. The **Spending Plan Details** table will expand. Each spending plan category is displayed next to a blue plus sign. Click the plus sign in order to expand the details for that category. You can enter information into any white field. The pale blue fields will calculate automatically as you enter information.

When you are done entering information for one category, you can click the plus sign next to the category title again to collapse those details. Then, click on the plus sign of the next category to begin entering those details.

Spending Plan Selection

Spending Plan Details

+ Waiver Services

+ Participant Delegated Goods and Services

+ Regular Purchases of Items/Goods

+ Savings for Purchases

+ Support Broker Fee

Total: \$2426.08

Service or Support Description	Start Date	End Date	Service Code	Hourly rate	Taxes per Hour	Total Hourly Cost	Hours per Week	Employee Payroll Tax	# Hrs/Units per Budget Period	Total Cost this Budget Period
17 Personal care attendant	7/1/2010	6/30/2011	naker/companion	\$ 8.50	\$ 0.94	\$ 9.44	15	\$ 0.00	257	\$ 2426.0
18				\$	\$ 0.00	\$ 0.00		\$ 0.00	0	\$ 0.00
19				\$	\$ 0.00	\$ 0.00		\$ 0.00	0	\$ 0.00
20				\$	\$ 0.00	\$ 0.00		\$ 0.00	0	\$ 0.00
21				\$	\$ 0.00	\$ 0.00		\$ 0.00	0	\$ 0.00

Total: \$0.00

Total: \$0.00

Total: \$0.00

Total: \$0.00

Spending Plan Total: \$ 2426.08

Budget Amount: \$ 1200.00

Save Save and Submit Close

NOTE

If your spending plans include service or item codes and the administrator has enabled drop-down menus to be used in those fields, then the codes will auto-complete. Just start typing the code and the rest will

While you are working, be sure to click **Save** often. This will save your work, so if you are timed-out by the CDM or are unable to do all the work on this spending plan at once, you will not lose everything you have entered. This will save the spending plan with a “Drafted” status. When you want to edit it, follow the directions for [Option 1: Edit this Plan](#) when you first open the online spending plan window.

The final step in creating an online spending plan is to click **Save and Submit**. This will save the spending plan and notify the program administrator that it is ready to be approved. Once you submit the spending plan, you will be unable to edit it (although you can copy it to create a new one).

Remember, until you click **Save and Submit**, the spending plan is not complete and will not be approved or denied.

Spending Plan Spreadsheet

There are three steps to creating a spending plan using the spreadsheet. You will download and save the spending plan spreadsheet, enter the information into the spending plan, then upload the spending plan into the CDM.

Downloading the Spreadsheet

Go to the participant’s file > **Financial** tab > **Get Spending Plan** sub-tab.



From the **Available Spending Plans** dropdown menu, choose which spending plan you want to open. If you want to start from scratch, select **Blank**. If you want to copy a previously submitted spending plan, choose that spending plan from the dropdown menu.

Available Spending Plans: ▼

From the **Use Budget** dropdown menu, select the approved budget from which you want to create a spending plan.

Use Budget: ▼

If you are copying a previously submitted spending plan, you can choose to either enter a new date range or to use the date range of the spending plan that you are copying. Make this selection in the **Effective Date Range** dropdown menu.

Effective Date Range: ▼

Designate the beginning and end dates of the spending plan. Remember that the spending plan effective dates must fall within the dates of the budget that you chose from the **Use Budget** dropdown menu.

Effective Dates:* / / to / /

Finally, click **Download**. A download dialog box will appear. Name the file, and choose where to save it. It is a good idea to have a standard naming format and a folder where you save spending plans.

NOTE
If you copied an existing spending plan and chose to use the same effective dates, you will receive a user message telling you that another version of the spending plan exists, so this plan will have a different version number if you submit it. Click **Confirm** to continue.

Filling out the Spending Plan

Now that you have downloaded the spending plan spreadsheet, it is time to open it and to fill it out. As you are working, remember to save the file often.

At the top of the spending plan you will find the contact information of the participant and his or her fiscal management services provider, the support broker name, and the budget and spending plan dates and amounts. This information is for your reference only and usually cannot be edited. In some programs, you will be able to edit the budget and spending plan summary information.0

	A	B	C	D	E	F	G	H	
1	DOH Region II				FEA Name	ACME Services LLC			
2					FEA Address	4400 N. Broad St. Philadelphia, PA 19104			
3					FEA Phone	(111)222-4444			
4									
5	Participant Name	Aaron Abner							
6	Participant Address	123 N. Beech St.			Budget Amount:		\$3,250.00		
7		Anytown, New Mexico 19234			Budget Effective Date:		6/1/2010		
8					Budget End Date:		5/31/2011		
9	Medicaid Number:	1234567890							
10	Participant File Status:	Active			Spending Plan Start Date:		6/1/2010		
11					Spending Plan End Date:		12/31/2010		
12	Support Broker Name:	Penny Pinkerton			Days in Spending Plan:		214		
13					Spending Plan Version		3		

Below the summary information, there is a table for each spending plan category. Enter spending plan information into the white cells in these tables. Do not enter any information into the shaded cells. The shaded cells automatically calculate, so any changes made to these cells will not be saved and might generate an error message.

The last cell in each row shows the cost of each line item. At the bottom right of each spending plan category table, the subtotal for the spending plan category is displayed. These values update automatically as you fill out the spreadsheet.

Waiver Services							Total Cost this Budget Period	
Service or Support Description	Start Date	End Date	Service Code	Hourly rate	Taxes per Hour	Total Hourly Cost		
Personal assistance	06/01/2010	12/31/2010	99509 - homemaker/compan	\$9.25	\$1.01	\$10.26	\$4711.08	
					\$0.00	\$0.00	\$0.00	
					\$0.00	\$0.00	\$0.00	
					\$0.00	\$0.00	\$0.00	
					\$0.00	\$0.00	\$0.00	
Total Waiver Services							\$4711.08	

Enter or edit information within the white cells

Category subtotal

The last table in the spreadsheet is the spending plan summary. Here you will see the subtotals for each category, the total cost of the spending plan, and the amount remaining (which is calculated by subtracting the spending plan total cost from the approved budget amount). Make sure that the Amount Remaining is a positive number, or else the spending plan total cost exceeds the approved budget amount, and the spending plan will be denied.

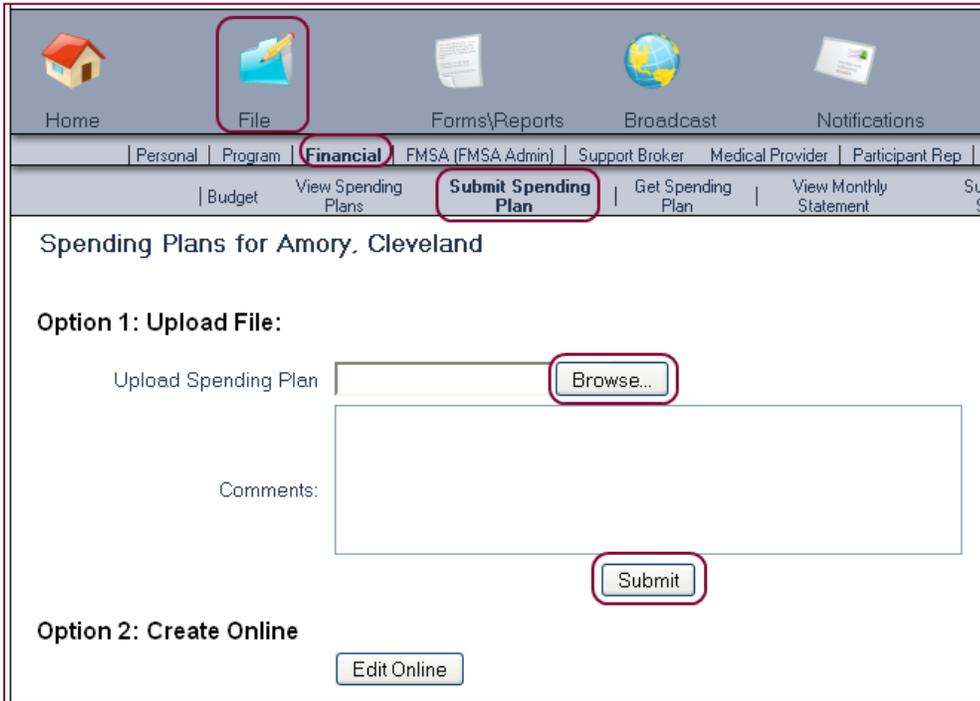
Summary of Spending Plan	
Waiver Services	\$4711.08
Participant Delegated Goods and Services	\$0.00
Regular Purchases of Items/Goods	\$24.00
Savings for Purchases	\$0.00
Support Broker Fee	\$0.00
Total Cost:	\$4735.08
Amount Remaining*:	-\$1485.08

Once you have completed all of the spending plan categories, save and close the spreadsheet.

Uploading/Submitting the Spending Plan

After you complete and saved the spending plan, return to the CDM and go to the participant’s file > **Financial** tab > **Submit Spending Plan** sub-tab. The top half of the page will be labeled “Option 1: Upload File”. In this section,

click **Browse**. A dialog box will open. Locate the spreadsheet file you saved and click **Open**. In the **Comments** box, add any comments if you have them. Finally, click **Submit**. The program administrator will now be notified that the spending plan needs to be reviewed.



Approving or Denying a Spending Plan

After a spending plan is submitted, the person or people responsible for approving them will receive a notification. It is also a good idea for that user role to have the “Pending Spending Plans” table on their homepage.

Notifications				
Description	Individual	Date	View File	Remove
Spending Plan Submitted for Approval	Andrews, Ashley	08/14/2010	View File	<input type="button" value="Remove"/>

Go to the participant’s file, then click the **Financial** tab, then the **View Spending Plan** sub-tab. Locate the spending plan with the status of “Submitted” and click **View**.

Active	Submitted	Start Date	End Date	Status	Submitted By	Comments	Version	Action	View
	08/14/2010	09/01/2010	08/31/2011	Submitted	Anderson, John	Comments	1	Edit	View

The “Spending Plan Details” table will expand and display the spending plan categories and subtotals. Click on the Details button in any category to view each line item in the spending plan.

Spending Plan Details	
Current Status: Submitted Start Date: 3/1/2008 <input type="text" value="Approved Date of Plan:"/> Budget Effective Date: 3/1/2008 Total Budget Amount for Period: \$2,000.00	
Category Name	Total Plan per Budget Period
<input type="button" value="Details"/> Direct Hire Services	\$253.97
<input type="button" value="Details"/> Emergency Back-Up Plan for Personal Care	\$225.00
<input type="button" value="Details"/> Other Purchased Services	\$0.00
<input type="button" value="Details"/> Regular Purchases of Items/Goods	\$744.00
<input type="button" value="Details"/> Savings for Purchases	\$82.00
Balance	
\$1.03	
<input type="button" value="Approve"/> <input type="button" value="Reject"/> <input type="text" value="Select Denial Reason..."/>	

Review all the spending plan details to ensure that it conforms to program policies.

If the spending plan is satisfactory, enter an “Approved Date of Plan” at the top and click **Approve**. This will trigger a notification telling the appropriate people (usually the support broker, FMS, and the participant) that the spending plan was approved and that the participant can begin paying for the items and services designated in the plan. The “Current Status” in the top left of the table will also display “approved”.

If the spending plan is unsatisfactory, choose an option from the Select Denial Reason dropdown menu and click **Reject**. This will trigger a notification telling the appropriate people (usually the support broker and participant) that the spending plan needs modification.

Recording Participant Expenditures

There are three ways to record participant expenditures within the CDM. You can submit expenditure reports by individual either via your browser or a spreadsheet, or you can enter more than one participant’s expenditures into the batch expenditure spreadsheet.

Individual Expenditure Report: Online Entry

To record expenditures for one person directly through your browser, go to the participant’s file, then click the **Financial** tab then the **Submit Expenditure Report** sub-tab. Click the **Edit Online** button.

A new window will open. From the **Select Spending Plan** dropdown menu, choose the spending plan that covers the dates of the expenditures you are recording. There is no need to change the date range. Click **Show Payments**.

A table will expand showing each spending plan category and the total amount of payments, if any, that have been entered in this date range. Click on any of the blue plus signs to view each line item that has been recorded in that category in the time period you chose above.

To record a new expenditure, expand the correct category. At the bottom of the category, click on the **Add Row** dropdown menu. This menu contains the items that were approved in that category in the participant’s spending plan. Choose the item that corresponds to the expenditure you are recording. Click **Add**.

A new row will be created and will import the spending plan data for the item that you chose from the **Add Row** dropdown menu. Or, if you chose **<Blank>** from that menu, the row will not have any data.

In the new row, enter the needed information, or edit the information that was imported from the spending plan if necessary.

Repeat these steps with all of the expenditures. Be sure to click **Save** often. When you are done, click **Save** a final time and close the window.

+ Services — Click the plus sign to expand a category

Service Type/Description	Date of Payment	Employee	Estim. Hourly Wage + Taxes	Actual Hours Paid	Actual Hourly Wage + Taxes	Service Code	Total Cost
18 Home Care	9/30/2009	Sarah Able	\$ 12.18	20.00	\$ 13.50	112235 - Hous	\$ 270.00
18 Home Care			\$ 12.18		\$	112235 - Hous	\$ 0.00

Add Row:

+ Emergency for Personal Care

+ Participant Delegated Goods and Services

+ Regular Purchases of Items/Goods

+ Savings for Purchases

Select a "Blank" or an item from the spending plan and click **Add**

Category subtotals

Total: \$270.00

Total: \$

Total: \$

Total: \$

Total: \$21.00

Save often and right before exiting

Total Payments this Period: \$ 291.00

Total Budgeted Amount: \$ 14397.48

Individual Expenditure Report: Spreadsheet Entry

There are three steps to recording expenditures using the spreadsheet. You will download and save the expenditure report spreadsheet, enter the information into the expenditure report, then upload the spreadsheet into the CDM.

Downloading the Spreadsheet

Go to the participant's file > **Financial** tab > **Get Expenditure Reports** sub-tab. From the **Approved Spending Plans** dropdown menu, choose the spending plan that covers the dates for which you will be recording expenditures. Click **Download**.

Personal | Program | **Financial** | FMSA Admin | Support Broker | Medical Provider | Participant Rep | Legal Guardian | Employee | Notes | Document

Budget | View Spending Plans | Submit Spending Plan | Get Spending Plan | View Expenditure Reports | Submit Expenditure Reports | **Get Expenditure Reports**

Download Expenditure Reports

Approved Spending Plans: 8/1/2009 - 7/31/2010

A download dialog box will appear. Name the file, and choose where to save it. It is a good idea to have a standard naming format and a folder where you save expenditure reports.

Filling out the Expenditure Report Spreadsheet

Now that you have downloaded the expenditure report spreadsheet, it is time to open it and to fill it out. As you are working, remember to save the file often.

At the top of the expenditure report, you will find the contact information of the participant and his or her fiscal management services provider, the support broker name, and the budget and spending plan dates and amounts. This information is for your reference only and cannot be edited.

DOH Region V		FEA Name	Consumer Services, Inc.
		FEA Address	811 Middletown Rd. Downingtown, PA 19532
		FEA Phone	
Participant Name	Thomas Able	Budget Amount:	\$1,200.00
Participant Address	432 N. Panther St. Philadelphia, Massachuse 19123	Budget Effective Date:	8/1/2009
		Budget End Date:	7/31/2010
Medicaid Number:	543211089	Spending Plan Start Date:	8/1/2009
Participant File Status:	Active	Spending Plan End Date:	7/31/2010
Support Broker Name:	Bernard Boland	Days in Spending Plan:	365
		Spending Plan Version	3

Below the summary information, there is a table for each spending plan category. These tables will include information imported from the spending plan. This imported information is only for your reference, so that you know what was approved in the spending plan. It will not be saved as an expenditure line item when you upload, unless you enter a “Date of Payment”.

Record each expenditure in the correct category table. You must enter a “Date of Payment” for each expenditure line item, or that line item will not be saved. Only enter information into the unshaded cells in these tables. Do not enter any information into the shaded cells. The shaded cells automatically calculate, so any changes made to these cells will not be saved and might generate an error message.

The last cell in each row shows the total cost of the recorded expenditure. At the bottom right of each category table, the subtotal for that category is displayed. These values update automatically as you fill out the spreadsheet.

Services							
Service Type/Description	Date of Payment	Employee	Hourly Wage + Taxes	Actual Hours Paid	Actual Hourly Wage + Taxes	Service Code	
Home Care			\$12.18			112235 - Housekeeping	
						Total Services:	\$0.00

Every expenditure must include a Date of Payment, or it will not be saved to the CDM.

Line item subtotal

Subtotal of expenditures in category

The last table in the spreadsheet includes the subtotals of expenditures recorded for each category and the total expenditures recorded in this report.

64	Summary	
65	Services	\$890.00
66	Amount paid for Emergency Backup Plan	\$0.00
67	Participant Delegated Goods and Services	\$124.00
68	Regular Purchases of Items/Goods	\$35.00
69	Savings for Purchases	\$50.00
70	Financial Management Services Fee	\$50.00
71	Support Broker Fee	\$75.00
72	Worker's Compensation	\$70.00
73	Total Paid this Period:	\$1294.00

Once you have completed entering all expenditures, save and close the spreadsheet.

Uploading the Expenditure Report Spreadsheet

NOTE

Never include an expenditure payment record in more than one expenditure report spreadsheet upload. It is always best to start a new report by downloading a new, blank expenditure report spreadsheet from a participant's file. You are able to upload more than one spreadsheet for any date range if some expenditures are entered later than others or if the spreadsheet does not have enough lines.

After you complete and save the expenditure report, return to the CDM and go to the participant's file > **Financial** tab > **Submit Expenditure Report** sub-tab. The top half of the page is labeled "Option 1: Upload File". In this section, click **Browse**. A dialog box will open. Locate the spreadsheet file you saved and click **Open**. Click **Submit**.

Batch Expenditure Upload

The batch expenditure upload enables you to record expenditures for many participants using a single spreadsheet. This process involves three steps: downloading the spreadsheet, filling it out, and uploading it.

Downloading the Batch Expenditure File

From the Quick Links section of your homepage, click on the **Expenditure Batch Processing** link. A new page will load. The top half of this page is the area from which you will download the blank expenditure file. First, choose the date range that encompasses the expenditures you will be recording. Click **Download**.

Download Spending Plans to batch file

Date Range: Jul. / 16 / 2010
to
Aug. / 16 / 2010

Download

Upload monthly expenditures from batch file:

Browse... Upload

A download dialog box will open. Name the file, and choose where to save it. It is a good idea to have a standard naming format and a folder where you save expenditure reports.

Filling out the Batch Expenditure File

Now that you have downloaded the batch expenditure spreadsheet, it is time to open it and to fill it out. As you are working, remember to save the file often.

The file you see now displays every line item from every approved spending plan that is or was active during the date range you designated during the download process. The numbers from the spending plan are imported into this spreadsheet, but no line item will be saved into the CDM unless you enter a “Date of Payment”.

	D	H	I	J	K	L	M	N	O	P	Q
1						Services					
2	Participant	Expenditure Type	Start Date	End Date	Date of Payment	Service Type/Description	Employee	Estim. Hourly Wage + Taxes	Actual Hours Paid	Actual Hourly Wage + Taxes	Service Code
3	Daniel Felino	Services	7/14/2006	8/16/2011		Cleaning		1\$11.10			
4	Daniel Felino	Services	7/14/2006	8/16/2011		Cooking		2\$15.54			
5	Daniel Felino	Emergency Back-l	7/14/2006	8/16/2011							
6	Dolores Deerfield	Services	9/1/2006	8/16/2011		Personal Care		1\$11.10			
7	Dolores Deerfield	Services	9/1/2006	8/16/2011		Housekeeping		2\$9.99			
8	Dolores Deerfield	Services	9/1/2006	8/16/2011		Food Preparation		3\$9.99			
9	Dolores Deerfield	Services	9/1/2006	8/16/2011		Transportation		5\$7.77			
10	Dolores Deerfield	Participant Delega	9/1/2006	8/16/2011							
11	Dolores Deerfield	Emergency Back-l	9/1/2006	8/16/2011							
12	Dolores Deerfield	Regular Purchases	9/1/2006	8/16/2011							
13	Dolores Deerfield	Savings for Purcha	9/1/2006	8/16/2011							
14	Dolores Deerfield	Financial Manager	9/1/2006	8/16/2011							
15	Dolores Deerfield	Support Broker Fe	9/1/2006	8/16/2011							
16	Dolores Deerfield	Worker's Compens	9/1/2006	8/16/2011							

Columns for expenditures in "Services Category.
For other categories, scroll right

Line item totals displayed in last column →

Each spending plan category has its own range of columns in the batch expenditure file. You may need to scroll to the right to find the unshaded cells within the columns for the line item category of the expenditure you are recording. Do not enter information into shaded cells, as this will not be saved to the CDM and may generate an error.

For each expenditure, locate the correct participant and line item. Enter a “Date of Payment” and scroll to the right until you come to the unshaded columns in that row. Enter the expenditure details. If the details were already imported from the spending plan, double check them and edit them to reflect actual expenses if needed.

The last column of the spreadsheet contains the totals for each line item recorded. These are the most important figures to check. They do not update based on the other line item information you enter.

Once you have completed entering all expenditures, save and close the spreadsheet.

Uploading the Batch Expenditure File

After you complete and save the expenditure batch file, return to the same page of the CDM from where you downloaded the batch expenditure file. Under “Upload monthly expenditures batch file”, click **Browse**. Locate the file, click **Open**, then click **Upload**.

Download Spending Plans to batch file

Date Range: Jul. / 16 / 2010
to
Aug. / 16 / 2010

Upload monthly expenditures from batch file:

C:\Documents and Set

The CDM will check the spreadsheet data in several ways. If it finds something that may be an error, it will return an error message. Most of these messages will include a line and column number. Go back to the spreadsheet and view that cell to make sure that it contains the correct type of data (e.g. a decimal instead of text). Make the necessary changes, save the file, and then upload it into the CDM again.

Once you have fixed any data entry errors, you will see a table displaying all the information that the CDM took from the spreadsheet. Double check this information. Be sure that all the expenditures you want to enter are there, and that there are none you did not mean to enter. Especially make sure the last column displays the correct total amount.

If the data in the table are correct, click **Commit Changes**. Otherwise, click **Upload New File** to make changes to the spreadsheet and upload it again.

Batch File Successfully Uploaded

Please review the items, and select Commit to save to database, or select Cancel to remove your changes.

ID	Participant Name	Medicaid #	Item #	Expenditure Type	Start Date	End Date	Date of Service	Service Type/Description	Employee	Estim. Hourly Wage + Taxes	Actual Hours Paid	Actual Hourly Wage + Taxes	Service Code	Back-up Provider	Emplo #
121	Daniel Felino	777654	14	Services	7/14/2006 12:00:00 AM	8/16/2011 12:00:00 AM	7/30/2010 12:00:00 AM	Cleaning	1	11.1	25	11.12			
122	Daniel Felino	777654	15	Services	7/14/2006 12:00:00 AM	8/16/2011 12:00:00 AM	7/30/2010 12:00:00 AM	Cooking	2	15.54	10	15.5			

Viewing Participant Expenditures

Go to the participant's file > **Financial** tab > **View Expenditure Reports** sub-tab.

All of the participant's previously approved spending plans are listed in the **Available Spending Plans** dropdown menu. From this menu, choose the spending plan that you want to compare expenditures against.

Set the **Date Range** fields to the range that contains the expenditures you want to view. If you want to view all expenditures that were recorded under the spending plan you chose, ignore the date range fields and just check the box below. Click **Go**.

In the image below, the search will return expenditures that had a date of payment in June of 2010 and that were approved under the spending plan that ends on 07/31/2010.

View Expenditure Reports for Able, Thomas

Available Spending Plans: 8/1/2009 - 7/31/2010

Date Range: Jun. / 1 / 2010 to Jun. / 30 / 2010

Or, check here to show all activity against the spending plan. **Go**

A table will display with each spending plan category. The total spending during the selected period for each category is displayed on the right side of the table. Click **Details** to view each expenditure recorded for any category.

View Expenditure Reports for Able, Thomas

Available Spending Plans: 8/1/2009 - 7/31/2010

Date Range: ... / ... / 2010 to ... / ... / 2010

Or, check here to show all activity against the spending plan. **Go**

Budget Amount: \$1,200.00 Monthly
Spending Plan Amount: \$1,199.79
Total Spending: \$8,068.40

Category Name	Plan Amount
Details Services	\$5,872.40
Details Savings for Purchases	\$2,196.00

Total spending by category during selected date range

Editing Participant Expenditures

Got to the participant’s file > **Financial** tab > **Submit Expenditure Report** sub-tab. Click the **Edit Online** button.

Submit Expenditure Reports

Option 1: Upload File

Upload File Option:

Upload Expenditure Reports

Option 2: Create Online

A new window will open. From the **Select Spending Plan** dropdown menu, choose the spending plan that covers the dates of the expenditures you want to edit. If you want to view only expenditures from a particular date range within the spending plan date range, then you can change the **Date Range** start or end dates. Click **Show Payments**.

Consumer Direction Module
National Resource Center for Participant-Directed Services

CDM
CONSUMER DIRECTION MODULE

Expenditure Report for Able, Thomas

Select Spending Plan:

Date Range: to

A table will expand showing each spending plan category and the total amount of payments, if any, that have been entered in this date range. Find the category that contains the expenditure you want to edit and click on the blue plus sign. The category will expand to show all of the category expenditures that have been entered during the date range selected.

Services Locate and edit expenditure Total: \$810.00

Service Type/Description	Date of Payment	Employee	Estim. Hourly Wage + Taxes	Actual Hours Paid	Actual Hourly Wage + Taxes	Service Code	Total Cost
18 Home Care	9/30/2009	Sarah Able	\$ 12.18	20.00	\$ 13.50	112235 - Hous	270.00
18 Home Care	10/16/2009	Sarah Able	\$ 12.18	21	\$ 13.50	112235 - Hous	283.50
18 Home Care	10/31/2009	Sarah Able	\$ 12.18	19	\$ 13.5	112235 - Hous	256.50

Add Row:

Find the expenditure to be edited. If there are multiple expenditures that are similar, the easiest way to identify the correct expenditure is by the “Date of Payment”.

Repeat this step with any other expenditures that need to be edited. Finally, click **Save** and close the window.

NOTE

The CDM database logs all the changes made to participant files, so even though the participant file will only display the updated expenditure, administrators do have records of edited expenditures.

Assessment Module Introduction

Using the assessment module, you can generate a budget based on the participant’s functional characteristics and the level and frequency of assistance needed with any activity of daily living (ADL) and instrumental activity of daily living (IADL). The program administrator can configure the formulas that determine the effect that each piece of assessment information will have on the budget. The assessment instructions are applicable only in programs that use the assessment module.

Creating a New Assessment

Go to the participant’s file > **Assessments** tab. A table will display any previous assessments created for this participant. Click **New Assessment** at the bottom of the page.

Assessment Date	Completed By	Date Modified
8/3/2010 12:00:00 AM	JAnderson	8/3/2010 1:16:09 PM

A new assessment will appear. Enter the date.

If the participant has no previous assessment, then all the fields will be blank. If the participant has a previous assessment, then the information from the most recent assessment will be copied into this new one. It is vital that you double check every detail of the assessment to make sure that old information is either still valid or has been updated.

Fill out the assessment according to your program’s policies and procedures. Check the box next to each functional characteristic of the participant. Then, enter the details for each ADL and IADL. To do this, click on the plus sign in the first column of the ADL and IADL tables. Enter the details regarding each activity. For each ADL or IADL the participant does not need help with, set the **Level of Assistance** dropdown menu to “Not Applicable”.

Category **ADLS** Click to show ADL/IADL details

	Complete	Activity	Activity Budget	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Bowel	\$0.00	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Dressing	\$91.14	<div style="border: 1px solid gray; padding: 5px;"> Level of Assistance: <input type="text" value="Minimum"/> <input type="button" value="v"/> Times per Day: <input type="text" value="2"/> Days per Week: <input type="text" value="7"/> Comments: <input type="text"/> </div>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Eating	\$37.20	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Grooming	\$11.90	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Mobility	\$0.00	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Shower	\$9.92	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Skin Care	\$0.00	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Sponge Bath	\$0.00	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Transfers	\$0.00	

Fill out details for every ADL/IADL. If no assistance is needed, set "Level of Assistance" to "Not Applicable"

Submit only when completely finished with assessment

Save often! —

Be sure to click **Save** often as you work. For security, the CDM is set to automatically log you out if you are inactive for a certain amount of time. Saving often will ensure that you don't lose your work if this happens.

When you have completed entering all the assessment details, click **Submit**. This will save your work, lock the assessment so it cannot be edited, and send a notification to the administrator to let them know that the assessment has been done and the budget is ready to be approved or denied.

Monitoring and Oversight Tools

Viewing and Printing an Assessment

Go to the participant’s file > **Assessments** tab. A table will display any previous assessments created for this participant. Locate the assessment you want to view, then click on that assessment’s date.

Personal | Program | Financial | FMSA | Service Advisor | Medical Provider | Participant Representative | Legal Guardian | Employee | Notes | Documents | **Assessments**

Terrance Alewife

Assessments

Assessment Date	Completed By	Date Modified
8/3/2010 12:00:00 AM	JAnderson	8/3/2010 1:16:09 PM

Click to view assessment

New Assessment

The window will display the assessment. To view the details of any of the recorded ADLs or IADLs, click the plus sign in the first column of those tables.

Category **ADLS** Click to view ADL/IADL details

	Complete	Activity	Activity Budget
+	<input checked="" type="checkbox"/>	Bowel	\$0.00
+	<input checked="" type="checkbox"/>	Dressing	\$91.14
+	<input checked="" type="checkbox"/>	Eating	\$37.20
+	<input checked="" type="checkbox"/>	Grooming	\$11.90
+	<input checked="" type="checkbox"/>	Mobility	\$0.00

Level of Assistance: Times per Day:
 Days per Week:
 Comments: Due to his old shoulder injury, Mr. Amory needs help putting on and taking off his shirts.

To print the assessment, click **View Printable Copy** at the bottom of the page. The page will refresh with a print-friendly version of the assessment. Scroll to the bottom and click **Print**. The print dialog box for your browser will open.

Viewing a Report

Go to the **Forms/Reports** area.

Consumer Direction Module
National Resource Center for Participant-Directed Services

1. Click **Forms/Reports**

Home File **Forms\Reports** Broadcast Notifications Admin

Forms Display: 5 Rows Go

Name	Date Uploaded	View
Enrollment Packet	1/7/2010 3:15:39 PM	View
Business Requirements	4/8/2008 11:01:04 AM	View
Tax Form Packet	1/7/2010 3:15:07 PM	View
Participant Representative Permission Form	1/7/2010 2:45:54 PM	View
Sample Form	3/3/2009	View

Reports Display: 8 Rows Go

Name	Date Uploaded	View
Amount of Monthly Budget	8/2/2006 12:00:00 AM	View
Appeal Tracking Report	7/25/2006 11:20:24 AM	View
Assessments By Due Date	8/2/2006 5:20:42 PM	View
Assessments Past Due By 30 or More Days	8/3/2006 12:00:00 AM	View
Batch Monthly Statement Report	1/1/0001 12:00:00 AM	View

2. Click **View** on the type of assessment that you want to examine (i.e. by Due Date or Past Due).

Cash and Counseling Application Version Click here with bugs or feedback

Locate the desired report and click **View**.

If the report requires more information, such as a date range, you will see a page like the one below. Enter any information needed and click **Run Report**.

PersonalChoice
State of Rhode Island Department of Human Services

3. Select appropriate month and year

Report Parameter(s) Inquiry for: **Demographic Characteristics of Participants**

4. Click **Run Report**

Report will show current data as of the date selected below.

Select a Report Date: May / 17 / 2010

Run Report

1 / 1 Main Report 100% BusinessObjects

The report will open in a new window. From here, you can browse or search the data in the report, or print or export it (see below).

Exporting a Report

Open any report. From the “Business Objects” toolbar, click on the export icon, which looks like a disk.

Participants
 Report will show current data as of the date selected below.

Select a Report Date: May. / 17 / 2010

Click on the Export icon

Run Report

1 / 1 Main Report 100% BusinessObjects

Demographic Characteristics of Cash & Counseling Participants
 Cumulative through 5/17/2010

Age Group of Participant (in years)	Male		Female		Total	
	No.	%	No.	%	No.	%
Children						
Less than 3	-	- %	-	- %	-	- %
3 to Less than 5	-	- %	-	- %	-	- %
5 to Less than 12	1	12.50%	1	8.33%	2	10.00%

A new window opens with export options. From the dropdown menu, choose the format into which you want to export. Your options include crystal reports (.rpt), PDF, Word (.doc), MS Excel (.xls), or rich text (.rtf).

Select the page range you want to export, and then click **OK**. The report will then be exported into the format you selected.

NOTE

You can get a free Crystal Report viewer from the SAP via the following link:
<http://www.businessobjects.com/forms/crystalreports/viewer/>

Printing a Report

Open any report. From the “Business Objects” toolbar, click on the print icon.

Participants
 Report will show current data as of the date selected below.

Select a Report Date: May. / 17 / 2010

Click on the Print Icon

Run Report

1 / 1 Main Report 100% BusinessObjects

Demographic Characteristics of Cash & Counseling Participants
 Cumulative through 5/17/2010

Age Group of Participant (in years)	Male		Female		Total	
	No.	%	No.	%	No.	%
Children						
Less than 3	-	- %	-	- %	-	- %
3 to Less than 5	-	- %	-	- %	-	- %
5 to Less than 12	1	12.50%	1	8.33%	2	10.00%

A new window will open with print options. Choose the page range that you want to print and click **OK**. A PDF file will open. In the top left corner of the window with the PDF open, click the print icon.

The standard print dialog box will open. Adjust settings as needed and click **OK**.

Navigating within a Report

In reports with multiple pages, you can navigate to a different page by clicking on one of the arrows in the “Business Objects” toolbar. Or, in the text box to the right of the page numbers, you can enter a page number and then click on the icon to the right of this text box to go directly to that page.

Report Parameter(s) Inquiry for: **Master Participant List**

Enter the Parameter Values below.



Use these arrows to change pages

Master Participant List

Or, enter a page number in this box, then click the icon on the right

Service Advisor Agency:

Service Advisor:				
Participant Name	Social Security #	Medicaid #	FMSA	Status

Searching within a Report

Open any report . From the “Business Objects” toolbar, find the binoculars icon. The text box to the left of this icon is the search box. Enter a term that you want to find, such as a participant’s name, then click on the **binoculars icon**. If the search term you entered is somewhere in the report, the page where it is located will display with the search term highlighted. If the search term is not anywhere in the report, then the search box will say **End of Search**.



Ad Hoc Reporting

Click **Ad Hoc Reporting** in the Quick Links section of your homepage (if the link is not there, then you do not have the level of permission needed to access this tool). The ad hoc reporting search criteria table displays.

Choose Search Criteria

The first step is to determine which participants will be included in the report. Start by choosing your first criterion and the comparison option, then enter the criterion input. The criterion input field has an auto-complete feature that can help you avoid typos. Click **Add** to save the criterion.

Here is an example of how to enter a search criterion that will return all female participants. The criterion type is set to “Gender”, the comparison option is set to “Equals”, and the user has entered “f”, so the option “Female” has appeared above the field. Click **Add**.

You can add as many criteria as you like. Below is an example of input criteria that will return all participants that are female, have an active file status, and have a budget that is greater than \$1,000.

The **Remove** button will delete the search criterion in that row.

Set Search Options

The search options box is on the right of the “Search Criteria” table. Each option is explained here:

- **Load a Saved Report Template:** If any report templates have previously been saved, you can select them from this dropdown menu. If you select a template and click **Go**, the search criteria, output columns and search options from the template will load.
- **Query Type:** Choose “And” if you want the report to display participants that satisfy all search criteria. Choose “Or” if you want the report to display participants that meet any of the search criteria.
- **Sort By:** This setting determines the order in which the report results are displayed.
- **Effective Date:** Values for same search criteria may change over time. One example is the “support broker agency”. Since a participant could be served by different agencies at different times, you need to tell the CDM which date to consider. In the example shown in the image below, the Effective Date is set to 08/01/2009,

so the report would show participants that were being served by “Helping Hands LLC” on that day. The following search criteria are modified by the “Effective Date”:

- Spending Plan Amount
- File Status ID
- File Status
- FMSA
- Has Representative
- Has Legal Guardian
- Support Broker First Name
- Support Broker Last Name
- Support Broker Agency
- **Date Range for Payments:** If you are using “Payments” as a search criterion, this range determines which payments are included in the search. In the example in the image below, the date range is set to 01/01/2009 – 12/31/2009, so the report would display participants that had more than \$5,000 in expenditures recorded in the year 2009.

The screenshot shows a 'Search Criteria' window with a blue header and a 'click to hide/show' link. The main area is divided into several sections:

- Search Criteria:** A list of filters with 'Remove' buttons:
 - DisenrollmentDate | Less Than | 01/01/2010
 - AND SupportBrokerAgency | Starts With | Helping Hands LLC
 - AND Payments | Greater Than | 5000
- Add Criterion:** A form to add a new filter: Date Created | Greater Than | _/~/_ | Add
- Options:** Load a Saved Report Template: [dropdown] | Go
- Query Type:** And Or (radio buttons)
- Sort By:** Date Created (dropdown)
- Effective Date:** 8/1/2009
- Date Range for Payments:** 1/1/2009 to 12/31/2009

At the bottom left, there are buttons for 'Output Columns' and 'Search'.

Select Output Columns

Now that you have chosen which participants will be included in the report, click the **Output Columns** button to choose which information from those participants’ files will be displayed. A popup window will appear with a list of columns that can be displayed. You can select any of these columns one-by-one, or you can choose **Display All Columns**. Click **Save**. The popup window will disappear.

Select Columns to Display

Select which columns to include in your results, then click Save. If nothing is selected, then all columns will be displayed.

- First Name
- Last Name
- Participant Id
- Medicaid Number
- SSN
- Emergency Contact Name
- Emergency Contact Number
- Date Created
- Date Last Modified
- Local Case Number
- Date Of Birth

Option 1: Select individual columns

Option 2: Select all columns

Display All Columns

Save Cancel

Finally, click **Search**. The “Search Results” table will expand and display the report you have built.

Exporting the Report

To analyze the data, print the report, or save and send the report, click the **Export** button. A download dialog box will appear. Open or save the file. The information is now available in an Excel spreadsheet.

Saving the Report as a Template

If there is a report that you will run more than once, you may want to save it as a template. Once you have created and run the report, click the **Save Selections into a Report Template**. When prompted, enter a descriptive name for the report and click **Save Report**. The CDM will now remember the search criteria, search options, and output columns for this report.

Next time you want to run this report, go to the “Search Options” pull-down menu, locate your report, and click **Go**. Review all the report settings and make any necessary changes and click **Search** to run the report.

Viewing Database Records (Audit Log)

This tool enables administrators to view any changes that have been made to the CDM database. From the Quick Links table on your homepage, click **Ad Hoc Reporting > Audit Log** tab.

From the **Table Name** dropdown menu, choose the database table you want to view. Set the **Date Range** and click **Search**.

Audit Search Select database table to view Set date range

Table Name: Participant Date Range: 8/1/2010 to 8/31/2010 Search Export

A table will display below with every record that was changed during the date range you chose. The “Changed By” column gives the user ID of the person that changed the value. The “Date” shows when the change was made. Every column includes the title of the database field, the old value, and the new value. If a field was changed during the date range, the title, old and new values will be in bold.

Person that made change and when change was made Changed fields are in bold Scroll to see more information

Summary of Changes Made			Column Value Details			
Field ID	Changed By	Date	Column16	OldValue16	NewValue16	Column17
30487	JAnderson	08/17/2010	LastAssessmentDate	Jul 27 2010 12:00AM	Aug 17 2010 1:42PM	LastPhoneMonitoringDate
30487	stateadmin	08/03/2010	LastAssessmentDate	Jul 27 2010 12:00AM	Jul 27 2010 12:00AM	LastPhoneMonitoringDate
30487	stateadmin	08/03/2010	LastAssessmentDate	Jul 27 2010 12:09PM	Jul 27 2010 12:00AM	LastPhoneMonitoringDate
29000	susanb	08/03/2010	LastAssessmentDate	Feb 13 2007 12:00AM	Feb 13 2007 12:00AM	LastPhoneMonitoringDate
29000	susanb	08/03/2010	LastAssessmentDate	Feb 13 2007 12:00AM	Feb 13 2007 12:00AM	LastPhoneMonitoringDate

Click **Export** at the top right to export the data to an Excel spreadsheet for printing, analysis, saving and sharing.



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The National Resource Center for Participant-Directed Services provides research-based technical assistance on all aspects of designing, implementing, managing and evaluating participant-directed programs.