Bridge Technical Assistance

Goals and Inventory of Needs

Department of Health Care Policy and Financing

October 2019

Our Mission

Improving health care access and outcomes for the **people** we serve while demonstrating sound stewardship of financial **resources**

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Department of Health Care
Policy & Financing

Background

Character limitations in text boxes for Goals and Inventory of Needs have been expanded to 600 characters
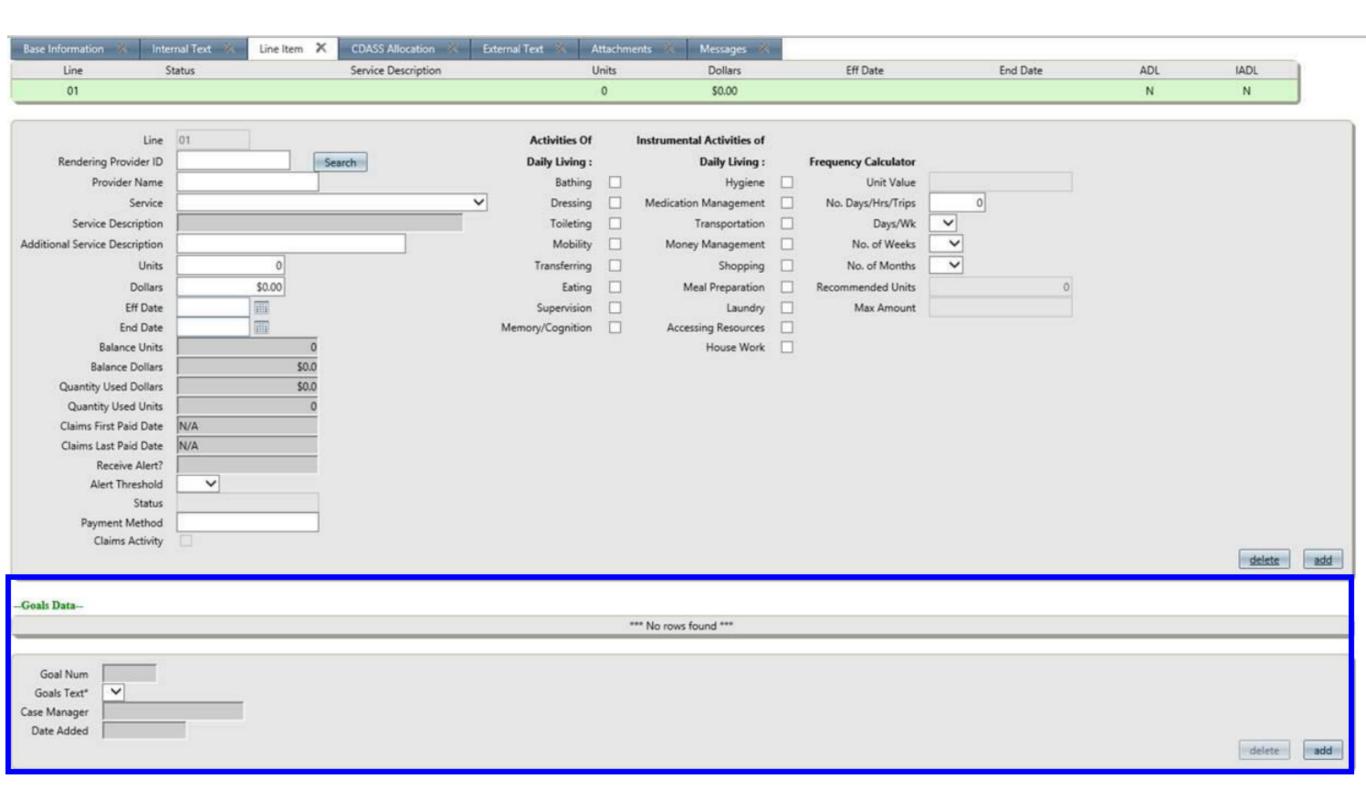
Implementation of Effective Date (Eff Date) and End Date fields for Goals and Inventory of Need
- Documents the Certification Period the for the Goal(s) and Inventory of Need(s)

Note: Individuals must have at least one Personal Goal and Inventory of Need throughout the Certification Period

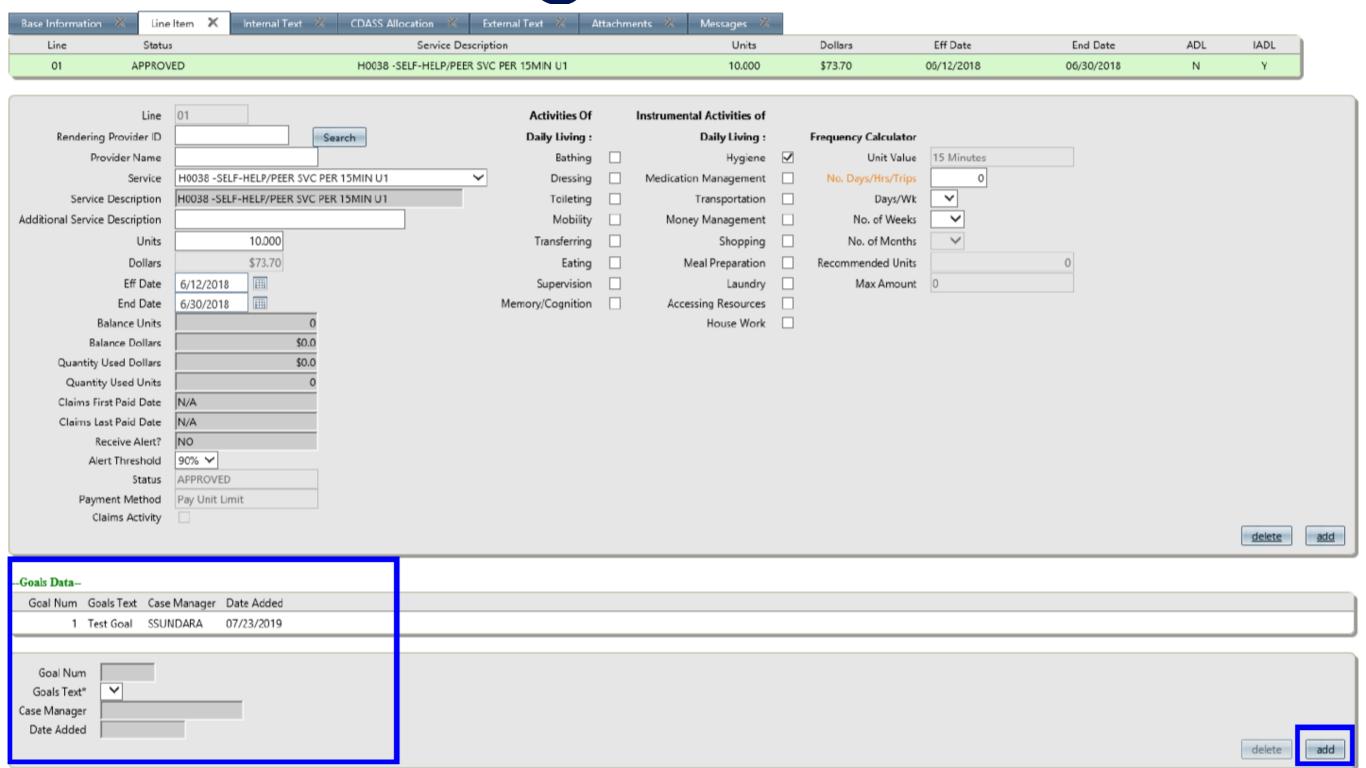# Previous view of PPA with Goals in the Bridge

Current view of PPA with Goals

Base Information | Internal Text | Line Item | CDASS Allocation | External Text | Attachments | Messages

Line	Status	Service Description	Units	Dollars	Eff Date	End Date	ADL	IADL
01			0	$0.00			N	N

Line: 01

Rendering Provider ID: [ ] Search

Provider Name: [ ]

Service: [ ]

Service Description: [ ]

Additional Service Description: [ ]

Units: 0

Dollars: $0.00

Eff Date: [ ]

End Date: [ ]

Balance Units: 0

Balance Dollars: $0.00

Quantity Used Dollars: $0.00

Quantity Used Units: 0

Claims First Paid Date: N/A

Claims Last Paid Date: N/A

Receive Alert?: [ ]

Alert Threshold: [ ]

Status: [ ]

Payment Method: [ ]

Claims Activity: [ ]

Activities Of Daily Living:
- Bathing [ ]
- Dressing [ ]
- Toileting [ ]
- Mobility [ ]
- Transferring [ ]
- Eating [ ]
- Supervision [ ]
- Memory/Cognition [ ]

Instrumental Activities of Daily Living:
- Hygiene [ ]
- Medication Management [ ]
- Transportation [ ]
- Money Management [ ]
- Shopping [ ]
- Meal Preparation [ ]
- Laundry [ ]
- Accessing Resources [ ]
- House Work [ ]

Frequency Calculator
- Unit Value: [ ]
- No. Days/Hrs/Trips: 0
- Days/Wk: [ ]
- No. of Weeks: [ ]
- No. of Months: [ ]
- Recommended Units: 0
- Max Amount: [ ]

delete | add

--Goals Data--

*** No rows found ***

Goal Num: [ ]

Goals Text*: [ ]

Case Manager: [ ]

Date Added: [ ]

delete | add

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Linking Goal in PPA

1. Add the line item on the PPA
2. Highlight the line item in the PPA
3. Click Add in the Goal section below the PPA
4. Select the Goal to be linked to the line item from the dropdown menu
5. Click Save on top of the PPA screen.
6. Repeat steps 4 through 5 for adding more goals to the specific line item.
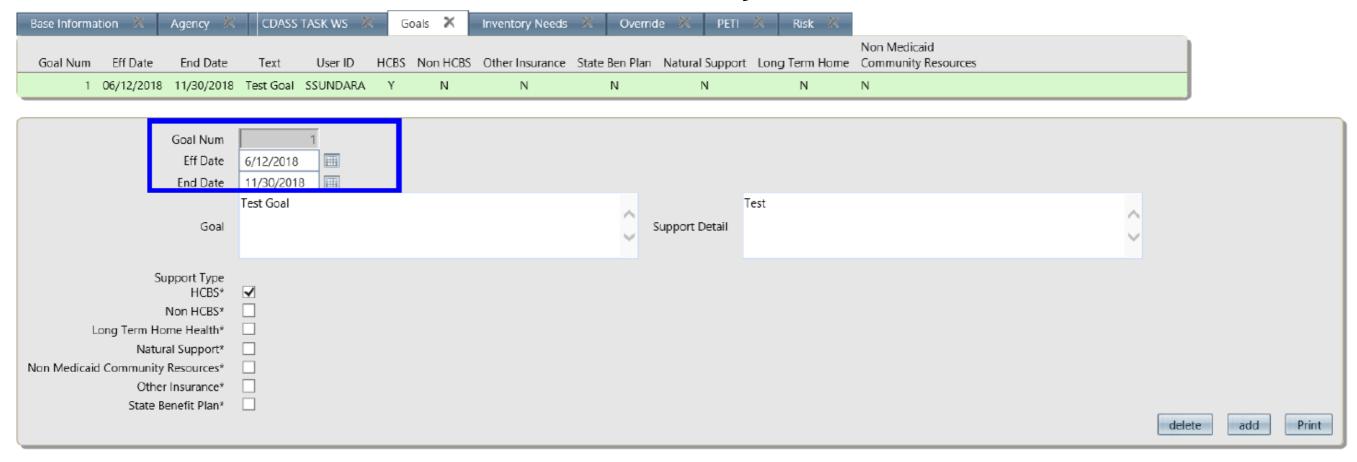
Linking Goal in PPA

Changes to Goals

Previous view of Goals:

Changes to Goals

Current view of Goals:

Existing Goals assigned Eff Date and End Date based on the dates of the PPAs to which they are linked
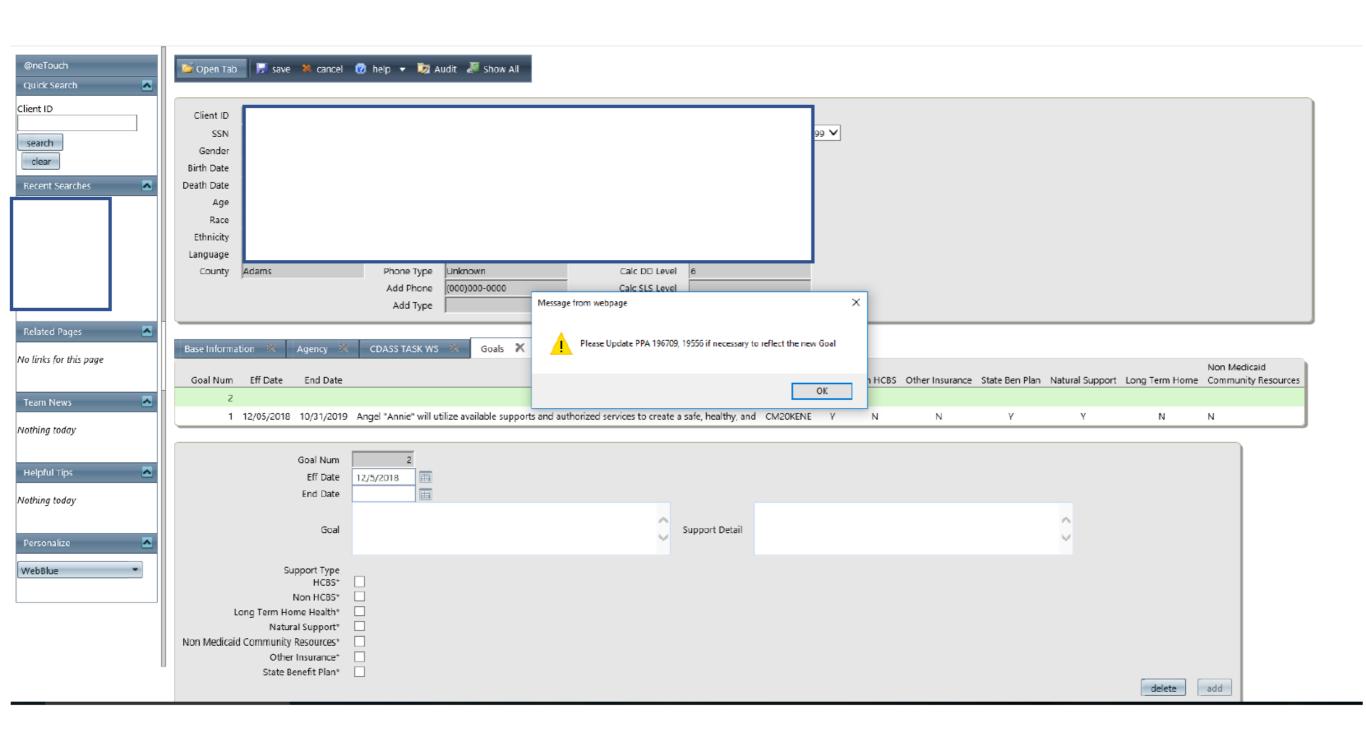
Changes to Goals

New Goal:

Eff Date and End Date are two new fields. These dates must be contained within a Certification Period (they cannot span across Certification Periods).

The dates of the Goal can either match exactly or be within the Certification Period.
1. Eff Date – On or after the Start Date of the PPA
2. End Date – On or before the End Date of the PPA

Changes to Goals

NOTE: If the case manager checks off Support type as HCBS for the Goal, it must still be linked to at least one line item in the PPA

If there is a current PPA for that Goal's Certification Period (Eff Date and End Date) there will be a pop-up message indicating that case managers may be required to make changes to the identified PPA

Changes to Goals
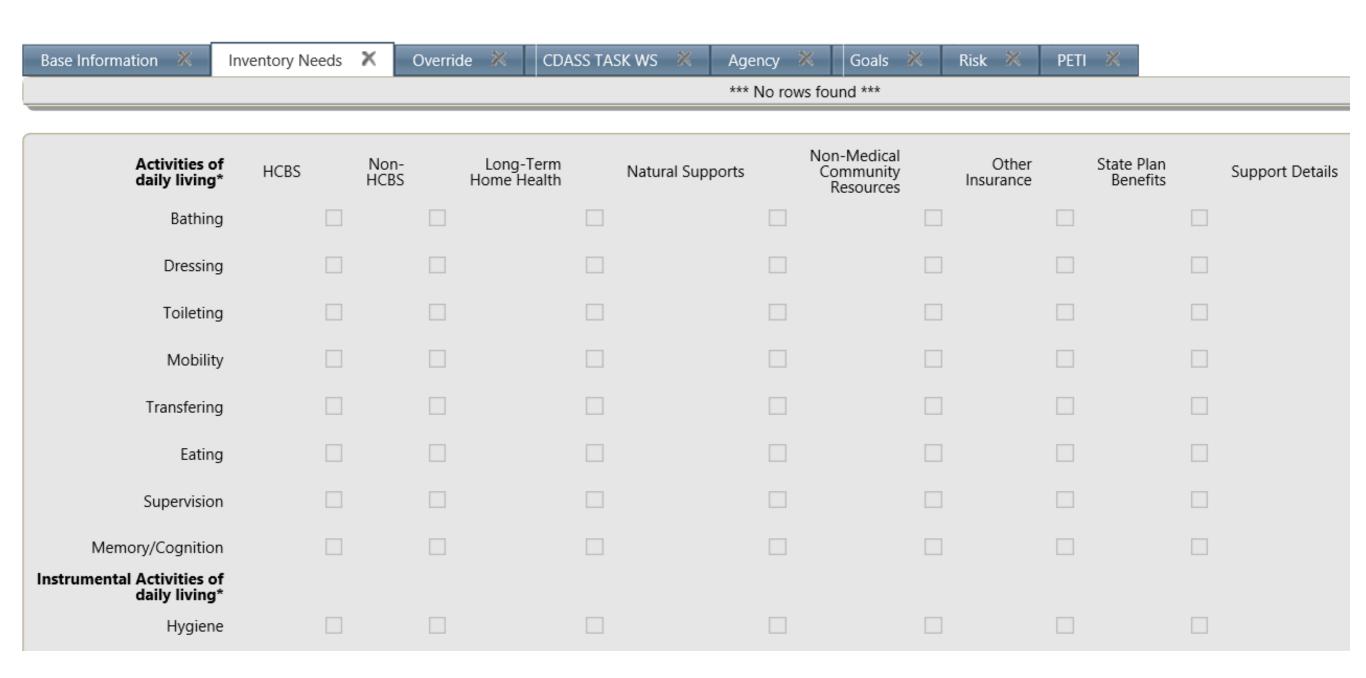
Changes to Inventory of Need

Existing Inventory of Need:
Assigned Eff date and End date based on date Inventory of Need was created

Individuals must have at least one Inventory of Need throughout the Certification Period

If the system generated dates do not accurately reflect the Certification Period, case managers may edit dates

Previous view of 'Inventory Needs' in the Bridge

| Base Information ✕ | **Inventory Needs** ✕ | Override ✕ | CDASS TASK WS ✕ | Agency ✕ | Goals ✕ | Risk ✕ | PETI ✕ |

*** No rows found ***

Activities of daily living*	HCBS	Non-HCBS	Long-Term Home Health	Natural Supports	Non-Medical Community Resources	Other Insurance	State Plan Benefits	Support Details
Bathing	☐	☐	☐	☐	☐	☐	☐	
Dressing	☐	☐	☐	☐	☐	☐	☐	
Toileting	☐	☐	☐	☐	☐	☐	☐	
Mobility	☐	☐	☐	☐	☐	☐	☐	
Transfering	☐	☐	☐	☐	☐	☐	☐	
Eating	☐	☐	☐	☐	☐	☐	☐	
Supervision	☐	☐	☐	☐	☐	☐	☐	
Memory/Cognition	☐	☐	☐	☐	☐	☐		☐
Instrumental Activities of daily living*								
Hygiene	☐	☐	☐	☐	☐	☐		☐

Current view of 'Inventory Needs' in the Bridge

| Base Information | ✕ | Agency | ✕ | CDASS TASK WS | ✕ | Goals | ✕ | Inventory Needs | ✕ | Override | ✕ | PETI | ✕ | Risk | ✕ |

*** No rows found ***

Eff Date [   ] ▦
End Date [   ] ▦

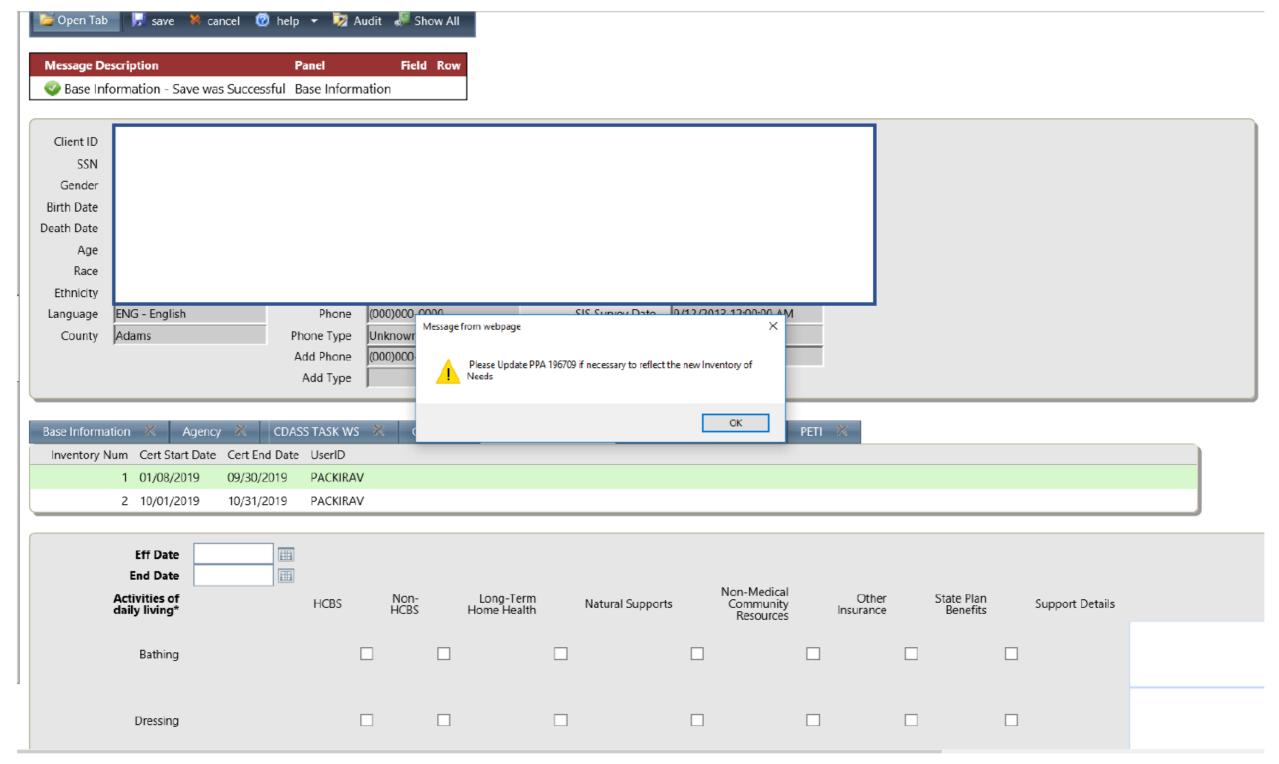| Activities of daily living*	HCBS	Non-HCBS	Long-Term Home Health	Natural Supports	Non-Medical Community Resources	Other Insurance	State Plan Benefits	Support Details
Bathing	☐	☐	☐	☐	☐	☐	☐	
Dressing	☐	☐	☐	☐	☐	☐	☐	
Toileting	☐	☐	☐	☐	☐	☐	☐	
Mobility	☐	☐	☐	☐	☐	☐	☐	
Transfering	☐	☐	☐	☐	☐	☐	☐	
Eating	☐	☐	☐	☐	☐	☐	☐	

New Inventory of Need

Eff Date and End Date are two new fields.

Dates must be contained within a Certification Period (they cannot span across Certification Periods)

1. Eff Date – On or after Start Date of Certification Period
2. End Date – Before or on End Date of Certification Period

New Inventory of Need

QUESTIONS?

Contact Information

DXC

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Thank You!

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