

# Bridge User Guide

Bridge Training for updates to Goals and  
Inventory of Needs

October 2019



**CO L O R A D O**

**Department of Health Care  
Policy & Financing**

## Bridge Training for Updates to Goals and Inventory of Needs

### Background:

This document provides guidance to case managers of HCBS waivers on recent changes to the Bridge.

Character limitations in text boxes for Goals and Inventory of Needs have impacted case managers' use of the Bridge. As a result, the character limitation to these sections has been expanded from 250 characters to **600 characters**. Case managers may use these expanded limits when this change goes live.

In addition, there has been the implementation of Effective Date (Eff Date) and End Date fields for the Goals and Inventory of Need. This enables case managers to document which Certification Period (or Service Plan) the Goal(s) and Inventory of Need(s) are attributed to.

Below are details of the changes and instructions for case managers to incorporate when entering Goals and Inventory of Need into the Bridge.

Please note that individuals must have at least one Personal Goal and Inventory of Need throughout the Certification Period.

## Changes to PPA Screen:

With the addition of the Eff Date and End Date to the Goals and Inventory of Need, case managers will see changes to the appearance of the Pre-Prior Authorization (PPA). Please see screen shots below to see the old PPA and the new PPA.

### Previous view of PPA with Goals in the Bridge:

This screenshot shows the previous view of the PPA screen. It features a form with several sections:

- Line Information:** Fields for Line, Rendering Provider ID, Provider Name, Service, Service Description, Additional Service Description, Units, Dollars, Eff Date, End Date, Balance Units, Balance Dollars, Quantity Used Dollars, Quantity Used Units, Claims First Paid Date, Claims Last Paid Date, Receive Alert?, Alert Threshold, Status, Payment Method, and Claims Activity.
- Activities Of:** A section for Daily Living with checkboxes for Bathing, Dressing, Toileting, Mobility, Transferring, Eating, Supervision, and Memory/Cognition.
- Instrumental Activities of:** A section for Daily Living with checkboxes for Hygiene, Medication Management, Transportation, Money Management, Shopping, Meal Preparation, Laundry, Accessing Resources, and House Work.
- Frequency Calculator:** Fields for Unit Value, No. Days/Hrs/Trips, Days/Wk, No. of Weeks, No. of Months, Recommended Units, and Max Amount.
- Goals:** Five dropdown menus labeled Goal1 through Goal5.

### New view of PPA with Goals in the Bridge:

This screenshot shows the new view of the PPA screen, which includes a table view and a detailed form:

- Table View:** A table with columns: Line, Status, Service Description, Units, Dollars, Eff Date, End Date, ADL, and IADL. The first row shows Line 01, Status, Service Description, 0 units, \$0.00, and ADL/IADL as N.
- Form:** A detailed form for Line 01, including fields for Rendering Provider ID, Provider Name, Service, Service Description, Additional Service Description, Units, Dollars, Eff Date, End Date, Balance Units, Balance Dollars, Quantity Used Dollars, Quantity Used Units, Claims First Paid Date, Claims Last Paid Date, Receive Alert?, Alert Threshold, Status, Payment Method, and Claims Activity. It also includes checkboxes for Activities Of and Instrumental Activities of, and a Frequency Calculator section.
- Goals Data:** A section titled "-Goals Data-" showing a message: "\*\*\* No rows found \*\*\*". Below this are fields for Goal Num, Goals Text\*, Case Manager, and Date Added.

To link a Goal to a line item in a PPA, case managers are to do the following:

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.

The screenshot displays a software interface for managing line items and goals. At the top, there are tabs for 'Base Information', 'Line Item', 'Internal Text', 'CDASS Allocation', 'External Text', 'Attachments', and 'Messages'. Below these is a table with columns: Line, Status, Service Description, Units, Dollars, Eff Date, End Date, ADL, and IADL. The first row shows Line 01, Status APPROVED, Service Description H0038 -SELF-HELP/PEER SVC PER 15MIN U1, Units 10.000, Dollars \$73.70, Eff Date 06/12/2018, End Date 06/30/2018, ADL N, and IADL Y.

Below the table is a detailed form for the selected line item. It includes fields for:
 

- Line: 01
- Rendering Provider ID: [Search]
- Provider Name: [Search]
- Service: H0038 -SELF-HELP/PEER SVC PER 15MIN U1
- Service Description: H0038 -SELF-HELP/PEER SVC PER 15MIN U1
- Additional Service Description: [Text Field]
- Units: 10.000
- Dollars: \$73.70
- Eff Date: 6/12/2018
- End Date: 6/30/2018
- Balance Units: 0
- Balance Dollars: \$0.0
- Quantity Used Dollars: \$0.0
- Quantity Used Units: 0
- Claims First Paid Date: N/A
- Claims Last Paid Date: N/A
- Receive Alert?: NO
- Alert Threshold: 90%
- Status: APPROVED
- Payment Method: Pay Unit Limit
- Claims Activity: [ ]

There are two sections for activities:
 

- Activities Of:** Daily Living (Bathing, Dressing, Toileting, Mobility, Transferring, Eating, Supervision, Memory/Cognition) with checkboxes.
- Instrumental Activities of:** Daily Living (Hygiene, Medication Management, Transportation, Money Management, Shopping, Meal Preparation, Laundry, Accessing Resources, House Work) with checkboxes.

A **Frequency Calculator** section includes:
 

- Unit Value: 15 Minutes
- No. Days/Hrs/Trips: 0
- Days/Wk: [Dropdown]
- No. of Weeks: [Dropdown]
- No. of Months: [Dropdown]
- Recommended Units: 0
- Max Amount: 0

At the bottom, there is a **Goals Data** section with a table:
 

Goal Num	Goals Text	Case Manager	Date Added
1	Test Goal	SSUNDARA	07/23/2019

 Below the table are input fields for Goal Num, Goals Text\*, Case Manager, and Date Added, and 'delete' and 'add' buttons.

## Changes to Goals:

### Existing Goal:

The change will be effective for both active and inactive Goals. The existing Goals will be assigned an Eff Date and End Date based on the dates of the PPAs to which they are linked. The Department recognizes that multiple scenarios could occur. Below are examples of how the dates will be assigned to existing Goals;

1. If the Goal covers the entirety of the PPA, then then Eff Date and End Date will match the PPA's Certification Period.
2. If a Goal is created in the middle of the Certification Period, the Eff Date will be the Goal creation date.
3. If a Goal was inactivated in the middle of the Certification Period, the Goal's End date will be the date the Goal was inactivated.
4. If a single Goal is linked to multiple PPAs, the Goal will be replicated and the Eff Date and End Date will match each of the respective PPAs.

## Previous view of Goals in the Bridge:

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

\*\*\* No rows found \*\*\*

Goal  Support Detail

Active

Support Type

- HCBS
- Non HCBS
- Long Term Home Health
- Natural Support
- Non Medicaid Community Resources
- Other Insurance
- State Benefit Plan

delete add

## New view of Goals in the Bridge:

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

Goal Num	Eff Date	End Date	Text	User ID	HCBS	Non HCBS	Other Insurance	State Ben Plan	Natural Support	Long Term Home	Non Medicaid Community Resources
1	06/12/2018	11/30/2018	Test Goal	SSUNDARA	Y	N	N	N	N	N	N

Goal Num

Eff Date

End Date

Goal  Support Detail

Support Type

- HCBS\*
- Non HCBS\*
- Long Term Home Health\*
- Natural Support\*
- Non Medicaid Community Resources\*
- Other Insurance\*
- State Benefit Plan\*

delete add Print

## 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 – Must be on or after the Start Date of the PPA
2. End Date – Must be on or before the End Date of the PPA

**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 (see screen shot below).

The screenshot shows a web browser window with the URL [https://cuatxco.dcs-usps.com/bridge/client\\_information.aspx?ask\\_cmg\\_client=79993](https://cuatxco.dcs-usps.com/bridge/client_information.aspx?ask_cmg_client=79993). The page title is "Colorado Medicaid Home" and "Client Information". The browser address bar shows "Bridge > Client Information". The page content includes a sidebar with navigation options like "Quick Search", "Recent Searches", "Related Pages", "Team News", "Helpful Tips", and "Personalize". The main content area displays a form for "Client Information" with fields for Client ID, SSN, Gender, Birth Date, Death Date, Age, Race, Ethnicity, Language, and County. A pop-up message from the webpage is displayed, stating: "Please Update PPA 196709, 19556 if necessary to reflect the new Goal". Below the form, there is a table with columns: Goal Num, Eff Date, End Date, and several support type checkboxes. The table contains one row with Goal Num 2, Eff Date 12/05/2018, and End Date 10/31/2019. The goal description is "Angel 'Annie' will utilize available supports and authorized services to create a safe, healthy, and CM20KENE". The support type checkboxes are: HCBS\* (checked), Non-HCBS\*, Long Term Home Health\*, Natural Support\*, Non-Medicaid Community Resources\*, Other Insurance\*, and State Benefit Plan\*.

If necessary, case managers will be able to modify these dates during the Certification Period. Please note that individuals must have at least one Personal Goal and Inventory of Need throughout the Certification Period.

## Changes to Inventory of Need:

### Existing Inventory of Need:

The change will be effective for all existing Inventory of Need. The existing Inventory of Need will be assigned an Eff date and End date based on the date the Inventory of Need was created. The Department recognizes that multiple scenarios could occur. Below are examples of how the dates will be assigned to existing Inventory of Needs:

1. If the number of Inventory of Need equals the number of PPAs and the date the Inventory of Need was created matches the PPA's Certification Period, each Inventory of Need Eff Date and End Date will match the PPA.
2. When there are multiple Inventory of Needs created **on the same day**, the system will attribute the Eff Date and End Date to the last Inventory of Need. The other Inventory of Needs will not have either Eff Date or End Date, it will be blank.
3. When there are multiple Inventory of Needs that were created within the same Certification Period, the system will ensure that there are no overlapping dates. This is done by making the End Date of the first Inventory Need a day before the next one was created. The Eff Date of the new Inventory of Need is the creation date and the End date will be the end of the Certification Period.
4. If a single Inventory of Need is linked to multiple PPAs, the Inventory of Need will be replicated, and the Eff Date and End Date will match the PPA's.

As noted above, 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, the case managers will have the ability to edit the dates to match.

Previous view of 'Inventory Needs' in the Bridge:

Base Information X Inventory Needs X Override X CDASS TASK WS X Agency X Goals X Risk X PETI X									
*** 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	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dressing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Toileting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mobility	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Transferring	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Eating	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Supervision	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Memory/Cognition	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Instrumental Activities of daily living*</b>									
Hygiene	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

New view of 'Inventory Needs' in the Bridge:

Base Information X Agency X CDASS TASK WS X Goals X Inventory Needs X Override X PETI X Risk X									
*** No rows found ***									
Eff Date	<input type="text"/>	<input type="text"/>							
End Date	<input type="text"/>	<input type="text"/>							
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		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dressing		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Toileting		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mobility		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Transferring		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Eating		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



## New Inventory of Need:

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 effective dates of the Inventory of Need can either match the Certification Period exactly or be within the Certification Period.

1. Eff Date – Must be on or after the Start Date of the Certification Period.
2. End Date – Must be before or on the End Date of the Certification Period.

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

If there is a current PPA for that Inventory of Need'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 (see screen shot below).

Message from webpage

⚠ Please Update PPA 196709 if necessary to reflect the new Inventory of Needs

Inventory Num	Cert Start Date	Cert End Date	UserID
1	01/08/2019	09/30/2019	PACKIRAV
2	10/01/2019	10/31/2019	PACKIRAV

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	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Dressing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	