Medicaid Waiver Management Application

CDO Budget and Plan of Care Process Quick Reference Guide

Once an Individual has chosen the Consumer Directed Option (CDO), the Case Manager will need to complete the Plan of Care in the Medicaid Waiver Management Application (MWMA) and complete the Consumer Directed Option Budget Request Form for budget approval process as they completed it prior to the launch of MWMA (outside of the MWMA system).

This Quick Reference Guide provides step by step instructions for the following:

Submitting a CDO Plan of Care for Authorization

Requesting an Exception to a CDO Budget

Submitting a CDO Plan of Care for Authorization

Steps for submitting a CDO Plan of Care for authorization are as follows:

1. Complete and submit the Plan of Care in MWMA. (For additional guidance on completing and submitting a Plan of Care, please refer to Section 10 of the MWMA User Guide.)

    For Michelle P. waivers, continue with step 2 to print the current Plan of Care. For all other waivers, skip to step 3.

2. Print the plan of care.
    2.a. Navigate to the Plan of Care Main Menu (Figure 1).
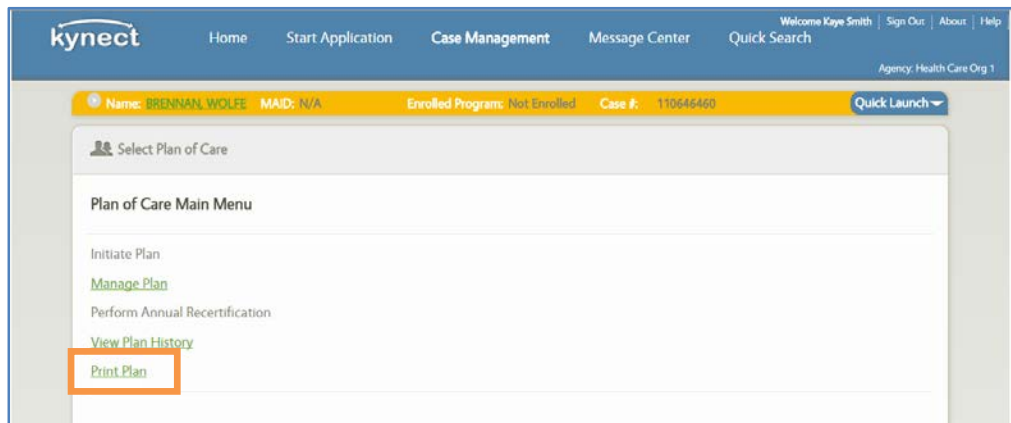   2.b. Click the **Print Plan** link.

Figure 1: Plan of Care Main Menu Screen

2.c. The **Print Plan** screen (Figure 2) displays. Select the radio button next to "Print the Entire Plan of Care" and click **Print** **Print**.
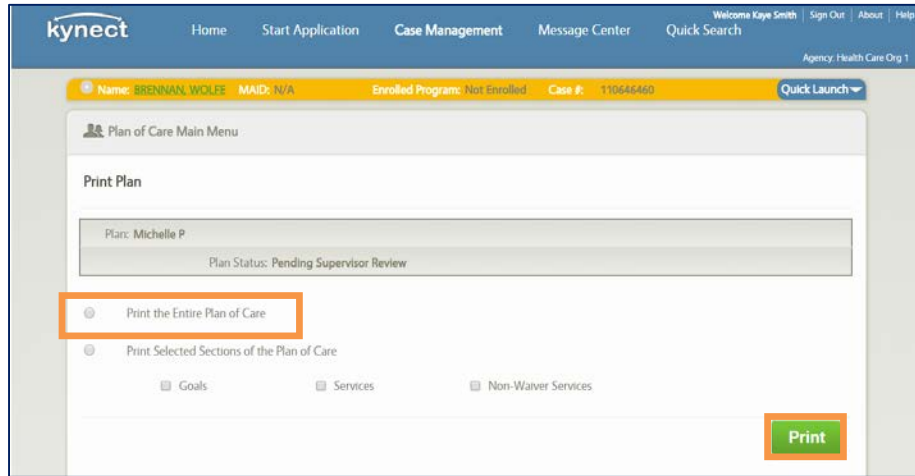
Figure 2: Print Plan Screen

3. Submit the Consumer Directed Option Budget Request form to DMS for budget approval. **Note for Michelle P Waiver only:** Submit the Printed Plan of Care and the Consumer Directed Option Budget Request form to DMS for budget approval. This step is outside of the MWMA system

   At this point, Carewise reviews the Plan of Care in MWMA and the reviewer pends the Plan of Care while the CDO budget approval is occurring. Once the review is completed by Carewise, a Revisions Requested by Plan Reviewer task will be present on your dashboard (Figure 3).
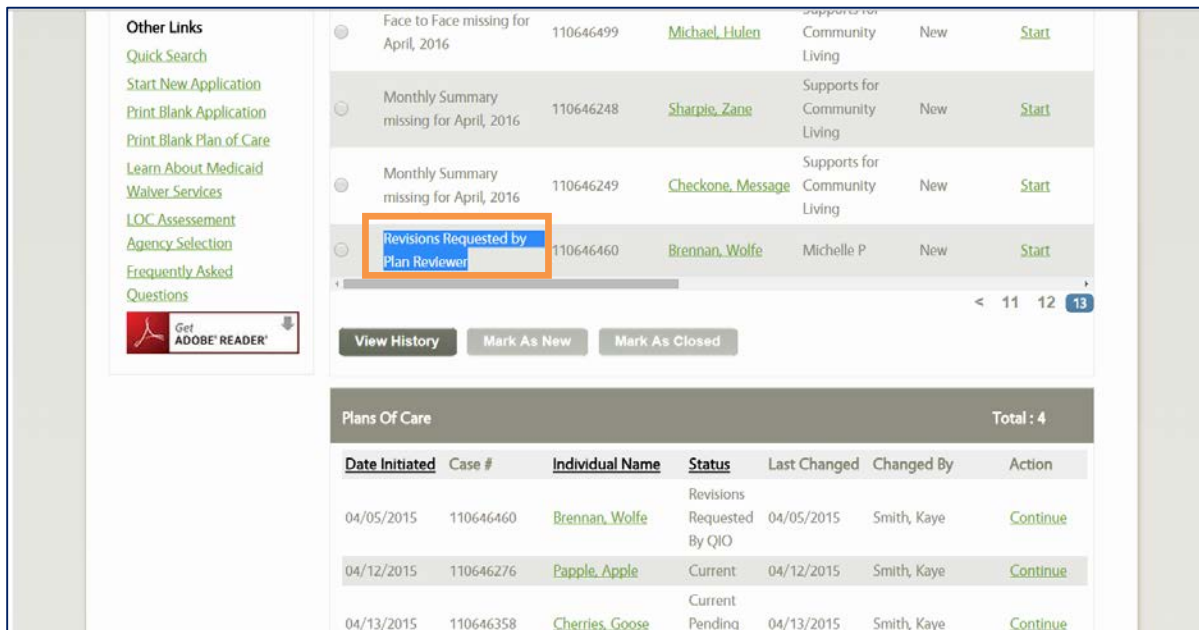

Figure 3: Revisions Requested by Plan Reviewer Task

4. Once you receive the CDO Budget, start the Revisions Requested by Plan Reviewer task (Figure 3). The *View Plan Details* screen displays (Figure 4).
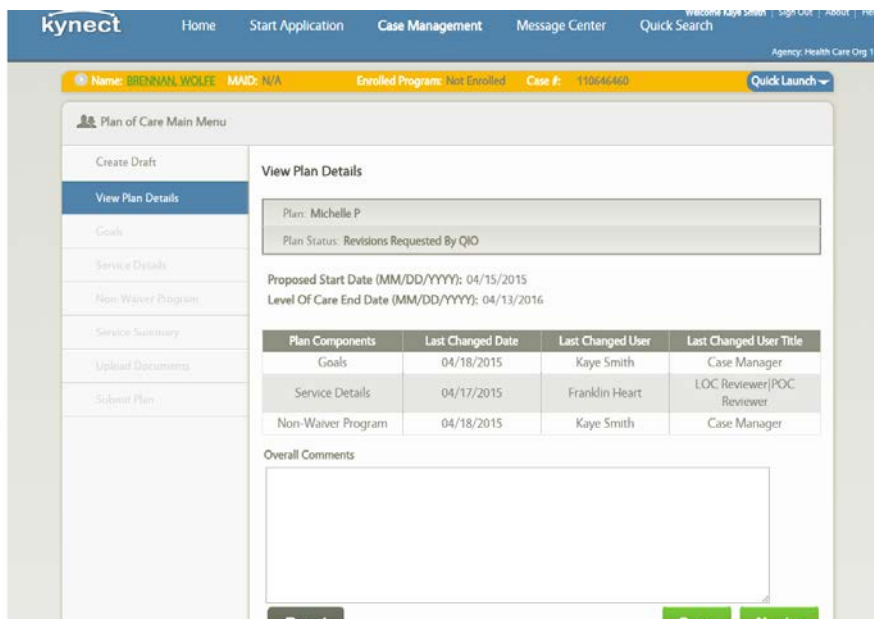
Figure 4: View Plan Details Screen

5. Next, navigate to the **Upload Documents** screen (Figure 5). Here, you can upload the CDO Budget.
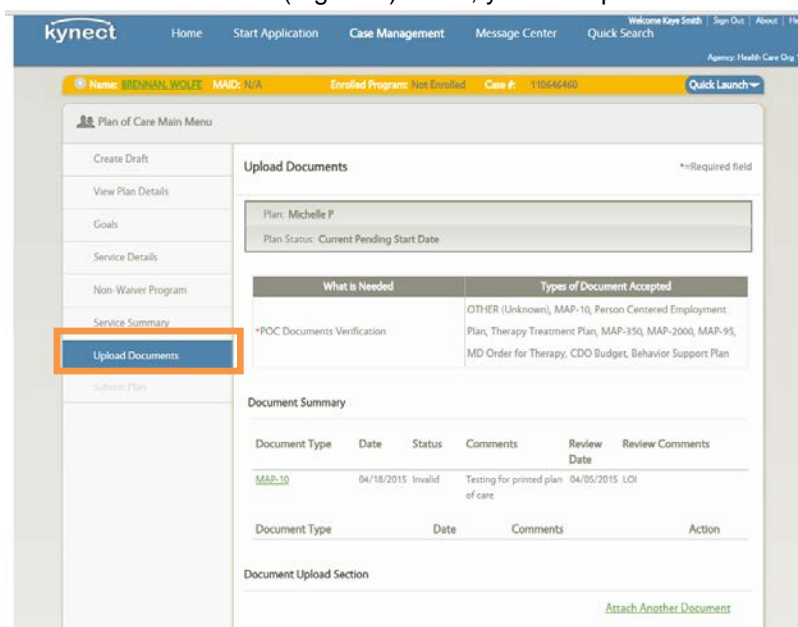

Figure 5: Upload Documents Screen

6. Submit the Plan of Care via the **Submit Plan** screen.

> When the Plan of Care is resubmitted, the system will trigger a task to Carewise (Plan Reviewer) to review the Plan of Care once more. At this time, Carewise will make the authorization decision on the Plan of Care in the MWMA system.

Requesting an Exception to a CDO Budget

When making an exceptional request for a CDO Budget, a Case Manager must provide DAIL with the following information:

- Editable DAIL- 100
- Proposed Plan of Care
- Current budget
- Current Plan of Care
- Daily Activity Log (for exceptions other than G&S only)
- MAP 351
- MAP 10
- Any relevant documents for G&S (e.g. MAP 95, estimates, CMN, professional letter, prescription)

Steps for printing and submitting these documents are as follows:

1. Print the current Plan of Care.
   1a. Navigate to the Plan of Care Main Menu (Figure 6).
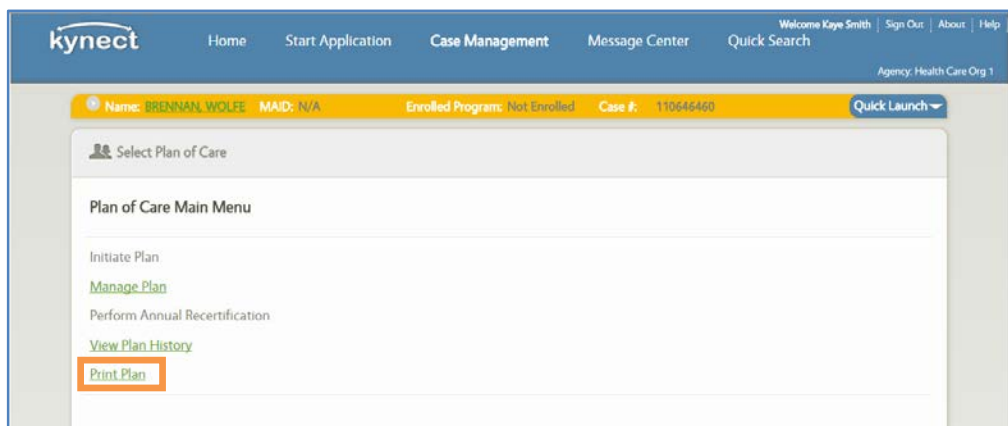   **1b.** Click the **Print Pla**n link.

Figure 6: Plan of Care Main Menu Screen

> **NOTE:** If this is an exceptional budget request, the case manager is required to send the editable DAIL-100 and a scan of the following to DAIL: Proposed Plan of Care, Current Budget, Current Plan of Care, Daily Activity Log, MAP 351, MAP 10, and any relevant documents for G&S. The next section provides details on how to print both the current and proposed Plan of Care from MWMA.

1c. The **Print Plan** screen (Figure 7) displays. Click the radio button next to "Print the Entire Plan of Care" and click **Print** .
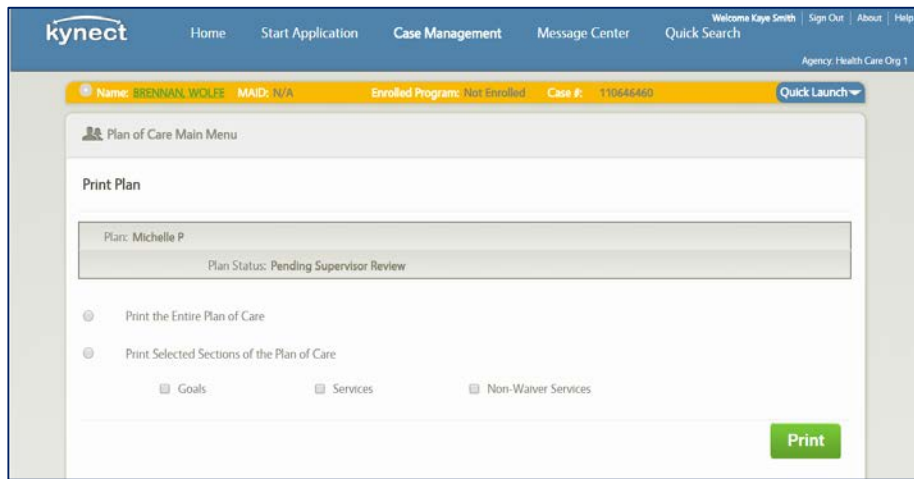
Figure 7: Print Plan Screen

2. Print the proposed Plan of Care.

    2a. Access the Individual's current Plan of Care via the ***Plan of Care Main Menu*** screen (Figure 8). Click the **Manage Plan** link on the POC.
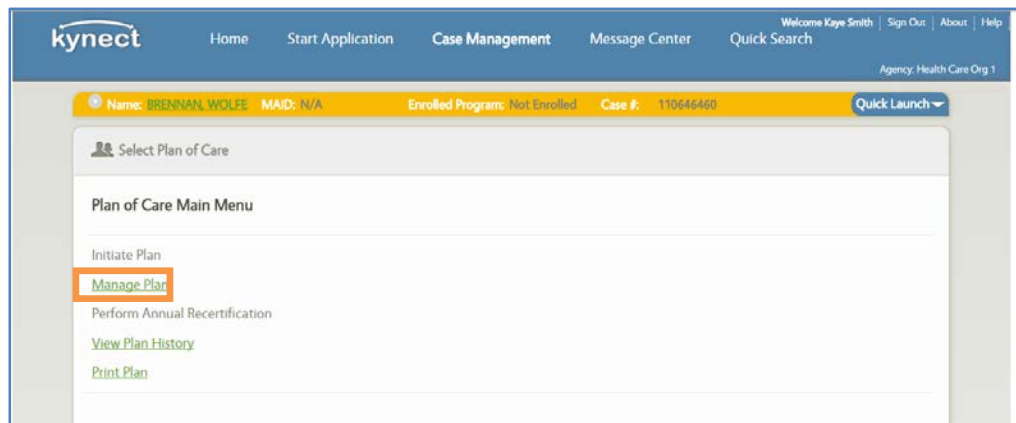

Figure 8: Plan of Care Main Menu

To enter the proposed services, navigate to the ***Service Details*** screen (Figure 9) and click **Add** `Add` to add a service.

Note: End date the already prior authorized service for which modification is required by providing Actual end date.

    2b. Enter the details for the proposed services and enter the following comment: "This is an exception request."

    Note: The service dates need to be outside of the current dates for the service.

    2c. Once you enter the proposed services, click **Save** `Save`. **DO NOT SUBMIT THE PLAN.**
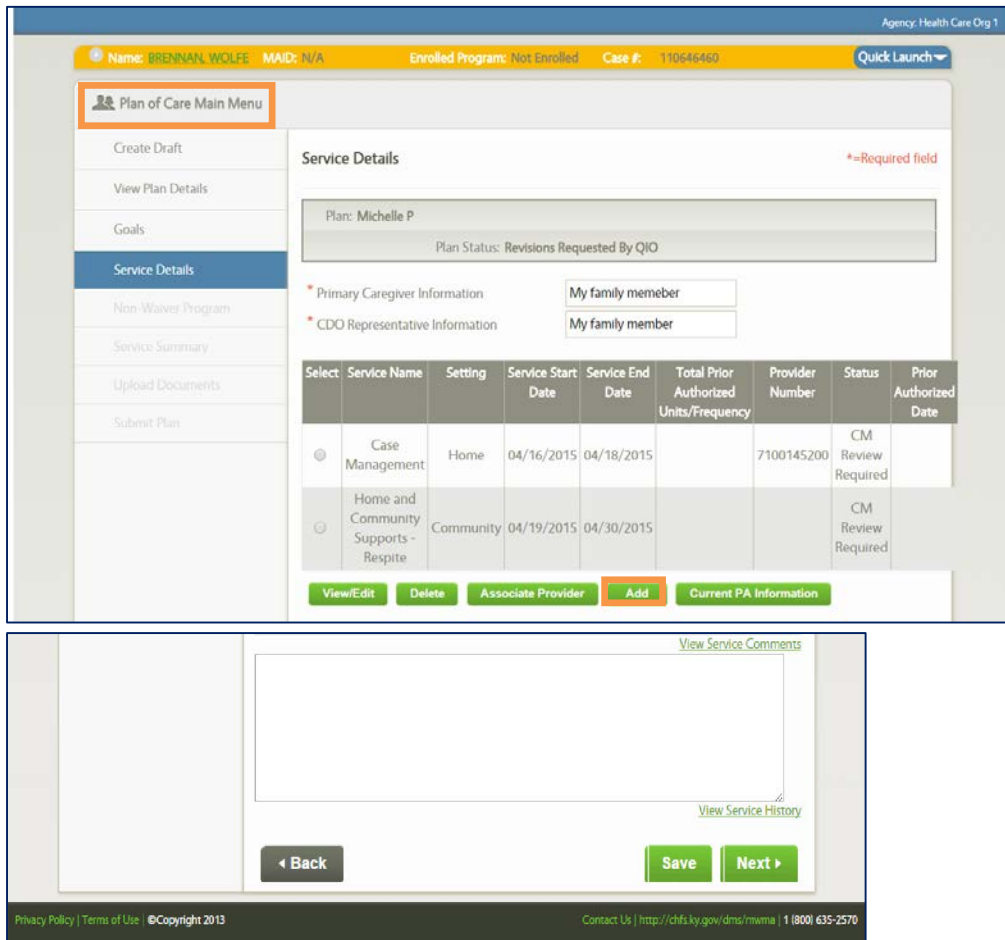
Figure 9: Service Details Screen

2d. Click the **Plan of Care Main Menu** link at the top of left navigation bar to navigate to the *Plan of Care Main Menu* screen (Figure 10).
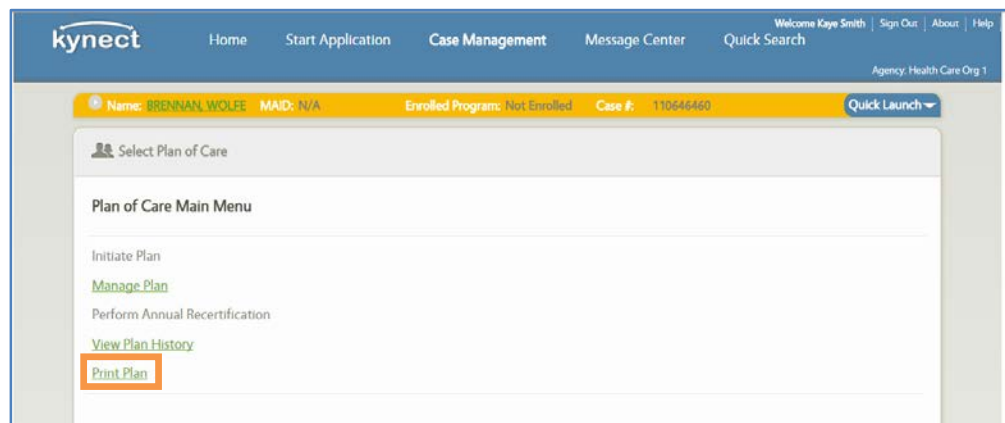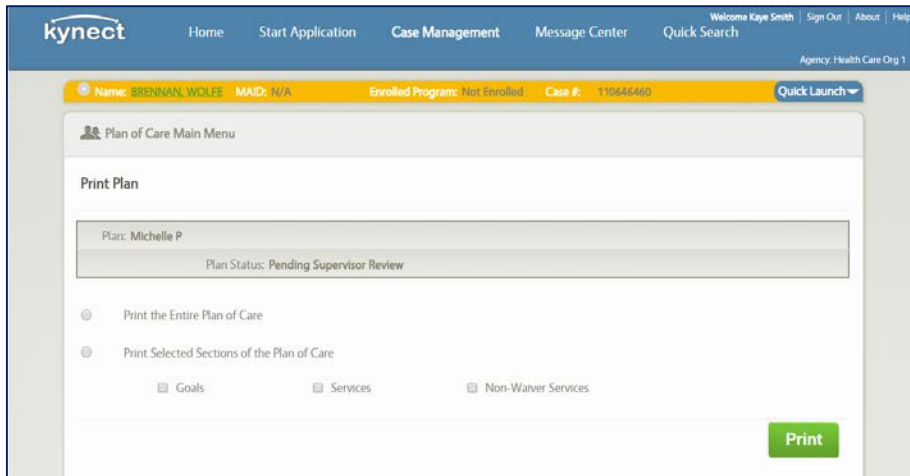
2e. Click the **Print Plan** link.

Figure 10: Plan of Care Main Menu Screen

2f. The *Print Plan* screen (Figure 11) displays. To print the POC, including the proposed services just entered, select the radio button next to "Print the Entire Plan of Care" and click [Print] **Print**.

Figure 11: Print Plan Screen

3. Email the editable DAIL-1000 to dail.pds@ky.gov or upload to MOVEit. Scan the other documents in the order listed above as a single file named exception with first initial and last name of consumer and date, e.g. Exception J Doe 11-26-14. Email file to DAIL.pds@ky.gov or upload to MOVEit.

4. **If the exception is granted**, submit the proposed services in the Plan of Care along with the budget and exception approval forms. **If the exception is not granted**, delete these proposed services from the Plan of Care. No further action is needed since the current services are already prior authorized by Carewise.