**INDEPENDENT LIVING SERVICES (ILS) DATA REPORTING SYSTEM (ILSDRS)**

The HHSC Independent Living Services (ILS) program works in partnership with local Centers for Independent Living through contracts to provide an array of independent living services.

The HHSC Independent Living Services Data Reporting System (ILSDRS) is the system used by the HHSC service providers to record the services provided to the Independent Living Services program consumers. This system is also used by the service providers to submit an invoice for the goods and services provided.

This handbook is a guide that provides the user with instructions to access the different screens within the system and enter the required reporting information.

**HELPFUL TIPS**

**Case Examples**

Most of the screen shots in this user guide consist of mock cases created by the developer. The screen shot will contain fictitious names.

**Using the Tab Key in the System**

While entering data in the system, use the **TAB** key to move to the next data field. If you use the **ENTER** key before entering all the data, the system will display an error message indicating the fields that still need to be entered.

**Using the Right and Left Arrows**

The system does not navigate to a previous screen or the next screen when using the right or left arrow on the upper left hand top of the screen.

**Entering Dates**

When entering a date, always use mmddyyyy. The system automatically enters slashes for the date. For example, when the date of 09012014 is entered the system will show the date as 09/01/2014.

**System Timeout**

The system times out after 20 minutes of no activity.

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**1000 System Access**

**1100 Accessing ILSDRS**

The user accesses ILSDRS at the following url:

<https://dmzweb.dars.state.tx.us/prd/ils>

Upon accessing the ILSDRS the user will be routed to the ILS User’s Agreement.

**1102 User Agreement and Logging In**

The service provider must read and agree to the terms and conditions on this page to access ILSDRS.

After the user has read the terms and conditions, the user may login to the system by entering the user name and password and selecting **sign in**. If the user does not agree to the terms and conditions, the user may close the screen to exit the system.

If the user does not have access rights, is inactive, or typed in an incorrect user name and/or password, the user will see the following error message: **Login was unsuccessful. Please correct the errors and try again. The user name or password provided is incorrect.**

If the external user forgets their password, they can select the **Forgot Password** link at the bottom of the page and follow the steps for re-setting their password.

**2000 Navigation**

**2100 Static Options**

Once the user gains access to the system, the application populates the static options consisting of **Skip to Content, Zoom Layout, Short Cut Keys,** and **Welcome**.

**2101 Skip to Content**

When the user selects **Skip to Content**, the system will allow the user to move directly to the **Case Search** content on the screen.

**2102 Zoom Layout**

When the user selects **Zoom Layout**, the system will zoom into the content on the screen.

**2103 Accessibility**

When the user selects **Accessibility**, the application opens the **Short Cut Keys**page. These are keyboard short cuts for the user.

**2104 Welcome Field**

The **Welcome** field displays the name of the user currently logged in. The user name will appear above the **Case Search** box.

**2200 Top Navigation**

The application also populates a top navigation menu consisting of these options:

* Consumer Information
* Report
* My Account
* State Admin

See Sections 3000 through 6000 for more information on how to navigate through these options.

**3000 Consumer Information**

**3100 Case Search**

The service provider conducts a case search in the following situations:

1. Searching for an existing active consumer;
2. Searching for an existing inactive consumer.
3. Creating a new consumer entry.

**3101 Searching for an Active Consumer**

Searching for an existing active consumer who is currently participating in the service provider’s program is the most common type of search that is used by a contractor.

To search for an active consumer on the contractor’s consumer information list:

* enter the case number or the name of the consumer and set the **Case Status** to **Active***;* or
* scroll down to see the list of all the consumers enrolled in the service provider’s program.

The system defaults to the service provider’s consumer list. See Screen Shot 5: Case Search with the Case Status as Active. When the consumer’s name appears, the user will see the following fields for the consumer:

* Consumer Name and Address;
* Date of Birth and City;
* Local Case Number and State;
* State Case Number and Zip Code;
* Enrollment Date and Phone.

Select the consumer name to access the case information. See Section 3200, Case Information, regarding the consumer information.

**3102 Searching for an Inactive Consumer**

Searching for an inactive consumer is used when the service provider needs to access previously entered information or has a consumer that is returning to the program. To search for an inactive consumer on the service provider’s consumer list:

* enter the case number or the name of the consumer and set the **CaseStatus** to **Inactive**; or
* scroll down to see the list of all the clients enrolled in the contractor’s program.

The system defaults to the service provider’s consumer list. When the consumer’s name appears, select the consumer name to access the case information. See Section 3200, Case Information, regarding the consumer information.

**3103 Creating a New Consumer Entry**

To create a new consumer entry, the system requires the service provider to conduct a consumer search. This requirement ensures that the consumer is not already receiving services in the ILS program in another service provider area or that they are not already in the ILSDRS system.

To search for a consumer, enter a portion of or the applicant's entire first and/or last name. Do not include punctuation such as periods (e.g., "Jr.") or commas (e.g. "Garcia, Jr."). Set the **Case Status** to **Active and Inactive**.

The service provider will see a:

* list of the consumers with the same name across all service providers; or
* message indicating that no records were found.

If the consumer’s name appears, a user may select the consumer’s name only if they are a consumer of the service provider. If the consumer is on the list with another service provider their name will appear but the user will not be able to select the name and view consumer information. If the consumer selected is a consumer of your service provider, the **Case Information** page will open with populated information. The user can edit the fields as needed. See Section 3200, Case Information regarding the consumer information.

Note: If a consumer’s name is listed but is not with the service provider you may contact HHSC staff or the specific Center for Independent Living to obtain further information as to active or inactive status with another service provider.

If the consumer does not appear on the list, then select the **New Case** button to create a new entry.

Enter the following information for the new consumer on the **Case Information** page.

* Provider (select the provider name from drop down list)
* Local Case Number (Enter the service provider’s case number)
* Social Security Number (SSN)
* First Name
* Last Name
* Middle Name
* Date of Birth (mmddyyyy: The system will automatically add the slashes)
* Gender
* Responsible Party (select from dropdown)

Note: If responsible party is “self”, there will not be an entry field for “Responsible Party”.

* Parent/Responsible Party First Name
* Parent/Responsible Party Last Name
* Secondary Responsible Party

Note: If responsible party is selected as “self” the secondary responsible party is optional so that another name can be entered (e.g. spouse, adult child).

* Phone
* Phone Type
* Alternate Phone
* Email
* Address1
* Address 2
* Zip Code (The system automatically fills in the city, state, and county.)
* City
* State
* County
* Residence Type
* Proof of Texas Residency
* Language Preference
* Communication Preference
* Primary Disability

Select from dropdown:

* + Cognitive
  + Mental/Emotional
  + Physical
  + Hearing
  + Vision
  + Deafblind
  + Other
* Secondary disability

Select from dropdown:

* + Cognitive
  + Mental/Emotional
  + Physical
  + Hearing
  + Vision
  + Deafblind
  + Other
* Race and Ethnicity: Enter all that apply.
* Family Income
* Family Monthly Gross Income
* Family Adjusted Gross Income.
* Family Size: Enter the family size.
* Source of Support
* Insurance Information: Check all the insurances the consumer has. Enter the consumer’s insurance number for each insurance type, as appropriate.
* Medicaid
* Medicare
* TRICARE
* Private Insurance through own employment
* Private Insurance through other means
* Public Insurance from other sources
* No Insurance
* Prior ILS Services
* Referral Source
* Marital Status
* School Attendance
* Educational Level
* Migrant Worker
* Colonias
* Veteran Status
* Date Information – At the time of first entry the only date that can be saved is the initial contact date.
* Select Save to save the record

**3200 Case Information**

The **Case Information** option appears on the **Case Information** menu after selecting a Consumer name link. The **Case Information** option contains six menu items:

* Case Demographic
* Note

**3201 Case Demographic**

The **Case Demographic** option provides all the demographic information that was entered when the client was added to the system. See Section 3103, Creating a New Client Entry, for all the demographic information regarding the client.

The user may edit any information on the **Case Demographic** page by selecting the field that needs to be edited and making the change. After all the changes are made, select the **Save** button at the bottom of the **Case Demographic** page. The system will show an updated status that includes the name of the user, the date, and time the update occurred.

**3202 Requested Services**

The **Requested Services** page allows the user to select each service the consumer is Requesting to receive and/or participate in from a drop down list. The **Requested Services** page can be updated throughout the life of the case to indicate the following information about **Requested Services**:

* the **status** of the service – requested, in progress, completed or cancelled;
* if the consumer is **service ready** – Y = yes or N = no (Note: All consumer service entries will show a “No” under **service ready** at the time requested services are documented at application until eligibility is determined and an IL Plan is completed. Once an IL Plan is entered **service ready** can be updated to reflect is the consumer is ready to begin the service.)
* if the service provider **has staff** – Y = yes, N = no, or N/A = staff is not required to provide the services such as a purchased service from a sub-contractor or purchased goods.
* If the service provider has **funds available** – Y = yes, N = no, or N/A = funds not necessary to provide the service such as service provider staff is providing the staff without any additional purchases.

**Note:** It is important that the Requested Services page be correctly completed as the completion of this page provides information that is utilized in the creation of reports including the waiting list report.

**Services** available for consumer request include:

* Advocacy / Legal Services
* Assistive Devices / Equipment Services
* Children’s Services
* Communication Services
* Counseling and Related Services
* Family Services
* Housing, Home Modification and Shelter Services
* IL Skills Training and Life Skills Training Services
* Information and Referral Services
* Mental Restoration Services
* Mobility Training Services
* Peer Counseling Services
* Personal Assistance Services
* Physical Restoration Services
* Preventive Services
* Prostheses & Other Appliances (to spec level 3) 
* Recreational Services
* Rehabilitation Technology Services
* Therapeutic Treatment
* Transportation
* Youth Services
* Vocational Services
* Hearing Aids
* Other Assistive Devices / Equipment Services
* Housing & Shelter Services
* Home Modifications
* Prosthetics
* Orthotics & other appliances
* Vehicle Modifications
* Power Wheelchairs & Scooters
* Other Rehabilitation Technology Services
* Other Services (specify)

**NOTE:** The service provider should carefully read the list of services in order to select the correct service for the consumer’s need. For example, Rehabilitation Technology Services is the broad category and there are also listings included under this broad category such as Vehicle Modifications, Power Wheelchairs & Scooters and Other Rehabilitation Technology Services. The service provider should select the item that most closely matches the consumer request.

The **Requested Services** page contains:

* A **save** button to allow the user to save the requested services.
* A **close screen** button to allow the screen to be closed and return to the **case demographic** page.

**3203 Goals**

The **Goals** page allows the user to select the consumer’s goals at the time the IL plan is completed or waived. The **Goals** page can be updated throughout the life of the case to indicate the following information about the consumer’s goals:

* Set (the goal is selected as a consumer’s goal at the time the IL plan or waiver is completed)
* Met (the goal is changed to met when the consumer has completed all services for that goal)
* Cancelled (the goal is changed to cancelled in the even the consumer is unable to or decides not to participate in the goal)

The list of goals correlates to the requested services page. Definitions of the goals and services can be found in federal reporting instructions for the 704 report.

The list of **Goals** the user may set at the time of IL plan or waiver development/completion include the following:

* Self Advocacy / Self Empowerment
* Communication
* Mobility / Transportation
* Community Based Living
* Educational
* Vocational
* Self Care
* Information Access / Technology
* Personal Resource Management
* Relocation from a nursing home or institute to community-based living
* Community / social participation
* Other (specify)

The **Goals** page contains:

* A **save** button to allow the user to save the requested services.
* A **close screen** button to allow the screen to be closed and return to the **case demographic** page.

**3204 Note**

The **Note** page allows the user to make notes regarding the consumer. To enter a new note, select the **New** button. In the **Select Topic** field, there is a drop down menu with the following choices:

* Initial Contact / Referral
* Application
* Eligibility
* Plan
* Services
* Central Office Managed Purchases
* Closure

The **Note** page contains:

* A **Save** button to allow the user to save the note. After the user has saved the note, the system returns to the **Note List** page for the consumer, refreshing the page with the new information. A new note may be entered.
* The **Close Screen** button closes the page and returns the user to the **Note List.** Select the **Close Screen** button to exit the **Note List**, then select **Case Information** or to any other item on the **Consumer Information** menu.

**3205 Service Record**

The **Service Record** page allows users to enter information about the services that they have provided to individual consumers. The data entered can be for services that are provided by service provider staff or for services and/or goods that are purchased using ILS funds.

Note: The service provider also has an option to upload all service record data which will be discussed later in this guide.

The Service Record information, whether entered individually or uploaded, is important and will be used to verify invoices for payment.

The **Service Record** page requires entry into the following areas:

* Service Category – select one of the categories from the drop down menu
  + Assistive Technology
  + Communication Devices & Services
  + Computer Hardware, Software & Accessories
  + Counseling & Therapies
  + Deaf Blind Equipment & Supplies
  + Diabetic Education & Services
  + Diagnostic & Evaluation Services
  + Health Services
  + Hearing Aids & Services
  + Medical Records
  + Orientation & Mobility Training
  + Orthotics
  + Power Wheelchairs & Scooters
  + Prosthetics
  + Rehabilitation Equipment Goods & Supplies
  + Residential Modifications
  + Transportation
  + Vehicle Modifications
* Service Detail – select one of the service detail categories from the drop down menu for the service category selected
  + Assistive Technology **Service Category**

**Service Detail** drop down list options:

* + - Assistive Technology Training
    - Augmentative Communication Devices
    - CCTV, Accessories
    - CCTV, Desktop
    - CCTV, Handheld or Portable
    - CCTV, Luggable
    - Video Magnifier
    - Notetakers
    - Assistive technology, not otherwise listed
  + Communication Devices and Services **Service Category**

**Service Detail** drop down list options:

* Telecommunication Devices for the Deaf and Hard of Hearing
* Braille for Blind / Visually Impaired
* Interpreter Services
* Computer Hardware, Software and Accessories **Service Category**

**Service Detail** drop down list options:

* + Adaptive Technology Hardware
  + Computer Software Manuals and Books
  + Computer Systems or Hardware
  + Scanners
* Counseling and Therapies **Service Category**

**Service Detail** drop down list options**:**

* Cognitive Therapy
* Counseling Services
* Occupational Therapy
* Physical Therapy
* Speech Therapy
* Deaf Blind Equipment and Supplies **Service Category**

**Service Detail** drop down list options**:**

* Deaf Blind Equipment/Supplies
* Diabetic Education and Services **Service Category**

**Service Detail** drop down list options**:**

* Diabetic Education
* Diabetic Shoes
* Diabetic Supplies
* Diagnostic & Evaluation Services **Service Category**

**Service Detail** drop down list options**:**

* Eye Exams and Diagnostics
* Hearing Exams and Diagnostics
* Laboratory/Pathology & Radiology
* Medical Diagnostic & evaluation services
* Psychological/psychiatric evaluation services
* Health Services **Service Category**

**Service Detail** drop down list options**:**

* Home Health Services RN, LVN or Home Health Aide
* Office/Outpatient/Hospital Consultation
* Other Medical Service
* Hearing Aids and Services **Service Category**

**Service Detail** drop down list options**:**

* Hearing Aid Purchase
* Hearing Aid Service Charge, Earmolds and Batteries
* Hearing Aid Services / Repairs
* Medical Records **Service Category**

**Service Detail** drop down list options**:**

* Medical Records
* Orientation & Mobility Training **Service Category**

**Service Detail** drop down list options**:**

* Orientation & Mobility Training
* Orthotics **Service Category**

**Service Detail** drop down list options**:**

* Orthotics, other than diabetic shoes
* Power Wheelchairs & Scooters **Service Category**

**Service Detail** drop down list options**:**

* Power Wheelchair
* Power wheelchair or scooter accessories (e.g. cushion)
* Power wheelchair or scooter battery, power unit or controller
* Power wheelchair or scooter repairs or rental
* Scooter
* Prosthetics **Service Category**

**Service Detail** drop down list options**:**

* General Prostheses
* Prosthesis specification review
* Prosthetic, lower limb
* Prosthetic, upper limb
* Prosthetic, electronic devices or repair
* Prosthetic eye
* Rehabilitation Equipment, Goods and Supplies **Service Category**

**Service Detail drop down list options:**

* Home Medical Equipment (e.g. hospital bed, patient lift)
* Manual Wheelchairs
* Medical Equipment Repair or Rental
* Home & Mobility Equipment (walkers, canes, crutches, braces, shower bench, etc)
* Other medical equipment
* Optical/Low Vision Devices and Services, not otherwise listed
* Bathroom Aids
* Clocks, Signalers, Alarm Vibrators, Etc.
* Kitchen & cooking aids
* Other
* Small Appliances
* Residential Modifications **Service Category**

**Service Detail drop down list options:**

* Major modification (e.g. permanent)
* Minor home mod (non-permanent – e.g. grab bars)
* Pre or Post Modification Inspection
* Pre-modification evaluation or title search
* Transportation **Service Category**

**Service Detail drop down list options:**

* Transportation
* Vehicle Modifications **Service Category**

**Service Detail drop down list options:**

* Driver Evaluation
* Hand Controls
* Modification Inspection or review by engineer
* Other Major Modifications (specify)
* Other Minor Modifications (specify)
* Repair of Vehicle Modification Equipment
* Van Lifts or Floor Lower

The **Service Other** edit box allows the user to enter detail when a service category and service detail are selected that require the user to “specify” the exact service information.

The **Begin Date** and **End Date** allow the user to enter the dates that the service was provided to the consumer. Please note that the **begin date** and **end date** must fall within the same month of service to be accepted by the data reporting system.

The **Contractor Provided** check box should be checked when the service provider’s staff is providing the service. An example of this may be Orientation & Mobility training when the service provider has an Orientation and Mobility Specialist on staff rather than purchasing the service on a contract basis.

The **Contractor Purchased** check box should be checked when the service provider is going to purchase a good or service. When the **contractor purchased** box is checked by the user the screen will populate with additional information about the vendor that must be entered. It is noted that if a service provider is seeking reimbursement for the good or service (other than staff salary) the **contractor purchased** box must be selected.

The **Vendor Purchased From** edit box should be completed by the user to indicate the vendor the good or service was purchased.

The **Cost** edit box should be completed by the user to indicate the total amount paid to the vendor for the good or service listed on the service record.

The **Paid Date** should be completed by the user to indicate the specific date the vendor was paid for the good or service.

The **Unit Type** should be selected from the drop down box as one of the following:

* Quarter Hour
* Half Hour
* Hour
* Item
* Day
* Service

The **Units Provided** edit box should be completed by the user to indicate the total amount of units as indicated above with **unit type**. For example the item being purchased in the example is a “Medication Reminder System” so the **unit type** would be “item” and the units provided would be “1”.

The **At risk for nursing facility placement or other non-community setting** check box should be selected with a consumer is at a significant risk of moving from their home to a non-community setting such as an assisted living facility or nursing home. Before checking this box the service provider ILS staff person would need to determine that the consumer is at risk and that the good or service being provided will assist in reducing the risk for placement in a non-community setting.

After entering all of the required information the user selects the **Save** button to save the service record.

The **Service Record** page contains:

* A **Save** button to allow the user to save the service record. After the user has saved the service record, the system returns to the **Service Record List** page for the consumer, refreshing the page with the new information.
* The **Close Screen** button closes the page and returns the user to the **Service Record List.** Select the **Close Screen** button to exit the **Service Record List** and the user will return to the consumer information page for the specific consumer.

**3206 Consumer Participation**

The **consumer participation** page allows the user to record the required information about consumers who are required to participate in the cost of their services. This page should only be completed for consumers who are determined to be required to participate in the cost of their services during the application, eligibility and plan development process or consumers who choose to pay for a portion of their services even when not required. This screen is important because it records the program income from **consumer participation**.

Upon selecting **consumer participation** from the consumer information menu for a specific consumer the user is directed to the **consumer participation list**. The consumer participation list provides a list of all months the specific consumer has participated in the cost of their service. To enter a new record select the “new” button at the bottom of the screen.

Upon selecting the “new” button a new record will open with a default to the current fiscal year and current month. The user will complete the following fields as applicable:

* **Participation Amount** – with the amount paid by the consumer as required.
* **Waived Date** – this date should be entered **ONLY** if the participation amount has been waived due to the specific circumstances noted in the ILS Standards. The service provider should keep corroborating documentation of the reason the consumer participation is being waived.
* **Waived Reason Code** – this code should be selected from the dropdown list **ONLY** if the consumer’s participation has been approved by service provider as waived for one of the specific reasons listed and noted in the ILS standards. The service provider should keep corroborating documentation of the reason for the waiver.
  + Waived Reason Codes include:
    - Decrease in income
    - Unexpected medical expenses
    - Unanticipated disability related expenses
    - Change in family size
    - Catastrophic loss such as fire, flood or tornado
    - Short-term financial hardship such as major repair to home or vehicle
    - Other (must be specified)
* **Waived Reason Other** – if “other” is selected as a waived reason code then this edit box must be completed.

The **Consumer Participation** page contains:

* A **Save** button to allow the user to save the service record. After the user has saved the consumer participation record, the system returns to the **Consumer Participation List** page for the consumer, refreshing the page with the new information.

The **Close Screen** button closes the page and returns the user to the **Consumer Participation List.** Select the **Close Screen** button to exit the **Consumer Participation List** and the user will return to the consumer information page for the specific consumer.

**4000 Reports**

The **Reports** option is found on the **Top Navigation** menu next to **Consumer Information.**

The purpose of this option is to allow the service provider and HHSC staff to produce reports as needed. The report option contains data starting with September 1, 2016.

All reports contain the following buttons:

* **Run Report:** Allows the user to obtain report results after parameters for the report are selected.
* **Close Screen:** Allows the user to close the report and return the main report screen.
* **Export to Excel**: Allows the user to load the return data set into an excel file and to print a hard copy of the data set.

The following are screen shots of the reports.

**4100 – Invoice Report**

Select “Invoice” from the left navigation menu and select the fiscal year, the report will default to the current fiscal year, to view the report. The “Invoice” report will default to the service provider and HHSC staff will have access to select a Provider Name from a drop down menu.

**4200 – Consumer Case Statistical Report**

Select “Consumer Case Statistical” from the left navigation menu and select the fiscal year, begin date and end date. The “Consumer Case Statistical Report” will default to the service provider and HHSC staff will have access to select a Provider Name from a drop down menu.

**4300 – Compliance Reports**

**4301 – Compliance Report – Initial Contact**

Select **Compliance** then **Initial Contact** from the left navigation menu. The “Provider Name” will default to the service provider and HHSC staff will be able to select a specific “Provider Name” from the drop down menu. The user enters the number of days since initial contact that they wish to query. In the example we are using “20 days” so this report could be used as an alert of those consumers who are nearing the 30 day benchmark.

**4302 – Compliance Report – Not Service Ready**

Select **Compliance** then **Not Service Ready** from the left side navigation menu. The service provider’s screen will default to their center name and HHSC staff will be able to select a specific “Provider Name” from the drop down menu.

**4303 – Compliance Report – Closed Cases**

Select **Compliance** then **Closed Cases** from the left navigation menu. The service provider’s screen will default to their center name and HHSC staff will be able to select a specific “Provider Name” from the drop down menu.

**4304 – Compliance Report – Application w/No Eligibility**

Select **Compliance** then **Application w/ No Eligibility** from the left navigation menu. The service provider’s screen will default to their center name and HHSC staff will be able to select a specific “Provider Name” from the drop down menu.

**4305 – Compliance Report – Application and Eligibility**

Select **Compliance** then **Application and Eligibility** from the left navigation menu.The service provider’s screen will default to their center name and HHSC staff will be able to select a specific “Provider Name” from the drop down menu.

**4306 – Compliance Report – Eligibility w/ No Plan Sign**

Select **Compliance** then **Eligibility w/ No Plan Sign** from the left navigation menu. The service provider’s screen will default to their center name and HHSC staff will be able to select a specific “Provider Name” from the drop down menu.

**4307 – Compliance Report – Eligibility and Plan Sign**

Select **Compliance** then **Eligibility and Plan Sign** from the left navigation menu. The service provider’s screen will default to their center name and HHSC staff will be able to select a specific “Provider Name” from the drop down menu.

**4400 – Service Record Report**

Select **Service Record** from the left navigation menu and select the fiscal year, begin date and end date the user wishes to query. The **Service Record** report screen will default to the service provider and HHSC staff will have access to select a Provider Name from a drop down menu.

**4500 – Wait List Report**

Select **Wait List** from the left navigation menu. The **Service Record** report screen will default to the service provider and HHSC staff will have access to select a Provider Name from a drop down menu.

**4600 – Closure Report**

Select **Closure** from the left navigation menu and select the fiscal year, begin date and end date the user wishes to query.. The **Closure** report screen will default to the service provider and HHSC staff will have access to select a Provider Name from a drop down menu.

**4700 – Consumer Participation Report**

Select **Consumer Participation** from the left navigation menu and select the fiscal year, begin date and end date the user wishes to query. The **Consumer Participation** report screen will default to the service provider and HHSC staff will have access to select a Provider Name from a drop down menu.

**4800 – Gender Report**

Select **Gender** from the left navigation menu and select the fiscal year, begin date and end date the user wishes to query.. The **Gender** report screen will default to the service provider and HHSC staff will have access to select a Provider Name from a drop down menu.

**4900 – Race Report**

Select **Race** from the left navigation menu and select the fiscal year, begin date and end date the user wishes to query. The **Race** report screen will default to the service provider and HHSC staff will have access to select a Provider Name from a drop down menu.

**4910 – Primary Language Report**

Select **Primary Language** from the left navigation menu and select the fiscal year, begin date and end date the user wishes to query. The **Primary Language** report screen will default to the service provider and HHSC staff will have access to select a Provider Name from a drop down menu.

**4920 – Primary Disability Report**

Select **Primary Disability** from the left navigation menu and select the fiscal year, begin date and end date the user wishes to query. The **Primary Disability** report screen will default to the service provider and HHSC staff will have access to select a Provider Name from a drop down menu.

**4930 – Insurance Report**

Select **Insurance Report** from the left navigation menu and select the fiscal year, begin date and end date the user wishes to query. The **Insurance** report screen will default to the service provider and HHSC staff will have access to select a Provider Name from a drop down menu.

**5000 My Account**

The **My Account**link is found on the **Top Navigation** menu. The user must have a user role equal to Case Management or Provider Admin before displaying the **My Account** option. This option provides the user to change their password.

**5100 Change Password**

When a user selects **Change Password** option on the **Top Navigation** menu, the system opens the **Change Password**page. The user is required to enter the current password, the new password and to confirm the new password. When the user selects the save button the application validates that all required fields are entered/selected.

**6000 Provider Admin**

The Provider Admin option is visible to contracted service providers and is found on the Top Navigation menu. For state staff please refer to “State Admin” in section 7000. When selecting the Provider Admin option, the system opens the left navigation menu consisting of the following options:

* User Maintenance
* Edit Provider
* Invoice Maintenance
* Consumer Participation Maintenance
* Upload File
* Uploaded Files
* Community Activities
* Requested Services
* Service Records

**6100 User Maintenance**

The **User Maintenance**option allows the provider administrator to:

* select and update an existing user record; or
* create a new user record.

If the user selects the **User Maintenance** option in the left navigation field, the system opens the **User List** page. The **User List** page contains the following options and buttons:

* **New** - When the user selects this button, the administrator is able to create a new user.

Note: The user must have user role equal to “Provider Admin” before the new button is enabled.

* **Close Screen** – When the user selects this button, the administrator is able to close the page.
* **Export to Excel** – When the user selects this button, the administrator is able to load the return data set into an excel file and to print a hard copy of the data set.

If there is existing user information, the screen will display the First Name; Last Name; Email; Phone and Inactive Date.

The user last name will be a hyperlink and when selected, the system will take the administrator to the user page. When the provider administrator selects the **New** button or the name hyperlink, the system opens the **User**page. If there is an existing user record, the page will be populated with existing data. If the administrator is adding a new user record, then the page will open a blank user maintenance page. The Provider Name field will default to the current service provider.

The user may add or update the following fields:

* First name
* Last name
* Email Address
* Phone
* Phone Type
* User Name
* Inactive date
* Check Boxes for the following access rights:
  + - Provider Admin (access rights)
    - Case Management (access rights)
    - Provider Upload Only (access rights)

When the user selects the **Save** button the application validates that all required fields are entered. If any entries are missing the application returns an error message and the record will not be saved until the errors are corrected.

After the record is saved the application returns to the **User List** page, refreshing the page with the previously entered search criteria. When the user selects the **Close Screen** button, the system returns to the **User List** page, refreshing the page with the previously entered search criteria.

The administrator can edit the information by selecting the user and adding the updated information. Select the **Save** button to update the information.

**6200 Edit Provider**

The **Edit Provider** option allows the provider admin user to update the service provider’s information.

When the user selects **Edit Provider** option in the left navigation field, the system opens the Provider information. The Provider Admin is able to edit the information on this page, including:

* Provider Name
* Contact Name
* Email
* Address
* Zip Code
* City
* State
* County
* Phone
* Phone Type
* Invoice Contact Name
* Invoice Contact Phone
* Invoice Contact Phone Type

The Edit Provider screen also displays Contract Records.

When the user completes the updates to the entry select **Save** to save the record and return to Consumer Information Case Search Screen.

**6300 Invoice Maintenance**

The **Invoice Maintenance** option allows the user to search for previously submitted invoices, update invoices if they have not been approved or cancelled and prepare an invoice to submit to the HHSC Independent Living Services (ILS) Program. When the user selects the **Invoice Maintenance** option, the system opens the **Invoice List** search page.

Upon entry to the **Invoice List** page, the user may search for an invoice by entering the following information:

* **Date From and Date To** – Enter the dates to get invoices within the date range and select the **Search** button.
* **Status** – Select a status of “Pending”, “Approved” or “Cancelled” and select the **Search** button to view invoices with a specific status.
* **Reset** – Select the Reset button to clear the search criteria.

The user may also create a **New Invoice** from this screen by selecting the **New Invoice** button. For more information on how to create a new invoice, see below for **Creating a New Invoice.**

Upon entry of search criteria and selecting the **Search** button the **Invoice List** page will populate with all invoices that fit the search criteria. The user can search for an invoice by scrolling down to the list of invoices. There is a bar menu above the invoice list with the following fields:

* Invoice Id – This field has a hyperlink to the invoice.
* Provider name – This field lists the provider’s name.
* Start Date – The system automatically sets the invoice date range from the most recent date to the earliest date. When the user selects the Start Date, the system reverses the date order from the earliest date to the most recent date.
* End Date – Just like the Start Date, the system automatically sets the invoice date range from the most recent date to the earliest date. When the user selects the Start Date, the system reverses the date order from the earliest date to the most recent date.
* Amount – This is the amount of the invoice.
* Status – This is the status of pending, approved or cancelled as noted above.

**Creating a New Invoice**

When the user selects the **New Invoice** button, the **Invoice Maintenance** page displays with the following fields:

* **Provider Information**

This box contains the contractor’s Texas Identification Number, Provider Name, Contact Name, Address, City, State, Zip Code, Contract Number and Purchase Order (PO) Number. These items are pre-filled when you enter into the **Invoice Maintenance New Invoice** page.

* **Invoice Period**

This section requires the provider to enter the Start Date and End Date. The Submitted Date is automatically populated with the current date.

* **Description of Services**

The user enters information in the following fields:

1. **Salary and Wages** including the total amount, OIB amount and Other amount.
2. **Fringe Benefits** enter total amount only.
3. **Travel** including total amount, OIB amount and Other amount.
4. **Equipment (Capitalized)** enter total amount only.
5. **Supplies and materials** enter total amount only.
6. **Other costs** enter total amount only.
7. **Purchased Services** enter total amount only.
8. **Consumer Participation** enter total amount only.
9. **Deduction for Advance Pay** enter total amount only.

The system calculates the **Subtotal A Line, Subtotal B Line and the Total Invoice Amount.** This report displays the invoice that is submitted monthly to HHSC for payment.

**6400 Consumer Participation Maintenance**

The **Consumer Participation Maintenance** screen allows the provider administrator to search and obtain a list of consumers who have participated in the cost of services during a particular time period, by month and year or by year. When the user selects the **Consumer Participation Maintenance** link on the left navigation menu, the system opens the **Consumer Participation** search page. The user may select the year and month then select **Search** button to display the list of consumer’s who participated in the cost of services during that time period. The user may also select the **Reset** button to clear the results and begin a new search; the **Close Screen** button to close the screen and return to the main Provider Admin page; or the **Export to Excel** button to export the results to an excel spreadsheet.

The user may also select the highlighted ID number to access and update the consumer’s consumer participation record in the event of an error in the entry. When the ID number is selected the system will display the Consumer Information, Consumer Participation screen. This screen can then be updated and the user can save changes by selecting the **Save** button.

**6500 Upload File**

**Please note that I have pasted in the instructions provided by Hilary so these need to be reviewed and language updated as needed**.

Both Service Record and Consumer Participation data may be uploaded from files into the ILS Data Reporting System. The file upload feature is accessed through the “Upload File” menu item found in the left-hand menu that is visible when the user selects the State Admin/Provider Admin top menu item (State or Provider admin depending on the user’s access level).

* For a service provider to upload a file the files must either:
* Have an extension of csv and contain comma-delimited data

-or-

* Have an extension of txt and contain tab-delimited data
* File names must not contain spaces.
* Files must contain one header line followed by one or more lines of data. Files must adhere to the specific format for that upload type.

**Service Record Format**

**Header Line** – file must contain this header line (showing comma-delimited version):

LocalCaseNumber,BeginDate,EndDate,ServiceDetailCode,ServiceDetailDescription,UnitType,UnitsProvided,Cost,IsContractorProvided,IsContractorPurchased,VendorName,PaidDate,IsAtRiskNursingFacilityPlacement,Filename

**Data Lines** – file must contain 1 or more data lines

Example (comma-delimited):

12345,2/2/2016,2/2/2016,12,Computer Systems or Hardware,Item,1,50,N,Y,Computer Supply Warehouse,03/06/2016,N,March2016.csv

The data fields are comprised of:

|  |  |  |  |
| --- | --- | --- | --- |
| **Field** | **Description** | **Data Type** | **Examples** |
| LocalCaseNumber | This is the provider’s case ID | Nvarchar(50) | 12345  89-BA-2016 |
| BeginDate | Start of service period | Datetime | 2/2/2016 |
| EndDate | End of service period | Datetime | 2/2/2016 |
| ServiceDetailCode | 1 or 2 character numeric code from Service Detail Code table | Nvarchar (2) | 1 |
| ServiceDetailDescription | See Service Detail Code table – **text must match exactly for code value given unless code =other** | Nvarchar (80) | Assistive Technology Training |
| UnitType | Must be one of **(must match exactly)**:  Quarter Hour  Half Hour  Hour  Item  Day  Service | Nvarchar(32) | Half Hour |
| UnitsProvided |  | Decimal(6,2) | 1.5 |
| Cost | If purchased | Decimal(12,2) | 368.23 |
| IsContractorProvided | Y or N | Single char | Y |
| IsContractorPurchased | Y or N | Single char | N |
| VendorName | If purchased, where purchased from | Nvarchar(80) |  |
| PaidDate | If purchased, date paid | Datetime |  |
| IsAtRiskNursingFacilityPlacement | Y or N | Single char | N |
| Filename | Name of file this record is in – will be same for all records in the file |  | March2016.csv |

**Service Detail Code Table**

Code Description

01 Assistive Technology Training

02 Augmentative Communication Devices

03 CCTV Accessories

04 CCTV, Desktop

05 CCTV, Hand-Held or Portable

06 CCTV, Luggable

07 Video Magnfier

08 Note Takers

09 Assistive technology, not otherwise listed

10 Adaptive Technology Hardware

11 Computer Software, Manuals, Books

12 Computer Systems or Hardware

13 Scanners

14 Cognitive Therapy

15 Counseling Services

16 Occupational Therapy

17 Physical Therapy

18 Speech Therapy

19 Deaf Blind Equipment & Supplies

20 Diabetic Education

21 Diabetic Shoes

22 Diabetic Supplies

23 Eye Exams & Diagnostics

24 Hearing Exams & Diagnostics

25 Laboratory/Pathology & Radiology

26 Medical diagnostic & evaluation services

27 Psychological/psychiatric evaluation services

28 Home Health Services - RN, LVN or Home Health Aide

29 Office/Outpatient/Hospital Consultation

30 Other Medical Service

31 Hearing Aid Purchase

32 Hearing Aid Service Charge, Earmolds, and Batteries

33 Hearing aid services/repairs

34 Home medical equipment (hospital bed, patient lift)

35 Manual wheelchairs

36 Medical equipment repair or rental

37 Home & mobility equipment (walkers, canes, crutches, braces, shower bench, etc )

38 Other medical equipment

39 Medical Records

40 Orientation & Mobility Training

41 Orthotics, other than diabetic shoes

42 Power Wheelchair

43 Power wheelchair or scooter accessories (e.g. cushions)

44 Power wheelchair or scooter battery, power unit or controller

45 Power wheelchair or scooter repairs or rental

46 Scooter

47 General Prostheses

48 Prosthesis Specification Review

49 Prosthetic - Lower Limb

50 Prosthetic - Upper Limb

51 Prosthetic electronic devices or repair

52 Prosthetic Eye

53 Telecommunication Devices for the Deaf and Hard of Hearing

54 Braille for Blind/Visually Impaired

55 Interpreter Services

56 Optical/Low Vision Devices & Services (not included elsewhere)

57 Bathroom Aids

58 Clocks, Signalers, Alarm Vibrators, Etc.

59 Kitchen & Cooking Aids

60 Other

61 Small Appliances

62 Major Modification (e.g. permanent)

63 Minor home mod (non permanent--e.g., grab bars)

64 Pre or Post Modification Inspection

65 Pre-modification evaluation or title search

66 Driver Evaluation

67 Hand controls

68 Modification Inspection or Review by Engineer

69 Other major modifications (Specify)

70 Other minor modifications (specify:)

71 Repair of Vehicle Modification Equipment

72 Van Lifts or Floor Lower

73 Transportation

**Consumer Participation Format**

**Header Line** – file must contain this header line (showing comma-delimited version):

LocalCaseNumber,Month,Year,Amount,FileName

**Data Lines** – file must contain 1 or more data lines

Example (comma-delimited):

12345,4,2016,50.75,CostShareApril2016.csv

|  |  |  |  |
| --- | --- | --- | --- |
| **Field** | **Description** | **Data Type** | **Examples** |
| LocalCaseNumber | This is the provider’s case ID | Nvarchar(50) | 12345  89-BA-2016 |
| Month | Numeric month from 1 to 12 | int | 4 |
| Year | 4-digit year | int | 2016 |
| Amount | Dollar amount of cost share | Decimal(12,2) | 49.42 |
| Filename | Name of file this record is in – will be same for all records in the file |  | March2016.csv |

**6600 Uploaded Files**

The user can search for **Service Record Files** or **Consumer Participation Files** that have been uploaded to the ILSDRS system. To search for uploaded files select **Uploaded Files** from the left navigation menu then select either **Service Record Files** or **Consumer Participation Files.** When either is selected from the menu the system will display a **Service Record File Upload List or a Consumer Participation File Upload List,** as appropriate, that contains the following information:

* ID
* Provider
* Status
* File Name
* Created By
* Created Date
* Validate Document

## 6700 Community Activities

The **Community Activities** screen allows service provider’s to enter the outreach and community activities in which they are involved for reporting on the Older Individuals who are Blind report (7OB).

When the user selects **Community Activities** they are directed to the **Community Activities** screen which displays all community activity entries. The screen has the following buttons:

* New
* Close Screen
* Export to Excel

The user may also add **New Community Activities** by selecting the **New** button and entering the following information:

* Provider
* Year
* Month
* Issue Area
  + Accessibility to Transportation
  + Access to Appropriate Healthcare
  + Availability/Access to Assistive Technology
  + Opportunities for Affordable/Accessible Housing Units
* Activity Type
* Community/Systems Advocacy
* Technical Assistance
* Community Education and Public Education
* Outreach Efforts
* Collaboration/Networking
* Hours Spent
* Objective – enter brief summary in the text box.
* Outcome – enter brief summary in the text box.

By selecting **Save** the user will save the information and return to the **Community Activities** screen

**6800 Requested Services**

The **Requested Services** screen allows the user to search for **Requested Services** by the following criteria:

* Requested Service
* Status
* Service Ready
* Has Staff
* Funds Available
* Begin Date
* End Date

These criteria allow searches of service provider’s consumers to be customizable.

The Search Requested Services Screen also has the following buttons:

* Search
* Reset
* Close Screen
* Export to Excel

**6900 Service Records**

The **Service Records** screen allows the user to search for **Service Records** by the following criteria:

* Service Detail Type
* Contractor Provided
* Contractor Purchased
* At Risk Nursing Facility/Other Placement
* Unit Type
* Begin Date
* End Date

These criteria allow searches of service provider’s consumers to be customizable.

The Search **Service Records** Screen also has the following buttons:

* Search
* Reset
* Close Screen
* Export to Excel

**7000 State Admin**

The **State Admin** option is found on the **Top Navigation** menu. This option is available for State administrators only. When selecting the **State Admin** option, the system opens the left navigation menu consisting of the following options:

* User Maintenance
* Code Maintenance
* Service Category Maintenance
* Provider Maintenance
* Invoice Maintenance
* Consumer Participation Maintenance
* Run End of Month
* Community Activities
* Requested Services
* Service Records
* Upload File
* Uploaded Files

**7100 User Maintenance**

The **User Maintenance**option allows the state administrator to:

* select and update an existing user record; or
* create a new user record.

If the user selects the **User Maintenance** option in the left navigation field, the system opens the **User List** page. The **User List** page contains the following options and buttons:

* **Provider Name** – The user may select the specific service provider to show data system users only for that Center.
* **Search** – When the user selects this button after selecting the provider name the list of users at that particular center will be displayed.
* **New** - When the user selects this button, the administrator is able to create a new user. Note: The user must have user role equal to “Provider Admin” before the new button is enabled.
* **Close Screen** – When the user selects this button, the administrator is able to close the page.
* **Export to Excel** – When the user selects this button, the administrator is able to load the return data set into an excel file and to print a hard copy of the data set.

If there is existing user information, the screen will display the First Name; Last Name; Email; Phone; Inactive Date; and last login date.

The user last name will be a hyperlink and when the last name is selected, the system will take the administrator to the user page.

When the administrator selects the **New** button or the name hyperlink, the system opens the **User**page. If there is an existing user record, the page will be populated with existing data. If the administrator is adding a new user record, then the page will open a blank user maintenance page.

The user may add or update the following fields:

* Provider Name
* First name
* Last name
* Email Address
* Phone
* Phone Type
* User Name
* Inactive date
* Check Boxes for the following access rights:
  + - State Admin (access rights)
    - Developer (access rights)
    - Read Only State Admin (access rights)
    - Provider Admin (access rights)
    - Case Management (access rights)
    - Provider Upload Only (access rights)

When the user selects the **Save** button the application validates that all required fields are entered. If any entries are missing the application returns an error message and the record will not be saved until the errors are corrected.

After the record is saved the application returns to the **User List** page, refreshing the page with the previously entered search criteria. When the user selects the **Close Screen** button, the system returns to the **User List** page, refreshing the page with the previously entered search criteria.

The administrator may edit the information by selecting the user and adding the updated information. Select Save to update the information.

**7200 Code Maintenance**

The **Code Maintenance**option allows the state administrator to:

* Search code types or
* if the user has the correct permissions they may select and update an existing code type; or
* create a new code type.

**7300 Service Category Maintenance**

The **Service Category Maintenance**option allows the state administrator to:

* View the following service category information:
  + - Service Detail Code
    - Service Detail Description
    - Managed in Central Office
    - Service Category
* Update the designation for Managed in **Central Office** and **Service Category**.

**7400 Provider Maintenance**

The **Provider Maintenance** screen allows the administrator to add a provider or update the information regarding the provider. When the user selects the **Provider Maintenance** link on the left navigation menu, the system opens the **Provider List** page. The user may select the “ID” number to open a **Provider** page populated with existing data. To enter a new provider the user will select the **New** button at the bottom of the **Provider List** page and a blank screen will be displayed. The user may add or update the following fields:

* Provider Number
* Provider Name
* Contact Name
* Email Address
* Address
* Zip Code
* City
* State
* County
* Phone
* Phone Type
* Date Inactive
* Invoice Contact Name (this is the name that appears on the invoice)
* Invoice Contact Phone
* Invoice Contact Phone Type
* When the user selects the **Save** button the system validates that all required fields are entered. If any entries are missing the system returns an error message and the record will not be saved until the errors are corrected.
* The administrator selects the **Save** button to save the provider record. After the record is saved the system stays on the **Edit Provider** page and refreshes the page with the updated information.

## 7500 Invoice Maintenance

* + The **Invoice Maintenance** option allows the user to prepare an invoice to submit to the HHSC Independent Living Services (ILS) Program. When the user selects the **Invoice Maintenance** option, the system displays the invoice list search page.

Upon entry to the **Invoice List** page, the user may search for an invoice by entering the following information:

* **Provider Name**
* **Date From and Date To** – Enter the dates to get invoices within the date range and select the **Search** button.
* **Status** – Select a status of “Pending”, “Approved” or “Cancelled” and select the **Search** button to view invoices with a specific status.

Additional options from this page include:

* **New Invoice** – Select the **New Invoice** button to create a new invoice. For more information on how to create a new invoice, see below for **Creating a New Invoice.**
* **Reset** – Select the Reset button to clear the search criteria.

Another way to search for an invoice is to search by provider name only and scroll down to the list of invoices. On the displayed table there is a bar menu above the invoice list with the following fields:

* Invoice Id – This field has a hyperlink to the invoice.
* Provider name – This field lists the provider’s name.
* State Date – The system automatically sets the invoice date range from the most recent date to the earliest date. When the user selects the Start Date, the system reverses the date order from the earliest date to the most recent date.
* End Date – Just like the Start Date, the system automatically sets the invoice date range from the most recent date to the earliest date. When the user selects the Start Date, the system reverses the date order from the earliest date to the most recent date.
* Amount – This is the amount of the invoice.
* Status – This is the status of pending, approved or cancelled as noted above.

**Creating a New Invoice**

When the user selects the **New Invoice** button, the **Invoice Maintenance** page displays with the following fields:

* **Provider Information**

This box contains the contractor’s Texas Identification Number, Provider Name, Contact Name, Address, City, State, Zip Code, Contract Number and Purchase Order (PO) Number. These items are pre-filled when you enter into the **Invoice Maintenance** page.

* **Invoice Period**

This section requires the provider to enter the Start Date and End Date. The Submitted Date is automatically populated with the current date.

* **Description of Services**

The user enters information in the following fields:

1. **Salary and Wages** including the total amount, OIB amount and Other amount.
2. **Fringe Benefits** enter total amount only.
3. **Travel** including total amount, OIB amount and Other amount.
4. **Equipment (Capitalized)** enter total amount only.
5. **Supplies and materials** enter total amount only.
6. **Other costs** enter total amount only.
7. **Purchased Services** enter total amount only.
8. **Consumer Participation** enter total amount only.
9. **Deduction for Advance Pay** enter total amount only.

The system calculates the **Subtotal A Line, Subtotal B Line and the Total Invoice Amount.** This report displays the invoice that is submitted monthly to HHSC for payment.

**7600 Consumer Participation Maintenance**

The **Consumer Participation Maintenance** screen allows the administrator to search by provider and obtain a list of consumers who have participated in the cost of services during a particular time period, by month and year or by year only. When the user selects the **Consumer Participation Maintenance** link on the left navigation menu, the system opens the **Consumer Participation** search page. The user may select the provider name, year and month then select **Search** button to display the list of consumer’s who participated in the cost of services during that time period. The user may also select the **Reset** button to clear the results and begin a new search; select the **Close Screen** button to close the screen and return to the main State Admin page; or the **Export to Excel** button to export the results to an excel spreadsheet.

**7700 Run End of Month**

Need entry to describe this option

**7800 Community Activities**

The **Community Activities** screen allows service provider’s to enter the outreach and community activities in which they are involved for reporting on the Older Individuals who are Blind report (7OB).

When the user selects **Community Activities** they are directed to **Search Community Activities** screen which allows searches using the following criteria:

* Provider
* Year
* Month

The user may search by selecting these criteria and the system displays a **Community Activities** list.

The user may also add **New Community Activities** by selecting the **New** button and entering the following information:

* Provider
* Year
* Month
* Issue Area
  + Accessibility to Transportation
  + Access to Appropriate Healthcare
  + Availability/Access to Assistive Technology
  + Opportunities for Affordable/Accessible Housing Units
* Activity Type
* Community/Systems Advocacy
* Technical Assistance
* Community Education and Public Education
* Outreach Efforts
* Collaboration/Networking
* Hours Spent
* Objective – enter brief summary in the text box.
* Outcome – enter brief summary in the text box.

By selecting **Save** the user will save the information and return to the Search **Community Activities** screen.

**7900 Requested Services**

The **Requested Services** screen allows the user to search for Requested Services by the following criteria:

* Provider
* Requested Service
* Status
* Service Ready
* Has Staff
* Funds Available
* Begin Date
* End Date

These criteria allow searches of service provider’s consumers to be customizable.

**7910 Service Records**

The **Service Records** screen allows the user to search for Service Records by the following criteria:

* Provider
* Service Detail Type
* Contractor Provided
* Contractor Purchased
* At Risk Nursing Facility/Other Placement
* Unit Type
* Begin Date
* End Date

These criteria allow searches of service provider’s consumers to be customizable.

**7920 Upload File**

**Please note that I have pasted in the instructions provided by Hilary so these need to be reviewed and language updated as needed**.

Both Service Record and Consumer Participation data may be uploaded from files into the ILS Data Reporting System. The file upload feature is accessed through the “Upload File” menu item found in the left-hand menu that is visible when the user selects the State Admin/Provider Admin top menu item (State or Provider admin depending on the user’s access level).

* For a service provider to upload a file the files must either:
* Have an extension of csv and contain comma-delimited data

-or-

* Have an extension of txt and contain tab-delimited data
* File names must not contain spaces.
* Files must contain one header line followed by one or more lines of data. Files must adhere to the specific format for that upload type.

**Service Record Format**

**Header Line** – file must contain this header line (showing comma-delimited version):

LocalCaseNumber,BeginDate,EndDate,ServiceDetailCode,ServiceDetailDescription,UnitType,UnitsProvided,Cost,IsContractorProvided,IsContractorPurchased,VendorName,PaidDate,IsAtRiskNursingFacilityPlacement,Filename

**Data Lines** – file must contain 1 or more data lines

Example (comma-delimited):

12345,2/2/2016,2/2/2016,12,Computer Systems or Hardware,Item,1,50,N,Y,Computer Supply Warehouse,03/06/2016,N,March2016.csv

The data fields are comprised of:

|  |  |  |  |
| --- | --- | --- | --- |
| **Field** | **Description** | **Data Type** | **Examples** |
| LocalCaseNumber | This is the provider’s case ID | Nvarchar(50) | 12345  89-BA-2016 |
| BeginDate | Start of service period | Datetime | 2/2/2016 |
| EndDate | End of service period | Datetime | 2/2/2016 |
| ServiceDetailCode | 1 or 2 character numeric code from Service Detail Code table | Nvarchar (2) | 1 |
| ServiceDetailDescription | See Service Detail Code table – **text must match exactly for code value given unless code =other** | Nvarchar (80) | Assistive Technology Training |
| UnitType | Must be one of **(must match exactly)**:  Quarter Hour  Half Hour  Hour  Item  Day  Service | Nvarchar(32) | Half Hour |
| UnitsProvided |  | Decimal(6,2) | 1.5 |
| Cost | If purchased | Decimal(12,2) | 368.23 |
| IsContractorProvided | Y or N | Single char | Y |
| IsContractorPurchased | Y or N | Single char | N |
| VendorName | If purchased, where purchased from | Nvarchar(80) |  |
| PaidDate | If purchased, date paid | Datetime |  |
| IsAtRiskNursingFacilityPlacement | Y or N | Single char | N |
| Filename | Name of file this record is in – will be same for all records in the file |  | March2016.csv |

**Service Detail Code Table**

Code Description

01 Assistive Technology Training

02 Augmentative Communication Devices

03 CCTV Accessories

04 CCTV, Desktop

05 CCTV, Hand-Held or Portable

06 CCTV, Luggable

07 Video Magnfier

08 Note Takers

09 Assistive technology, not otherwise listed

10 Adaptive Technology Hardware

11 Computer Software, Manuals, Books

12 Computer Systems or Hardware

13 Scanners

14 Cognitive Therapy

15 Counseling Services

16 Occupational Therapy

17 Physical Therapy

18 Speech Therapy

19 Deaf Blind Equipment & Supplies

20 Diabetic Education

21 Diabetic Shoes

22 Diabetic Supplies

23 Eye Exams & Diagnostics

24 Hearing Exams & Diagnostics

25 Laboratory/Pathology & Radiology

26 Medical diagnostic & evaluation services

27 Psychological/psychiatric evaluation services

28 Home Health Services - RN, LVN or Home Health Aide

29 Office/Outpatient/Hospital Consultation

30 Other Medical Service

31 Hearing Aid Purchase

32 Hearing Aid Service Charge, Earmolds, and Batteries

33 Hearing aid services/repairs

34 Home medical equipment (hospital bed, patient lift)

35 Manual wheelchairs

36 Medical equipment repair or rental

37 Home & mobility equipment (walkers, canes, crutches, braces, shower bench, etc )

38 Other medical equipment

39 Medical Records

40 Orientation & Mobility Training

41 Orthotics, other than diabetic shoes

42 Power Wheelchair

43 Power wheelchair or scooter accessories (e.g. cushions)

44 Power wheelchair or scooter battery, power unit or controller

45 Power wheelchair or scooter repairs or rental

46 Scooter

47 General Prostheses

48 Prosthesis Specification Review

49 Prosthetic - Lower Limb

50 Prosthetic - Upper Limb

51 Prosthetic electronic devices or repair

52 Prosthetic Eye

53 Telecommunication Devices for the Deaf and Hard of Hearing

54 Braille for Blind/Visually Impaired

55 Interpreter Services

56 Optical/Low Vision Devices & Services (not included elsewhere)

57 Bathroom Aids

58 Clocks, Signalers, Alarm Vibrators, Etc.

59 Kitchen & Cooking Aids

60 Other

61 Small Appliances

62 Major Modification (e.g. permanent)

63 Minor home mod (non permanent--e.g., grab bars)

64 Pre or Post Modification Inspection

65 Pre-modification evaluation or title search

66 Driver Evaluation

67 Hand controls

68 Modification Inspection or Review by Engineer

69 Other major modifications (Specify)

70 Other minor modifications (specify:)

71 Repair of Vehicle Modification Equipment

72 Van Lifts or Floor Lower

73 Transportation

**Consumer Participation Format**

**Header Line** – file must contain this header line (showing comma-delimited version):

LocalCaseNumber,Month,Year,Amount,FileName

**Data Lines** – file must contain 1 or more data lines

Example (comma-delimited):

12345,4,2016,50.75,CostShareApril2016.csv

|  |  |  |  |
| --- | --- | --- | --- |
| **Field** | **Description** | **Data Type** | **Examples** |
| LocalCaseNumber | This is the provider’s case ID | Nvarchar(50) | 12345  89-BA-2016 |
| Month | Numeric month from 1 to 12 | int | 4 |
| Year | 4-digit year | int | 2016 |
| Amount | Dollar amount of cost share | Decimal(12,2) | 49.42 |
| Filename | Name of file this record is in – will be same for all records in the file |  | March2016.csv |

**7930 Uploaded Files**

The user may search for **Service Record Files** or **Consumer Participation Files** that have been uploaded to the ILSDRS system. To search for uploaded files select **Uploaded Files** from the left navigation menu then select either **Service Record Files** or **Consumer Participation Files.** When either is selected from the menu the system will display a **Service Record File Upload List or a Consumer Participation File Upload List,** as appropriate, that contains the following information:

* ID
* Provider
* Status
* File Name
* Created By
* Created Date
* Validate Document