Sample Fiscal Year View on the Service Detail Screen in HCSIS

1. Go to: Plan > Manage Plan > View/Modify Plan Details > Service Details

HCSis — The Home and Community Services Information System — Help

Home | M4Q | Individual | Plan | SC | Provider | Financial | Admin. | Tools
Manage Plan
Plan - Manage Plan - Plan Components - Service Details

| Current Individual | | Name: | | SSN: | | MCI#: | | Residential County: | | Info |

| Current Plan | | Revision Type: General Update | | Plan Status: Approved | | Plan Effective Date: 08/12/2014 | | Proj. Annual Review Date: |

Select	Service Name	Provider Name	Total Units	Service Start Date	Service End Date	Service Frequency	Units per Visit	Days of Service Delivery	Fiscal Year View
○	Community Inclusion - Agency Managed	ABC CI AGENCY	1669	08/12/2014	08/11/2015	1 times for 7 days	32	Tue	View
○	Supports Coordination - ongoing	GHI SC AGENCY	146	08/12/2014	08/11/2015	3 times for 30 days	4	Var	View
○	Supports Coordination - ongoing	GHI SC AGENCY	127	08/12/2013	08/11/2014	3 times for 30 days	4	Var	View
⦿	Community Inclusion - Agency Managed	ABC CI AGENCY	1669	08/12/2013	08/11/2014	1 times for 7 days	32	Var	View
○	Job Finding and Assessment: Job Finding	JF&A AGENCY	1	08/12/2012	08/11/2013	1 times for 30 days	1	Var	View
○	Community Inclusion - Agency Managed	ABC CI AGENCY	2086	08/12/2012	08/11/2013	2 times for 7 days		Mon, Tue, Fri	View

2. Select the Service Name and then click on View for Fiscal Year View

Fiscal Year View - Windows Internet Explorer provided by PA Dept of Human Services

| Current Individual | Name: | SSN: | MCI#: | Residential County: | Info |

| Current Plan | Revision Type: General Update | Plan Status: Approved | Plan Effective Date: 08/12/2014 | Proj. Annual Review Date: |

Service Name: Community Inclusion - Agency Managed

Segment Start Date	Segment End Date	Service Unit Rate	Segment Total Units	Funding Stream	Utilized Units	Authorization Status
8/12/2013	6/30/2014	9	1477	Autism Waiver	1176	Authorized
7/1/2014	8/11/2014	9	192	Autism Waiver	179	Authorized
		Total: 1669			**1355**	

Close

On the **Fiscal Year View** screen, the segments are separated by fiscal year. The Bureau of Autism Services' fiscal year starts on July 1st and ends on June 30th.

*In this example, the participant's Plan Effective Date is 08/12/2014. Based on the service selection made above (Community Inclusion - Agency Managed from Service Start Date 08/12/2013 to Service End Date 08/11/2014), the first segment in the **Fiscal Year View** is from 08/12/2013 until the end of that fiscal year (06/30/2014), and the second segment is at the start of the next fiscal year (07/01/2014) until the service end date (08/11/2014). 1477 units were authorized for the first segment time period of which 1176 were utilized, and 192 for the second segment time period of which 179 units were utilized. Of the 1669 total units authorized for this individual, 1355 units were utilized during this plan year.*

3. Refer to Service Utilization Calculator (excel file) on the BAS Virtual Training Center

	A	B	C
1	**Service Utilization Calculator**		
2	To use this calculator please refer to the service details screen in the ISP.		
3	Total Units authorized for the current plan year	1669	Found in service details screen under Fiscal Year View-see total under "Segment Total Units" column
4	Total Number of units utilized during current plan year	1355	Found in service details screen under Fiscal Year View-see Total under "Utilized Units" column
5	Total Units unused for current plan year	314	Auto Populates
6	**Amount of units to be equal to or over 25%**	**1694**	Auto populates
7	Total units submitted for the new plan year for this service	1669	Found in service details screen of ISP
8	**Justification required?**	**No**	If yes, justification for the increase must be written into the service notes, however RO may still ask for a decrease in units

In this example, the service provider entered the number of units authorized and utilized during the current plan year, and the number of units being submitted for the new plan year to calculate if justification will be needed.

The Service Utilization Calculator was created to be used during the Annual Review Plan process and can be found on the Virtual Training Center. Review any services that were underutilized with the ISP Team during the plan development process. Discuss with the team how much of each service is actually expected to be used in the next plan year, given past history. Allow sufficient time for this at the meeting.