

Instructions to Submit Quarterly Reports for DDP Provider in MedCompass

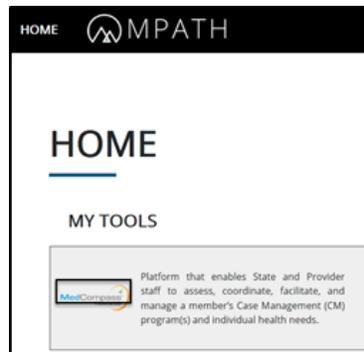
Purpose: Provide Instructions to Submit Quarterly Reports for DDP Providers

- ✓ Log on to I CAP

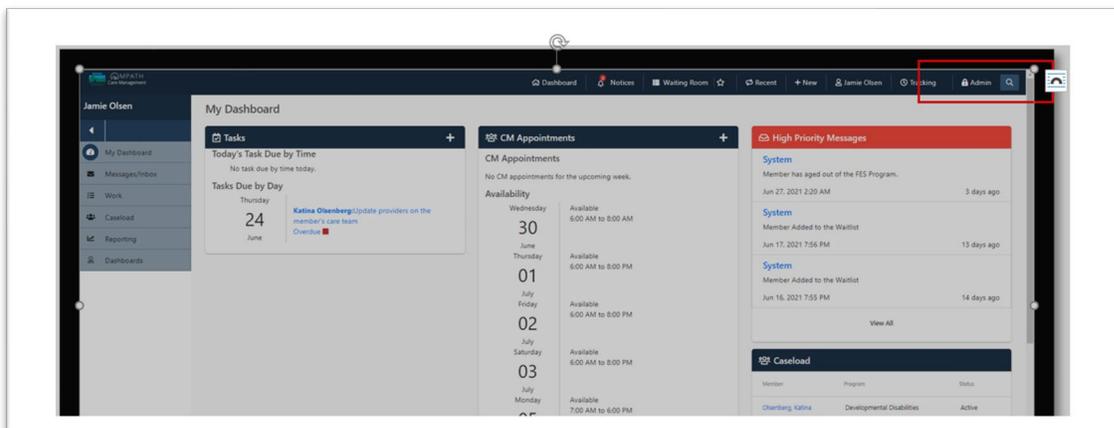
[ICAP Portal \(healthinteractive.net\)](http://healthinteractive.net)



- ✓ Log on to MedCompass



- ✓ Land on MedCompass Dashboard and Click on Search.



Instructions to Submit Quarterly Reports for DDP Provider in MedCompass

✓ Enter Member's Identifying Information and Select Search

The screenshot shows the 'Member Search' form in the MedCompass interface. The form has several input fields: 'Search by identifying number' (with a sub-field for 'Member ID'), 'Member Name', and 'Date of Birth'. There are also fields for 'To search by name', 'Last Name', and 'First Name'. A red box highlights the 'Search' button in the top right corner of the form.

✓ Go to Reports and Click Quarterly Objective Status Report.

The screenshot shows the 'Member Reports' page. The left sidebar has a 'Reports' menu item highlighted with a red box. The main content area shows a table of reports with the following columns: 'Name' and 'Description'. The 'Quarterly Objective Status Report' is highlighted with a red box in the table.

Name	Description
DDP Case Note Member Level Report	This report is on the member level report screen. This report will pull information from the member's Case Notes.
INDIVIDUAL FAMILY SERVICE PLAN (IFSP) Report	Report should pull the member's Individual Family Service Plan (IFSP) assessment.
Member Cost Plan Summary Report	This report is a cost plan comparison of the current fiscal year and next fiscal year.
Quarterly Objective Status Report	This report includes information from the member's Quarterly Objectives

✓ Enter Date Parameters and Select View Report

The Quarterly Report schedule is based on the calendar year (January- March, April- June, July- September, October- December) or the date of the PSP Meeting. Each Quarterly Report must be submitted within 30 days of the end of the quarter.

Example: Run report for 04/01/2021 to 06/30/2021. All active goals/objectives will populate the report for the provider or case management agency.

The screenshot shows the 'Quarterly Objective Status Report' form. The form has two date input fields: '* Quarter Start Date' (set to 04 / 01 / 2021) and '* Quarter End Date' (set to 06 / 30 / 2021). A red box highlights the 'View Report' button in the top right corner of the form.

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- ✓ Review Results and Export to Excel by Clicking Export and Selecting Excel format

Quarterly Objective Status Report

Quarter Start Date: 04 / 01 / 2021

Quarter End Date: 06 / 30 / 2021

View Report

Back

1 of 1

Export

Quarterly Objective Status Reports

Member Name : Katina Olsenberg
CHIMES ID :
Report Run Date : 7/7/2021
Quarter Date Span : 4/1/2021- 6/30/2021

Date of PSP Meeting	Date Quarterly Report Information is Submitted	Provider Agency	Care Plan Goal	Care Plan Objective	Care Plan Objective Start Date	Status Progress (Include summary of progress on each objective during this quarter i.e summary of monthly data sheets.)	Objective Status (Continue, Review/Revision, Completed) All status changes agreed upon by PSP Team	Quarterly Report Information Compiled By	Depart
06/20/2021			Continue to Maintain Part time Employment	Engage with Job Coach	06/24/2021				
06/20/2021		REACH INC	Attend Recreational Activities	Participate in Group Activities	06/24/2021				

- ✓ Download Excel File and Click Open File

Quarterly Objective Status Report

Quarter Start Date: 04 / 01 / 2021

Quarter End Date: 06 / 30 / 2021

Export

Export Report
✓ Quarterly Objective Status Reports received.

Quarterly Objective Status Reports

Member Name : Katina Olsenberg
CHIMES ID :
Report Run Date : 7/7/2021
Quarter Date Span : 4/1/2021- 6/30/2021

Date of PSP Meeting	Date Quarterly Report Information is Submitted	Provider Agency	Care Plan Goal	Care Plan Objective	Care Plan Objective Start Date	Status Progress (Include summary of progress on each objective during this quarter i.e summary of monthly data sheets.)	Objective Status (Continue, Review/Revision, Completed) All status changes agreed upon by PSP Team	Quarterly Report Information Compiled By	Depart
06/20/2021			Continue to Maintain Part time Employment	Engage with Job Coach	06/24/2021				
06/20/2021		REACH INC	Attend Recreational Activities	Participate in Group Activities	06/24/2021				

Instructions to Submit Quarterly Reports for DDP Provider in MedCompass

✓ Enter the Following Fields

Quarterly Objective Status Reports									
Member Name :		Katina Olsenberg							
CHIMES ID :		7777777							
Report Run Date :		7/7/2021							
Quarter Date Span		4/1/2021- 6/30/2021							
Date of PSP Meeting	Date Quarterly Report Information is Submitted	Provider Agency	Care Plan Goal	Care Plan Objective	Care Plan Objective Start Date	Status Progress (Include summary of progress on each objective during this quarter i.e. summary of monthly data sheets.)	Objective Status (Continue, Review/Revision, Completed) All status changes agreed upon by PSP Team	Quarterly Report Information Compiled By	Department/ Service
06/20/2021			Continue to Maintain Part time Employment	Engage with Job Coach	06/24/2021				
06/20/2021		REACH INC	Attend Recreational Activities	Participate in Group Activities	06/24/2021				
06/20/2021		JOB CONNECTION, INC	Continue to Live In Home Setting	Daily Checklist	06/24/2021				
06/20/2021		MONTANA ACHIEVEMENT PROJECT	Continue to Maintain Part time Employment	Engage with Job Coach	06/24/2021				

- 1) Date Quarterly Report Information Submitted (Column B)**
Enter the date the provider staff summarizes the objective status information to be entered in Column G. This date could be different for each objective.
- 2) Status/Progress (Column G)**
Include summary of progress on each objective during this quarter, i.e. summary of monthly data sheets.
- 3) Objective Status (Column H) (Continue, Review/ Revision, Completed)** Provider agency recommends the objective status based on the progress during the quarter. All status changes agreed upon by PSP Team.
- 4) Quarterly Report Information Compiled By (Column I)**
Enter the name of the provider staff who summarized the data entered in Column G.
- 5) Department/Service (Column J)**
Enter site assignment or type of service of the provider staff identified in Column I for example.

Below are three examples of Provider agency quarterly reports with sample data entered.

Example 1

Quarterly Objective Status Reports

Member Name : Katina Olsenberg
 CHIMES ID : 7777777
 Report Run Date : 7/7/2021
 Quarter Date Span 4/1/2021- 6/30/2021

Date of PSP Meeting	Date Quarterly Report Information is Submitted	Provider Agency	Care Plan Goal	Care Plan Objective	Care Plan Objective Start Date	Status Progress (Include summary of progress on each objective during this quarter i.e. summary of monthly data sheets.)	Objective Status (Continue, Review/Revision, Completed) All status changes agreed upon by PSP Team	Quarterly Report Information Compiled By	Department/ Service
06/20/2021	7/16/2021	JOB CONNECTION, INC	Continue to Live In Home Setting	Daily Checklist	06/24/2021	Remembers to brush teeth daily without prompts, needs daily reminder to take lunch box to work M-F.	Continue	Aaron Hahm	Wildflower Group Home Mgr

Instructions to Submit Quarterly Reports for DDP Provider in MedCompass

Example 2

Quarterly Objective Status Reports

Member Name : Katina Olsenberg
 CHIMES ID : 7777777
 Report Run Date : 7/7/2021
 Quarter Date Span : 4/1/2021- 6/30/2021

Date of PSP Meeting	Date Quarterly Report Information is Submitted	Provider Agency	Care Plan Goal	Care Plan Objective	Care Plan Objective Start Date	Status Progress (Include summary of progress on each objective during this quarter i e summary of monthly data sheets.)	Objective Status (Continue, Review/Revision, Completed) All status changes agreed upon by PSP Team	Quarterly Report Information Compiled By	Department/ Service
06/20/2021	7/28/2021	MONTANA ACHIEVEMENT PROJECT	Continue to Maintain Part time Employment	Engage with Job Coach	06/24/2021	Met with job coach to fill out employment application for Garden Center.	Continue	Jamie Olsen	Community Employment Program

Example 3

Quarterly Objective Status Reports

Member Name : Katina Olsenberg
 CHIMES ID : 7777777
 Report Run Date : 7/7/2021
 Quarter Date Span : 4/1/2021- 6/30/2021

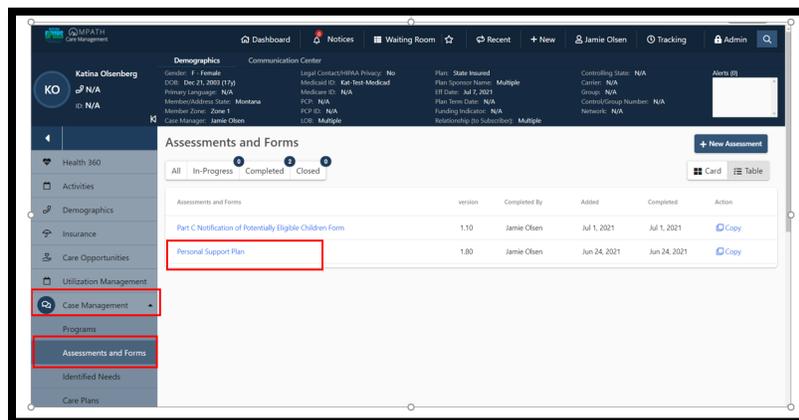
Date of PSP Meeting	Date Quarterly Report Information is Submitted	Provider Agency	Care Plan Goal	Care Plan Objective	Care Plan Objective Start Date	Status Progress (Include summary of progress on each objective during this quarter i e summary of monthly data sheets.)	Objective Status (Continue, Review/Revision, Completed) All status changes agreed upon by PSP Team	Quarterly Report Information Compiled By	Department/ Service
06/20/2021	7/19/2021	REACH INC	Continue to Maintain Part time Employment	Engage with Job Coach	06/24/2021	Katina met with her Job Coach Zx. Once was at job site to train on new task of copying. The second meeting was at the office to review bus schedule.	Continue	Jenn Conners	Supported Employment
06/20/2021	8/6/2021	REACH INC	Attend Recreational Activities	Participate in Group Activities	06/24/2021	Katina participated a group activity with her coworkers by going to a retirement party on 6/24, and went to the community garden with her garden club on 7/31.	Continue	Cathy Murphy	Job Coach

- ✓ Save Completed Quarterly Objective Status Report to Your Desktop or Hard Drive using the DDP Naming Convention.

Example: FY21 Benetar Job Connection Quarterly Report April-June.

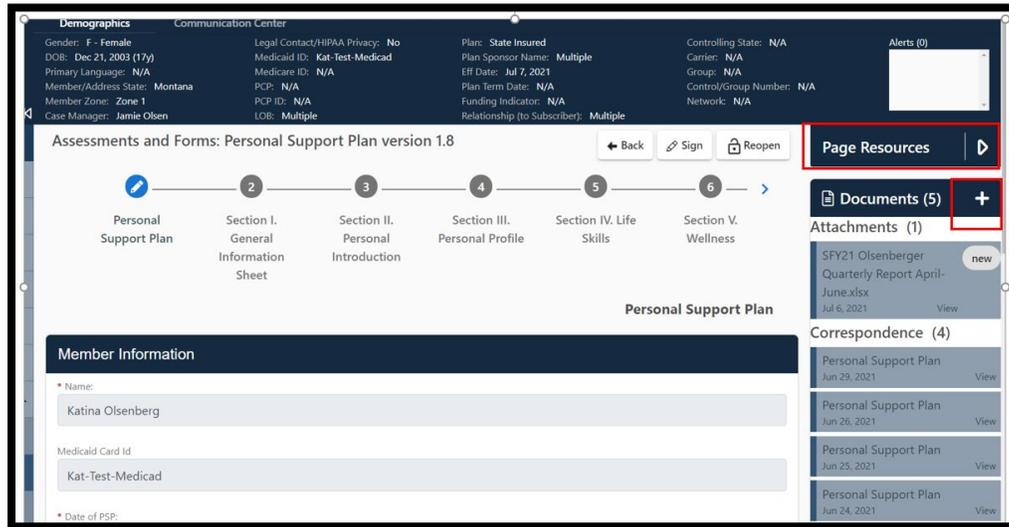
- ✓ Upload Quarterly Objective Status Report

- 1) Search Member using Name or Chimes ID, go to Case Management, select Assessment and Forms, Click into current Personal Support Plan.

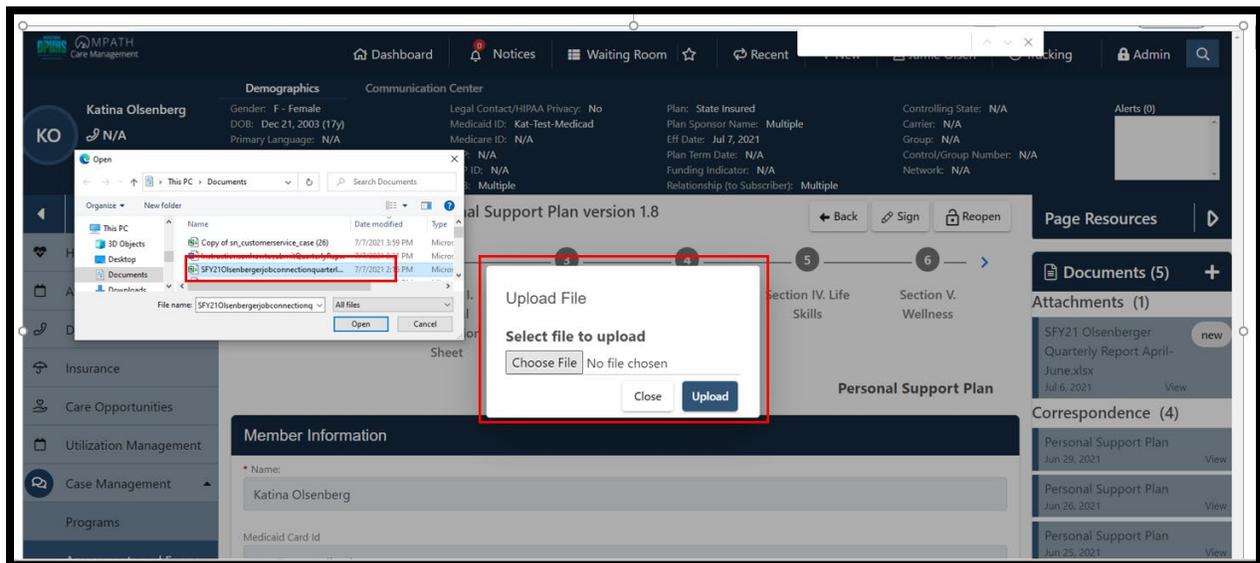


Instructions to Submit Quarterly Reports for DDP Provider in MedCompass

2) Select Page Resources Carrot, Click Document + Button



3) Select attach file, choose file to attach, and select upload.



✓ Please Note the Following

- 1) Each Quarterly Report must be submitted within 30 days of the end of the quarter.
- 2) Providers will see only those Care Plan Goals and Objectives for which they are responsible.
- 3) Provider Field on the Report will be blank if the Provider Field on the Goal Screen has not been selected. If a Case Manager is responsible for the specific goal, the case management agency will need to be added to the Care Team.

Instructions to Submit Quarterly Reports for DDP Provider in MedCompass

For AWARE TCM, please select provider type 82, AWARE INC (TCM), MMIS Provider Id 00007003307

For State Case Management, select provider type NP, and MT DPHHS DDP Case Mgmt, Provider id 0001110928

- 4) For PSP's that have not been completed in MedCompass, upload the document in using the page resources in the personal support plan using the naming convention.