

Employer First name, Last name
Employer Mailing Address 1, Address 2
Employer City, State, Zip

Dear Employer:

This packet contains examples of reports that will be available to you on a monthly basis starting in March 2014. Enclosed with this letter, you will find samples of each of the reports along with descriptions about how to read the reports.

If the descriptions of the reports are not clear, you may attend call-in training that PPL will offer. This training is optional.

Training dates and times are noted below. PPL will not be able to answer live questions during the training, but you can submit questions in advance and we will address them during the sessions.

Reports Training Schedule	Date and Time of Training	Call-In Number
<ul style="list-style-type: none"> M-6 OLTL Monthly Utilization Report M-6DCW OLTL Direct Care Worker Summary Report 	March 12, 2014 11:00am to 12:00pm	1-877-668-4493 <u>Access Code:</u> 767 741 284
<ul style="list-style-type: none"> M-4 OLTL CLE Overutilization Report M-5 OLTL CLE Underutilization Report M-12 Worker Working 16+ Hour Shift Report 	March 14, 2014 3:00pm to 4:00pm	1-877-668-4493 <u>Access code:</u> 765 794 394
<ul style="list-style-type: none"> M-6 OLTL Monthly Utilization Report M-6DCW OLTL Direct Care Worker Summary Report 	March 19, 2014 3:00pm to 4:00pm	1-877-668-4493 <u>Access code:</u> 765 650 815
<ul style="list-style-type: none"> M-4 OLTL CLE Overutilization Report M-5 OLTL CLE Underutilization Report M-12 Worker Working 16+ Hour Shift Report 	March 21, 2014 11:00am to 12:00pm	1-877-668-4493 <u>Access code:</u> 761 804 656

To submit questions in advance of training:

Email paoltl-clereports@pcgus.com or call customer service at 1-877-908-1750 and indicate that you have a question to submit for the reports training.

You can expect to receive participant direction reports at the end of March 2014. These reports will also be available on the PPL Web Portal; instructions on how to access your reports can be found at www.publicpartnerships.com. On the home page, you will see a large Program Login are on the right side of the screen. To get to your program page, simply enter: Username: **PADPWOLTL** Password: **PPLDPW56**. We look forward to providing them to you.

DESCRIPTION OF OLTL MONTHLY UTILIZATION REPORT

Overview

The Pennsylvania Office of Long Term Living (OLTL) Monthly Utilization Report is a monthly report that describes your approved services and how many units* have been used in each monthly plan period, including the number of units paid to each worker for the month that is being reported to you. This report also describes the amount of unused services for each monthly plan period. This report will also be sent to your Service Coordinator and OLTL.

Report Header

1. This is the title of the report. There is an M followed by a number before the title of this report; this stands for Monthly and the number describes the order of the report.
2. This is month that the report covers.
3. This is the name and address of the Common Law Employer (CLE).
4. This section identifies the Participant's waiver, MA ID, Service Coordinator and Service Coordination Entity. It also indicates the date that the report was generated.
5. This is the name of the program Participant.

Service Plan Summary Section

6. The Service Description (Code) lists the services approved in your plan.
7. The Service Start Date lists the date that your approved service plan begins.
8. The Service End Date lists the date that your approved service plan ends.
9. The Amount Authorized lists the total amount of units or dollars approved per your service plan.
10. The Amount Used lists the total amount of units or dollars you have used during the service plan period.
11. The Balance lists the total amount of units or dollars you have not used during the service plan period.
12. The Service Plan Total lists the total amount all services authorized, used, and the balance of services left in your service plan.

Payment Summary Section

13. The Provider lists active worker(s) employed by you for the month being reported.
14. The Units/Gross Amount Paid lists the service units or dollars paid to your workers for the month being reported. The units or dollars paid may be for services worked during the reporting month or the previous month.
15. The Total Payments for this Reporting Month lists the total amount services paid to all workers.

*A unit is .25hrs or 15mins; 4units equals 1 hour

Public Partnerships, LLC
 PA DPW OLTL
 One Cabot Road, STE 102
 Medford, MA 02155

1 Report M-6 OLTL Monthly Utilization Report

2 Month Ending: December 2013



3 JESSICA PARTICIPANT
 1ST AVENUE
 HARRISBURG, PA 17110

4 PA DPW - OLTL - Aging Waiver

Consumer MA ID: 0000022444

Report Generated Date: 3/3/2014

Service Coordinator: JANE TESTCOORDINATOR

5 Participant Name: JESSICA PARTICIPANT

Service Coordinat Entity: TEST SC SERVICES

This is not a bill but is a monthly report for your information only.

Section 1: Service Plan Summary:

This section shows how many service units were used this year, how many were allocated (Amount Authorized), how many have been used for the service plan period, including this month (Amount Used), and how many are left (Balance) in the participant's service plan.

6 Service Description (Code)	7 Service Start Date	8 Service End Date	9 Amount Authorized		10 Amount Used		11 Balance	
			Units	Dollars	Units	Dollars	Units	Dollars
Personal Assistance , 1 unit = 15 minutes (W1792)	05/01/2013	05/31/2013	216.00	NA	16.00	NA	200.00	NA
Personal Assistance , 1 unit = 15 minutes (W1792)	06/01/2013	06/30/2013	720.00	NA	298.00	NA	422.00	NA
Personal Assistance , 1 unit = 15 minutes (W1792)	07/01/2013	07/31/2013	744.00	NA	656.00	NA	88.00	NA
Personal Assistance , 1 unit = 15 minutes (W1792)	08/01/2013	08/31/2013	744.00	NA	744.00	NA	0.00	NA
Personal Assistance , 1 unit = 15 minutes (W1792)	09/01/2013	09/30/2013	720.00	NA	508.00	NA	212.00	NA
Personal Assistance , 1 unit = 15 minutes (W1792)	10/01/2013	10/31/2013	744.00	NA	744.00	NA	0.00	NA
Personal Assistance , 1 unit = 15 minutes (W1792)	11/01/2013	11/30/2013	720.00	NA	720.00	NA	0.00	NA
Personal Assistance , 1 unit = 15 minutes (W1792)	12/01/2013	12/31/2013	744.00	NA	456.00	NA	288.00	NA
Service Subtotal:			5,352.00	NA	4,142.00	NA	1,210.00	NA

Service Subtotal:

12 **Service Plan Total:** 5,352.00 NA 4,142.00 NA 1,210.00 NA

Section 2: Payments Summary

This section shows all payments for service units that have been made on your behalf this month. These payments may be for service units worked this month and service units worked in the previous month.

13	Provider	Service Code	Units	14	Gross Amount Paid
	MELISSA TEST	W1792	108.00		NA
	ROBERT TEST	W1792	60.00		NA

15	Total Payments for this Reporting Month:	168.00	NA
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DESCRIPTION OF OLTL DIRECT CARE WORKER SUMMARY REPORT

Overview

The Pennsylvania Office of Long Term Living (OLTL) Direct Care Worker Summary Report is a monthly report that describes what your direct care workers were paid in the reporting month and since January of the current year. It also identifies what PPL has paid in taxes on your behalf. This report will also be sent to your service coordinator and OLTL.

Report Header

1. This is the title of the report. There is an M followed by a number before the title of this report; this stands for Monthly and the number describes the order of the report.
2. This is month that the report covers.
3. This is the name and address of the common law employer.
4. This section identifies the participant's waiver, MA ID, service coordinator and service coordinator entity. It also indicates the date that the report was generated.
5. This is the name of the program participant.

DCW Summary Section

6. Workers are listed alphabetically by last name. Each worker's information appears on a new page.
7. The SUI Rate is the common law employer's State Unemployment Insurance tax rate.
8. The Hire Date is the date that the DCW was notified of his/her good to go status.
9. The Qualified Date is the date that you last qualified this worker. If this worker was hired after January 1, 2013, you qualified this worker by completing the DCW Qualification Form. If this worker was hired before January 1, 2013, the qualification date will be 1/1/2013.
10. The Pay Type indicates if this worker gets paid via a physical check or EFT (direct deposit).
11. The Status indicates if the worker is currently employed by the common law employer (Active) or no longer works for the employer (Terminated).
12. The PAS Pay Rate is the rate of pay for the direct care worker.
13. This section lists the employee deductions for the reporting month and year-to-date (YTD). First, the report lists gross earnings for the worker for the time period. Following that are the employee deductions. This includes what PPL paid on the employee's behalf toward Social Security (SocSec), Medicare (MdCare), Federal Income Tax (FED), State Income Tax (State), Local Taxes (Local) and Other Taxes (Other). Other includes deductions not covered by the previous list such as voluntary employee deductions.
14. This section lists the common law employer deductions for the reporting month and year-to-date (YTD). This is what PPL paid on the employer's behalf toward State Unemployment Insurance (SUI), Social Security and Medicare (FICA), Federal Unemployment Tax (FUTA), and Workers' Compensation (WC).
15. This section sums the monthly and year-to-date totals for employee and employer deductions for all workers.

Public Partnerships, LLC
 PA DPW OLTL
 One Cabot Road, STE 102
 Medford, MA 02155

1 Report M-6DCW OLTL Direct Care Worker Summary Report

2 Month Ending: October 2013



3 KEVIN PARTICIPANT
 123 SOUTH STREET
 JEANNETTE, PA 15644

4 PA DPW - OLTL - OBRA
 Consumer MA ID: 1601011111
 Report Generated Date: 2/11/2014
 Service Coordinator: CHRISTINA COORDINATOR
 Service Coordination Entity: ALL ABILITIES, INC

5 Participant Name: KEVIN PARTICIPANT

This is not a bill but is a monthly report for your information only.

Direct Care Worker Summary:

YTD information is based upon calendar year for tax purposes and not service plan year.

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WILL EMPLOYEE

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7 SUI Rate: 10.8937 Hire Date: 5/1/2013 Qualified Date: 4/25/2013 Pay Type: CHECK Status: Active

12 PAS Pay Rate: 10.57

13

Employee Deductions

14

Employer Paid Deductions

	Earnings	SocSec	MdCare	Fed	State	Local	Other	SUI	FICA	FUTA	WC
DCW:											
Reporting Month:	\$1,099.28	\$68.16	\$15.94	\$63.00	\$33.74	\$16.64	\$0.76	\$0.00	\$84.10	\$0.00	\$54.96
YTD:	\$12,092.08	\$749.76	\$175.34	\$447.60	\$371.14	\$177.04	\$8.42	\$925.96	\$925.10	\$42.00	\$604.56

6 MELBA WORKER
 SUI Rate: 10.8937 Hire Date: 1/1/2013 Qualified Date: 1/1/2013 Pay Type: CHECK Status: Active

PAS Pay Rate: 10.68

	Employee Deductions							Employer Paid Deductions			
	Earnings	SocSec	MdCare	Fed	State	Local	Other	SUI	FICA	FUTA	WC
DCW:											
Reporting Month:	\$2,776.80	\$172.16	\$40.26	\$162.10	\$85.24	\$35.94	\$1.94	\$0.00	\$212.42	\$0.00	\$138.84
YTD:	\$29,989.44	\$1,859.33	\$434.81	\$1,782.56	\$920.59	\$382.95	\$21.04	\$925.96	\$2,294.14	\$42.00	\$1,499.47

	Employee Deductions							Employer Paid Deductions			
	Earnings	SocSec	MdCare	Fed	State	Local	Other	SUI	FICA	FUTA	WC
15 Employer Total:											
Reporting Month:	\$3,876.08	\$240.32	\$56.20	\$225.10	\$118.98	\$52.58	\$2.70	\$0.00	\$296.52	\$0.00	\$193.80
YTD:	\$42,081.52	\$2,609.09	\$610.15	\$2,230.16	\$1,291.73	\$559.99	\$29.46	\$1,851.92	\$3,219.24	\$84.00	\$2,104.03

DESCRIPTION OF OLTL COMMON LAW EMPLOYER OVERUTILIZATION REPORT

Overview

The Pennsylvania Office of Long Term Living (OLTL) Common Law Employer Overutilization Report is a monthly report that describes where you have over used your monthly services more than 110% of what you have approved in your plan. This report alerts you when you have over used your monthly services for two months in a row from the month being reported to you. This report will also be sent to your service coordinator and OLTL.

Report Header

1. This is the title of the report. There is an M followed by a number before the title of this report; this stands for Monthly and the number describes the order of the report.
2. This is month that the report covers.

Under Utilization Summary Section

3. The Service Coordination Entity column lists the organization who provides your service coordination services.
4. The Service Coordinator Name column lists your specific representative from this organization.
5. The Participant column lists the program participant receiving services.
6. The MA ID column lists the program participants Medicaid Assistance number.
7. The Service Code column lists the specific service identification code for the under used service(s).
8. The Service Description column lists the name of the specific service approved in your plan.
9. The Report Month section identifies the month being reported for the over utilized services.
10. The Previous Month section identifies the previous month where services were also over utilized.
11. The Allocated column lists the amount of units*/dollars authorized during the month.
12. The Amount Used column lists the amount units/dollars used during the month.
13. The Over Utilization column lists the amount of units/dollars used over the amount allocated during the month.
14. The Utilization % column lists the percentage of services that were over utilized from what was allocated during the month.

**A unit is .25hrs or 15mins; 4units equals 1 hour*

1 M-4 OLTL Over Utilization Report – 2 Consecutive Months

2 Month Ending: November 2013

Shows distinct participants who have utilized 110% or more of their monthly allocation by service.

Sort by:

Service Coordination Entity

*Allocated - per approved service plan

** MCI is the first 9 digits of the MA ID

3	4	5	6	7	8	9							10										
						11			12				13			14							
						Report Month		Previous Month		Allocated *		Amount Used		Over Utilization			Allocated *		Amount Used		Over Utilization		
Service Coordination Entity	Service Coordinator Name	Participant Name	MA ID**	Service Code	Description	Units	Dollars	Units	Dollars	Units	Dollars	%	Units	Dollars	Units	Dollars	Units	Dollars	%				
TEST SC SERVICES	TESTCOORDINATOR, JANE	PARTICIPANT, JAMES	0000999922	W1792	Personal Assistance Services	360.00		960.00		600.00		266.67	372.00		992.00		620.00		266.67				

DESCRIPTION OF OLTL COMMON LAW EMPLOYER UNDERUTILIZATION REPORT

Overview

The Pennsylvania Office of Long Term Living (OLTL) Common Law Employer Underutilization Report is a monthly report that describes where you have used less than 80% of the monthly services that you have approved in your plan. This report alerts you when have under used you monthly services for two months in a row from the month being reported to you. This report will also be sent to your service coordinator and OLTL.

Report Header

1. This is the title of the report. There is an M followed by a number before the title of this report; this stands for Monthly and the number describes the order of the report.
2. This is month that the report covers.

Under Utilization Summary Section

3. The Service Coordination Entity column lists the organization who provides your service coordination services.
4. The Service Coordinator Name column lists your specific representative from this organization.
5. The Participant column lists the program participant receiving services.
6. The MA ID column lists the program participant's Medicaid Assistance number.
7. The Service Code column lists the service identification code for the under-used service(s).
8. The Service Description column lists the name of the service approved in your plan.
9. The Report Month section identifies the month being reported for the underutilized services.
10. The Previous Month section identifies the previous month where services were also underutilized.
11. The Allocated column lists the amount of units*/dollars authorized to be used during the month.
12. The Amount Used column lists the amount units/dollars used during the month.
13. The Under Utilization column lists the amount of units/dollars not used during the month.
14. The Utilization % column lists the percentage of services that were used against what was allocated during the month.

*A unit is .25hrs or 15mins; 4units equals 1 hour

1 M-5 OLTL Under Utilization Report - 2 Consecutive Months
2 Month Ending: November 2013

Shows distinct participants who have utilized 80% or less of their monthly allocation by service.

Sort by: **Service Coordination Entity**

*Allocated - per approved service plan

** MCI is the first 9 digits of the MA ID

3 Service Coordination Entity	4 Service Coordinator Name	5 Participant Name	6 MA ID**	7 Service Code	8 Description	9 Report Month						10 Previous Month							
						11 Allocated *		12 Amount Used		13 Under Utilization		14 Utilization %	Allocated *		Amount Used		Under Utilization		Utilization %
						Units	Dollars	Units	Dollars	Units	Dollars		Units	Dollars	Units	Dollars	Units	Dollars	
TEST SC SERVICES	TESTCOORDINATOR, JANE	PARTICIPANT, JANICE	0000033311	W1792	Personal Assistance Services	792.00		464.00		328.00		58.59	792.00		448.00		344.00		56.57

DESCRIPTION OF OLTL WORKER WORKING 16+ HOURS SHIFT REPORT

Overview

The Pennsylvania Office of Long Term Living (OLTL) Worker Working 16+ Hours Summary Report is a monthly report that describes when your worker(s) have worked for 16 hours or more during a single shift. The report will demonstrate all dates of services and shifts worked that are equal to or greater than 16 hours for the month being reported. This report will also be sent to your service coordinator and OLTL.

Report Header

1. This is the title of the report. There is an M followed by a number before the title of this report; this stands for Monthly and the number describes the order of the report.
2. This is month that the report covers.

Under Utilization Summary Section

3. The Region column lists the specific area the program participant belongs to, according to the program; regions are determined by the county where the participant lives.
4. The County column lists the county where the program participant lives.
5. The Waiver/Program column lists the specific waiver/program the participant is eligible to receive services under.
6. The DCW/SSW column lists the specific worker who provided the services.
7. The Participant column lists the program participant receiving services.
8. The MA ID column lists the program participant's Medicaid Assistance number.
9. The Service Coordination Entity column lists the organization who provides your service coordination services.
10. The Service Coordinator Name column lists your specific representative from this organization.
11. The Timesheet Number column lists the unique identification number assigned when PPL systems receive a timesheet for processing.
12. The Date Worked column lists the specific date the worker provided services.
13. The Hours Worked column lists the total number of hours worked for date of service.

1 Report M-12**OLTL Worker Working 16+ Hours Shift Report****2** Month Ending: December 2013

Shows workers that have worked 16 or more hours on a single shift.

Sort by:

Sort By Region

** MCI is the first 9 digits of the MA ID

3 Region	4 County	5 Waiver/Program	6 DCW/SSW	7 Participant	8 MA ID**	9 Service Coordination Entity	10 Service Coordinator	11 Timesheet Number	12 Date Worked	13 Hours Worked
REGION1	BEAVER	AGING	TEST, COLLEEN	PARTICIPANT, MARY	0000444555	TEST SC SERVICES	TESTCOORDINATOR, JANE	PA0000597899	12-05-2013	24.00
REGION1	BEAVER	AGING	TEST, KAULINE	PARTICIPANT, MARY	0000444555	TEST SC SERVICES	TESTCOORDINATOR, JANE	PA0000599785	12-02-2013	23.00
Subtotal:(Distinct count of participants based upon specified sort)				1						
GRAND TOTAL: (Distinct count of participants based upon specified sort)				1						