USER MANUAL

USTEPS PROVIDER INTERFACE (UPI)

State of Utah
Division of Services for People with Disabilities
Introduction:

The USTEPS Provider Interface (UPI) is an Internet based computer system designed for providers who contract with the Division of Services for People with Disabilities. UPI gives the provider access to some of DSPD’s case management data about the people they serve. In general terms, the data involves information about the person, their Person Centered Support Plan (PCSP) budgets, the provider’s payment history, the provider’s 1056 and 520 reports, Incident Reporting and other administrative data.

Access to consumer data is controlled by the PCSP Budget. Providers designated on the budget as delivering service(s) to the person are given access to that information through UPI.

User Accounts:

Information displayed in UPI is protected and restricted based on who logs into the system and the level of user access they are permitted to have. Each contracted provider is required to choose which of their employees can access UPI. The company owner can make the decision himself or delegate the authority to another employee of their choice. If the owner chooses to delegate the authority to a “company representative”, they must notify DSPD of that assignment by completing the form “o-9 UPI Company - Designee Approval”.

Each person who is approved to log into UPI must complete the “o-8 UPI ACCESS Form” which authorizes DSPD to create a UPI user account for them. The person is also required to create a Utah ID account based on the email address specified on the Form o-8.

Access to System Features:

UPI currently has two functional areas. One area concerns financial information about the people served by the provider. The other is Incident Reporting. Access to these areas is controlled by individual user roles specified by the Form o-8.

Financial Information

Financial information about individual consumers:
- Consumer Budget (from the active PCSP)
- Consumer Budget (from the previous plan cycle)
- Consumer Form 1056

Financial information consolidated at the provider level:
- Provider Caseload Budget Report (displays consumer budget and payment data by service code)
- Provider Caseload Form 1056 (displays all 1056’s for all consumers served by the provider)
• Provider Current PCSP Services (displays budget lines for all consumers served by the provider from their respective active plans)
• Payment History Search (allows for searching for any payment made to the provider)
• 520 Invoice Search (allows for searching / retrieving the 520 for a given month)

Incident Report Information

An Incident Report refers to the workflow of information gathered about a specific incident reported by the provider. The workflow includes the following:

• The Incident Notification
• The Incident Report
• Support Coordinator Follow Up
• Additional Follow Up Questions Answered by the Support Coordinator
• The Investigation Report
• Incident Closure
UPI Home Screen

The Home screen displays a list of all the consumers the provider currently serves or did serve in the recent past (i.e. consumers were served in the previous plan cycle and are no longer served in the current plan will appear on the caseload list for up to one year after the old plan closed).

In order to view information about a specific consumer, the user must click (anywhere) on the row of data in the table where the consumer is displayed.
Provider Menu

When the user places their mouse pointer over the “Caseload Reports” menu, the system will display a list of options that summarize the provider’s information based on their level of access. For example, if the user is authorized to see financial information in UPI, then they will see the “Provider Reports”, “Payment Search” and “520 Search” options. Likewise, if the user is authorized to see Incident Report data, then they will see the “Incident Report” option.
Incident Reports

The main Incident Report Screen shows all incidents for the provider and displays the current status of each one in the incident report workflow.

<table>
<thead>
<tr>
<th>IR ID</th>
<th>Consumer</th>
<th>Provider</th>
<th>IR Level</th>
<th>IR Notice</th>
<th>IR Date/Time</th>
<th>IR Disc Date</th>
<th>Assi</th>
</tr>
</thead>
<tbody>
<tr>
<td>655</td>
<td>Ju Adams</td>
<td>Abigail</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>654</td>
<td>Ju Adams</td>
<td>Abigail</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>653</td>
<td>Ph. Richard NKJ</td>
<td>Critical Level</td>
<td></td>
<td></td>
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</tr>
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<td>663</td>
<td>Ju Adams</td>
<td>Abigail</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Provider Reports

This screen provides a list of reports that summarize / consolidate data for all consumers the provider serves.

1. Select the desired report from the list.
2. Click on the desired output format.
3. Click on the “Get Report” button.
Payment Search Screen

The Payment Search Screen allows the user to search for any range of payments based on a paid date or a service delivery date.

1. Enter the date range that covers either the paid date or the service delivery date.

2. Click on the “Search” button.

The output displayed in the table can be downloaded to the user’s computer by clicking on the Microsoft Excel, PDF or CSV icon.

“Export All Data” dumps all of the data pulled from the search criteria. “Export Current Page Data” dumps only the data displayed on the current screen.
The 520 Search Screen

The 520 Search Screen allows the user to search for the 520 invoices produced by the Department of Human Services for their company in a given month.

The “File Type” specifies the source file used in the search.

The start and end dates specify the month(s) for which the user wants to see the invoices.

1. Select the File Type.
2. Enter the Start Date for the desired month / range.
3. Enter the End Date for the desired month / range.
4. Click on the “Search” button.

After the search has been executed, the table will display the individual invoice file for the month(s) that fall within the search’s date parameters. Click on the “View” button located in the row of the table. The file will load as a PDF.
Selected Consumer Menu

After a consumer is selected from the Home screen, the system loads the person’s information on the Main Consumer Screen and makes the “Consumer” menu become available. The Consumer menu makes information available based on the person who is selected and displayed in the upper right-hand corner of the screen.
Consumer Reports

The Consumer Reports Screen displays information about the specific consumer selected from the Home Screen.

1. Select the desired report.
2. Select the desired report output.
3. Click on the “Get Report” button.
Incident Report

The Incident Report screen presented on the Consumer Menu only displays incident reports for the selected consumer.

Incident Reports