

## Overview

The **Local Funding** module serves two purposes in Brittco. First it gives you access to local funding authorizations from Summit County so you can review what services you have been authorized to perform as well as provide a history of local funding authorizations for individuals you've served over various plan year spans.

Second it gives you access to both manage and create invoices to submit for payment of services rendered.

#	Date Created	Staff	Service Dates	Amount	# of Claims	Status
10034	Sep 8, 2023, 10:03am	Bacola, Robin	03/20/23 - 04/07/23	\$2,007.20	40	Submitted
10019	May 25, 2023, 10:59am	Church, Janelle	08/04/22 - 02/27/23	\$972.14	24	Paid

This document focused on reviewing the Local Funding authorizations.

## Overview

Local Funding pays for services using local funds from Summit County. If you are providing for an individual receiving locally funded services, this dashboard gives you easy access to understand what the current utilization is for those funds.

The information about each individual is listed on a card. There are filters across the top to help you zero in on what you want to view. You can also choose to view the cards in terms of what funds are **Remaining** versus what funds are **Used**.

Local Funding
Manage Invoices

Client Year

2024 ✕
2023 ✕

Remaining
  Used
 
Apply Filters

**Barr Jr., Charles** ⋮

Span: 03/15/23 - 03/14/24

Effective: 09/19/23 Version #: 3

**Note:** Add PTT and HPC and transportation

**9 authorizations**  
\$4194.66 / \$25213.2

17%

Details

**Beckham, John** ⋮

Span: 07/01/23 - 06/30/24

Effective: 07/01/23 Version #: 1

**Note:** URC LM - Annual 2023 - 2024 CPT 12345

**2 authorizations**  
\$578.24 / \$2566

23%

Details

**Jackson, Marva** ⋮

Span: 02/01/23 - 01/31/24

Effective: 09/19/23 Version #: 3

**Note:** add LTN

**7 authorizations**  
\$8012.56 / \$45343.6

18%

Details

**Longmier, Sarah** ⋮

Span: 10/20/23 - 10/31/23

Effective: 09/19/23 Version #: 2

**Note:** Ending local services 10/31/2023. Level 1 starting 11/01/2023

**6 authorizations**  
\$0 / \$3615.91

0%

Details

**Longmier, Sarah** ⋮

Span: 11/01/23 - 10/31/24

Effective: 11/01/23 Version #: 1

**Note:** new Level 1 span - local OTT and PTT needed

**2 authorizations**  
\$0 / \$1224

0%

**Marlowe, Biff** ⋮

Span: 02/01/23 - 01/31/24

Effective: 02/01/23 Version #: 1

**Note:** URC-BN-Annual 2023-24. JR#123456

**5 authorizations**  
\$5580.31 / \$33382.8

17%

Each card lists top level information about that individual's funding:

- If you want to **Print** the information, click on the vertical ellipsis.
- **Span** indicates the starting and ending dates of the individual's plan of service.
- **Effective** and **Version** list the most recent effective date and version number for the current authorizations.
- **Note** indicates any special information the URC added to the authorization.
- The total number of **Authorizations** for local funding are listed.
- The split numbers (*\$18562.01/\$39725.79*) indicate what is utilized versus what is authorized.
- The partial circle with the percentage (*47%*) gives a quick visualization of the utilized amount.
- If you want to see more information, click **Details**.

**Barr Jr., Charles** 

Span: 03/15/23 - 03/14/24

Effective: 09/19/23 Version #: 3

Note: Add PTT and HPC and transportation

**9 authorizations**

\$4194.66 / \$25213.2



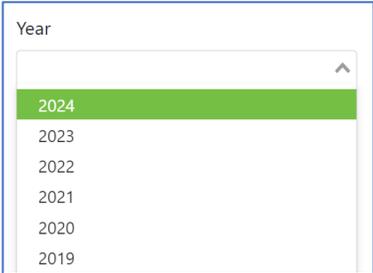
 Details

## Getting the Utilization Information

The first step in getting the utilization information for an individual is to filter the report.

### Filtering the View

There are two filters available in *Local Funding*: **Client** and **Year**.

Filter	Picture	Description
<b>Client</b>		<ul style="list-style-type: none"> <li>• <b>Client</b> drop-down lists are first are alphabetized by client names and also include the date of birth to help distinguish individuals with similar names.</li> <li>• You can select a single client or multiple clients by scrolling to the name and pressing <b>Enter</b> on each selection you want to include.</li> </ul>
<b>Year</b>		<ul style="list-style-type: none"> <li>• <b>Year</b> defaults to whatever authorizations are currently active for the individual.</li> <li>• If you designate a specific year, it limits the list to authorizations in that year, which depending on the span dates may affect the results.</li> <li>• You may need to designate more than one year to get all the plans you need.</li> </ul>

Select your filters and click **Apply Filter**.

Client:  x v Year:  v

Remaining  Used [Apply Filters](#)

If you've looked for a specific individual, their card appears in the result set. Click **Details**.

Local Funding [Manage Invoices](#)

Client:  x v Year:  v

Remaining  Used [Apply Filters](#)

**Barr Jr., Charles** ⋮

Span: 03/15/23 - 03/14/24

Effective: 09/19/23 Version #: 3

Note: Add PTT and HPC and transportation

**9 authorizations**

\$4194.66 / \$25213.2

  
17%

[Details](#)

Showing 1-1 of 1

## Viewing the Utilization Details

When the detailed view opens, you can read the individual line items that were authorized with the span.

Local Funding
Manage Invoices

Client

Year

Remaining  Used
 Apply Filters

**Barr Jr., Charles**

Span: 03/15/23 - 03/14/24

Effective: 09/19/23 Version #: 3

**Note:** Add PTT and HPC and transportation

**9 authorizations**  
\$4194.66 / \$25213.2

17%

Details

Previous Version

Service	Code	Rate	Provider	Amount / Units Used	Dates	
Day Program	LDF	1.73	All Services Provider	<div style="display: flex; align-items: center;"> <div style="width: 20px; height: 20px; border-radius: 50%; background-color: #007bff; margin-right: 5px;"></div> <span>26%</span> </div> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <span>\$2740.32 / \$10380.00</span> <span>1584 / 6000</span> </div>	03/15/23 - 03/14/24	Details
Residential	LMM	5.10	All Services Provider	<div style="display: flex; align-items: center;"> <div style="width: 20px; height: 20px; border-radius: 50%; background-color: #ccc; margin-right: 5px;"></div> <span>0%</span> </div> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <span>\$0 / \$1530.00</span> <span>0 / 300</span> </div>	03/15/23 - 03/14/24	Details
Residential	LPC	6.16	All Services Provider	<div style="display: flex; align-items: center;"> <div style="width: 20px; height: 20px; border-radius: 50%; background-color: #ccc; margin-right: 5px;"></div> <span>0%</span> </div> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <span>\$0 / \$1232.00</span> <span>0 / 200</span> </div>	07/01/23 - 03/14/24	Details

## Points of Interest

- You can still switch between **Remaining** and **Used** at the top of the screen.
- The **Service, Code, Rate** and **Provider** columns identify what services were provided by which providers and the rate per unit for those services.
- The **Amount/Units Used** uses a split (/) to display the information:
  - For **Amount** the split number is displayed as currency values – the first value is the amount utilized, the second value is the amount authorized.
  - For **Units Used** the split number is displayed as whole numbers – the first value is the number of units utilized, the second value is the number of units authorized.
- If the **Dates** periods are in **green**, they are still open items; if the period is in **red**, the authorized period has passed and the item is closed.
- Click on **Previous Version** drop-down list to view past versions of the authorized services – this may indicate what services were added or authorized for more funding.

## Viewing More Detail

If you click on the **Detail** button by a specific line item, you can view the payment **Status** as well as

Local Funding
Manage Invoices

Client

Year

Remaining  Used
 Apply Filters

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Note: Add PTT and HPC and transportation

9 authorizations  
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17%

Details

Previous Version

Service	Code	Rate	Provider	Amount / Units Used	Dates	
Day Program	LDF	1.73	All Services Provider	<div style="display: flex; align-items: center; justify-content: center;"> <div style="border: 1px solid #007bff; border-radius: 50%; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center; margin-right: 5px;">26%</div> <div> <p>\$2740.32 / \$10380.00</p> <p>1584 / 6000</p> </div> </div>	03/15/23 - 03/14/24	Details

Date	Units	Rate	Amount	Invoice #	Status
April 28, 2023	48	1.73	\$83.04	10044	Paid
April 27, 2023	48	1.73	\$83.04	10044	Paid
April 26, 2023	48	1.73	\$83.04	10044	Paid
April 25, 2023	48	1.73	\$83.04	10044	Paid
April 24, 2023	48	1.73	\$83.04	10044	Paid
April 21, 2023	48	1.73	\$83.04	10044	Paid

## Points of Interest

- On this level you can see line items pertaining to the **Date** (of service), **Units**, **Rate**, **Amount** and **Invoice #**.
- **Status** lists the payment status of the line item – options will be *Pending Payment* or *Paid*. Line items imported from Gatekeeper may always have a Pending Payment status but their amounts will be applied against their overall utilization of the authorization.
- Click on the **Details** button for the authorization line item to hide this level of detail.

## Printing the Utilization Information

If you want to get a printout of the utilization information, click on the vertical ellipsis.

**Barr Jr., Charles**

Span: 03/15/23 - 03/14/24

Effective: 09/19/23 Version #: 3

Note: Add PTT and HPC and transportation

9 authorizations

\$4194.66 / \$25213.2



17%

[Details](#)

⋮

This opens a separate browser tab that displays the report. Click the **Print** button under the report title to print.

Local Funded Authorized Services							
Individual Name			Barr Jr., Charles		Span		03/15/23 - 03/14/24
Medicaid Number			000000000006		Version Number		3
DODD Number					Completed Date		09/19/23
County					Notes		Add PTT and HPC and transportation
Service	Code	Rate	Provider	Units	Amount	Service Dates	
Day Program	LDF	1.73	All Services Provider	6000	\$10380.00	03/15/23 - 03/14/24	
Residential	LMM	5.10	All Services Provider	300	\$1530.00	03/15/23 - 03/14/24	
Residential	LPC	6.16	All Services Provider	200	\$1232.00	07/01/23 - 03/14/24	
Professional	LPY	5.10	All Services Provider	200	\$1020.00	03/15/23 - 03/14/24	
Transportation	LTB	20.49	All Services Provider	480	\$9835.20	03/15/23 - 03/14/24	

You'll be prompted to select a printer to print to. Click **Print**.

**Print** ?

Total: 1 sheet of paper

**Printer**

Microsoft Print to PDF v

**Copies**

1

**Pages**

All

e.g. 1-5, 8, 11-13

**Color**

Black and white v

[More settings v](#)

[Print using system dialog... \(Ctrl+Shift+P\)](#)

Print
Cancel

### Local Funded Authorized Services

<b>Individual Name</b>	Barr Jr, Charles	<b>Span</b>	03/15/23 - 03/14/24		
<b>Medicaid Number</b>	000000000006	<b>Version Number</b>	3		
<b>DODD Number</b>		<b>Completed Date</b>	09/19/23		
<b>County</b>		<b>Notes</b>	Add PTT and HPC and transportation		

Service	Code	Rate	Provider	Units	Amount	Service Dates
Day Program	LDF	1.73	All Services Provider	6000	\$10380.00	03/15/23 - 03/14/24
Residential	LMM	5.10	All Services Provider	300	\$1530.00	03/15/23 - 03/14/24
Residential	LPC	6.16	All Services Provider	200	\$1232.00	07/01/23 - 03/14/24
Professional	LPY	5.10	All Services Provider	200	\$1020.00	03/15/23 - 03/14/24
Transportation	LTB	20.49	All Services Provider	480	\$9835.20	03/15/23 - 03/14/24
Transportation	LTO	1.04	All Services Provider	100	\$104.00	07/01/23 - 03/14/24
Professional	OTT	17.00	All Services Provider	12	\$204.00	04/15/23 - 04/28/23
Professional	PTE	46.00	All Services Provider	2	\$92.00	03/15/23 - 06/30/23
Professional	PTT	17.00	All Services Provider	48	\$816.00	07/01/23 - 03/14/24