

PM01: Maintain Services

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1.1 Introduction

The *PM01: Maintain Services* design topic is used to create, view, and maintain the approved list of service types for Florida Safe Families Network (FSFN).

This topic explains the process for creating, maintaining, and viewing approved service types, setting service rates and updating licensing information associated with a service types. Each service type has an associated “Service Code” that the Department of Children and Families (DCF) can use as reference numbers for each service type this service code will be unique across the system (no two services will have the same service code).

The service information described in this topic has a direct impact on many areas of the FSFN application including placements, payments, and claiming. Services can only be entered or maintained by appropriate staff depending on the security level. Service types have many attributes that are utilized by other parts of the system; this topic paper contains an additional section entitled “Relationships to Other Topics” which explains the interdependencies between service types and other topics.



1.2 Pages

1.2.1 List Service Types Page

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Fiscal Agency: **PARTNERSHIP FOR STRONG FAMILIE**

Criteria

Service Category: Residential Service Placement Active Inactive **Filter**

Reporting Category: Group Home Service Type Medium Description: **Clear**

Results

Service Category	Service Type Medium Description	Service Code	Service/Placement	Reporting Category	Effective Date	Inactive Date	Actions
Residential	APD Group Home	100548	Placement	Group Home	01/2000		EDIT Copy
Residential	Group Home	100580	Placement	Group Home	01/2000		EDIT Copy
Residential	Shelter Facility (Res)	100644	Placement	Group Home	01/2000		EDIT Copy

Insert

Export **Close**

1.2.1.1 Page Summary

Navigation

This page is accessed from the Financial Work page by selecting the Utilities drop down > List Service Types and clicking the Continue button.

The List Service Types page remains open when launching the Service Type page from this page.



1.2.1.2 Page Information

Page	List Service Types	
Drop down	Fiscal Agency	Required; lists the fiscal agency(s) associated with the user's unit; if only one exists, defaults to that value; otherwise defaults to blank and the user is required to select a value. Results show only service types for the selected fiscal agency.
Group Box	Criteria	
Drop down	Service Category	User-selected. Displays the full list of all service categories.
	Reporting Category	User selected. Displays the fill list of all Reporting Categories.
Checkbox	Service	Defaults to checked. When selected, results show only service types with the Service radio button selected.
	Placement	Defaults to checked. When selected, results show only service types with the Placement radio button selected.
	Active	Defaults to checked. When selected, results show only service types without an inactive date or with a future date.
	Inactive	Defaults to unchecked. When selected, results show reporting categories with an inactive date before the current date.
Field	Service Type Medium Description	Optional text field that allows the user to enter a complete or partial Service Type Description. When entered, only results with a Service Type Medium Description matching the entered text will display.



Button	Filter	Click to refresh the list using the currently selected values for the Active and Inactive check boxes.
	Clear	Click to reset the criteria to their default values.
Group Box	Results	
Field	Service Category	Read-only display of the service category from the Service Type page.
	Service Type Medium Description	Read-only display of the service category medium description from the Service Type page.
	Service Code	Read-only display of the service code from the Service Type page.
	Service/ Placement	Read-only display of the service or placement radio button value from the Service Type page. If the Service radio button is selected on the Service Type page, "Service" displays; if the Placement radio button is selected, "Placement" displays.
	Reporting Category	Read-only display of the Reporting Category from the Service Type page. If the Multiple check box is checked on the Service Type page, "Multiple" displays, otherwise the Reporting Category displays.
	Effective Date	Read-only display of the effective date for the currently active entry if one exists. An active entry has an effective date in, before, or after the current month and a blank inactive date, or an inactive date in or after the current month. If there is no currently active entry, display the most recent entry based on effective date.
	Inactive Date	Read-only display of the inactive date for the selected entry.



Hyperlink	Action	<p>Edit opens the Service Type page for this row in edit mode; conditionally visible when the user has edit access for the Service Type page.</p> <p>View opens the Service Type page for this row in view mode; conditionally visible when the user has view access and no edit access for the Service Type page.</p> <p>Copy opens the Service Type page in create mode, with the selected row's values pre-populated; conditionally visible when the user has create access for the Service Type page.</p>
Button	Insert	<p>Opens the Service Type page in create mode with nothing prepopulated.</p> <p>Conditionally visible when the user has create access for the Service Type page.</p>
	Export	<p>Exports the results in to a file with column headers that can be viewed using a spreadsheet tool such as MS Excel (e.g., csv format).</p>
	Close	<p>Closes the page and returns to the Desktop.</p>



1.2.2 Page - Service Type - Header

1.2.2.1 Page Overview

Navigation

The Service Type page is accessed by selecting a value of “Create Service,” “Maintain Service” or “View Service” in the “Utilities” drop down on the Financial Work page. Once the option has been selected, the user clicks “Continue” and the Service Type page displays in the appropriate mode.

This page also launches from the List Service Types page by clicking Insert in the Results group box. When accessed via the List Service Types page, the user returns to the List Service Type page when this page is closed.

This page remains open when launching the Service Type page from this page.

Page Summary

The user must select the “Fiscal Agency” a service is associated to in order to create, maintain, or view the desired service. In the “Service Information” group box, the “Fiscal Agency” drop down is filtered to include only the Fiscal Agencies to which the authorized user has an assignment.

If the “View Service” or “Maintain Service” is selected only “Service Types” associated with the user’s selected Fiscal Agency is available to be selected. After selecting the “Fiscal Agency,” the user must select the “Service Category” which filters the “Short Desc,” “Medium Desc” and “Long Desc” The user is able to select the “Service Type” from one of the three drop downs in the “Service Information” group box for the specific service to be “Viewed” or “Maintained.” After the selection is made, the system populates the remaining group boxes with the details of the selected service type.

If the user accesses the Service Type page through “Create Service,” the user only has the ability to create service types associated to the user’s fiscal agency. The “Service Type” that is created must be associated with a “Service Category” before the service can be used. The authorized user enters the short description, medium description, and long description of the service in the “Short Desc,” “Medium Desc” and “Long Desc” fields. The user clicks the “Service Code”



button to generate the next available numeric service code or enters a service code manually. If the manually entered “Service Code” is already in use, the user receives an error message. Throughout FSFN, the Long Description (Long Desc) is primarily used for reporting purposes and it is not generally displayed within the application. Medium Descriptions (Medium Desc) are the values that are contained within the drop down selection lists. Short Descriptions (Short Desc) display once they are selected from the drop down values.

A service category may contain one or more service types and a service type may be contained within one or more service categories. If a service type is contained within more than one service category, each instance of the service type must be created for each service category separately.

1.2.2.2 Page Information

Group Box	Service Information	
Fields	Fiscal Agency	Fiscal Agency for which the service is being created, maintained, or viewed; User-selected drop down list is filtered to only the fiscal agencies that the user has an assignment to; required; no default.
	Service Category	User selected dropdown. NOTE that the Service Category of Post Adoption Services will have its own separate Security Resource which will prevent users without the Security from creating new Service Types under Post Adoption Services; similarly, users may have Security to create Post Adoption Services "Service Types" but not the security to create Services Types under any other Service Categories. Therefore, in “Create” mode, all available service categories display based upon the user’s Security. In “Maintain” or “View” modes, only the Service Categories with already existing Services Types for the selected Fiscal Agency will display. Required; no default.



	Service Code	The numerical code corresponding to the selected service; system derived if maintaining or viewing an existing service; if creating a new service populated through the “Service Code” button or manually entered; an error message generated stating “Duplicate Service Code. Please try again.” Required; 9 Character field.
Button	Service Code	Enabled when creating a new service type. Populates the service code field with the next available service code number.
	Short Desc	The short name for a given service type (15 characters); User selected drop down if maintaining or viewing an existing service; user entered in “create” mode; required.
	Medium Desc	The medium name for a given service type (25 characters); User selected drop down if maintaining or viewing an existing service; user entered in “create” mode; required
	Long Desc	The Service Type field is (40 characters); pre-fills if maintaining or viewing an existing service; user entered in “create” mode; required.
Fields	Effective Date	Date the service type becomes effective; user-entered required date in the format mm/yyyy (not days); can be a future or past date.
	Inactive Date	Date the service type is no longer active; user-entered optional date in the format mm/yyyy (not days); can be a future or past date.
	Date Last Paid	The date of the last recorded payment for the specific service type; view only. Defaults to 00/00/0000.

1.2.2.3 Background Processing

- When the Service Type page opens, the system allows service type information to be created, maintained, or viewed based on the Fiscal Agency of the worker and the Security



Resource of the worker launching the page. If creating a new service, the user can only create Service Types associated with the Fiscal Agency which the user has an assignment.

- If maintaining or viewing an existing service, a “Service Category” must be selected before the short, medium, or long description fields are enabled. When one of the descriptions is selected, the other two description fields pre-fill with the appropriate descriptions.
- If “View Service” is selected, the values associated with the selected service type pre-fill the corresponding fields within the Service Type page. All fields are not modifiable.
- If “Maintain Service” is selected, the values associated with the selected service pre-fill the corresponding fields within the Service Type page and all fields are modifiable.
- If “View Service” or “Maintain Service” is selected, the “Fiscal Agency” must be selected before the “Service Category” is enabled and selectable.
- If “Create” is selected, the Fiscal Agency must be selected before the service is created.
- If creating a new Service Type under the Service Category of Post Adoption Services, the Service Type Specifics group box will automatically default to the “Service” radio button and will be disabled and grayed out. This will prevent users from ever accidentally creating a Post Adoption Services Service Type as a “Placement” Service Type.

1.2.2.4 Save Processing

- If a pre-existing service code is entered by the user in the Service Code field for a new service type, the following error message displays: “Duplicate Service Code. Please try again.”
- If any of the short, medium or long descriptions are left blank, the following error message displays: “Please enter data in the fields which are highlighted – {blank field}.”
- If a service code is not entered for a new service, the following error message displays: “Please enter data in the fields which are highlighted – Service Code.”
- Upon clicking Save if the user is attempting to create a Service Type under the Service Category “Post Adoption Services” and doesn’t have the security to do so, the following validation message displays: You do not have the Security to create Post Adoption Services Service Types. <OK>
- Upon clicking Save if the user is attempting to create a Service Type under any Service Category OTHER THAN “Post Adoption Services” and doesn’t have the security to do



so, the following validation message displays: You do not have the Security to create Fiscal Service Category Service Types. <OK>

1.2.2.5 CRUD Matrix

Table Name	CRUD
Service Type	C,R,U



1.2.3 Page – Service Type

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Service Information

Fiscal Agency: PARTNERSHIP FOR STRONG FAMILIE Short Desc: Group Home Effective Date: 11/2015
Service Category: Residential Med Desc: Group Home Inactive Date:
Service Code: 2840 Service Code Long Desc: Group Home Date Last Paid: 00/00/0000

Service Type Specifics

Service Placement Payments Allowed Reporting Category: Multiple Allowed
 Override Parent Agency rule Ongoing Service/Placement Statewide Reporting: Foster Care Services
Service Batch: Group Facility Amount Auto Calculated NYTD Reporting: Not Applicable
Age From: Age To: Service Spans Multiple Days Spending Limit: N/A Period:
Next Service Type: Non-System-Disbursed Payment Limit Amount:
Eligibility: Applicable Episode Driven Accepts Override Approval:
License Type Required: Child Caring Agency (CCA) Unit Type Rate by Service Rate by Provider
 Fixed Price Rate by Child Allowed
 Full Month Advance
 Negative Payment Allowed

Service Rates

Select	Effective Date	Last Updated	Rate Period	Rate	Action
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Multiple Rate Categories

Reporting Category	Rate	Action
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The Service Type page allows a worker to document the necessary information in order to maintain, create, or view service types. The page consists of the following group boxes:

- Service Information
- Service Type Specifics
- Service Rates
- Multiple Rate Categories



1.2.3.1 Page Information

Group Box	Service Type Specifics	
Fields	Service	Indicates if this service type is a service; user selected radio button; defaults to not selected when creating a new service. Not required.
	Placement	Indicates if this service type is a placement. If Services radio button is not selected then this radio button will be selected. Defaults to selected; Not required
	Override Parent Agency Rule	When selected, the check box “Parent Agency Rule” will be overridden (Parent Agency Rule states that payments are issued to the provider’s designated Parent Agency, to override this rule means that the payment will be issued directly to the provider) user-selected check box; defaults to unchecked when creating a new service; not required.
	Service Batch	Specifies the category to be used to group payments relating to the specific service; User-selected drop down; defaults to blank when creating a new service. Required.
	Age From	Numeric field represents the youngest age in years from 0 to 98 required in order to receive a service. Optional, when entered; Age To is required.
	Age To	Numeric field represents the oldest age in years from 1 to 99 required in order to receive a service; conditionally required when Age From is entered; must be greater than Age From.



	Next Service Type	Optional user selected drop down. Conditionally enabled when Age To is entered. Filters services within the same Fiscal Agency and Service Category that also have Age From and Age To Age From on the services listed in the drop down must be greater than the Age To on the current service type. Indicates the next service type a child is to move to when the child ages up to the next age range of service; filtered based on service category; required if the Age Range for the service is “0-5”, or “6-12”, disabled for all other age ranges. This field is disabled if the “Service Type” is a one-time payment or “Payments Allowed” is unselected indicating an unpaid service, or “Ongoing Service/Placement” is not selected, or “Episode Driven” is selected.
	Eligibility	<p>Specifies if the eligibility status of the child is applicable for the service or placement type; values are “Exclude from Claiming,” “Applicable,” “Not Applicable,” and “Administrative (50/50)”. Defaults to “Not Applicable” when creating a new service; User-selected drop down; Required.</p> <p>Note: “Applicable” signifies that the Child’s Title IV-E and TANF eligibility affect the selection of the OCA for this service; “Not Applicable” signifies that the Child’s Title IV-E and TANF eligibility does not affect the selection of the OCA for this service; Administrative 50/50 signifies that the selection of the OCA is based in the Service.</p>
	License Type Required	Displays the type of license required by the provider before a service can be activated; Defaults to “No Existing License Type”; user editable; required.



	<p>Payments Allowed</p>	<p>Indicates payments for the specific service are allowed; defaults to unchecked when creating a new service; user-selected check box; not required.</p> <p>Note: when Payments Allowed check box is selected all disabled check boxes in the Payments group box are enabled, if Payments allowed is unchecked only “Payments Allowed” and “Ongoing Service/Placement” check boxes are enabled.</p>
	<p>Ongoing Service/Placement</p>	<p>Indicates if payments are ongoing for the specified service or placement; defaults to unchecked when creating a new service.</p> <p>User-selected check box; not required.</p>
	<p>Amount Auto Calculated</p>	<p>Indicates if the payment amount for the specific service is automatically calculated by the system; defaults to unchecked when creating a new service; enabled by selecting “Payment Allowed”; automatically checked and disabled when “Ongoing Service/Placement” is selected.</p> <p>User-selected check box; not required.</p>
	<p>Service Spans Multiple Days</p>	<p>Indicates the specific service may span more than one day; enabled by selecting “Payment Allowed;” defaults to unchecked when creating a new service; automatically checked and disabled when “Ongoing Service/Placement” is selected. User-selected check box; not required.</p>
	<p>Non-System Disbursed Payment</p>	<p>Indicates if invoice disbursements are allowed for a specific service type; enabled by selecting “Payment Allowed”; defaults to unchecked when creating a new service; User-selected check box; not required.</p>
	<p>Episode Driven</p>	<p>Indicates if the payment for the specific service type is an “Episode Driven Payment”; enabled by selecting “Payment Allowed”; defaults to unchecked when creating a new service. If checked automatically selects and disables, “Amount Auto Calculated”, “Ongoing Service/Placement,” “Service Spans Multiple Days,” and “Unit Type” check boxes; also disables “Fixed Price” and the “Next Service Type” drop down. User-selected check box; not required.</p>



	Unit Type	Indicates that units field on the Payment Request page (See FM01: Payment Processing for more details) will be enabled for the service in order to determine payment amount; defaults to unchecked when creating a new service; enabled by selecting “Payment Allowed”; checked and disabled when Episode Driven is selected. User-selected check box; not required.
	Fixed Price	<p>Enabled by selecting “Payment Allowed”. Fixed Price specifies if the selected service is a fixed price service; defaults to unchecked when creating a new service; if this check box is selected, “Rate by Child Allowed,” “Episode Driven Payment,” “Advance,” and “Full Month” check boxes will all be disabled and unchecked; “Ongoing Service/Placement,” “Amount Auto Calculated,” “Service Spans Multiple Days,” and “Negative Payment Allowed” check boxes will be checked and disabled.</p> <p>The fixed priced check box enables the “Contract Capacity” and “Over Capacity Rate” on the Provider Rate page (Section 1.2.3) defaults “Rate Type” group box to the “By Provider” radio button. User-selected check box; not required</p>
	Full Month	Enabled by selecting “Payment Allowed”. Specifies that the payment to provider should be for the “Full Month” not prorated for the days the service is provided. If placement/service existed within that month, the entire month will be paid; defaults to unchecked when creating a new service; User-selected check box; not required.
	Advance	Enabled by selecting “Payment Allowed”. Specifies that the payment is an “Advance” payment for services; defaults to unchecked when creating a new service; User-selected check box; not required



Negative Payment Allowed	Enabled by selecting “Payment Allowed”. Specifies that a user can select whether the service type should allow a negative payment on the Overpayment Request page; defaults to unchecked when creating a new service; User-selected check box; not required.
Reporting Category hyperlink	Clicking the hyperlink opens the Reporting Category page in view mode; closing the Reporting Category page returns the user to this page.
Reporting Category drop down	Conditionally required user-selected value for the reporting category derived from the Reporting Category page. Must be blank when Multiple Allowed check box is checked. Enabled and required when Payments Allowed check box is selected
Multiple Allowed	Designates whether this service type can have multiple rate categories; defaults to unchecked; when checked the Reporting Category must be blank. Enabled when Payments Allowed checkbox is selected.
Statewide Reporting Dropdown	The “Statewide Reporting Group” to which the selected service belongs. A value of “Excluding from Reporting” may be in this drop down to designate that a service should not be included in reports. Required; no default value.
NYTD Reporting	The selected service “NYTD Reporting Group.” A value of “Not Applicable” is included in this drop down to designate that a service is not related to any of the identified NYTD Reporting Groups; required; no default value.
Spending Limit	Enabled when Payments Allowed checkbox is selected. Displays the type of spending limit associated with a service type; user editable if “Payments Allowed” check box is selected; Required; defaults to “N/A.”
Period	Displays the length of time to which the spending limit applies; Enabled and Required when “Spending Limit Type” is other than “N/A”; User editable; no default.
Limit Amount	Displays the spending limit amount associated with a specific service type for the period selected; User-entered textbox; Defaults to blank (null); Conditionally required when “Spending Limit Type” is other than “N/A.”



	Approval	Specifies the job class required for overriding the spending limit; Conditionally Required if “Accepts Override” check box is selected. User editable; no default.
	Accepts Override	Indicates if override is allowed for a service type; defaults to unchecked when creating a new service. User-selected checkbox; not required. Conditionally enabled when Provider Based or Child Based is Selected from the Spending Limit dropdown.
	Rate By Service	Radio Button indicates that the specific service has a service based rate; this rate is stored in the Service Rate table; user selected radio button; defaults to selected when creating a new service. When “Payments Allowed” check box is selected and this radio button is selected the “Rate By Service” button is enabled. If “Payments Allowed” and “Rate by Child Allowed” check box are checked this radio button is selected and the “Rate By Service” button is enabled.
	Rate by Provider	Radio button indicates that this specific service has a provider based rate; this rate is stored in the Provider Service Rate table; user-selected radio button; disables the “Rate” button.
	Rate by Child Allowed	Indicates if a child specific rate is allowed for a service type; defaults to unchecked when creating a new service; enabled by selecting “Payment Allowed.” User-selected check box; not required.
Group Box	Service Rates	
Fields	Select	Enabled when “Multiple Allowed” checkbox is selected. User-selected radio button specifies the rate row with which the Multiple Rate Categories is associated.
	Effective Date	Date the rate for the service type is effective. Must be on or after the date in the Service Type Effective Date field. Conditionally required when the Rate by Service radio button is selected.



	Last Updated	Displays the last date the service rate was updated for the selected service type; mm/dd/yyyy; system derived from the Service Rate table. For newly entered service rates this will be entered when the Service Type page is saved; View only.
	Rate Period	Displays the rate period for the selected service type (Daily, or Monthly); system derived from the Service Rate table for existing service types; user entered if inserting new rate information; Defaults to "Daily"; required.
	Rate	Displays the rate amount for the selected service type; system derived from the Service Rate table; user entered if creating new rate information; required.
	Delete	Deletes the row. Available until the new row has been saved through the Service Type page. Displays in the Action column.
	Insert	Button is enabled only if "Payments Allowed" and "Amount Auto Calculated" check boxes are selected, and "Rate by Service" radio button is selected. Displays in the Action column.
Group Box	Multiple Rate Categories	
Fields	Reporting Category	Reporting categories appear in the drop down only if the reporting category effective date on the Other Cost Accumulator page is on or before the rate effective date. The reporting category inactive date on the Other Cost Accumulator page must be blank or on or after the rate effective date. If the reporting category was previously saved and is now inactive, it displays with "Inactive" and the inactive date in parentheses "(mm/yyyy)" appended to the description
	Rate	Amount of the portion of the total rate allocated to this reporting category
	View OCA	Hyperlink that opens the Other Cost Accumulator page in view mode for the reporting category; when user closes the Other Cost Accumulator page, they are returned to this page. Displays in the Action column.
	Delete	Hyperlink that deletes the associated row. Displays in the Action column.



Buttons	Save	Standard Save processing.
	Close	Standard Close processing.

1.2.3.2 Background Processing

- If the “Ongoing Services/Placement” check box is selected, then the “Amount Auto Calculated” and “Service Spans Multiple Days” check box are selected automatically and cannot be edited.
- If the “Payments Allowed” check box is not selected, all payment related information except “Ongoing Service/Placement” is disabled. In addition, the “Full Month” and “Advance” check boxes are disabled.
- If the “Payments Allowed” check box is selected, payment related information is enabled. This includes the “Reporting Category” drop down and the “Spending Limit” drop down. In addition, the “Full Month” and “Advance” check boxes are enabled.
- If “Accepts Override” is checked then the “Approval Level for Override” drop down list is enabled and required.
- If the “Override Parent Agency Rule” check box is checked, all payments for the specified service type are issued to the specific provider instead of the “Parent Agency Rule.”
- When a reporting category is associated with the service type, verify that the effective/inactive dates of the service type are within the effective/inactive dates of the reporting category. If there are multiple reporting categories, verify the date for each one.
- The “Insert” button in the Service Rates group box displays a new blank row to enter new rate information. The most recent “Effective Date” and information are used in payment processing.

1.2.3.3 Save Processing

- Upon clicking the “Save” button on the Service Type page; the information contained is saved to the Service Type table.
- If the Rate field has an invalid amount the user receives the edit message “Invalid Rate, please enter a valid rate”. If there is an invalid rate effective date the user receives the edit message, “Invalid Effective Date For Rate Row: 1”



- Upon clicking Save if the user is attempting to create a Service Type under the Service Category “Post Adoption Services” and doesn’t have the security to do so the following validation message displays: You do not have the Security to create Post Adoption Services Service Types. <OK>
- Upon clicking Save if the user is attempting to create a Service Type under any Service Category OTHER THAN “Post Adoption Services” and doesn’t have the security to do so the following validation message displays: You do not have the Security to create Fiscal Service Category Service Types. <OK>



If the “Next Service Type” drop down has a value, a row is inserted to the Birthday table with the current `cd_srvc`, the specified `cd_srvc_next`, and the Age From and Age To values for the current service. If a row already exists on the Birthday table, the field `cd_srvc_next` is updated.

- If the “Payments Allowed” check box is selected, the “Rate by Service” is selected as the “Rate Type” and a rate is not entered into in the Service Rates group box on “Save,” the user receives this edit message: “You must enter a Service Rate for the Service Type.”
- Save Service Rate and new Multiple Reporting categories.
- Upon clicking the “Save” button, the Long Description is verified that it is unique for the Fiscal Agency selected.

1.2.3.4 Relationships to Other Topics

- Selecting “Payments Allowed,” “Ongoing Service/Placement,” “Amount Auto Calculated,” and “Service Spans Multiple Days” and then, de-selecting the “Service” radio button indicates that payments for the specific service type are ongoing and that the service type will appear on the “Service Type” drop down on the Out of Home Placement page (*SM10a: Out of Home Placement*). Ongoing payments are automatically processed by the system through the Calculation Ongoing Amount Batch.
- Selecting “Payments Allowed,” “Ongoing Service/Placement,” “Amount Auto Calculated,” “Service Spans Multiple Days,” check boxes and the “Age From” and “Age To” fields (and not selecting Episode Driven payment) indicates the systems Birthday Batch will process the placement change when the child reaches the appropriate age (*PM02: Person Provider*).
- Selecting “Payments Allowed” and not selecting “Ongoing Service/Placement” indicates that payments for this service are one-time payments. One-time payments are entered using the Payment Request page (*FM01: Process Payments*). The service type appears on the “Service Type” drop down on the Payment Request page.
- For one-time and ongoing payments, selecting a value other than “N/A” for “Spending Limit” group box “Type” field enforces spending limits on amounts entered on the Payment Request page and the “Calculation Ongoing Amount” batch process (*FM01: Process Payments*). For more details, refer to (*FM01: Process Payments*).



For one-time payments, selecting the “Service Spans Multiple days” check box enables the “End Date” on the Payment Request page (*FM01: Process Payments*).

- For one-time payments, selecting the “Amount Auto Calculated” check box disables the “Amount” field on the Payment Request page (*FM01: Process Payments*).
- For one-time payments, selecting the “Unit Type” check box enables the “Units field” on the Payment Request page (*FM01: Process Payments*), allowing the user to enter the number of units of service.
- Selecting “Payments Allowed,” “Ongoing Service/Placement,” and “Fixed Priced” indicates that the service is a fixed priced service, with system disbursed payments, and be processed by the “Fixed Price Batch” program (*FM01: Process Payments*).
- Selecting “By Service” as the Rate Type and not selecting the “Rate by Child Allowed” indicates a service-based rate. The rate is entered using the Service Rate page accessed by clicking the Rate button on the “Service Type” page.
- Selecting “By Provider” as the Rate Type and not selecting the “Rate by Child Allowed” indicates a provider-based rate. The rate is entered using the Provider Service Rate page. *For details see (PM02a: Personal Provider and PM02b: Organization Provider.)*
- Selecting “Rate by Child Allowed” overrides any service-based or provider-based rates available for this service. The “Child Specific Rate” field is enabled on the Out of Home Placement page (*SM10a: Out of Home Placement*).
- For one-time payments, selecting the “Non-System-Disbursed Payment” check box indicates that an invoice will not be generated for the specified service type. For more details refer to (*FM01: Process Payments* and *FM02: Issue/Reconcile Checks*).
- For ongoing payments, selecting the “Episode Driven Payment” check box indicates an Episode Driven Payment. Episode Driven Payments are treated as Episode-Based recurring payments that require the worker to enter the number of units the child was actually in the Episode Driven placement. Episode Driven services are processed by the Create Pending Episode-Driven Payments batch program (*FM01: Process Payments*).
- The “Date Last Paid” field is updated by the Calculate-Ongoing Amounts batch program (*FM01: Process Payments*). It is also used to determine if the service rate has changed



since the last payment. For more details, refer to Trigger 6100 (Section 1.4.9 of this document) and to *(FM01: Process Payments)*.

If “Age From” and “Age To” fields are specified, the system verifies that the age of the child receiving a service is within the required age range for that service. For more details, refer to *(SM10a: Out of Home Placement)* topic and *(FM01: Process Payments)*.

1.2.3.5 CRUD Matrix

Table Name	CRUD
Service Type	C,R,U
Service Rate	C,R,U,D



1.2.4 Page – Service Category Options Page

Service Category	Service Sub Category Description	Code	Inactive	Action
Adoption	kjhklj	382	<input type="checkbox"/>	
Food	non-veg	379	<input type="checkbox"/>	
Assessment & Evaluation	Abel Assessment	243	<input type="checkbox"/>	
Independent Living	Academic Support	356	<input type="checkbox"/>	
Counseling/ Therapy	Adolescent Substance Abuse Counseling	294	<input type="checkbox"/>	
Child Care	After School Program	280	<input type="checkbox"/>	
Transportation	Airfare	137	<input type="checkbox"/>	
Other	Alcohol and Drug Testing	365	<input type="checkbox"/>	
Assessment & Evaluation	Anger Management Assessment	245	<input type="checkbox"/>	
Counseling/ Therapy	Anger Management Group	296	<input type="checkbox"/>	
Counseling/ Therapy	Anger Management Individual	295	<input type="checkbox"/>	
Foster Home	Annual Clothing - Foster Home 0-4	173	<input type="checkbox"/>	
Counseling/ Therapy	Art Therapy	297	<input type="checkbox"/>	
Assessment & Evaluation	Assessment Addendum/Update	255	<input type="checkbox"/>	
Child Care	Athletics	380	<input type="checkbox"/>	
Assessment & Evaluation	Attachment/Bonding Assessment	246	<input type="checkbox"/>	

Navigation

This page provides the ability to maintain a single set of service categories for use by both case management and financial management functions. This statewide list of values is maintained by a designated user with DCF’s program office. User accesses this page from the Financial Work page, Utilities drop down, Service Category Options.



1.2.4.1 Page Information

Group Box	Service Categories	
Fields	Unlabeled dropdown	User selected drop down of all Service Categories. Default to 'All'. When 'All' is selected from the dropdown, a list of all service sub categories are displayed under the Service Category group box.
Group Box	Service Sub Categories	
Fields	Service Category	Read-only description of the service category associated with this service sub category row; if "List All Sub Categories" selected, there will be multiple values for the full list of sub categories
	Service Sub Category Description	Required user entered text describes the sub category for the service category. Length 49 characters
	Code	Read-only system generated unique identifier for the service sub category Generated upon the first successful save for a new service sub category
	Inactive	User selected check box indicates whether the row is active or inactive; defaults to unchecked to indicate active
	Action	Delete hyperlink deletes the associated row; conditionally visible until the newly inserted row is saved
Buttons	Insert	Insert button creates a new sub category row for the selected service category
	Export	Exports the Service Sub Categories into a file with column headers that can be viewed using a spreadsheet tool such as MS Excel (e.g., csv format)



	Save	Saves the page.
	Close	Closes the page and returns to the Desktop.

1.2.4.2 Background Processing

- Conversion consideration: merge existing values for Service Category used in the Case Plan page into the values used in the Service Type page. Preserve existing code location for the “financial” Service Category that is used widely throughout the system to minimize code, conversion, and reporting impacts.

1.2.4.3 Save Processing

- Save values for Service Category and Service Sub Category.

1.2.4.4 Security

- Security Resource – Add new resource for this page.
- Security Profiles – add new profile that includes create and update access to this new page:
 - Statewide Program Office Worker



1.3 Inventories

1.3.1 Table Definitions

Table Name	Description
SERVICE_TYPE	The SERVICE_TYPE table maintains information associated with any defined category of provider service offered by DCF or the county organizations, including training requirements, standard rate (across all provider organizations) and license requirements etc., associated with providers. Processes of PM01 (Maintain Services) and FSFN table maintenance builds maintain this data.
SERVICE_RATE	This table houses the rate(s) information associated with Service Types. This information is created and maintained in PM01 (Maintain Services).

1.3.2 Drop downs and Reference Data

Field Name:	Long Description
Table Name:	Service Type
Field Name:	Medium Description
Table Name:	Service Type
Field Name:	Short Description
Table Name:	Service Type
Field Name:	Service Batch
Table Name:	Code_Desc
Group Id:	SUBCTGRY



Field Name:	Service Category
Table Name:	Code_Desc
Group ID	SRVCTGRY

Field Name:	Eligibility
Table Name:	Code_Desc Group
Group ID	TITLEIVE

Field Name:	Type
Table Name:	Code_Desc_Static
Group ID	SRVCSPND

Field Name:	Period
Table Name:	Code_Desc_Static
Group ID	SRVCSPNL

Field Name:	Eligibility
Table Name:	Code_Desc Group
Group ID	TITLEIVE

Field Name:	Approval Level for Override
Table Name:	Job_Class

Field Name:	Rate Period
Table Name:	Service Rate



Field Name:	License Type Required
Table Name:	Code_Desc
Group ID	LCNSTYPE

Field Name:	Statewide Reporting Group
Table Name:	Code_desc
Group ID	SWSRVRPT

Field Name:	NYTD Reporting Group
Table Name:	Code_desc
Group ID	NYTDPRT

1.3.3 Automated Messages

None

1.3.4 Checklists

None

1.3.5 Ticklers

None

1.3.6 Notifications

None

1.3.7 Text Templates

None

1.3.8 Reports

None



1.3.9 Online Triggers

Transaction Code	Description
6100	Service rate change. This trigger is created if a service rate change occurs with the effective date of the change (DT_EFCT_STRT on SERVICE_RATE/PRVD_SRVC_RATE Tables) being earlier than the last payment date for that particular service (DT_PMNT_LST on the SERVICE_TYPE Table). This trigger will be used by FM01 - Calculate Ongoing Amounts Batch to create retroactive payments for those providers who have already been paid although the rate change was effective earlier than their payment date.



1.4 Batch Programs

None

1.5 Requirements

FME – 001

FME - 002