



Riverside/San Bernardino, CA TGA Policy and Procedure ARIES Policy # 9	By..... Bonnie Flippin, MBA, Staff Analyst II Effective.....November 1, 2011 Revised.....December 7, 2011 APPROVED  Scott Rigsby, Public Health Program Coordinator
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Subject – Tracking Dental Expenditures

- PURPOSE** To establish guidelines for the tracking of dental expenditures across the TGA to facilitate compliance with the Inland Empire HIV Planning Council (IEHPC) per-client cap on dental expenditures.
- POLICY** Each agency is responsible for verifying that the Ryan White (RW) Oral Health expenditure cap limit requirement is being adhered to, TGA-wide. See the most current *IEHPC Oral Health Services Standards of Care* for the most recent cap limit.
- SCOPE** This procedure applies to all contractors (providers) funded to provide Oral Health services under the Ryan White Programs within the Riverside/San Bernardino, CA TGA.
- PROCEDURE**
- A. Enter Service Delivery Cost**
- Enter Oral Health Service delivery on the Services screen in ARIES. Whenever possible, service delivery data are to be entered into ARIES at the point of service (POS), in real time.
1. Indicate the appropriate number of units for the service delivery.
 2. Change the default total cost to the actual Ryan White cost of the service delivery (see **Attachment 1**).
- B. Determine Agency Expenditure To-Date**
- Before providing RW funded Oral Health Services, verify whether your agency has reached the expenditure cap limit for the client.
1. For an agency-specific expenditure total by client, run the *Oral Health Services Totals by Client* report. This report can be found on the Service Reports screen. Choose the appropriate parameters and run the report as described in **Attachment 2**.
 2. Agencies may also use their own systems to verify RW Oral Health expenditures. However, all agencies contracted to deliver RW funded Oral Health Services are required to enter cost data in ARIES for each service delivery (see Section A above).

C. Determine TGA-wide Expenditure To-Date

If the client has not yet reached the expenditure cap within your agency, determine whether the client has received Oral Health Services from another agency in the TGA.

1. If the client is a "Share" client, use the Services display screen in ARIES to view TGA-wide Oral Health Service delivery as described in **Attachment 3**. [*NOTE: This screen will NOT display the service expenditures for other agencies. The system masks (\$0.00) expenditures for other agencies for information-privacy purposes.*]
2. As noted in **Attachment 3**, the screen will indicate the names of staff that have entered Oral Health Service deliveries in ARIES pertaining to the client. Click on the staff name to determine the agency at which they are employed. Contact the agency to obtain agency's total Ryan White Oral Health expenditures to-date for the client.
3. Sum your agency's expenditure total and the totals of other agencies providing Oral Health Services to the client during the program year to arrive at a TGA-wide Oral Health Services expenditure total.

NOTE: If the client is a "Non-Share" client, you will need to rely on the client's self-report to determine if they receive Oral Health Services from other agencies in Riverside or San Bernardino County.

D. Ryan White Program Monitoring of Policy

The Ryan White Program will monitor compliance with this policy:

1. Ryan White Program staff will conduct periodic Quality Assurance checks in ARIES. All Oral Health service entries must include cost data and no client should exceed the TGA-wide IEHPC Oral Health cap within the fiscal year. *Note: Administrative Agency access to ARIES permits Ryan White Program staff to see expenditures entered by all agencies in the TGA.*
2. Ryan White Program staff will visit provider sites as necessary to ensure compliance with this P&P.
3. Ryan White Program-funded providers found to be in violation of this P&P will be required to submit a plan to correct any deficiencies. Continued deficiency may result in delay or denial of payment.

Oral Health – Tracking Expenditures – ARIES

Services: Services “New” (To enter service data into ARIES...)

Staff * Site

Date of Service * Days to Next Service date

Contract Name * Created Date

Program *

Primary Service *

Secondary Service *

Agency Subservice *

Units of Service * @ \$ per = \$ Total

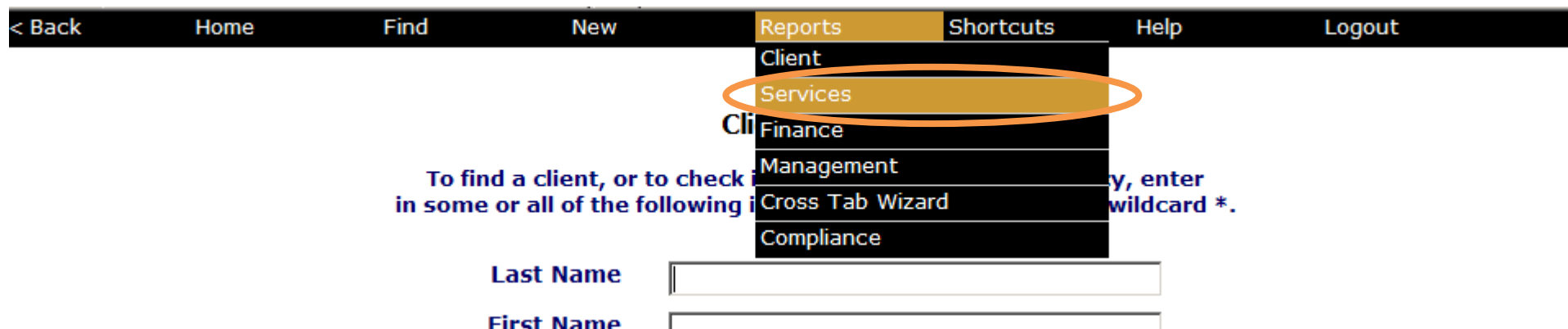
Client Payment CARE/HIPP Co-Payment *

Actual Minutes Spent

Service Notes

When entering Oral Health Service delivery data, enter the appropriate number of units of service and change the default unit expenditure (\$0.00) to the actual Ryan White expenditure for the service delivery.

Reports Menu: Client (To get to the Oral Health Service Totals Report for cost data related to your agency only...)



At or near the bottom of the list of services is the report, “Oral Health Service Totals by Client”:

[Gender and Visit Count](#)

Filters by service date, CADR category, and agency. NOTE: Age is calculated as of the date the report is run. To calculate more detail information, export and edit this report.

[Primary Service Report - Detail](#)

Detail service records listing agency, urnHRSA, primary svc, UOS, date of svc, city, st, zip, sa, rw-funded?; filters = dates of service, primary service, and rw-funded?

[Fallen Out of Care Report](#)

Displays Name, ARIES ID, Race, and date of most recent service. Can be filtered by Service Date, Client Status and Primary Service

[Summary of Services by Funding Source](#)

Displays Primary Service, total visits and unique client count.

[Oral Health Service Totals by Client](#)

Filters on Date of Service, Agency Client ID 1, Primary Service and Funding Source

Choose your parameters:

- Type in Service Date Range – **Between** ****/**/**** & **/**/******
- Type in Primary Service – **Equals** **Oral Health Care**
- If you want just ONE individual type their Agency Client ID **Equals *******
- If you leave Agency Client ID 1 blank it will give you all clients
- Funding Source Name – choose **Ryan White Part A**
- CLICK on **Report**

Example Results:

Oral Health Service Totals by Client (Agency expenditures total only)

Client Name	Agency Short Name	Total Cost
Doe, John	Agency A	1755.0000
Mouse, Mickey	Agency A	1450.0000
Mouse, Minnie	Agency A	605.0000
Duck, Donald	Agency A	500.0000
Doe, Jane	Agency A	175.0000
Bambi	Agency A	130.0000

Services: *Main Screen* (To view [TGA-wide service delivery...](#))

DEMO-GRAPHICS ELIGIBILITY PROGRAMS MEDICAL MEDICATIONS RISK & ASSESSMENTS CARE PLAN CASE NOTES **SERVICES** CUSTOM DATA

Enter the appropriate parameters to filter for Oral Health services :

- Date range (between ****/**/****** and ****/**/******)
- Program = **Ryan White**
- Primary = **Oral Health Care**

Mickey T Mouse ⚠

Services **New**

Date and Staff

Program Primary **Search**

Date	Staff	Category	UOS	Total	Edit
12/6/2007	Theresa Brennan	Ryan White > Medical Case Management (including Treatment Adherence) > Medical Case Management > Case Management Services	2.00 15 Minutes @ \$0.00	\$0.00	Edit
12/6/2007	Theresa Brennan	Ryan White > Medical Transportation Services > Medical Transportation Services > Transportation Services	1.00 Transaction @ \$0.00	\$0.00	Edit
6/1/2007	Beth Newton	Ryan White > Medical Case Management (including Treatment Adherence) > Medical Case Management > Case Management Services	2.00 15 Minutes @ \$0.00	\$0.00	Edit
3/21/2007	Theresa Brennan	Ryan White > Medical Case Management (including Treatment Adherence) > Medical Case Management > Case Management Services	4.00 15 Minutes @ \$0.00	\$0.00	Edit
3/21/2007	Theresa Brennan	Ryan White > Medical Transportation Services > Medical Transportation Services	2.00 Transaction @ \$0.00	\$0.00	Edit

Click on the Staff names to determine which agency delivered Oral Health Services to the client. ARIES masks other agency expenditures (\$0.00). Therefore, you will need to contact this agency directly to obtain their agency-specific Ryan White Oral Health expenditure total to-date for this client.

NOTE: This screen shot does not show Oral Health Services. However, the concept is the same.