Program Participation System (PPS): Step-by-Step Training Guide for Children's Long-Term Support (CLTS) Program

P-00697 (08/2021)

Table of Contents

Program Participation System (PPS): Step-by-Step Training Guide for Children's Long-Term Support (CLTS) Program 1

Introduction 4

Purpose 4

CLTS Eligibility and Enrollment Policy 4

Placement of a Child in PPS 4

First-Come, First-Served Policy 4

Crisis Criteria Considerations 5

Child Moves Between Counties Prior to Enrollment 5

Process for Obtaining PPS User Access 5

User Profile Options 6

Obtaining a WAMS ID 6

Obtaining Access to the CLTS Profile 6

PPS Basics 7

Internet Explorer, IE 10 and 11 7

Log In to PPS 7

PPS Home Screen 7

Specific PPS Functions 9

Saving 9

Operating Buttons 9

PPS Messages 9

Enter a Child's Data in PPS 11

Search 11

Register New Child in PPS 12

Entering "Wait List Management" Information 13

"Children's Wait List Details" Page 14

"Variance Request" Information 16

Update History 16

Most Recent Functional Screen Information, Functional Eligibility Information, and Contact Information 16
"Wait List Management" Page 17
Look Up a Child on the "Wait List" page 17
Changing a Child's Information in PPS 17
Refreshing the CLTS FS 18
County Transfers While the Child is not enrolled in CLTS 18
Adding a Child Already Under another CWA in PPS 18
Ending a child's record in PPS 18
Family Defers Services 19
How to Run Reports 19
Technical Support 21
Technical Support within PPS 21
Technical Support outside PPS 21
Other Resources 21
Safety and Security 21

Introduction

Purpose

The Wisconsin Department of Health Services (DHS), Bureau of Children's Services (BCS), developed a web-based system for county waiver agencies (CWAs) to manage and view the Children's Long-Term Support (CLTS) program portal.

The CLTS program portal is maintained online through the Wisconsin Program Participation System (PPS) module. The PPS portal is only for functionally eligible children not yet enrolled in CLTS services. It is not for children enrolled in CLTS program. Any child enrolled in the CLTS Waiver Program should no longer be open in PPS and needs to be end dated.

CLTS Eligibility and Enrollment Policy

The CLTS eligibility and enrollment policy is in the CLTS Waiver Manual (P-02256). DHS updated the online system, the CLTS PPS record, wherein all functionally eligible children are managed.

The CWA removes children's names from CLTS Program, by entering an end date in PPS:

- When the child enrolls
- Is no longer eligible for enrollment and authorization of services
- When the family declines services.

Placement of a Child in PPS

For placement of a child in PPS, a child must be determined "functionally eligible" for CLTS services, as documented by a completed Children's Long-Term Support Functional Screen (CLTS FS). The CLTS FS determines eligibility for designated CLTS programs through documentation that indicates the child meets the appropriate level of care (LOC) requirements for the following target groups:

- Intellectual/Developmental Disability (ID/DD)
- Physical Disability (PD)
- Severe Emotional Disturbance (SED)

First-Come, First-Served Policy

All children determined eligible for the Children's Long Term Support Program meet the first come, first served policy and are fully funded.

Crisis Criteria Considerations

When a CWA confirms that at least one of the crisis criteria exists, the CWA must enter a crisis reason in PPS. (See Section "Variance Request" Information for details regarding how to enter a crisis reason.) The content and applicability of the crisis criteria being met will be reviewed and monitored by DHS.

Child Moves between Counties Prior to Enrollment

If a child moves from one Wisconsin county to another prior to enrollment in CLTS, the child maintains their original start date. The sending county (county of origin) makes contact to the receiving county (the child's new county of residence) and transfers the child's record through PPS. (See Section "Wait List Management" for details regarding how to transfer a child's record.) Whenever a child moves, the sending county shares a copy of the child's information with the receiving county.

Process for Obtaining PPS User Access

Each county designates at least one user to access and update information in PPS. Users maintain a Web Access Management System User ID (WAMS ID) to access the PPS system where the CLTS program portal is housed. Use this link to obtain a WAMS ID. Once users obtain a WAMS ID, they can access the CLTS record to add children or review a child's status. Once functional eligibility is determined, the CWA adds the child's data to PPS.

Access to PPS

The "CLTS Children's Wait List" profile is located in PPS. A WAMS ID and access to the appropriate PPS profile for the CWA's designated staff is necessary to access the "Wait List System." Two CWA profiles are available in PPS. The different user profiles and directions regarding access PPS include:

User Profile Options

- "Children's Wait List CLTS Full Access:" User has full access to register, modify, add and close children's records and run reports of the CWA's CLTS Profile.
- "Children's Wait List CLTS View Only Access:" User has access to view CLTS Profile and run reports.

Obtaining a WAMS ID

1) Request a Wisconsin User ID and Password here.
    a. Submit your contact and account information.
    b. You will be sent a confirmation with a link to the Account Activation page.
    Note: You must have an accessible, valid, and unique e-mail address to complete the self-registration process.
2) Activate your Account.
    a. Click the link in your confirmation email to get to the Account Activation page.
    b. Log in using your new Wisconsin User ID and Password to activate your account.

Obtaining Access to the CLTS Profile

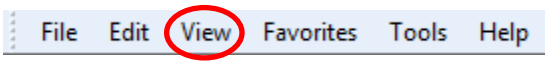
1) Go to https://pps.wisconsin.gov/PPS_AcctRequest.html
2) Follow the instructions at https://www.dhs.wisconsin.gov/pps/ppsaccessing.pdf.
    a. Begin PPS request as shown on slide 13.
    b. Information filled out as shown on slides 15 and 16 will be the following for CLTS program staff:
        - Agency Name (field 6): CLTS CWA (e.g., CLTS Door County)
        - Agency Supervisor (field 7): CLTS lead
        - Profiles (field 9):
            - "Children's Wait List CLTS Full Access"
            - "Children's Wait List CLTS View Only Access"

PPS Basics

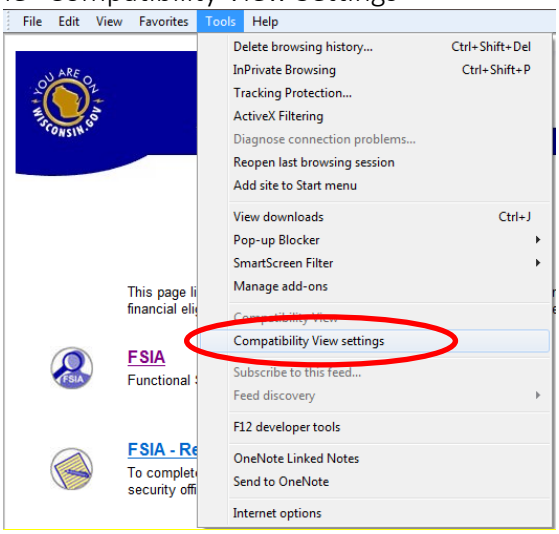
Internet Explorer, IE 10 and 11

PPS requires the use of Internet Explorer and will not function correctly with other browsers such as Chrome, Firefox, Safari, Etc. If users have a newer version of Internet Explorer (IE), this would be IE 10 or 11, before accessing PPS, a couple steps are completed prior to PPS working in the web browser.

- Open Internet Explorer to the Gateway Page: https://fsia.wisconsin.gov/#
- Press the ALT key to bring up the menu bar and click on Tools



Open the "Compatibility View Settings"



Click "Add" to display the webpage in Compatibility View.

Log In to PPS

1) Go to https://pps.wisconsin.gov/.
2) Click on "PPS-Production."
3) Enter your WAMS ID and Password.
4) Select "Children's Wait List CLTS Full Access."
5) Click "Next."

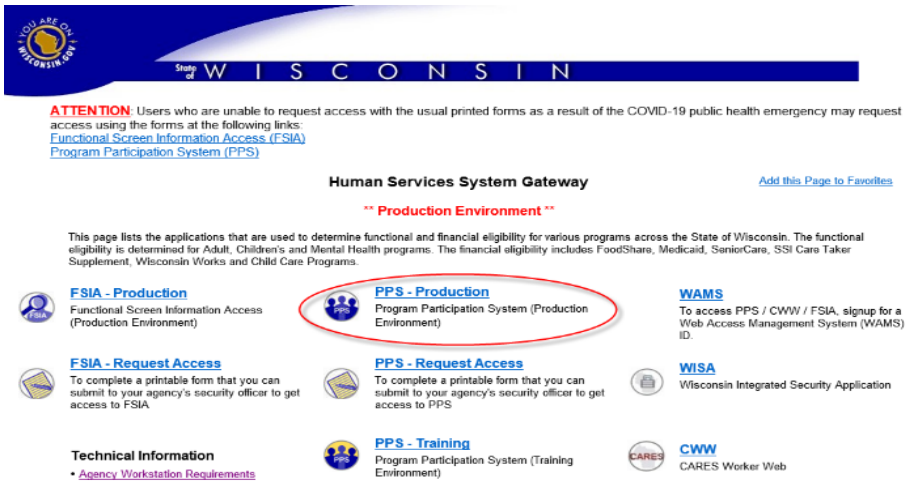
PPS Home Screen

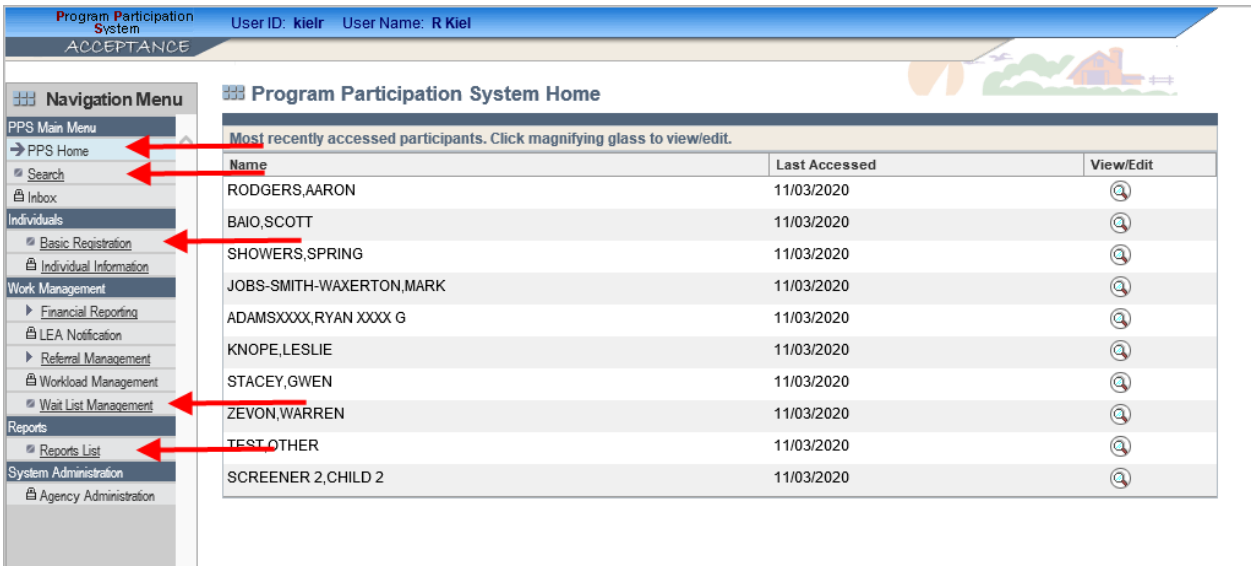
The main viewing area of the PPS Home screen will list the last 10 participant files the user viewed. If users have access to multiple PPS systems, then this screen will display participants viewed in any PPS program. For instance, when users access PPS for the Birth to 3 Program, the

first time they enter the Home Screen (when using the CLTS Profiles), it displays the last 10 children viewed from the Birth to 3 Program. If users do not have access to any other PPS programs, then the first time they enter the system, no lists appear on this page, because they are only accessing one profile.

The left side of the screen will contain a Navigation Menu. The Navigation Menu serves as an easy way to access different PPS modules. CLTS Profile users will only need access to five menu items. A module name with a padlock icon indicates the user does not have access to that specific module.

The five Navigation Menu items for which CLTS Profile users maintain access include: PPS Home, Search, Basic Registration, "Wait List Management" and "Children's Wait List Report List." Descriptions of the aforementioned module functions of all of these modules exist throughout the rest of this Training Guide.





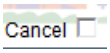
Specific PPS Functions

Saving

PPS users will not find a “Save” button on every page. The system automatically saves changes when users navigate from the page where the changes were made. Navigating from a page includes clicking on a different page through the Navigation Menu or clicking “Return,” “Next,” or “Previous” page buttons. PPS will not save changes in the following circumstances: if the program times out (after 30 minutes); if the program is closed prior to navigating off of the screen (such as through clicking the X ( ) at the top of the screen); or if the “Cancel” button is clicked prior to navigating off the screen.

Operating Buttons

View Edit icon: The View Edit icon is available once an individual’s record is opened. It is found on the PPS Home page, “Wait List Information” page, and “Wait List Management” page. The View Edit icon is used when a user would like to view and/or edit an individual’s PPS record.



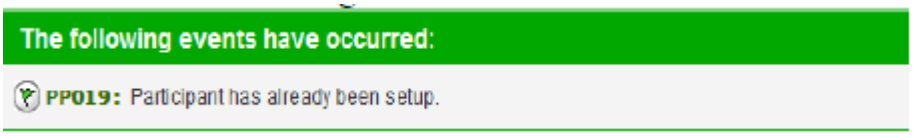
Cancel button: The Cancel button, on the top right of the PPS screen, allows users to exit a page without performing any functions. It can be used to exit a page or to navigate off a screen without saving new data. It is also useful when a page requests required information and no information is entered (click Cancel and continue navigating off the screen), or when exiting a page containing an error message.

Reset button: When entering new data, the reset button resets a page back to its last saved status. The reset button only works when the new data entered is not yet saved. For example, if data is entered and the user navigates off the page, and then returns to the page again, the information is not reset to prior to navigation off the page.

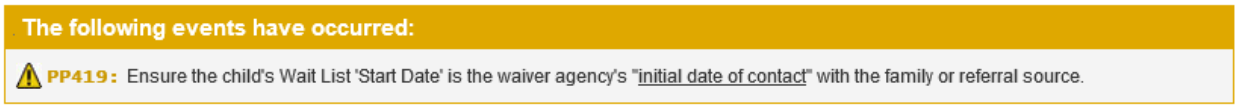
PPS Messages

Three types of messages appear in PPS when users work in the system. All PPS messages are important. Green and yellow indicators allow users the possibility of continuing, while users cannot bypass red messages without correction.

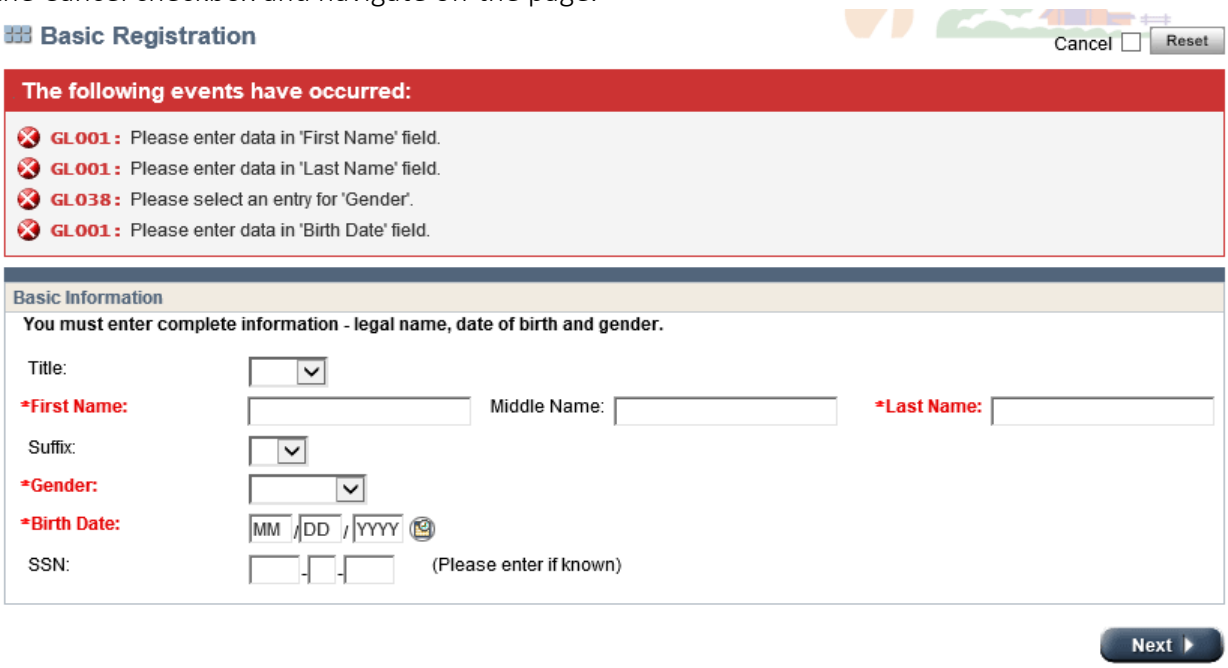
Green messages are informational and alert users when the system automatically did something helpful for them. Green messages indicate that users can continue in the system without further action.



Yellow messages are warning messages, alerting users that something entered on the page may be incorrect. When receiving a yellow messages, double check the issue, and carefully decide how to proceed. To proceed past a yellow message, continue the action or correct the information and resubmit.



Red messages are error messages. If a red error message is received, the user is unable to continue in the system without fixing the issue or canceling the action. To cancel the action, click the Cancel checkbox and navigate off the page.



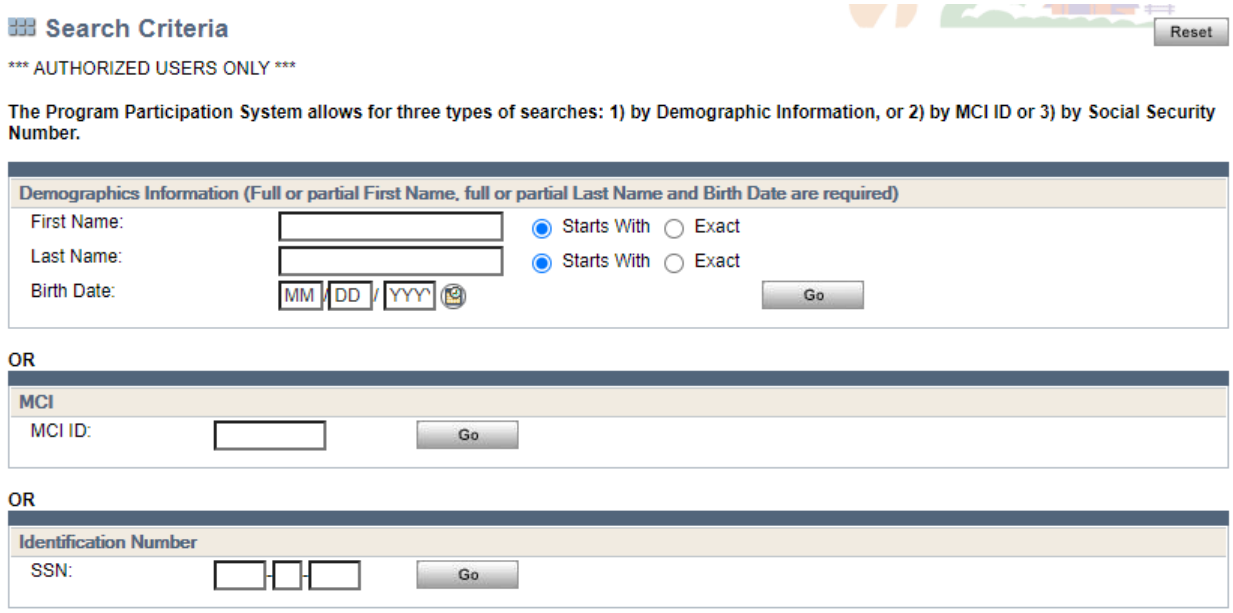
Enter a Child's Data in PPS

Search

To prevent duplicate entries, it is important to conduct a search in PPS before registering a new child. Please be careful that all participant information is accurate when searching in PPS. The system's search function is specific and may not find a child if the information has been entered incorrectly. It is important to note that when a duplicate record is made, it cannot be deleted. For this reason, please ensure accurate birthdate data entry.

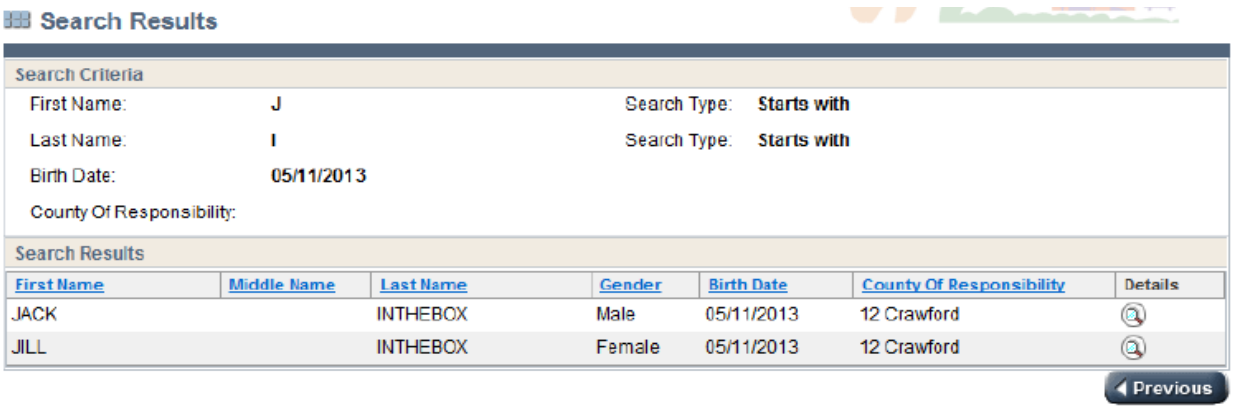
To search for a child in PPS:

1) Click on the "Search" option from the Navigation Menu on the left hand side of the screen.
2) Enter only the first initial of the child's first and last name, and birth date or, if available, the child's Social Security number in the appropriate fields.
3) Press "Go."

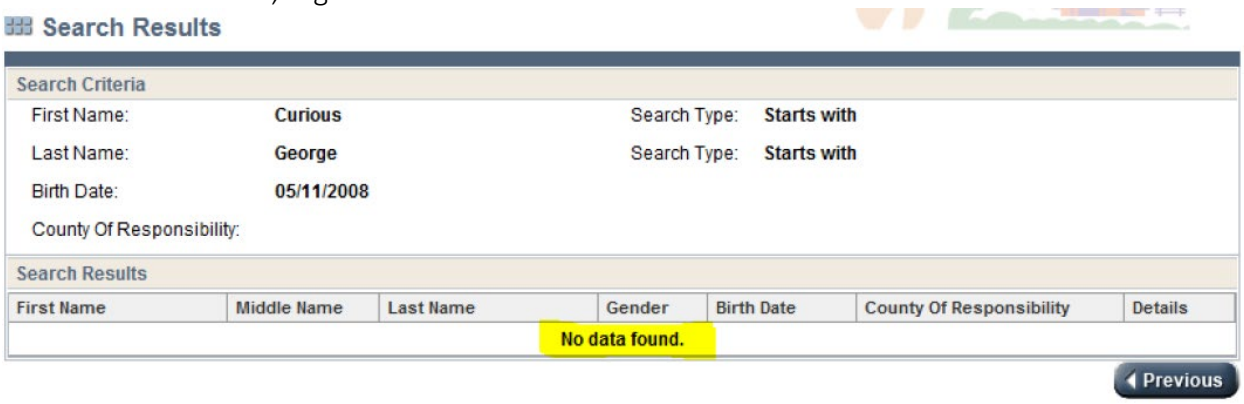


If the child has an existing record in PPS, then the system locates the match. Click the radio button next to the match and click "Next." This action takes you to the Individual Summary Page.

If the search locates multiple individuals, review all information provided before selecting the correct child's record. When search results show identical information between multiple listings, view each record individually. This is likely a duplicate entry in the system. Upon verification that multiple entries of the same individual exist, contact the SOS Helpdesk.



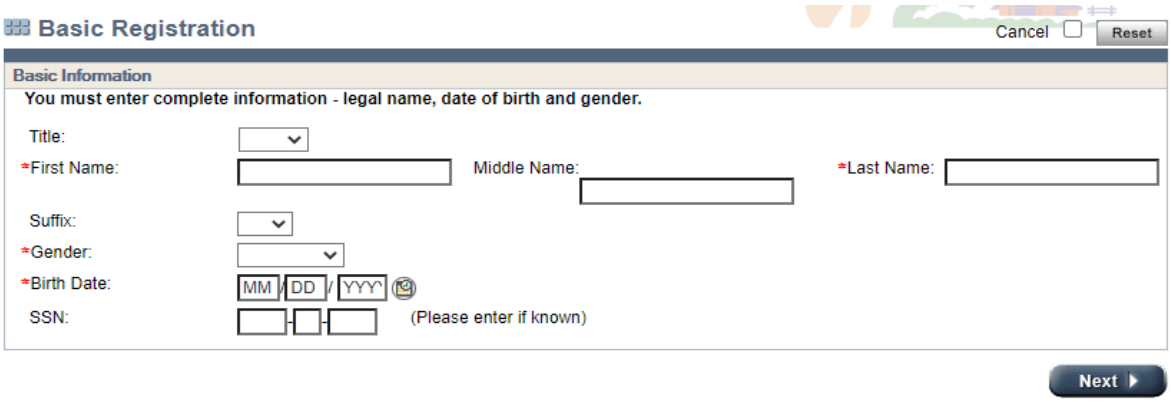
If the child is not yet in registered in PPS, Search Results will indicate "No data found." If no data is found, check that the correct information was entered, and attempt a second search. If the data is still not found, register the child in PPS.



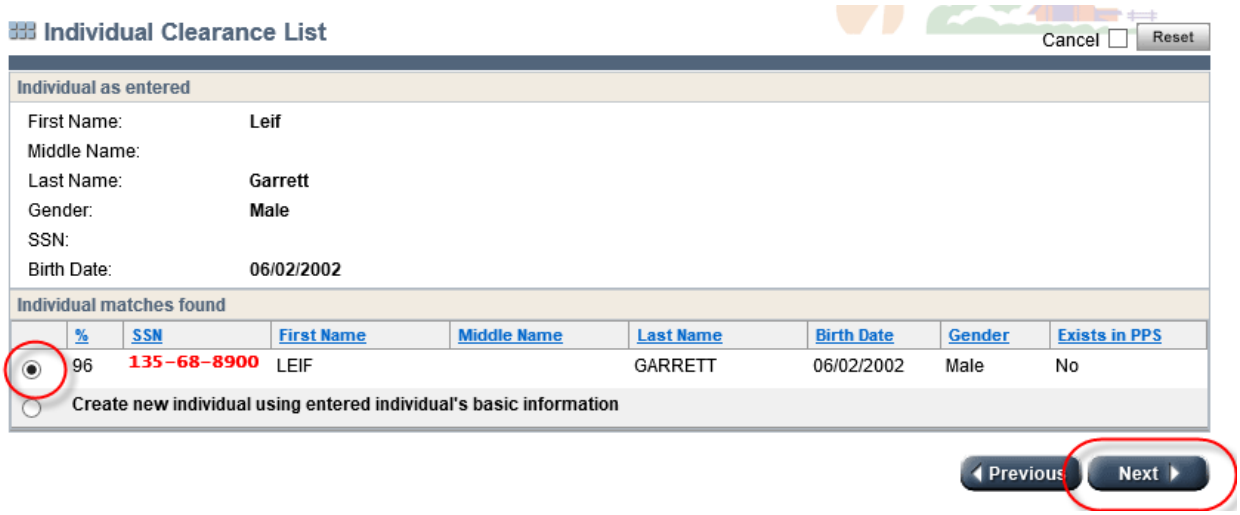
Register New Child in PPS

To register a new child in PPS:

1) Perform a search. Only register a new child upon verification that the child's data does not exist in PPS.
2) Click "Basic Registration" in the Navigation menu.
3) Enter the child's first and last name, gender, and birth date. If known, also enter the child's Social Security number and County of Responsibility.
4) Click "Next."



The MCI Clearance Results Page will display if there are any potential matches 75% and above. Select one of the potential matches or create a new individual in PPS and MCI Systems.

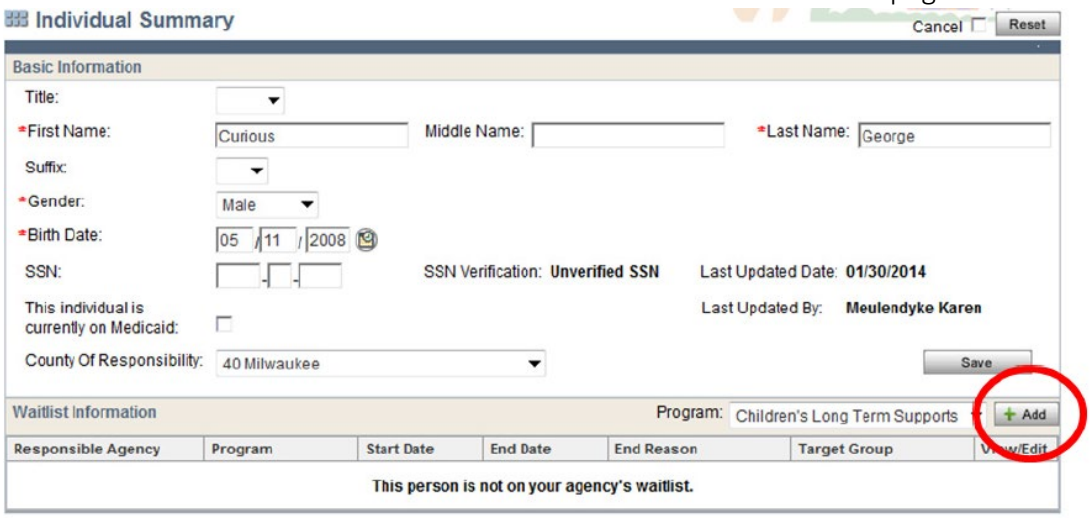


Entering "Wait List Management" Information

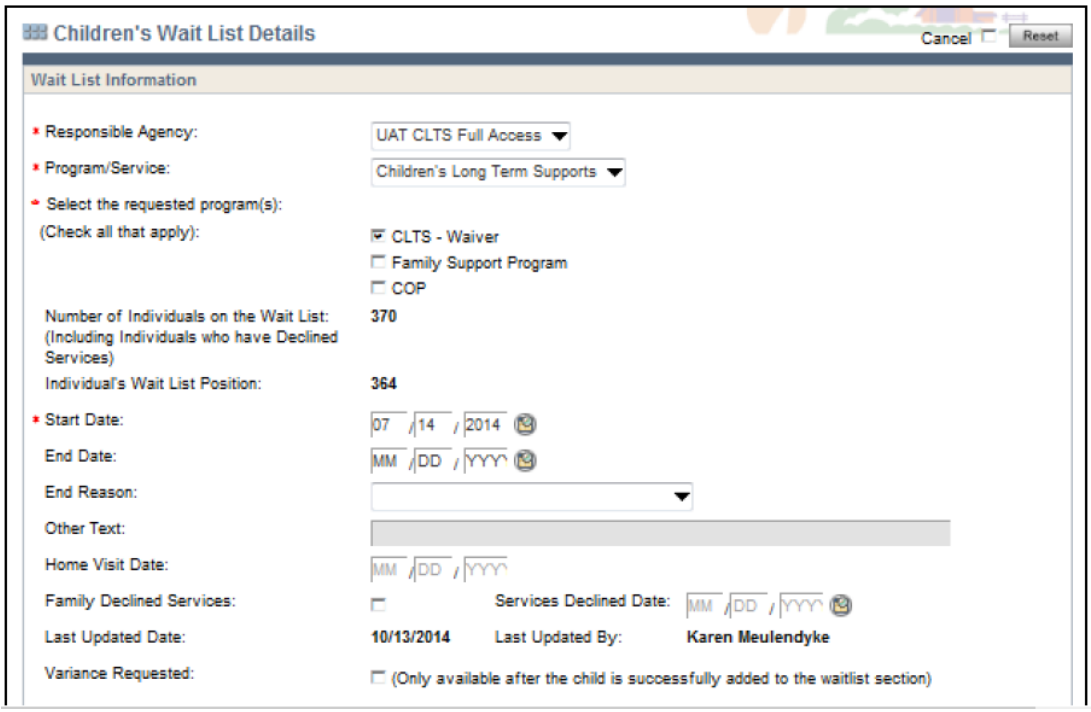
After a child is registered in PPS, or found in a PPS search, the user will be brought to the Individual Summary page. The Individual Summary page shows the child's Basic Registration and Individual Information. The child must have a completed CLTS FS demonstrating functional eligibility to be added to the CLTS "Wait List Management" page. Without an eligible CLTS FS, a child must not be placed in the CLTS "Wait List Management" page. A child registered in PPS, but without an eligible CLTS FS, will not appear on the agency "Wait List Report."

To add a child to the "Wait List Management" page:

1) Enter the child's information on the "Individual Summary" page.
2) Click the "Add" button under the "Wait List Information" box. This will upload the child's CLTS FS information and take the user to the CLTS "Wait List Details" page.



3) Complete the page's required fields, and click the "Return" button or navigate off the page to save information.



"Children's Wait List Details" Page

The following information fields are on the "Children's Wait List Details" page:

Responsible Agency: This field displays the profile of the current logged in user and the agency responsible for a child's services when the child is entered in PPS. If a child on your "CWA's Wait List Report" moves to a new county, the Responsible Agency field must be updated.

Program/Service: The Program/Service field defaults to "Children's Long Term Supports."

Select the requested program(s): This field displays checkboxes for users to indicate which program or programs for which the child is registered. The system's automatic default is the CLTS Waiver; however, users may check more than one box if the child is waiting for multiple programs' services. Please check all that apply.

Number of Individuals on the Wait List: Displays the total number of individuals waiting for enrollment.

Individual's Wait List Position: This number can be disregarded at this time.

Child Enrollable: A yes/no field can be disregarded at this time. Children are considered enrollable once full eligibility is determined by CWA. CWAs do not wait for this "Child Enrollable" field to say "Yes," and moves to enroll and begin service planning immediately.

Start Date: The child's start date must be the program referral date. Users will receive a warning message to confirm this, see below.

The following events have occurred:

⚠ PP419: Ensure the child's Wait List 'Start Date' is the waiver agency's "initial date of contact" with the family or referral source.

The CLTS FS completion is required and the child determined functionally eligible for the program before entering the child's data on the "CLTS Wait List" page.

The following events have occurred:

⊗ PP001: Individual is not found in FSIA.

If the user enters a start date and receives the red error message above then double check the child's information, including the CLTS FS. If the user believes they received this message in error, please contact the SOS Helpdesk.

End Date: This field allows users to enter the date the individual is closed in PPS. The end date must be after the start date, and cannot be a future date. Do not forget to enter the End Date. When ending a child due to "Enrolled in CLTS Waiver" the user may get the following warning message. The message can be bypassed by clicking the Return button again. Current policy does not require a child to be first on the "Wait List."

The following events have occurred:

⚠ PP191: This individual is not first on the Wait List. You must request a variance from CLTS.

End Reason: This field allows users to choose the most appropriate reason for closing the child's PPS record. This is a required field if End Date is entered. If more than one end reason applies, enter the most appropriate reason. If "Other" is selected as the end reason option, the field "Text Box Other" displays and is required, with a brief description of the end reason.

Deferred Services: This field allows users to indicate if a family is requesting more time before beginning services after being determined eligible by CWAs.

Services Deferred Date: This field indicates the date upon which the family requested additional time before enrolling in CLTS services.

Last Updated Date, Last Updated By, and Update History: These fields provide information about the last updates made to the child's current record, when the updates occurred, and who made them. The most recent update is listed in the "Last Updated Date" and "Last Updated By" fields. Updates before the last update will be listed in the "Update History."

Variance Requested: After a child's successful addition in PPS, the "Variance Requested" checkbox is enabled. After completing the initial, required fields, to add a child in PPS, save the information by navigating off the page and return to the "Wait List Details" page to enable the checkbox. Once the "Variance Requested" checkbox is selected, the "Variance Information Section" appears for the user to determine a crisis criteria reason for the identified child.

"Variance Request" Information

For children requiring immediate services rendered by CWA, the county service coordinator determines a variance request.

1) Complete all fields under the "Variance Request" Information section, including a description of the crisis.
2) Click the "Send Variance Request to CLTS" button. CWAs do not need approval from DHS to prioritize services for this child.
3) Enroll the child in the Eligibility and Enrollment Streamlining (EES) system and then enter an "End Date" and "End Reason" in the child's PPS record.

Update History

The Update History tracks the "Variance Request" history if more than one request is submitted for a child.

Most Recent Functional Screen Information, Functional Eligibility Information, and Contact Information

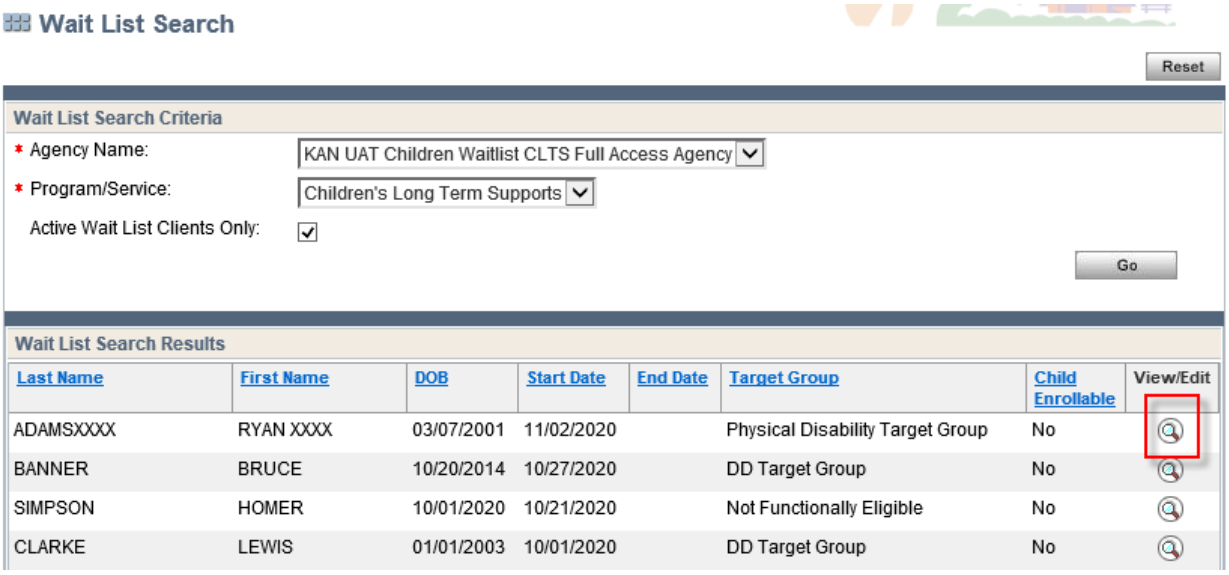
The Functional Screen Information field contains data extracted from the CLTS FS data. This information is view-only and updates automatically when the individual's page is opened. Users can manually update the child's CLTS FS information by clicking the "Refresh" button.

“Wait List Management” Page

Once a child registration is complete in PPS, their information can be found under the “Wait List Management” page.

Look Up a Child on the “Wait List” page

1) Click on “Wait List Management” under the Navigation bar on the left side of the screen.
2) Select appropriate Agency Name and Program on the “Wait List Search” page.
3) Select the box next to “Active Wait List Clients Only” for a report of your county’s children with functional eligibility for enrollment in CLTS. Alternatively, do not select “Active Wait List Clients Only” to search for children closed in PPS.
4) Press “Go” and the “Wait List Search Results” will appear.
   The “Wait List Search Results” include the CWA’s list of children not yet end dated in PPS. The default view is organized from the most recent to the oldest start date.
5) To view a specific child’s record from the “Wait List Search Results,” click on the magnifying glass icon in the View/Edit column.



Changing a Child’s Information in PPS

Changing a child’s name or adding or editing a child’s Social Security number is completed in FSIA and PPS. If a child’s address, phone number or eligibility information changes, make the update in FSIA and, consequently, the child’s CLTS FS refreshes.

Refreshing the CLTS FS

The most recent CLTS FS determination and FSIA contact information for the child automatically updates upon every entry into a child's "Wait List Profile." If a completed CLTS FS indicates the child is no longer eligible for CLTS services, "Not Functionally Eligible" text appears under "Target Group" and a message appears indicating the child is no longer eligible for waiver services.

You may also refresh the CLTS FS information manually, at any time, by clicking the "Refresh" button, located in the "Functional Screen Information" window on the "Children's Wait List Details" page.

County Transfers While the Child is not enrolled in CLTS

If a child who is determined functionally eligible for CLTS but has not yet been enrolled moves to a new county, the child retains functional eligibility and should be enrolled once other eligibility criteria are met.

To transfer the record of a child in PPS:

1) Contact the new county to ensure awareness of the transfer.
2) Go to the child's "Individual Summary" page.
3) Click the "Go" button on the right-hand side of the screen, next to the View Edit icon.
4) From the "County Transfer" page, select the agency to which the child is transferring and click the "Transfer" button.

Upon successful transfer of the child's record another county agency, a yellow message displays, confirming the transfer, and the CWA completing the transfer can no longer view the child's record.

Adding a Child Already Under another CWA in PPS

A child can only be listed under one county in PPS. If a user from one county attempts to add a child already listed with another county, they will receive a red error message indicating the current county of origin. The user should contact the county of origin to gather more information about the child's eligibility status and request a county transfer, if necessary.

Ending a child's record in PPS

To remove a child's name from PPS:

1) Search for the child's record through "Wait List Management" or "Search" pages on the Navigation Menu.
2) Open the child's file by clicking on the magnifying glass under the View/Edit column.
3) Enter an End Date and End Reason.
4) Click the "Return" button or navigate off the page to save information.

Upon completion of these steps, the child is considered closed in PPS and no longer shows under "Active Wait List Clients Only."

Family Defers Services

If a family defers services after functional eligibility has been determined and the child was registered in PPS, then:

1) Go to "Wait List Management" page by selecting "Wait List Management" from the Navigation Menu.
2) Enter Agency Name and Program, or use default selections.
3) To view the child's details, click on the magnifying glass icon in the View/Edit button.
4) Once in "Children's Wait List Details," select the "Family Deferred Services" check box.

Once a child is deemed functionally eligible and has been registered in PPS but the family is not ready to decide to enroll in the CLTS Waiver Program, the CWA support and service coordinator (SSC) can select "Deferred Services." The child remains in PPS until the CWA enters an end date and end reason. The CWA will discuss the family's anticipated timeframe for making a decision. The CWA remains in contact with the family regularly to check status of decision.

How to Run Reports

PPS "Children's Wait List Report" allow CWAs to create lists of children who have been determined functionally eligible in either Excel or PDF format.

To run the "Children's Wait List Report:"

1) Click on "Reports List" option in the Navigation Menu.
2) Once on the "Children's Wait List Report" screen, enter Program and Agency, by highlighting the county agency in left-hand and click the "Add" button.
3) Enter other criteria to include in the report. When running the report to view all children, be sure to select "Include all children" under the "The Report Will" dropdown.
4) Click on the type of report file to export (either PDF or Excel).
5) Click Submit.
6) A "Children's Wait List Report" generates and results appear in a new window.

Children's Wait List Report

Cancel Reset

Wait List Reports Criteria

(Note: A blank report will be opened if there are no records found matching the specified criteria.)

* Program/Service: Children's Long Term Supports

* Select the requested program(s):
- [x] CLTS - Waiver
- [x] Family Support Program
- [x] COP

* Agency:

Add All >>
Add >
Remove <
Remove All <<

KAN UAT Children Waitlist CLTS Full Access

Start Date From:	MM / DD / YYYY	Start Date To:	MM / DD / YYYY
End Date From:	MM / DD / YYYY	End Date To:	MM / DD / YYYY
End Reason:			
Age From:		Age To:	
Active Wait List Clients Only:	[x]		
Variance Reason:			
The Report Will:	Include all children		

Export Type

Export Type: PDF

Submit

Technical Support

Technical Support within PPS

Click on the Help button at the top right-hand corner of the PPS module for system instructions.

Technical Support outside PPS

For further technical assistance regarding CLTS Enrollment policy, please contact the CLTS Inbox.

For technical support please contact the DHS SOS Desk at 608-266-9198 or DHSSOSHelp@wisconsin.gov

Additional information about PPS can be found here.

Other Resources

CLTS-specific PPS resources can be found online.

Safety and Security

PPS contains personal identity and other sensitive information, and is therefore subject to Health Insurance Portability and Accountability Act (HIPAA) regulations. Users must comply with the PPS and Wisconsin State Acceptable Use Policy, which includes alerting the proper agency to remove a user's access when access is no longer warranted. Users should also log off the PPS system when finished with each individual session by clicking the Logout button at the top right of the screen.