MMIS Plan of Care (POC) Guide

Updated: Aug. 11, 2026

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Introduction

The MMIS Plan of Care (POC) Guide provides the information you need to: search for and view a POC, set up and modify a nursing home POC, set up and modify an in-home meals POC, and view and modify Patient Liability. This guide contains step-by-step instructions, panel images, and other tips and hints for successfully entering or modifying a POC.

HIPAA: Security and confidentiality

It is crucial that MMIS users comply with all HIPAA privacy and security regulations. However, there is no private health information (PHI) in this POC Guide. All panel images and samples have been taken from a training environment where all data has been de-identified. There are no references to real people or cases.

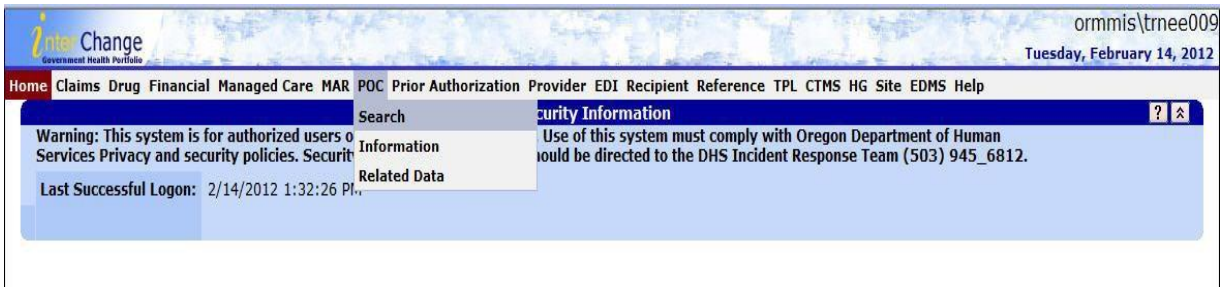
MMIS actions and permissions

Access to the MMIS is user-specific and based on the employee's job duties. Some employees may have both update and read access to certain areas of the MMIS, while others have read-only access. If you need additional access in the MMIS to perform your job duties, such as entering a POC, talk with your supervisor or manager.

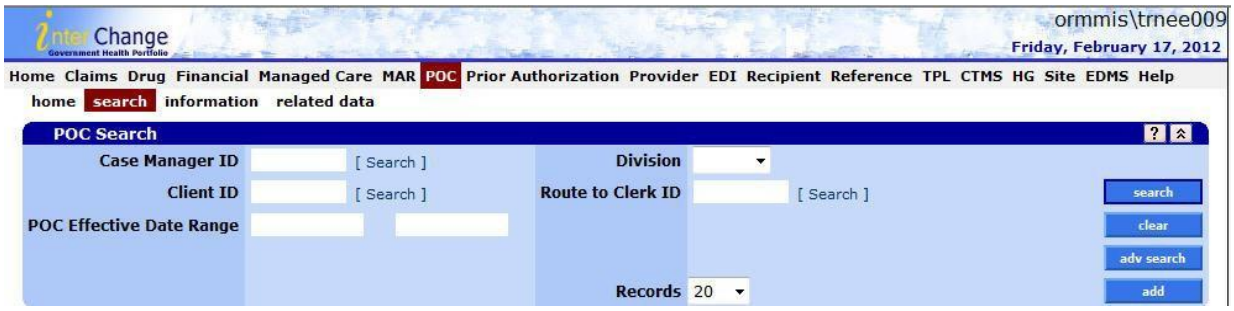
View an existing POC

Three of the most common reasons to search for and view an existing POC are: to review an individual's POC information, to modify an existing POC, and to make sure an individual doesn't already have an existing POC in the system before setting up a new POC for the individual. Below are instructions on how to search for and view an existing POC.

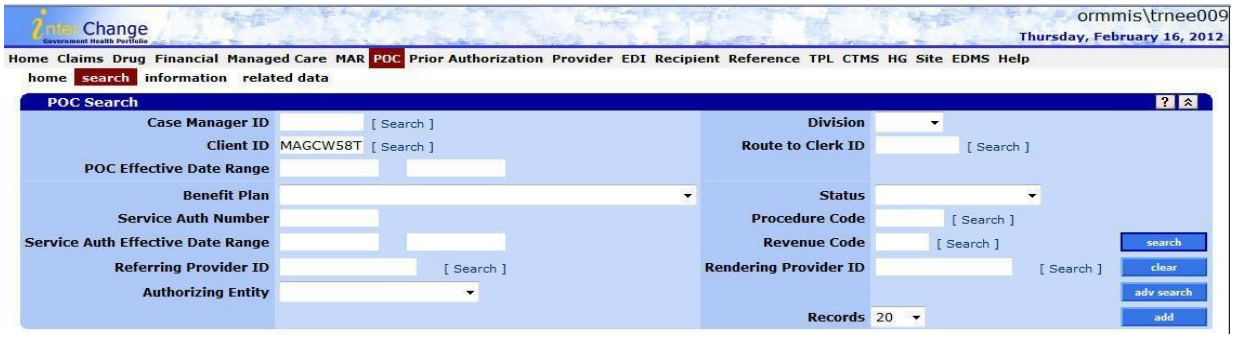
1. Select Search from the POC submenu.



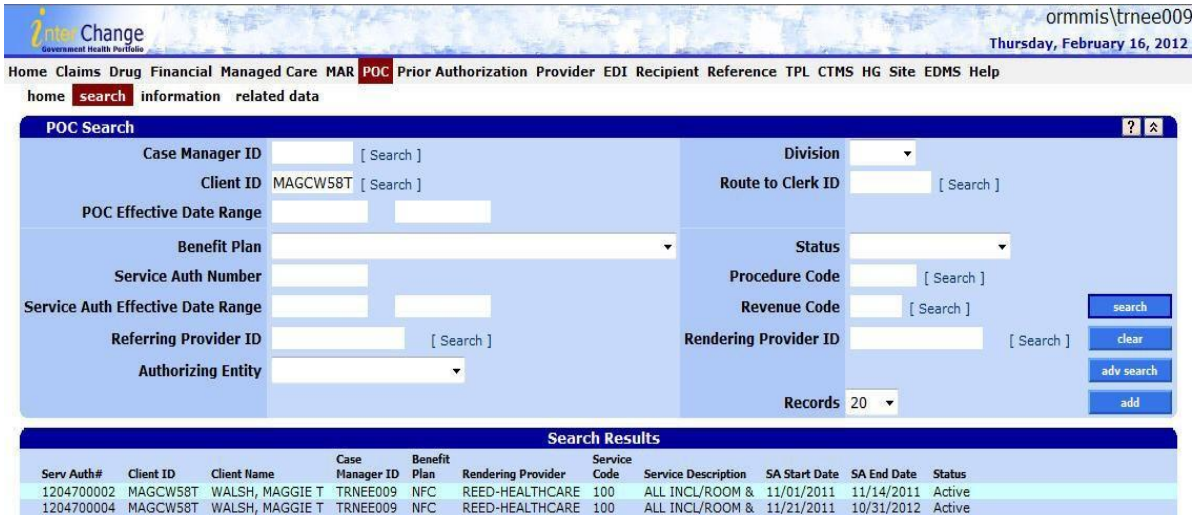
2. Click adv search (advanced search). This opens up additional fields on the panel to expand your search criteria options.



3. Enter your search criteria and click search. You can search with a variety of criteria, such as Service Auth Number or Case Manager ID.



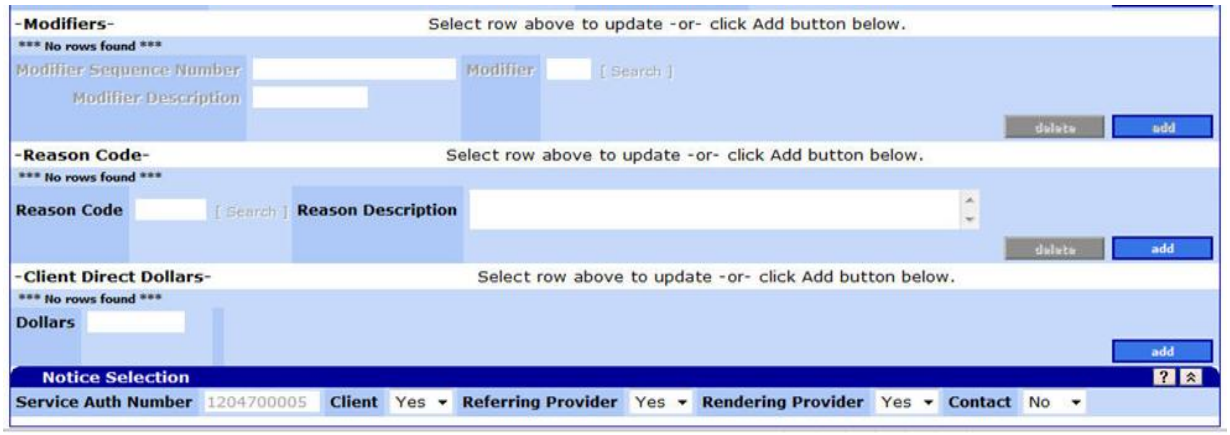
4. Select a line item to view the POC Information panel. If there is more than one line item (service authorization) in an existing POC, or more than one POC, then the Search Results will display all line items. If there is only one line item in a POC, then the search will take you directly to the POC Information panel.



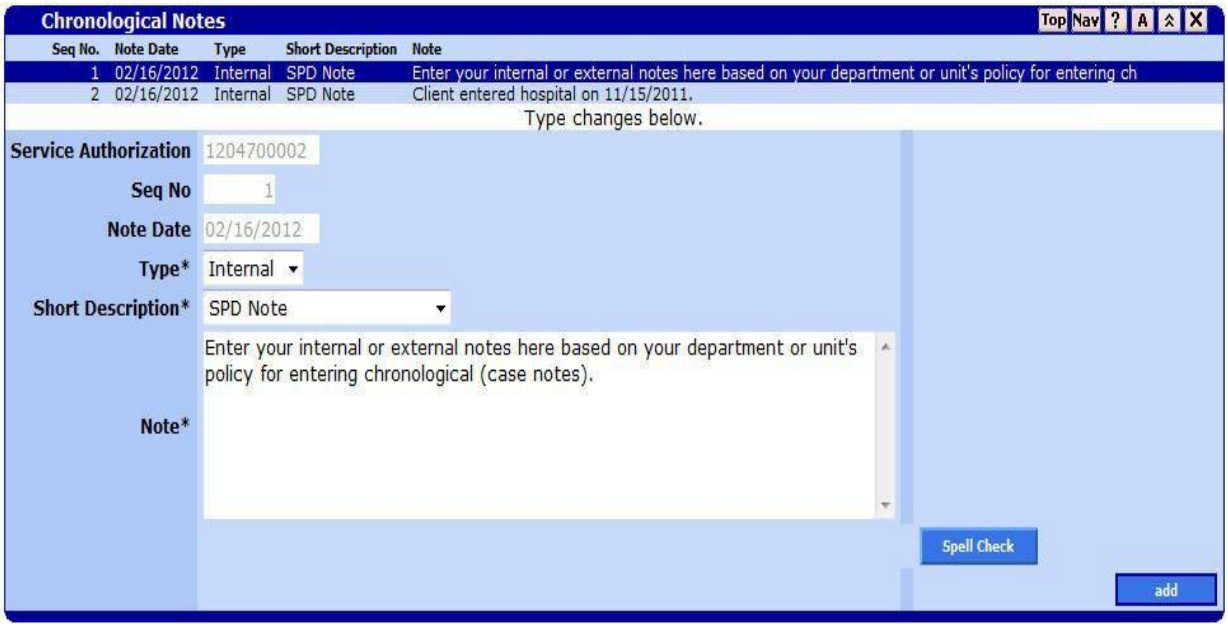
5. The POC Information and Maintenance panels open by default. Select Line Item on the maintenance panel to access line items for the individual's POC.

6. The Base Information and Line Item panels load. Select the Line Item you wish to view and the fields below the line item will populate.

7. The Notice Selection panel indicates which parties will receive copies of notices related to the individual's POC.



8. The Chronological Notes panel displays any notes entered for the POC as required by business policy.



Set up a nursing home POC

The nursing home POC is the most common type and is generally set up for one year. The following step-by-step procedure illustrates how to set up a nursing home POC in the MMIS. See Figures nine through 21. Before setting up a new POC, always search to ensure an existing POC isn't already set up

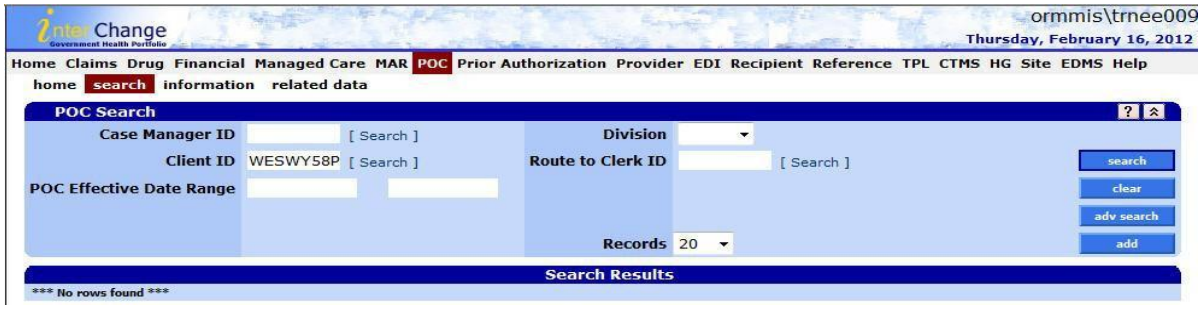
for the individual. You can search for care plans using a variety of criteria; however, using the individual's prime number is the most specific.

The most efficient way to complete the Line Item panel is to enter information on the right side of the panel first and the left side of the panel second. This is necessary because you must enter the Effective Date and the End Date on the right side of the panel in order for the benefit plans to appear in the Benefit Plan field on the left side of the panel.

Note: Do not press the <Enter> key on your keyboard to move from field to field as you enter information on the Line Item panel. Pressing the Enter key activates the add button, which inserts another line item each time you press the key.

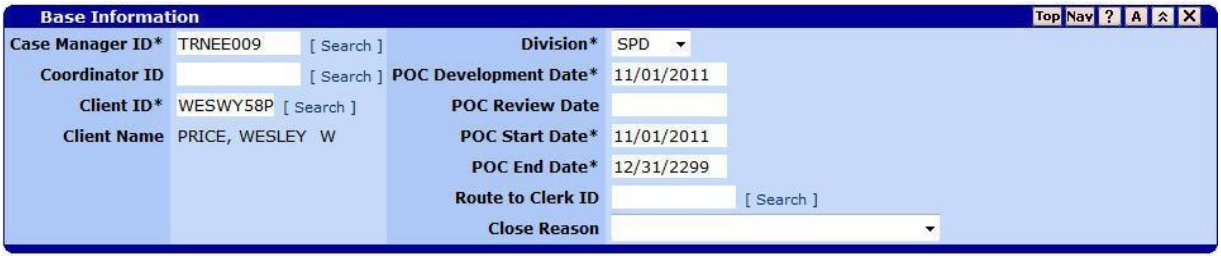
Use the <Tab> key to move from field to field or click in the fields using your mouse. If you press the Enter key or click the add button inadvertently, click cancel on the maintenance panel and re-enter your POC, starting with the Base Information panel. That is the easiest and most efficient way to handle a line item added by mistake.

1. Select Search from the POC submenu.
2. Enter the Client ID and click search. If there is no POC for this individual, you will see "No rows found" in the Search Results.



3. Click add to begin entering the new POC. When you click the **add** button, a blank POC record opens and the following panels will display in order: POC Information, POC Maintenance, Base Information, Line

Item, and Chronological Notes. You will begin by entering information on the Base Information panel.



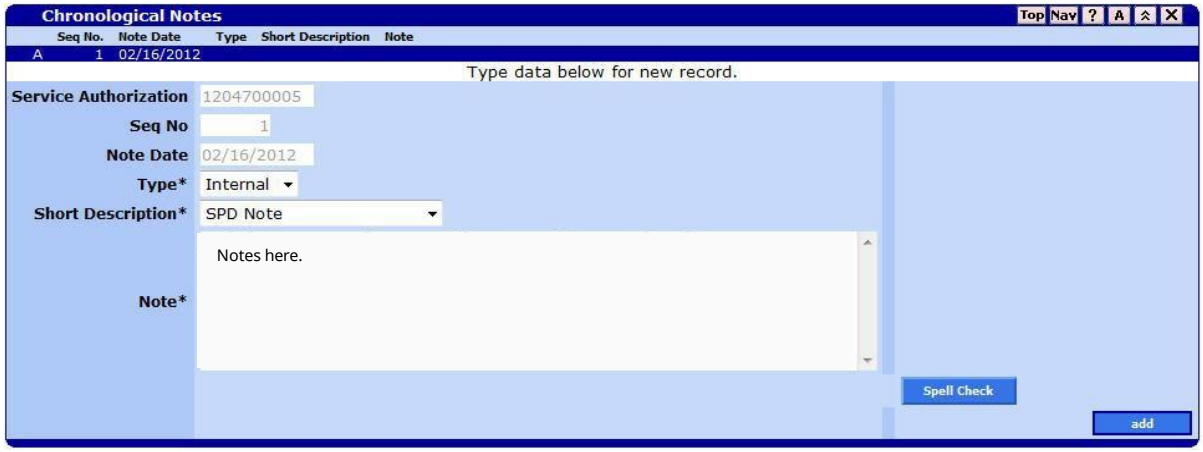
4. Select the Division.
5. Enter the POC Development Date, which defaults to the current date.
    - This is the date the POC was created in the MMIS and defaults to the current date. Although you can modify this date, you may leave it as the default because it does not drive any of the processes related to a POC, such as claims and payments.
6. Enter the POC Start Date.
    - This date must be on or before the date the individual entered the nursing home. For example, if the individual entered the nursing home on March 15, 2012, then the POC Start Date must be entered as March 15, 2012, or earlier. All Line Item (service authorization) entries must fall between the POC Start Date and POC End Date.
7. Enter the POC End Date as the infinity date (12/31/2299).
    - The POC End Date on the Base Information panel is always the infinity date of 12/31/2299. This is a ODHS/OHA policy. Although a nursing home POC is usually set up for one year, you will still enter 12/31/2299 as the POC End Date on the Base Information panel. If you had entered a specific POC End Date on the Base Information Panel, that entry would close all the line items

(including active ones) as of the date you entered in the POC End Date field. This would also prevent you from making any modifications or corrections to the POC.

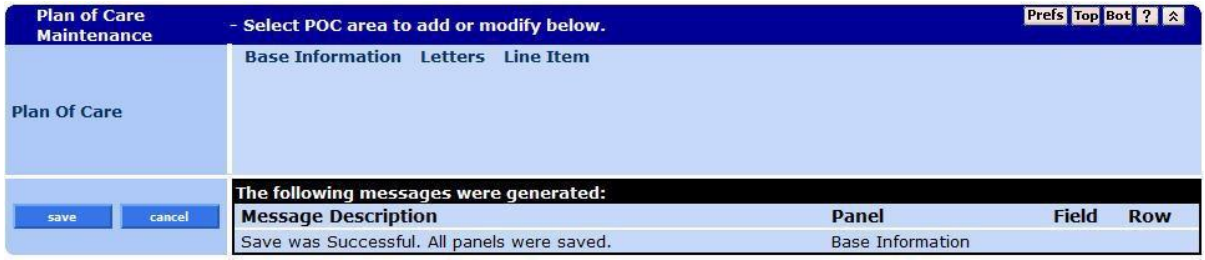
8. Click the Add button to add a new Line Item and activate the fields. A Service Auth Number appears in the top left corner of the panel.
9. Select Revenue Code in the Service Code Type field.
10. Enter the Service Code.
11. Enter the Effective Date and End Date in their respective fields.
    - The Effective Date is the date the individual entered the nursing home. This date must be on or after the POC Start Date entered on the Base Information panel.
    - The End Date is usually one year from the Effective date. Enter the last day of the month just prior to the Effective Date month, but one year later. For example: If the Effective Date is 11/01/2011, then the End Date would be 10/31/2012.

12. In the Units field, enter one (1).
13. Select SPD Residential Stay in the Unit Qualifier field.
14. Select Daily from the Frequency field.
15. Select Pay System Price from the Payment Method field.
16. Select Active from the Status field.

17. The Used Units field starts out as zero (0). After you click save, the Balance Units field populates with the number of days for which the POC was set up (usually around 365 days). As claims are processed, the Used Units field increases and the Balance Units field decreases.
18. Enter the Rendering Provider ID in the corresponding field or search for the ID by clicking [Search].
    - After clicking outside the Rendering Provider ID field, the provider's Name, Address, City, State, & Zip fields populate.
19. Select the Authorizing Entity.
20. Select Nursing Home in the Benefit Plan field.
21. Leave the defaults in the last four fields.
22. It is not necessary to enter the Modifiers, Reason Code, and Client Direct Dollars.
23. You may leave the default values on the Notice Selection panel or change them as needed.
    - These fields indicate which parties will receive notices related to the individual's POC.
24. Enter Chronological Notes as required by your business policy.
    - Internal Note: Only ODHS/OHA staff can view these notes.
    - External Note: These notes will also be visible to providers via the web portal.



25. Click the add button.
26. Select Internal or External from the Type field.
27. Select the Short Description.
28. Enter text in the Note field.
29. Click save on the maintenance panel to save the POC. You will see a "Save was Successful" message.



Modifying a nursing home POC

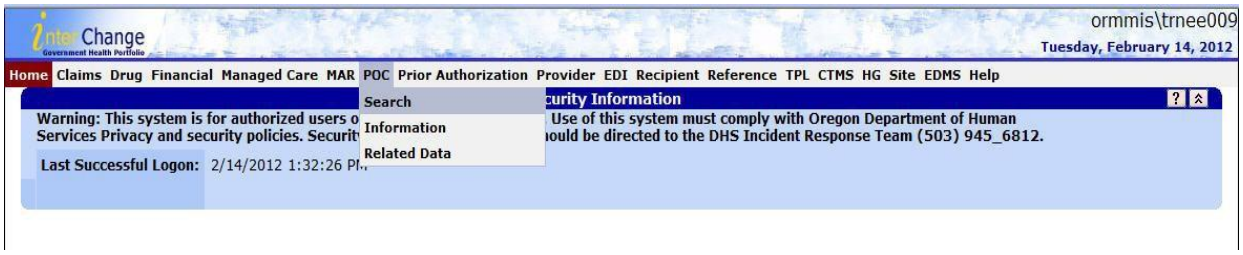
The following sections describe how to modify a nursing home POC due to an individual's temporary hospitalization and close the POC due to the individual's subsequent death.

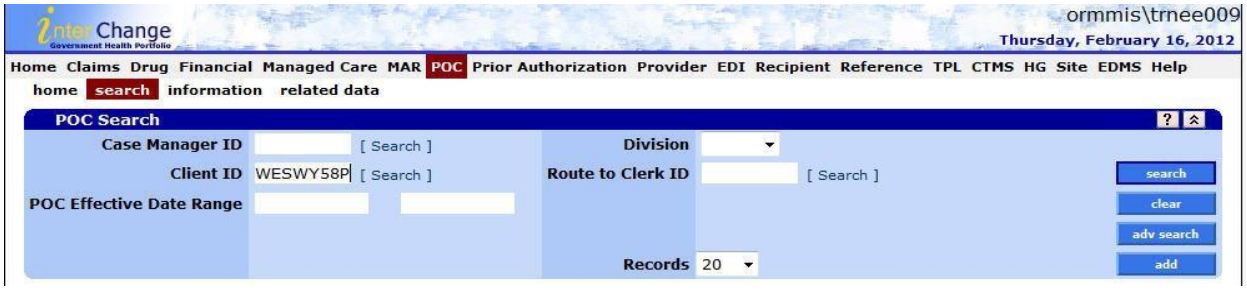
Modifying POC due to individual hospitalization

When an individual leaves the nursing home and is hospitalized for a period of time, you will end date the line item (service authorization) for that individual's POC. You will not end date the POC on the Base Information

panel. You will leave this End Date as the infinity date of 12/31/2299. Figures 22 through 27 illustrate how to modify a nursing home POC when an individual leaves the nursing home for a hospital stay.

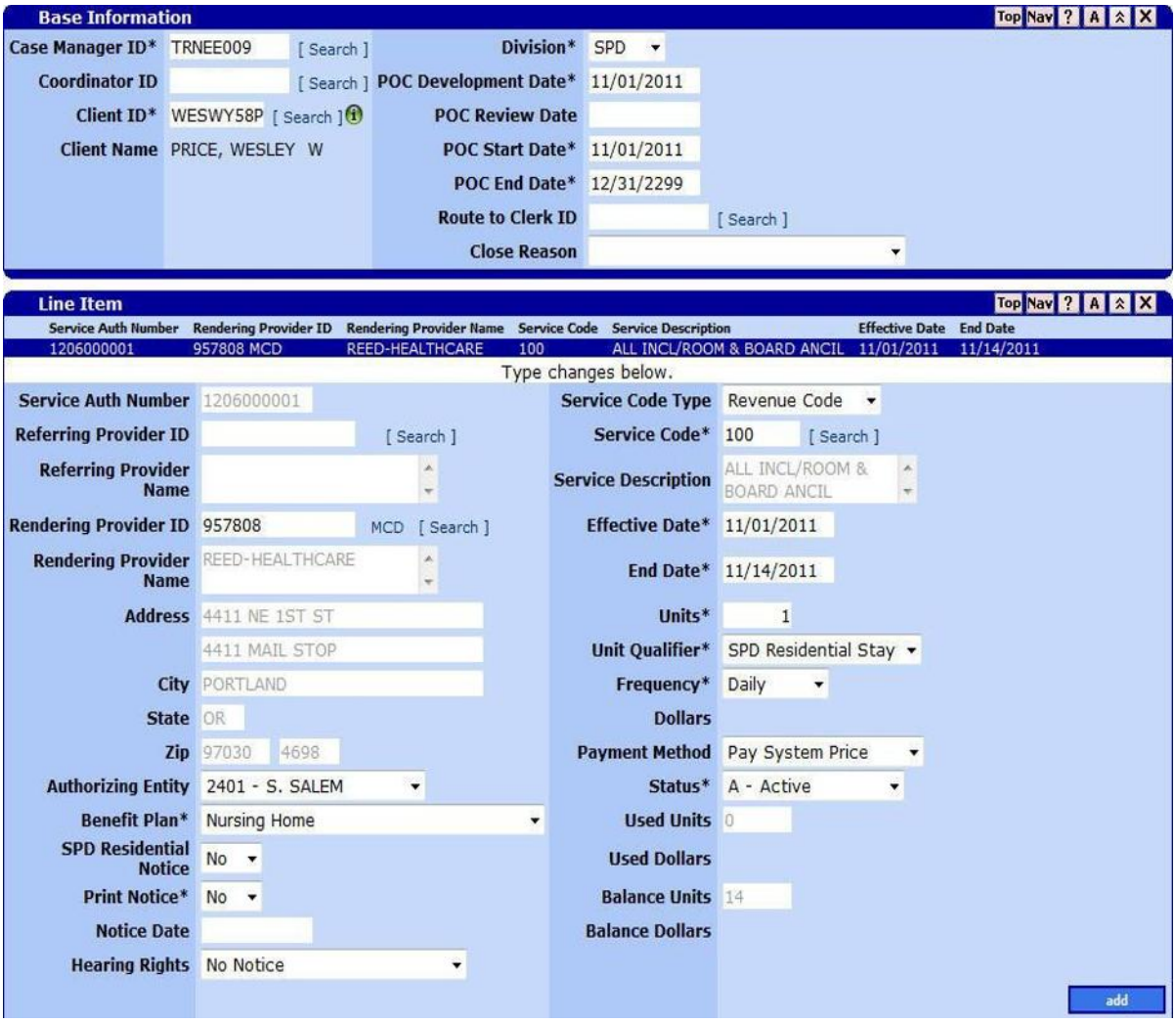
1. Select Search from the POC submenu.





2. Enter the Client ID and click search.
   - The POC Information and the Maintenance panels display.

3. Select Line Item on the maintenance panel to view the individual's POC record.
    - The Base Information, Line Item, and Chronological Notes panels will display.
    - Important: Do not change the POC End Date on the Base Information panel. Leave this date as the infinity date (12/31/2299).



4. Select the Line Item and the fields below will populate.
5. In the End Date field, type in the date as the day before the individual entered the hospital.

6. Click the add button.
7. Select Internal or External from the Type field.
8. Select the Short Description.
9. Enter text in the Note field.

10. Click save on the maintenance panel to save the changes you made to this POC. You will see a "Save was Successful" message.

The next steps will illustrate how to modify a nursing home POC when an individual has left the hospital after a short stay and is returning to the nursing home. You will add a new line item on that individual's existing POC and enter the Effective Date as the date the individual returned to the nursing home.

1. Select Search from the POC submenu.
2. Enter the Client ID and click search.
    - The POC Information and the Maintenance panels display.
3. Select Line Item on the maintenance panel to display the individual's POC record.

- The Base Information, Line Item, and Chronological Notes panels will display.

4. Click the Add button to add a new line item.
5. Choose Revenue Code in the Service Code Type field.
6. Enter the Service Code.
7. Enter the Effective Date as the date the individual returned to or will return to the nursing home.
8. Enter the original End Date you had entered when setting up the POC.

9. In the Units field, enter 1.

- The Used Units field starts out as zero (0). After you click save, the Balance Units field populates with the number of days for which the POC is set up. As claims are processed, the Used Units field increases and the Balance Units field decreases.

10. Select SPD Residential Stay from the Unit Qualifier field.

11. Select Daily from the Frequency field.
12. Select Pay System Price from the Payment Method field.
    - The Dollars, Used Dollars, and Balance Dollars fields will disable when you select the Payment Method.
13. Select Active from the Status field.
14. Enter the Rendering Provider ID.
15. Select the Authorizing Entity.
16. Select Nursing Home from the Benefit Plan field.
17. Leave the defaults in the last four fields.
18. Enter Chronological Notes as required by your business policy.
19. Click the add button.
20. Select Internal or External from the Type field.
    - Internal Note: Only ODHS/OHA staff can view these notes.
    - External Notes: These notes will also be visible to providers via the web portal.
21. Select the Short Description.
22. Enter text in the Note field.
23. Click save on the maintenance panel to save the line item you just added to this POC. You will see a “Save was Successful” message.

Close POC due to individual’s death

The following illustrates how to close a nursing home POC due to individual’s death. In this example, the individual dies after leaving the hospital and returning to the nursing home.

1. Select Search from the POC submenu.

2. Enter the Client ID and click Search.
3. Click on one of the line items to view the POC Information and Maintenance panels.
4. Click Line Item on the maintenance panel to display the individual's POC record.
    - The Base Information, Line Item, and Chronological Notes panels will display.
    - Important: Do not make any changes on the Base Information panel. Leave all fields as you entered them when setting up the original POC.
5. Select the line item you wish to close.
6. In the End Date field, enter the day before the individual died.
7. In the Status field, select "C – Closed."
8. Enter Chronological Notes as required by your business policy.
9. Click the Add button.
10. Select Internal or External from the Type field.
    - Internal Note: Only ODHS/OHA staff can view these notes.
    - External Notes: These notes will also be visible to providers via the web portal.
11. Select the Short Description.
12. Enter text in the Note field.
13. Click save on the maintenance panel. You will see a "Save was Successful" message.

Set up an in-home meals POC

Another type of POC is for in-home meals. The following step-by-step procedure illustrates how to enter an in-home meals POC for an individual who is receiving weekly meals.

Before setting up a new POC, always search to ensure an existing one isn't already set up for the individual.

1. Select Search from the POC submenu.
2. Enter the Client ID and click Search.
3. If there is no POC for this individual, you will see "No rows found" in the Search Results.
4. Click Add to begin entering the new POC.
    - When you click the add button, a blank POC record opens and the following panels display in order: POC Information, POC Maintenance, Base Information, Line Item, and Chronological Notes. You will start by entering information on the Base Information panel.

5. Enter the appropriate MMIS username in the Case Manager ID field.
6. Enter the individual's prime number in the Client ID field.
    - When you click outside the Client ID field, the Client Name field populates.
7. Select the Division.

8. Enter the POC Development Date.
    - This is the date the POC was created in the MMIS and defaults to the current date. Although you can modify this date, generally you may leave it as the default date because it does not drive any of the processes related to a POC, such as claims and payments.
9. Enter the POC Start Date.
    - This date is generally the date the individual is to start receiving meals. All Line Item entries must fall between the POC Start Date and POC End Date.
10. Enter the POC End Date as the infinity date (12/31/2299).
    - The POC End Date on the Base Information panel is always the infinity date of 12/31/2299. This is a ODHS/OHA policy. Regardless of the length of the POC, you will still enter 12/31/2299 as the POC End Date on the Base Information panel. If you entered a specific POC End Date on the Base Information Panel, that entry would close all the line items (including active ones) as of the date you entered in the POC End Date field. This would also prevent you from making any modifications or corrections to the POC.
    - The most efficient way to complete the Line Item panel is to enter information on the right side of the panel first and the left side of the panel second. This is necessary because you must enter the Effective Date and the End Date on the right side of the panel in order for the benefit plans to appear in the Benefit Plan field on the left side of the panel.
    - Important: Do not press the Enter key on your keyboard to move from field to field as you enter information on the Line-Item

panel. Pressing the Enter key activates the add button, which inserts another item each time you press the key. Use the Tab key to move from field to field or click in the fields using your mouse. If you press the Enter key or click the add button inadvertently, click cancel on the maintenance panel and re-enter your POC, starting with the Base Information panel. That is the easiest and most efficient way to handle a line item added by mistake.

11. Click the add button to add a new Line Item and activate the fields. A Service Auth Number appears in the top left corner of the panel.
12. Select Procedure Code in the Service Code Type field.
13. Enter the Service Code.
14. Enter the Effective Date and End Date in their respective fields.
    - The Effective Date is generally the first day meal delivery will begin.
15. In the Units field, enter one (1(.
16. Select Meal from the Unit Qualifier field.
17. Select Weekly from the Frequency field.
18. Select Pay System Price from the Payment Method field.
19. Select Active from the Status field.
20. The Dollars, Used Dollars, and Balance Dollars fields will be disabled after you select the Payment Method.
21. The Used Units field starts out as zero (0). After you click save, the Balance Units field populates with the number of meals for which the POC was set up. As claims are processed, the Used Units field increases and the Balance Units field decreases.

22. Enter the Rendering Provider ID in the corresponding field or search for the ID by clicking Search.
    - After clicking outside the Rendering Provider ID field, the Provider's Name, Address, City, State, and Zip fields populate.
23. Select the Authorizing Entity.
24. Select Aged and Physically Disabled in the Benefit Plan field.
25. Leave the defaults in the last four fields.
26. It is not necessary to enter the Modifiers, Reason Code, and Client Direct Dollars.
27. You may leave the default values on the Notice Selection panel or change them as needed.
    - These fields indicate which parties will receive notices related to the individual's POC.
28. Enter Chronological Notes as required by your business policy.
29. Click the add button.
30. Select Internal or External from the Type field.
    - Internal Note: Only ODHS/OHA staff can view these notes.
    - External Note: These notes will also be visible to providers via the web portal.
31. Select the Short Description.
32. Enter text in the Note field.
33. Click save on the maintenance panel to save the POC. You will see a "Save was Successful" message.

Modify an In-Home Meals POC

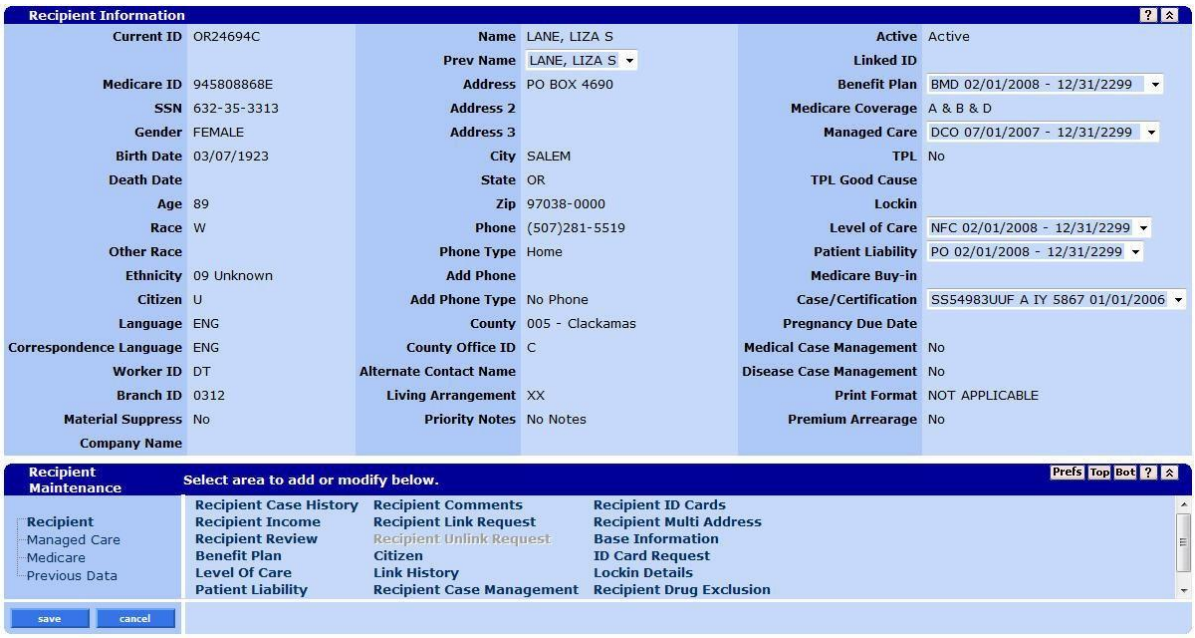
1. Select Search from the POC submenu.
2. Enter the Client ID and click search.
    - The POC Information and Maintenance panels display.
3. Select Line Item on the maintenance panel to view the individual's POC record.
    - The Base Information, Line Item, and Chronological Notes panels will display.
4. Select the line item and the fields will populate.
5. Choose Daily from the Frequency field.
    - After you click save, the Balance Units field changes from the number of weekly meals to the number of daily meals to be delivered to the individual.
6. Enter Chronological Notes as required by your business policy.
7. Click the add button.
8. Select Internal or External from the Type field.
    - Internal Note: Only ODHS/OHA staff can view these notes.
    - External Note: These notes will also be visible to providers via the web portal.
9. Select the Short Description.
10. Enter text in the Note field.
11. Click save on the maintenance panel to save the POC. You will see a "Save was Successful" message.

View patient liability information

The financial liability amount that must be paid by the individual for residential care can be viewed on the Patient Liability panel in the MMIS Recipient subsystem. The panel displays ongoing monthly liability amounts and Internal Control Numbers (ICNs) for claims to which the liability amounts have been applied.

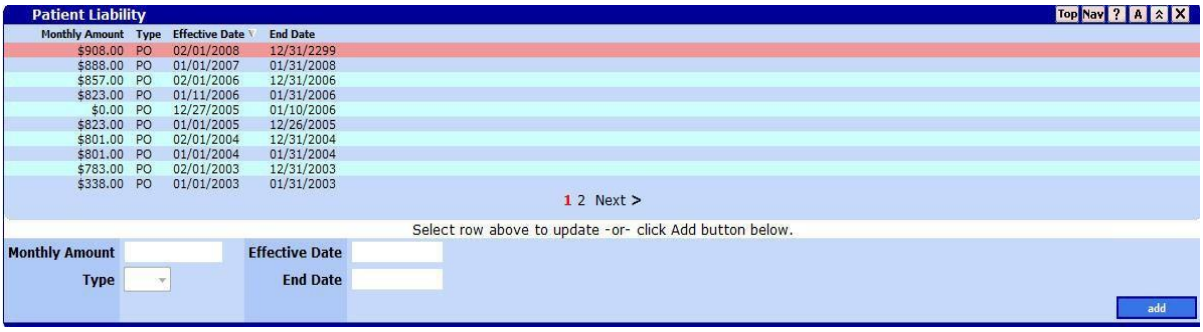
ICNs are unique claim numbers assigned to each claim submitted to the MMIS. The following step-by-step procedure illustrates how to search for and view patient liability via the recipient record.

1. Select Search from the Recipient submenu.
2. Enter the search criteria and click search.
    - The Recipient Information and Maintenance panels display.

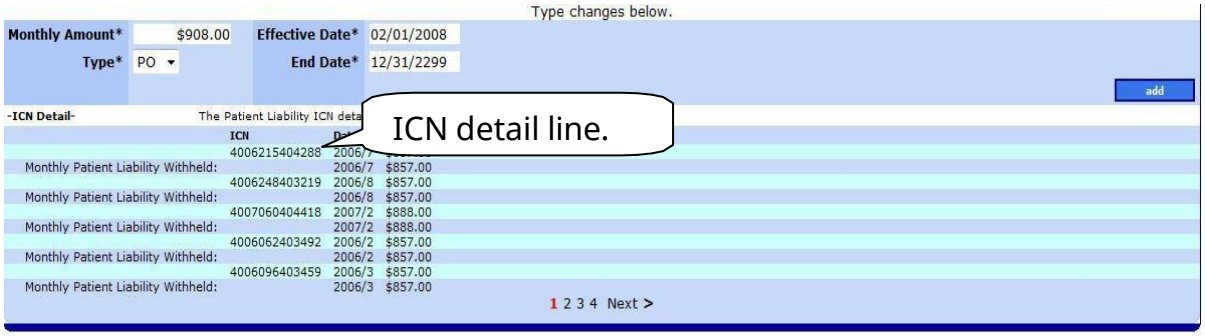


3. Select Patient Liability on the maintenance panel to view liability amounts and ICNs.
    - Notice that the Level of Care and Patient Liability fields are populated.

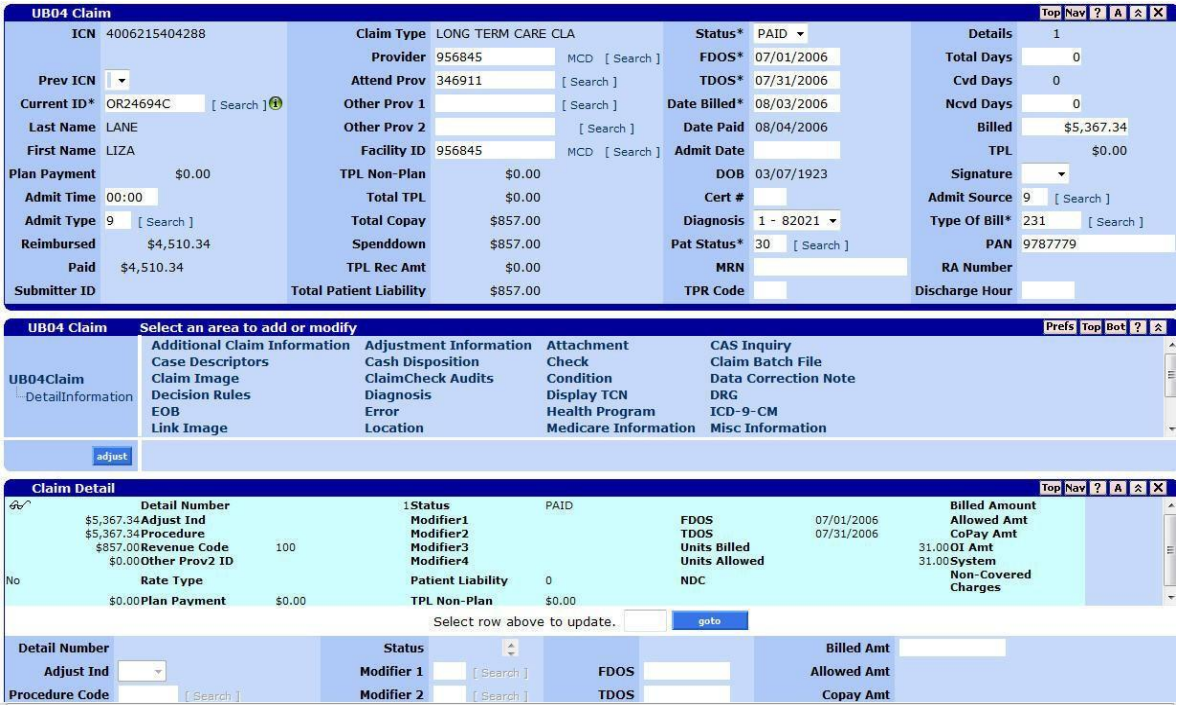
4. Select any line to display ICN details for claims to which liability amounts have been applied.



5. You cannot open a claim by selecting an ICN detail line. See Figure 66.



6. To review the claim, search in the Claims subsystem using the ICN as your search criteria.
    - Select Search from the Claims submenu.
    - Enter the ICN and click Search.
    - When you search using the ICN, the MMIS will open that specific claim record.
    - Note that the patient liability amount is listed as the copay on the claim.



Adjust Patient Liability

The following process illustrates how to make temporary changes to an individual's monthly liability amount through the MMIS, such as in the initial month of placement.

In this example, the individual's liability amount is being adjusted to "No Liability" for one month. Select Search from the Recipient submenu.

1. Enter the search criteria and click search.
    - The Recipient Information and Maintenance panels display.
2. Select Patient Liability on the maintenance panel.

3. Select the line item to be adjusted.
4. Enter the last day the liability amount will apply in the End Date field.
5. Click Save on the Maintenance panel.
6. Click Add to add a new liability line item.
7. Enter $.01 in the Monthly Amount field.
8. Select NL from the Type field.
9. Enter the Effective Date and End Date of no liability month.
10. Click save on the maintenance panel.
    - Note that you must enter at least $.01 in the Monthly Amount field in order to save the record. The MMIS reads this as no patient obligation.
    - If you don't enter at least $.01 in the Monthly Amount field, the system will return this error message when you click the Save button: "A Monthly Amount greater than zero is required."
11. Click Add to add a new line item for the month that liability will resume.
12. Enter the liability amount in the Monthly Amount field.
13. Select PO from the Type field.
14. Enter the date on which liability will resume in the Effective Date field.
15. Enter 12/31/2299 in the End Date field.
16. Click Save on the maintenance panel.

Important: Be aware that there is no delete button on the Patient Liability panel. If you inadvertently click the Add button, you will add an additional line item that you would have to complete in order to save the record. Your only option at that point would be to cancel your work and start over.

Troubleshooting – FAQ guide

1. Problem: The Service Code field will not accept the code I entered. It doesn't display a Service Description when I click outside the Service Code field.
    - Solution: You may have entered a Service Code that does not correspond to the Service Code Type. Verify that you chose the correct Service Code number and that it corresponds to the Service Code Type.
2. Problem: After trying to save a new POC, I received a message on the Maintenance panel showing a long list of fields that need to be completed on the Line Item panel.
    - Solution: After entering a line item, you may have inadvertently clicked the add button or pressed the Enter key on your keyboard. Either of these actions would have added a new line item that you don't need. The best way to fix this problem is to click cancel on the maintenance panel and start over. When you click cancel, both line items will be removed (your original one and the new one). Then you will re-enter your POC information, starting with the Base Information panel. It is possible to withdraw the extra line item, but that method is more complicated and time consuming than canceling and re-entering the POC.
3. Problem: When saving a new POC, I received the following message: "Line Item Effective Date must be later than or equal to POC Start Date. Start Date excludes a service authorization line item."
    - Solution: You entered an Effective Date on the Line Item panel that is before the POC Start Date on the Base Information panel.

You will need to change the POC Start Date or the Effective Date so that the Effective Date on the Line Item panel is on or after the POC Start Date on the Base Information panel. In all care plans, the Effective Date and the End Date on the Line Item panel must fall between the POC Start Date and the POC End Date on the Base Information panel.

4. Problem: The correct benefit plan does not display in the Benefit Plan drop-down list on the Line Item panel.
    - Solution: If the correct benefit plan is not displayed for the type of care plan you are setting up, it is because:
        - The individual is not covered by the benefit plan, or
        - The individual is not covered by the benefit plan during the date range listed in the Effective Date and End Date fields on the Line Item panel.
5. Problem: The Benefit Plan field on the Line Item panel is disabled and no benefit plans display.
    - Solution: There are two likely possibilities: 1) you didn't enter the Effective Date and End Date on the Line Item panel. The Benefit Plan field will not populate with a list of benefit plans until you enter both an Effective Date and an End Date on the Line Item panel, or 2) you didn't enter the Client ID on the Base Information panel.

Additional resources and contact information

Do you want to sign up for MMIS training? Search for "MMIS" in Workday Learning.

Are you experiencing technical issues with the MMIS, such as not being able to log in? Contact the ODHS/OHA Service Desk at 1-503-945-5623 or using the OIS Service Desk Self-Service Portal.

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