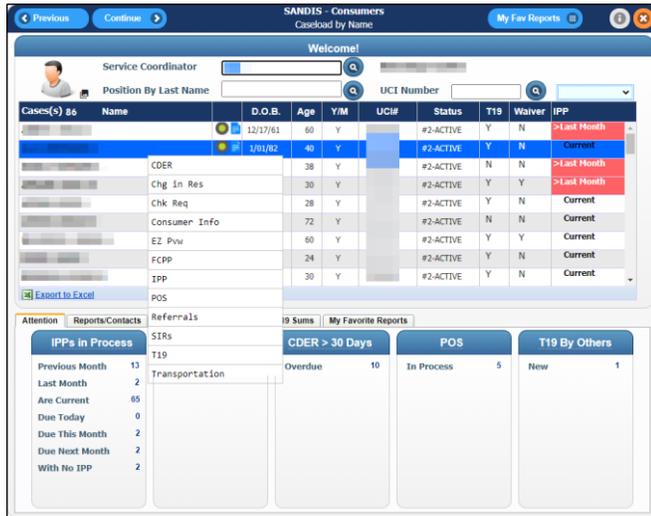


# Purchase of Service (POS)

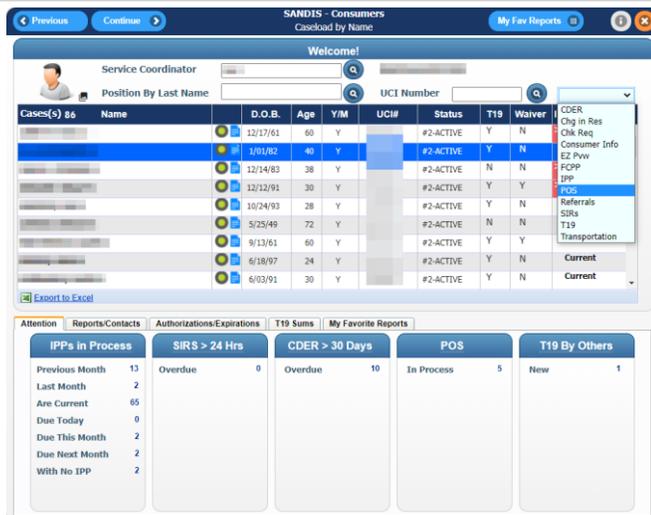
Purchase of Service (POS) requests for clients can be created, viewed, printed and authorized within the POS screens in SANDIS7.

The POS screen can be accessed a number of ways –

Right-clicking on an individual in the welcome screen and selecting **POS**.



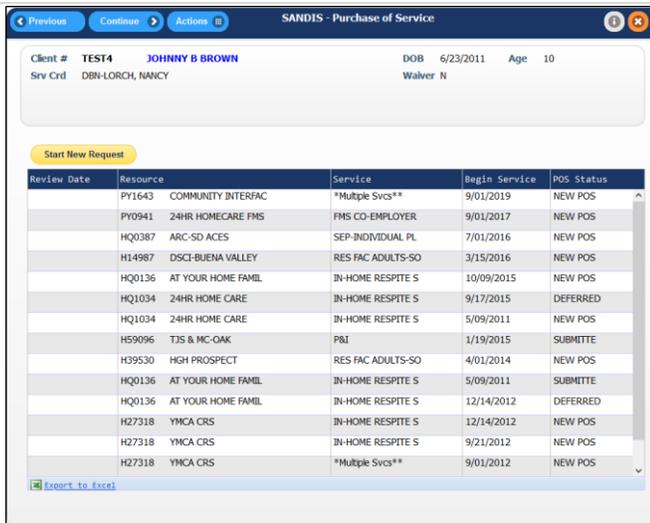
Selecting **POS** on the drop-down menu after entering a client's UCI in the on-call lookup field.



Or by clicking **POS Requests** under the group **POS/Fiscal – SC Level** using the navigation menu.

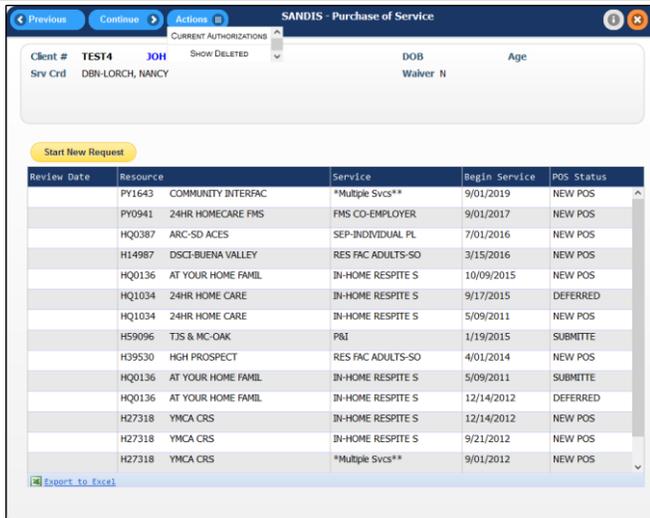


The POS History Screen will display information about the individual's POS Requests in a table with columns that can be right-clicked and then Sorted or Filtered.



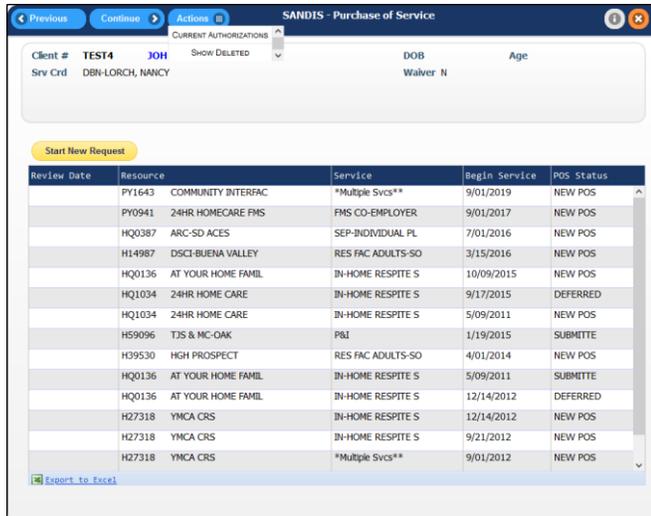
Clicking **Previous** or the **X** will close the POS History screen.

Placing your mouse cursor over the **Actions** menu will display a submenu with options for **deleted POS Requests** or the individual's **Current Authorizations**.



## Create a new POS request

To create a new POS Request, click on the  button.



Client # TEST4 JOH      Show DELETED      DOB      Age  
Srv Crd DBN-LORCH, NANCY      Waiver N

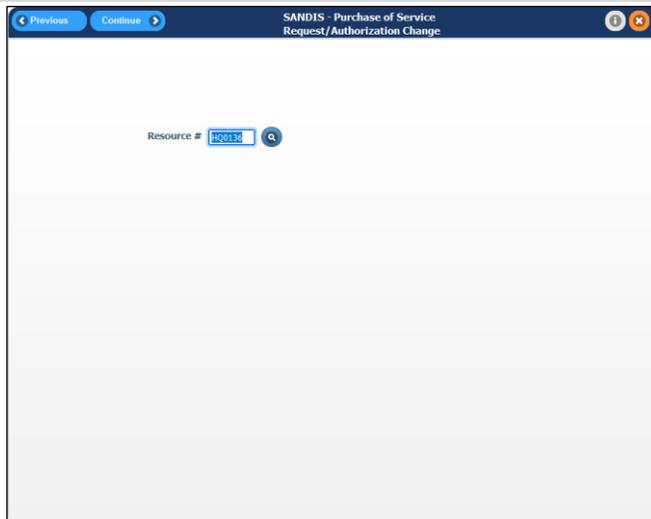
**Start New Request**

Review Date	Resource	Service	Begin Service	POS Status	
	PY1643	COMMUNITY INTERFAC	*Multiple Svcs**	9/01/2019	NEW POS
	PY0941	24HR HOMECARE FMS	FMS CO-EMPLOYER	9/01/2017	NEW POS
	HQ0387	ARC-SD ACES	SEP-INDIVIDUAL PL	7/01/2016	NEW POS
	H14987	DSCI-BUENA VALLEY	RES FAC ADULTS-SO	3/15/2016	NEW POS
	HQ0136	AT YOUR HOME FAMIL	IN-HOME RESPITE S	10/09/2015	NEW POS
	HQ1034	24HR HOME CARE	IN-HOME RESPITE S	9/17/2015	DEFERRED
	HQ1034	24HR HOME CARE	IN-HOME RESPITE S	5/09/2011	NEW POS
	H59096	TJS & MC-OAK	P&I	1/19/2015	SUBMITTE
	H39530	HGH PROSPECT	RES FAC ADULTS-SO	4/01/2014	NEW POS
	HQ0136	AT YOUR HOME FAMIL	IN-HOME RESPITE S	5/09/2011	SUBMITTE
	HQ0136	AT YOUR HOME FAMIL	IN-HOME RESPITE S	12/14/2012	DEFERRED
	H27318	YMCA CRS	IN-HOME RESPITE S	12/14/2012	NEW POS
	H27318	YMCA CRS	IN-HOME RESPITE S	9/21/2012	NEW POS
	H27318	YMCA CRS	*Multiple Svcs**	9/01/2012	NEW POS



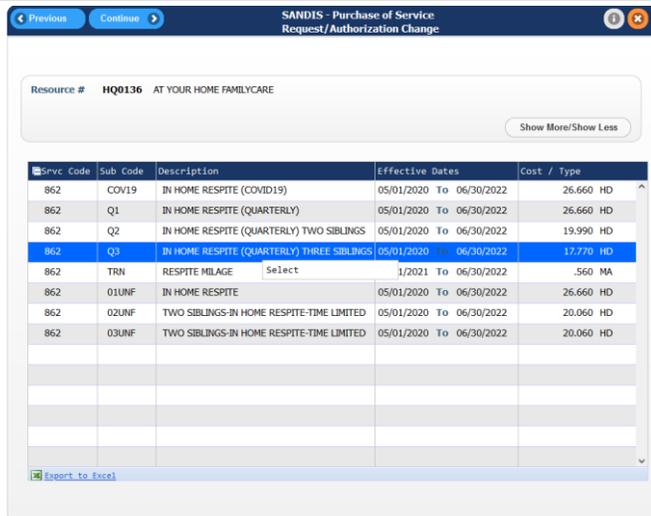
Enter the desired Resource number for which this POS is being requested or click  to find a Vendor using the **Resource by Name** search feature.

Click  to advance to the Resource's Rate Table to select the Service and Sub-Code desired.



Resource #  

The selected Resource's Rate Table provides information related to the various rates associated with the vendor. The columns in the table are sortable and can also be searched after being right-clicked and the option being taken. Find the desired Service Code and Sub-code from within the table, right-click the record and choose **"Select"** to advance.

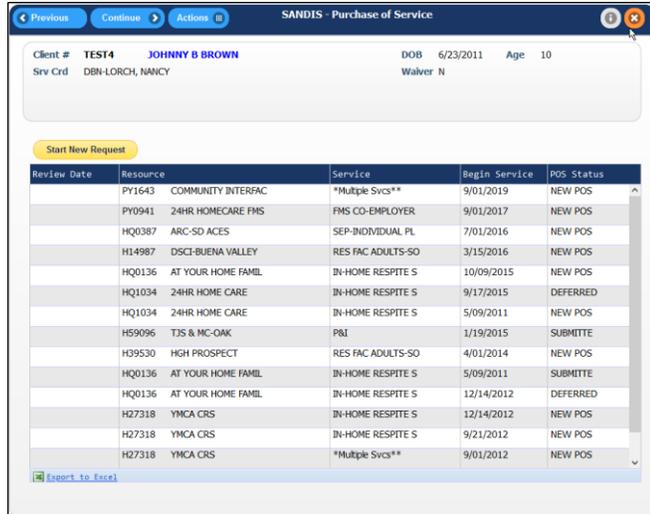


Resource # HQ0136 AT YOUR HOME FAMILYCARE Show More/Show Less

Svcs Code	Sub Code	Description	Effective Dates	Cost / Type
862	COV19	IN HOME RESPITE (COVID19)	05/01/2020 To 06/30/2022	26.660 HD
862	Q1	IN HOME RESPITE (QUARTERLY)	05/01/2020 To 06/30/2022	26.660 HD
862	Q2	IN HOME RESPITE (QUARTERLY) TWO SIBLINGS	05/01/2020 To 06/30/2022	19.990 HD
862	Q3	IN HOME RESPITE (QUARTERLY) THREE SIBLINGS	05/01/2020 To 06/30/2022	17.770 HD
862	TRN	RESPITE MILEAGE <span>Select</span>	1/2021 To 06/30/2022	.560 MA
862	01UNF	IN HOME RESPITE	05/01/2020 To 06/30/2022	26.660 HD
862	02UNF	TWO SIBLINGS-IN HOME RESPITE-TIME LIMITED	05/01/2020 To 06/30/2022	20.060 HD
862	03UNF	TWO SIBLINGS-IN HOME RESPITE-TIME LIMITED	05/01/2020 To 06/30/2022	20.060 HD

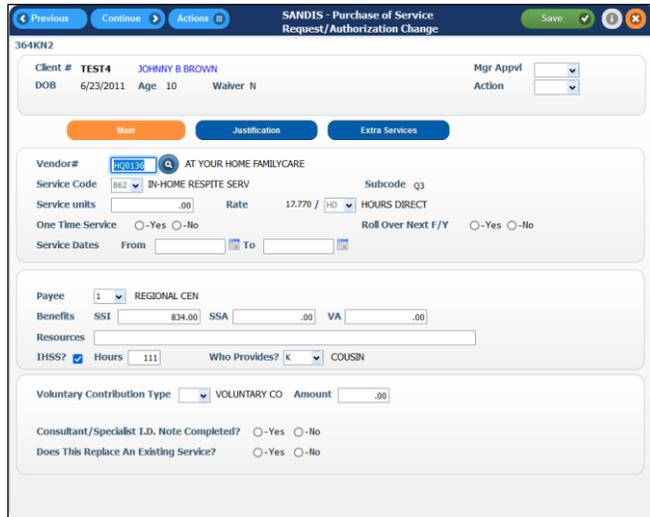


Clicking  or the  will return to the POS History screen **without** creating a POS Request.



Review Date	Resource	Service	Begin Service	POS Status	
	PY1643	COMMUNITY INTERFAC	*Multiple Svcs**	9/01/2019	NEW POS
	PY0941	24HR HOMECARE FMS	PMS CO-EMPLOYER	9/01/2017	NEW POS
	HQ0387	ARC-SD ACES	SEP-INDIVIDUAL PL	7/01/2016	NEW POS
	H14987	DSCI-BUENA VALLEY	RES FAC ADULTS-SO	3/15/2016	NEW POS
	HQ0136	AT YOUR HOME FAMIL	IN-HOME RESPITE S	10/09/2015	NEW POS
	HQ1034	24HR HOME CARE	IN-HOME RESPITE S	9/17/2015	DEFERRED
	HQ1034	24HR HOME CARE	IN-HOME RESPITE S	5/09/2011	NEW POS
	H59096	TJS & MC-OAK	P&I	1/19/2015	SUBMITTE
	H39530	HGH PROSPECT	RES FAC ADULTS-SO	4/01/2014	NEW POS
	HQ0136	AT YOUR HOME FAMIL	IN-HOME RESPITE S	5/09/2011	SUBMITTE
	HQ0136	AT YOUR HOME FAMIL	IN-HOME RESPITE S	12/14/2012	DEFERRED
	H27318	YMCA CRS	IN-HOME RESPITE S	12/14/2012	NEW POS
	H27318	YMCA CRS	IN-HOME RESPITE S	9/21/2012	NEW POS
	H27318	YMCA CRS	*Multiple Svcs**	9/01/2012	NEW POS

Once a Service and Sub-Code have been selected from the Resource's Rate Table, the Main page of the POS Request will load. Enter the necessary information into the different fields as necessary on the **Main** tab.



Client # TEST4 JOHNNY B BROWN DOB 6/23/2011 Age 10 Walver N

Mgr Appvl [dropdown] Action [dropdown]

Vendor# [input] AT YOUR HOME FAMILYCARE

Service Code [input] IN-HOME RESPITE SERV Subcode q3

Service units [input] Rate 17.770 / [input] HOURS DIRECT

One Time Service -Yes -No Roll Over Next F/Y -Yes -No

Service Dates From [input] To [input]

Payee [input] REGIONAL CEN

Benefits SSI 834.00 SSA [input] VA [input]

Resources [input]

IHSS?  Hours 111 Who Provides? [input] COUSIN

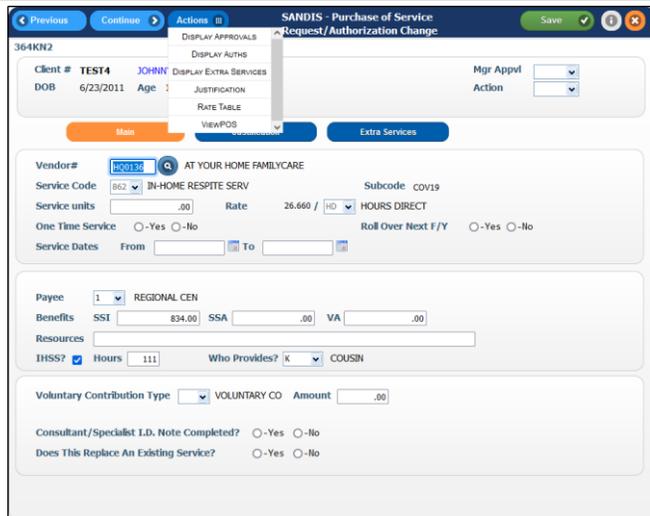
Voluntary Contribution Type [input] VOLUNTARY CO Amount [input]

Consultant/Specialist I.D. Note Completed? -Yes -No

Does This Replace An Existing Service? -Yes -No

Click  to use the **Resource by Name** search to change the Vendor#.

To change the Service Code and/or Sub-code, mouse over  and select **Rate Table** to return to the vendor's rate table and change the selection. The Start (From) and End (To) Dates can be entered manually or by using .



Client # TEST4 JOHNNY B BROWN DOB 6/23/2011 Age 10 Walver N

Mgr Appvl [dropdown] Action [dropdown]

Vendor# [input] AT YOUR HOME FAMILYCARE

Service Code [input] IN-HOME RESPITE SERV Subcode COV19

Service units [input] Rate 26.660 / [input] HOURS DIRECT

One Time Service -Yes -No Roll Over Next F/Y -Yes -No

Service Dates From [input] To [input]

Payee [input] REGIONAL CEN

Benefits SSI 834.00 SSA [input] VA [input]

Resources [input]

IHSS?  Hours 111 Who Provides? [input] COUSIN

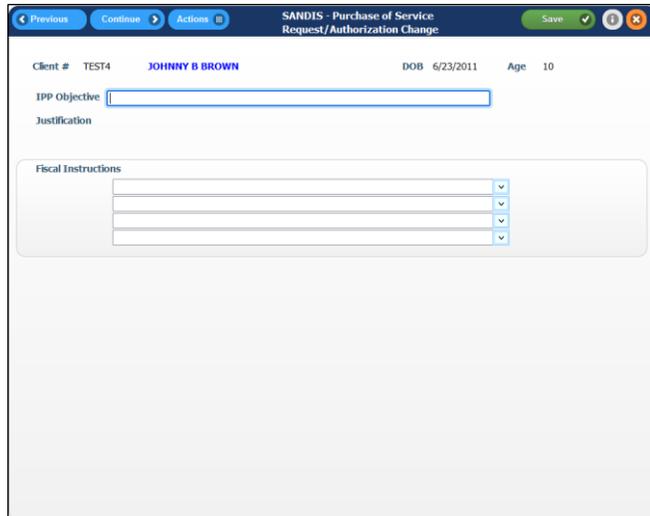
Voluntary Contribution Type [input] VOLUNTARY CO Amount [input]

Consultant/Specialist I.D. Note Completed? -Yes -No

Does This Replace An Existing Service? -Yes -No

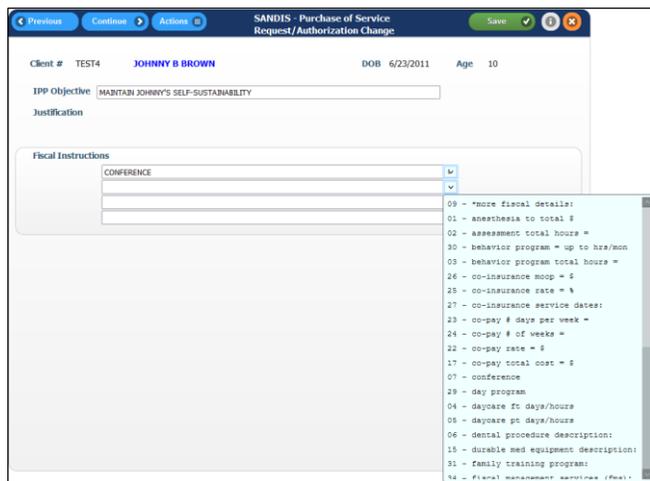
## Justifications Tab

Clicking on the  icon,  icon or the  icon will save any entered information and advance to the Justification tab.



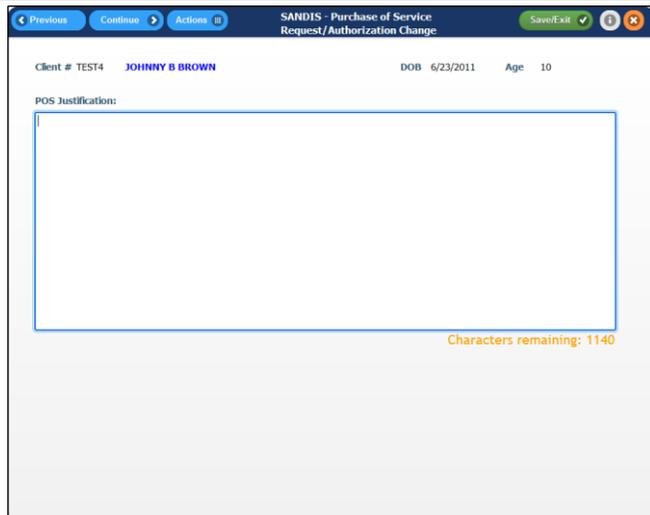
Enter the required information on the Justifications Screen. Each of the fields in the Fiscal Instructions section can be manually entered or a template can be selected from the corresponding drop-down menu and then modified as necessary.

Clicking  will save any entered information and remain on the page. Clicking  will return the page to the main tab.



Click  to be save your work and redirect to the Extra Comments section.

The Extra Comments screen contains a character limited text area where any additional information can be entered.



Clicking **Continue** or **Save/Exit** will save any entered information and return to the POS Request History Screen where the request can be further worked with as needed.

If needed, you can exit the screen without saving changes by clicking on the **✕** icon.

### Extra Services Tab

To add additional services offered by the same vendor to the POS Request, click **Extra Services** and enter desired service and subcodes as needed by clicking on the **Add Service** icon.

Service Code	Sub Code	Type	Units	Rate	
Totals for Primary Service			1.000	26.66	26.66
Additional Services Total			.000	.00	.00
Grand Totals for Services			.000		26.66

A window will prompt to select the units for the desired service code and will also display the rate of the service. Enter the units and any comments as necessary and press **Add** to continue.

Once all services have been added, clicking **✕** on the **Add/Maintain Additional Service Code** window will return the screen to the main tab of POS Request workflow.

## Change a POS request

To make any edits or updates to an existing POS Request, return to the POS History Screen, right-click the desired request and select **Change**.

Once back in the POS Request, changes can then be made to any necessary fields, *the same process as when entering a new POS Request*.

Review Date	Resource	Service	Begin Service	POS Status
	HQ0387 ARC-SD ACES	*Multiple Svcs**	7/01/2016	NEW POS
	HQ0136 AT YOUR HOME FA	Change	2/22/2022	NEW POS
	HQ0136 AT YOUR HOME FA	Copy	2/22/2022	NEW POS
	PY1643 COMMUNITY INTER	Print	9/01/2019	NEW POS
	PY0941 24HR HOMECARE	Retract	9/01/2017	NEW POS
	HQ0387 ARC-SD ACES	Submit	7/01/2016	NEW POS
	H14987 DSCI-BUENA VALLI	View	3/15/2016	NEW POS
	HQ0136 AT YOUR HOME FAMIL	Delete	10/09/2015	NEW POS
	HQ1034 24HR HOME CARE	IN-HOME RESPITE S	9/17/2015	DEFERRED
	HQ1034 24HR HOME CARE	IN-HOME RESPITE S	5/09/2011	NEW POS
	H59096 TJS & MC-OAK	P&I	1/19/2015	SUBMITTE
	H39530 HIGH PROSPECT	RES FAC ADULTS-SO	4/01/2014	NEW POS
	HQ0136 AT YOUR HOME FAMIL	IN-HOME RESPITE S	5/09/2011	SUBMITTE
	HQ0136 AT YOUR HOME FAMIL	IN-HOME RESPITE S	12/14/2012	DEFERRED

Only records in with a **NEW POS** status can be **Changed, Submitted** or **Deleted**.

ERROR MESSAGE

Request already Approved/Denied - Action not allowed

Press the Continue Button

## Submit a POS request

Once all the information is entered correctly for the POS Request, it can be directed to a manager for approval by right-clicking and selecting **Submit**. The Status will change to **Submitted** and the POS Request can no longer be modified.

Review Date	Resource	Service	Begin Service	POS Status
	HQ0387 ARC-SD ACES	*Multiple Svcs**	7/01/2016	NEW POS
	HQ0136 AT YOUR HOME FAMIL	*Multiple Svcs**	2/22/2022	NEW POS
	HQ0136 AT YOUR HOME FAMIL	IN-HOME RESPITE S	2/22/2022	NEW POS
	PY1643 COMMUNITY INTERFAC	*Multiple Svcs**	9/01/2019	NEW POS
	HQ0387 ARC-SD ACES	SEP-INDIVIDUAL PL	7/01/2016	NEW POS
	H14987 DSCI-BUENA VALLEY	RES FAC ADULTS-SO	3/15/2016	NEW POS
	HQ1034 24HR HOME CARE	IN-HOME RESPITE S	9/17/2015	DEFERRED
	HQ1034 24HR HOME CARE	IN-HOME RESPITE S	5/09/2011	NEW POS
	H59096 TJS & MC-OAK	P&I	1/19/2015	SUBMITTE
	H39530 HIGH PROSPECT	RES FAC ADULTS-SO	4/01/2014	NEW POS
	HQ0136 AT YOUR HOME FAMIL	IN-HOME RESPITE S	5/09/2011	SUBMITTE
	HQ0136 AT YOUR HOME FAMIL	IN-HOME RESPITE S	12/14/2012	DEFERRED
	H27318 YMCA CRS	IN-HOME RESPITE S	12/14/2012	NEW POS
	H27318 YMCA CRS	IN-HOME RESPITE S	9/21/2012	NEW POS

## Retract a POS request

A note that has been submitted can be edited once more by retracting it. Simply right-click the submitted record, select **Retract** and the list will refresh with the request converted back to **New POS**.

Review Date	Resource	Service	Begin Service	POS Status	
	HQ0387	ARC-SD ACES	SEP-INDIVIDUAL PL	7/01/2016	NEW POS
	H14987	DISCI-BUENA VALLEY	RES FAC ADULTS-SO	3/15/2016	NEW POS
	HQ0136	AT YOUR HOME FAMIL	IN-HOME RESPITE S	10/09/2015	NEW POS
	HQ1034	24HR HOME CARE	IN-HOME RESPITE S	9/17/2015	DEFERRED
	HQ1034	24HR HOME CARE	IN-HOME RESPITE S	5/09/2011	NEW POS
	H59096	TJS & MC-OAK	P&I	1/19/2015	NEW POS
	H39530	HGH PROSPECT	RES FAC ADULTS-SO	4/01/2014	NEW POS
	HQ0136	AT YOUR HOME FAMIL	IN-HOME RESPITE S	5/09/2011	SUBMITTED
	HQ0136	AT YOUR HOME FAMIL	IN-HOME RESPITE S		Change
	H27318	YMCA CRS	IN-HOME RESPITE S		Copy
	H27318	YMCA CRS	IN-HOME RESPITE S		Print
	H27318	YMCA CRS	*Multiple Svcs**		Retract
	PQ4333	INNOVATIVE THERAPY	ES OT/PT/ST SPEC		Submit
	HQ0136	AT YOUR HOME FAMIL	IN-HOME RESPITE S		View
					Delete

## Delete a POS request

If a POS Request needs to be deleted, right-clicking and selecting **Delete** will mark the POS Request for deletion and remove it from the POS History screen.

*Only POS Requests in NEW POS status can be deleted.*

Review Date	Resource	Service	Begin Service	POS Status	
	HQ0387	ARC-SD ACES	*Multiple Svcs**	7/01/2016	NEW POS
	HQ0136	AT YOUR HOME FAMIL	*Multiple Svcs**	2/22/2022	NEW POS
	HQ0136	AT YOUR HOME FAMIL	IN-HOME RESPITE S	2/22/2022	NEW POS
	PY1643	COMMUNITY INTERFAC	*Multiple Svcs**	9/01/2019	NEW POS
	HQ0387	ARC-SD ACES	SEP-INDIVIDUAL PL	7/01/2016	NEW POS
	H14987	DISCI-BUENA VALLEY	RES FAC ADULTS-SO		W POS
	HQ1034	24HR HOME CARE	IN-HOME RESPITE S		FERRED
	HQ1034	24HR HOME CARE	IN-HOME RESPITE S		W POS
	H59096	TJS & MC-OAK	P&I		W POS
	H39530	HGH PROSPECT	RES FAC ADULTS-SO		W POS
	HQ0136	AT YOUR HOME FAMIL	IN-HOME RESPITE S		SUBMITTED
	HQ0136	AT YOUR HOME FAMIL	IN-HOME RESPITE S		FERRED
	H27318	YMCA CRS	IN-HOME RESPITE S	12/14/2012	NEW POS
	H27318	YMCA CRS	IN-HOME RESPITE S	9/21/2012	NEW POS

## Copy a POS request

To copy a previous POS Request, right-click the desired POS Request and select **Copy** to begin a NEW POS Request, will all of the targeted Request's information.

Review Date	Resource	Service	Begin Service	POS Status	
	PY1643	COMMUNITY INTERFAC	*Multiple Svcs**	9/01/2019	NEW POS
	PY0941	Change	FMS CO-EMPLOYER	9/01/2017	NEW POS
	HQ0387	Copy	SEP-INDIVIDUAL PL	7/01/2016	NEW POS
	H14987	Print	RES FAC ADULTS-SO	3/15/2016	NEW POS
	HQ0136	Retract	IN-HOME RESPITE S	10/09/2015	NEW POS
	HQ1034	Submit	IN-HOME RESPITE S	9/17/2015	DEFERRED
	HQ1034	View	IN-HOME RESPITE S	5/09/2011	NEW POS
	H59096	Delete	P&I	1/19/2015	SUBMITTED
	H39530	HGH PROSPECT	RES FAC ADULTS-SO	4/01/2014	NEW POS
	HQ0136	AT YOUR HOME FAMIL	IN-HOME RESPITE S	5/09/2011	SUBMITTED
	HQ0136	AT YOUR HOME FAMIL	IN-HOME RESPITE S	12/14/2012	DEFERRED
	H27318	YMCA CRS	IN-HOME RESPITE S	12/14/2012	NEW POS
	H27318	YMCA CRS	IN-HOME RESPITE S	9/21/2012	NEW POS
	H27318	YMCA CRS	*Multiple Svcs**	9/01/2012	NEW POS

The new request will load the copied request's information and have all sections pre-filled. Select all the required information and press **Continue** to advance through the POS workflow.

The process to complete a copied request will be the same as a new request.

### Viewing a POS request

Right-clicking and selecting **View** will load the contents of the POS Request in the POS Interface but in View Only mode

Review Date	Resource	Service	Begin Service	POS Status	
	PY1643	COMMUNITY INTERFAC	*Multiple Svcs**	9/01/2019	NEW POS
	PY0941	Change	FMS CO-EMPLOYER	9/01/2017	NEW POS
	HQ038	Copy	SEP-INDIVIDUAL PL	7/01/2016	NEW POS
	H1498	Print	RES FAC ADULTS-SO	3/15/2016	NEW POS
	HQ013	Retract	IN-HOME RESPITE S	10/09/2015	NEW POS
	HQ103	Submit	IN-HOME RESPITE S	9/17/2015	DEFERRED
	HQ103	View	IN-HOME RESPITE S	5/09/2011	NEW POS
	H59096	Delete L2 & ML LINK	P&I	1/19/2015	SUBMITTE
	H9530	HIGH PROSPECT	RES FAC ADULTS-SO	4/01/2014	NEW POS
	HQ0136	AT YOUR HOME FAMIL	IN-HOME RESPITE S	5/09/2011	SUBMITTE
	HQ0136	AT YOUR HOME FAMIL	IN-HOME RESPITE S	12/14/2012	DEFERRED
	H27318	YMCA CRS	IN-HOME RESPITE S	12/14/2012	NEW POS
	H27318	YMCA CRS	IN-HOME RESPITE S	9/21/2012	NEW POS
	H27318	YMCA CRS	*Multiple Svcs**	9/01/2012	NEW POS

### Printing a POS request

Right-clicking and selecting **Print** will load the contents of the POS Request in a report format

Click  after selecting to print the report or email the report to yourself as a PDF. Clicking  will exit without performing any action.

