

Summit 4: Pay for Performance and Billing

Supports Coordination Organization
Performance-Based Contracting

September 15, 2025



Agenda

- Introduction
- Changes to Rates and Billing Methodology
- Pay for Performance
- PBC Resources
- Next Steps

Performance-Based Contracting: Aligning Payment with Outcomes



1915(b)(4) Alternative Payment Methodology

- New rate methodology – monthly payments
- Pay for Performance (P4P)

Continuity of Care

- All SCOs regardless of current performance contracted
- Stabilization and reconciliation adjustments
- P4P



Performance Based Contracting

Over time -

SCO payment increasingly
dependent on performance.

Only SCOs able to meet
performance measures will
have contracts.



Changing Mindset:

Payment Model Impact on Outcomes

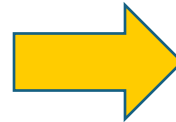


Pennsylvania
Department of Human Services
Office of Developmental Programs

15 Minute Units

**SCO reimbursed when SC completes
discrete process-oriented tasks**

Quantity focused



PBC Payments

**SCOs must meet performance
measures**

Quality focused



Continuity of Care

Service disruption avoidance

- All SCOs enrolled January 1st have an opportunity to contract, regardless of current performance
- QM Plan to correct deficiencies
- Phase-in of performance measures

Payment structure to support systems change

- Predictability of billable activities
- Funding for capacity building
 - ✓ FY25-26 P4P up to 3% revenue x 2
 - ✓ FY26-27 P4P 3% of revenue
- 3 year stabilization and reconciliation adjustments

Changes to Billing Methodology



Support Coordination Payment Structure Effective July 1, 2026

Supports Coordination Level	Payout	Per Individual Rate
Standard Targeted Support Management	Two outcome payments available annually – (Completion of ISP and 1 individual monitoring (separate from the date of the ISP)	\$606.00
Intensive Targeted Support Management / PFDS	Monthly payment – must meet minimum activity standards to bill	\$295.00
Community Living and Consolidated waiver	Monthly payment – must meet minimum activity standards to bill	\$334.01
Initial ISP Development	One time payment	\$1,196.28



Associate SC

What they are:

- A new role starting January 2026 that allows SCOs to use staff with less credentialing than a SC for certain activities.
- Designed to give SCOs more flexibility and help address workforce shortages

Why it matters:

- Expands the Supports Coordination workforce.
- Helps SCOs retain SCs for higher-level functions while delegating some activities to Associates
- Aligns with PBC's emphasis on flexibility, sustainability, and workforce stability.

Training & Requirements:

- Must complete SC Orientation and First Year Training (same as SCs).
- If facilitating Charting the LifeCourse tools: must have 1+ years of experience with people with ID/A and complete the CtLC Learner Pathways Practitioner-level course.
- Standard ODP provider background checks also apply

What they can do:

- Perform some functions previously limited to SCs, for example:
 - Facilitating the use of Charting the LifeCourse tools with individuals and families.
 - Supporting monitoring activities.
 - Assisting with plan development tasks (within defined limits)



Standard TSM



Allowable Billing Frequency	Minimum Requirements for Billing	Activity Requirements (what did the SC do?)	Documentation/Claim Substantiation	Associate SC Activities
Program Enrollment Type: Standard TSM (SC only, Base funded services[1], ICF/ID)				
Maximum of twice annually	Delivery and documentation of at least one activity from list A, the minimum billing standard is met:			
	1. Individual monitoring tool completion	1. Real time/ Face-to-Face Individual Monitoring	1. Individual Monitoring tool is complete, service note documenting completion of Individual Monitoring	
	2. Annual ISP meeting	2. Annual ISP meeting and plan development	2. Service note documenting Annual ISP meeting and annual ISP is completed	
	3. Participation in the individual's SIS assessment.	3. Face to face or virtual participation in SIS assessment	3. Service note documenting SC's participation in SIS assessment	
	4. Completion of Lifecourse Tools	4. SC completes Lifecourse Tools with an individual	4. Service note documenting completion of Lifecourse Tool(s).	x
	5. Individual wellness check	5. SC visits the individual at the request of individual, family, AE, ODP, etc	5. Service note documenting SC's actions related to wellness check	

Intensive TSM & P/FDS – List A



Allowable Billing Frequency	Minimum Requirements for Billing	Activity Requirements (what did the SC do?)	Documentation/Claim Substantiation	Associate SC Activities
Program Enrollment Type: Intensive TSM and PFDS Waiver (SC only, Base funded services, ICF/institution/hospital transition, PFDS Waiver)				
Monthly	<p><i>For P/FDS participants, monitoring frequency as described in Waivers applies.</i></p> <p><i>Meet requirements of List A or List B</i></p> <p>List A: Delivery and documentation of at least one activity from list A, the minimum monthly billing standard is met:</p>			
	1. Individual monitoring tool completion	1. Real time/Face-to-Face Individual Monitoring[2]	1. Individual Monitoring tool is completed, service note documenting completion of Individual Monitoring	
	2. Facilitating Annual ISP meeting	2. Facilitate annual ISP meeting and plan development	2. Service note documenting annual ISP meeting and annual ISP is completed	
	3. Facilitating ISP team meeting	3. Facilitate real time/face-to-face ISP team meeting	3. Service note documenting team meeting	
	4. Updates to the ISP (Critical Revision, Fiscal Year Renewal)	4. SC generates updated ISP	4. ISP is updated; service note reflects actions taken in ISP to update content or revise services	
	5. Facilitation of/Completion of a Lifecourse tool with individual/family	5. Facilitation/completion of Lifecourse Tool (trajectory, star...)	5. Service notes with documentation of meeting to gather information x for facilitation of/completing Lifecourse tools and/or completed Lifecourse tool	
	6. Participation in the individual's SIS assessment or SIS discrepancy review process	6. Participates in SIS assessment or SIS discrepancy review process	6. Service note documenting SC's participation in SIS assessment or SIS discrepancy review	
	7. Incident management activities, including reporting, participation in the administrative review, verification of corrective action, or follow-up on concern or grievance.	7. SC or SCO enters an incident in EIM or its successor or completes activities in EIM related to a specific incident for an individual. This may also include participation in the administrative review, verification of corrective action, follow-up on concerns or grievances.	7. Service note documenting SC's actions related to incident.	
	8. Making referrals to ODP service providers.	8. SC or other agency representative makes directed referrals to qualified ODP service providers.	8. Service note documenting referral efforts	
	9. Individual wellness check	9. SC visits the individual at the request of individual, family, AE, ODP, etc.	9. Service note documenting SC's actions related to wellness check.	
	10. Attending meetings not facilitated by the SC including Individualized Education Program planning meeting, interagency meeting, court hearings, etc.	10. Attend meeting, real time, face to face or virtual, directly related to a specific individual	10. Service note documenting meeting attendance and summary of meeting	

Intensive TSM & P/FDS – List B



Allowable Billing Frequency	Minimum Requirements for Billing	Activity Requirements (what did the SC do?)	Documentation/Claim Substantiation	Associate SC Activities
	activities from List B, the minimum monthly billing standard is met: NOTE: The two activities can be the same activity, twice in a one-month period.			
	1. Phone call with individual or their surrogate	1. Phone call with individual or their surrogate	1. Service note documenting phone call with individual or surrogate	x
	2. Written correspondence with individual or their surrogate	2. Written correspondence with the individual or their surrogate	2. Service note documenting issuance of written communication	x
	3. Direct contact with an individual's team member in which the SC gathers information to assess or monitor the individual: ex: Phone call or personal contact, email exchange, letter/correspondence exchange	3. Direct contact with an individual's team member in which the SC gathers information to assess or monitor the individual: ex: Phone call or personal contact, email exchange, letter/correspondence exchange	3. Service note documenting phone call that demonstrates the purpose of the activity and that it is relative to a referral/linkage, monitoring of services, ensuring health and safety related to the needs and risks of the individual	x
	4. Direct contact with other agencies such as providers or community resources, insurance companies, Office of Vocational Rehabilitation (OVR) or County Assistance Offices (CAO), to maintain benefits or make referrals that are appropriate for the individual: ex: Phone call or personal contact, email exchange, letter/correspondence exchange	4. Direct contact with other agencies such as providers or community resources, insurance companies, OVR, or County Assistance Offices to make referrals that are appropriate for the individual ex: Phone call or personal contact, email exchange, letter/correspondence exchange in which the SC gathers information to provide to the individual or team	4. Service note documenting contact that demonstrates the purpose of the communication.	x
	5. Review of documentation or records ex: provider records, variance process, SIS review, etc.	5. Review of documentation or records that is of direct benefit to the individual	5. Service note documenting record reviewed and benefit to the individual	x
	6. IM4Q closing the loop activities	6. Review, follow up, and data entry related to IM4Q	6. IM4Q activity in HCSIS, service note documenting IM4Q activity	x
	7. Updating PUNS	7. Update individual's PUNS status or related information	7. Updated PUNS, service note documenting PUNS related activity	
	8. Completing forms on behalf of or with an individual ex: variance form, applications, etc.	8. SC completes a variance form or assists an individual with an application or paperwork	8. Service note documenting form or assistance provided on behalf of or with an individual	x
	9. Completing a General Update to the ISP	9. SC completes a General Update to the ISP	9. Completed General Update and service note documenting changes made to the ISP	

Consolidated and Community Living Waiver List -A



Allowable Billing Frequency	Minimum Requirements for Billing	Activity Requirements (what did the SC do?)	Documentation/Claim Substantiation	Associate SC Activities
Program Enrollment Type: Consolidated and Community Living Waiver				
Monthly	<p><i>For Consolidated and Community Living Waiver participants, monitoring frequency as described in Waivers applies.</i></p> <p><i>Meet requirements of List A or List B</i></p> <p>List A: Delivery and documentation of at least one activity from list A, the minimum monthly billing</p>			
	1. Individual monitoring	1. Real time/Face-to-Face Individual Monitoring	1. Individual Monitoring tool is completed, service note documenting completion of Individual Monitoring	
	2. Facilitating Annual ISP meeting	2. Facilitate annual ISP meeting and plan development	2. Service note documenting annual ISP meeting and annual ISP is completed	
	3. Facilitating ISP team meeting	3. Facilitate ISP team meeting	3. Service note documenting team meeting	
	4. Updates to the ISP (Critical Revision, General Update, Fiscal Year Renewal)	4. SC generates updated ISP	4. ISP is updated, service note reflects actions taken in ISP to update content or revise services	
	5. Facilitation of/Completion of a Lifecourse tool with individual/family	5. Facilitation/completion of Lifecourse Tool (trajectory, star...)	5. Service notes with documentation of meeting to gather information for facilitation of/completing Lifecourse tools and/or completed Lifecourse tool	x
	6. Participation in the individual's SIS assessment or SIS discrepancy review process	6. Participates in SIS assessment or SIS discrepancy review process	6. Service note documenting SC's participation in SIS assessment or SIS discrepancy review	
	7. Incident management activities, including reporting, participation in the administrative review, verification of corrective action, or follow-up on concern or grievance.	7. SC or SCO enters an incident in EIM or its successor or completes activities in EIM related to a specific incident for an individual.	7. Service note documenting SC's actions related to incident.	
	8. Making referrals to ODP service providers.	8. SC or other agency representative makes directed referrals to qualified ODP service providers.	8. Service note documenting referral efforts	

Consolidated and Community Living Waiver List -B



Allowable Billing Frequency	Minimum Requirements for Billing	Activity Requirements (what did the SC do?)	Documentation/Claim Substantiation	Associate SC Activities
Monthly	List B: Delivery and documentation of at least two activities from List B, the minimum monthly billing standard is met:			
	1. Phone call with individual or their surrogate	1. Phone call with individual or their surrogate	1. Service note documenting phone call with individual or surrogate	x
	2. Written correspondence with individual or their surrogate	2. Written correspondence with the individual or their surrogate	2. Service note documenting issuance of written communication	x
	3. Direct contact with an individual's team member in which the SC gathers information to assess or monitor the individual: ex: Phone call or personal contact, email exchange, letter/correspondence	3. Direct contact with an individual's team member in which the SC gathers information to assess or monitor the individual: ex: Phone call or personal contact, email exchange, letter/correspondence	3. Service note documenting contact with team members to gather information, monitor or assess.	x
	4. Direct contact with other agencies such as providers or community resources, insurance companies, Office of Vocational Rehabilitation (OVR) or County Assistance Offices (CAO), to maintain benefits or make referrals that are appropriate for the individual: ex: Phone call or personal contact, email exchange, letter/correspondence exchange	4. Direct contact with other agencies such as providers or community resources, insurance companies, OVR, or County Assistance Offices to make referrals that are appropriate for the individual ex: Phone call or personal contact, email exchange, letter/ correspondence exchange in which the SC gathers information to provide to the	4. Service note documenting contact that demonstrates the purpose of the communication.	x
	5. Review of documentation or records ex: provider records, variance process, SIS review, etc	5. Review of documentation or records that is of direct benefit to the individual	5. Service note documenting meeting attendance and summary of meeting	x
	6. IM4Q closing the loop activities	6. Review, follow up, and data entry related to IM4Q	6. IM4Q activity in HCSIS, service note documenting IM4Q activity	x
	7. Updating PUNS	7. Update individual's PUNS status or related information	7. Updated PUNS, service note documenting PUNS related activity	x
	8. Completing forms on behalf of or with an individual ex: variance form, applications, etc.	8. SC completes a variance form or assists an individual with an application or paperwork	8. Service note documenting form or assistance provided on behalf of or with an individual	x
	9. Completing a General Update to the ISP	9. SC completes a General Update to the ISP	9. Completed General Update and service note documenting changes made to the ISP	x
[1] Base funded Supports Coordination services will continue to be delivered and paid on the existing 15-minute unit fee schedule		[2] Deviation of monitoring frequency and location requirements for individuals in the Consolidated, Community Living and P/FDS Waivers: During the time when an individual is receiving a waiver service on a less than monthly basis or on temporary travel, the SC shall conduct monthly phone monitorings with at least one SC teleservice monitoring occurring every three months.		

Questions and Answers

P4P Payments

Definitions for SCO Pay-for-Performance (P4P)



- **Baseline data:** Initial data collected on a specific date (e.g., 07/01/2025) or date range (calendar year 2025) that is used as a reference point to measure future growth and performance improvements, and to establish targets, and future benchmarks.
- **Milestones:** Specific, measurable objectives or stages of progress that must be achieved by a certain deadline as part of the P4P program. Each milestone comes with its own set of criteria, deadlines, and documentation requirements, and SCOs receive supplemental payments based on meeting or exceeding these milestones.
- **Technology solutions:** Any hardware, software, digital system, training, or consultation used to enhance the efficiency, quality of care, and operational management of SCOs; including strategies for individuals to increase the use of supportive technology (i.e., assistive technology, remote supports).

Pay for Performance (P4P)



Pennsylvania
Department of Human Services
Office of Developmental Programs

Two (2) optional initiatives designed to support SCOs to **BUILD CAPACITY:**

1. Person-Centered Planning Through **Credentialing**

- Submit a plan to expand capacity through training and credentialing
- Up to 3% of total ODP-eligible SCO revenue in FY24-25 (base funds and AAW revenue excluded)
- Total statewide available \$3.8M
- Plan submissions: Oct 1- Nov 1, Payments: Jan 2026

2. Person-Centered Applications of **Technology**

- Submit a plan that includes technology solutions aimed to improve the quality of care and individual outcomes by expanding access to supportive technology or other technology solutions such as data management systems.
- Up to 3% of total ODP-eligible SCO revenue in FY24-25 (base funds and AAW revenue excluded)
- Total statewide available \$3.8M
- Plan submissions: Oct 1- Nov 1, Payments: Jan 2026

Pay For Performance (P4P):

FY26-27 Improvement in Targeted Individual Outcomes



Pennsylvania
Department of Human Services
Office of Developmental Programs

SCOs that demonstrate effective use of person-centered practices by **achieving at least 1 of the below 4 targets are eligible for a milestone 2 payment.**

Employment (Target 1)

Increase the combined percentage of working age individuals that are receiving Career Assessment or Job Finding services through ODP or OVR AND individuals competitively employed in integrated settings (working age participants only and adjusted for acuity) from the SCO's calendar year 2025 baseline.

Continuum of Services (Target 2)

Increase the percentage of individuals using Supported Living, Life Sharing, or Housing Transition and Tenancy Services from the SCO's calendar year 2025 baseline.

Continuum of Services (Target 3)

Increase the percentage of individuals using non-residential services from the SCO's calendar year 2025 baseline.

Technology (Target 4)

Increase number of unique individuals using either remote supports or assistive technology from the calendar year 2025 baseline.



P4P Payments

- Method of payment – gross adjustments
 - Notification letters will include initiative payment amount(s) and SLC to which payment(s) will be made.
 - The P4P payment(s) will be the default payment method for the SLC in PROMISe (EFT or check).

SCO Data Submission Form – P4P

Pay for Performance (P4P) Initiative Program

SCOs will have the opportunity to earn additional compensation through an alternative payment model (APM) called P4P. P4P provides added initiative payments to SCOs that deliver high-quality and cost-efficient care. P4P payments will be made to eligible SCOs that meet or exceed performance targets in staff accreditation in person-centered planning and implementation of technology. When implemented, these payments will be in addition to the established rates and will be made if performance outcomes are achieved.

SCOs will be eligible for P4P payment initiatives to both invest in and reward capacity building and high-quality service delivery. P4P will also advance ODP's goal of aligning SCO payment with outcomes.

Question: Which P4P initiatives would your SCO like to apply for?

- ☐ Capacity Building for Person-Centered Planning - Credentialing
- ☐ Capacity Building for Person-Centered Planning - Technology
- ☐ My SCO will not apply for P4P initiatives

Pay for Performance: Credentialing and Technology

Capacity Building



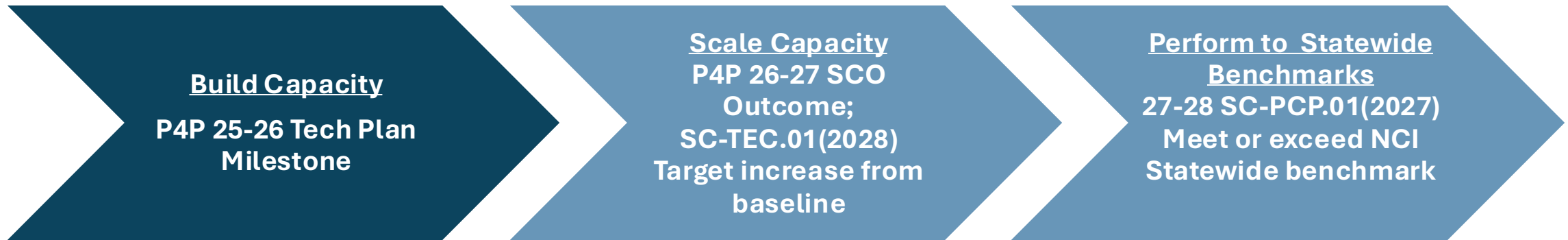
Pennsylvania
Department of Human Services
Office of Developmental Programs

- Assessment of Needs
- Workforce - Knowledge and Skills
- Infrastructure
- Available Funding
- Efficiency
- Quality
- Customer Service
- Outcomes



Continuous Quality Improvement: Phase-In Measure Design

Technology Example



[SC-PCP.01] Demonstrate effective practices to support individuals with realizing their personal goals

[SC-TEC.01] Demonstrate use of technology to improve health and wellness, and create additional opportunities to increase independence for individuals

SCO Data Submission Form – P4P (Credentialing)

P4P Initiative: Capacity Building for Person-Centered Planning Through Credentialing

[If Capacity Building for Person-Centered Planning is selected]

To promote effective person-centered planning for everyone, a Supports Coordination Organization (SCO) must have Supports Coordinators (SCs) with skills and knowledge in many areas including planning for individuals and families over a person's lifespan, supporting individuals with complex needs, working with teams to ensure individuals that want to work have opportunities to be employed, facilitating alternatives to residential services, and working with local communities to identify non-residential housing options.

SCO Data Submission Form – P4P (Credentialing)

P4P Initiative: Capacity Building for Person-Centered Planning Through Credentialing

Please answer the following questions to provide details about your SCO's plan related to Capacity Building for Person-Centered Planning. This initiative plan supports efforts to strengthen staff skills in areas like planning across the lifespan, supporting complex needs, promoting employment, finding alternatives to residential care, and working with communities on housing options.

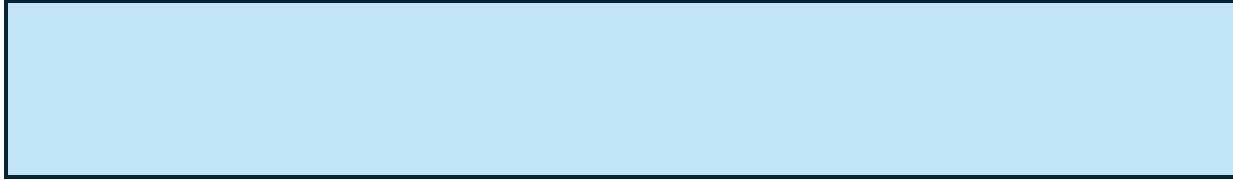
Question: Which training/credentialing program(s) has your SCO initiated (or do you plan to initiate) for SCs, SC Supervisors, and Directors?

- ☐ American Institute of Health Care Professionals (www.aihcp.net)
- ☐ Capacity Building Institute (CBI)
- ☐ Certified Case Manager (CCM) -Commission for Case Manager Certification
- ☐ Certified Community Health Worker (CCHW) - Pennsylvania Certification Board
- ☐ Certified Disability Management Specialist (www.ccmcertification.org)
- ☐ Dual Diagnosis Training Curriculum - ODP
- ☐ Enabling Technology Navigator Certification (ETN)
- ☐ LifeCourse Ambassador - LifeCourse Nexus
- ☐ NADD-CC: Clinical Certification. NADD Dual Diagnosis Specialist Certification
- ☐ NADD-DDS: Dual Diagnosis Specialist Certification. The National Association for the Dually Diagnosed (NADD) Specialist Certification – (https://thenadd.org/?page_id=22741) -
- ☐ Pediatric Capacity Building Institute (PCBI)
- ☐ Pediatric Capacity Building Institute (PCBI) - DHS
- ☐ Person Centered Thinking Trainer Credentialing – The Learning Community for Person Centered Practices – (<https://tlccpcp.com/trainers/become-a-trainer>)
- ☐ Social Role Valorization – International Social Role Valorization Association (complete course work and maintain membership)
- ☐ Other, please specify: _____

SCO Data Submission Form – P4P (Credentialing)

P4P Initiative: Capacity Building for Person-Centered Planning Through Credentialing

Question: How is your SCO structured to support the training/credentialing program(s) indicated in the previous question? Please include: how program(s) are implemented, any associated staff positions, supervision and mentoring, IT/technology, human resources, and knowledge transfer to additional staff.

A light blue rectangular box with a thin black border, intended for the user to provide their response to the question. It is currently empty.

SCO Data Submission Form – P4P (Credentialing)

P4P Initiative: Capacity Building for Person-Centered Planning Through Credentialing

Question: What are the estimated costs associated with purchasing, leasing, or operationalizing the new technology services and/or solutions? Complete the table below with specific line items for each investment or activity.

Expense Type	Amount
Staff Training Wages	
Program Administration Costs	
Staff Bonuses	
Staff Wage Incentives (Annual Cost)	
Consulting	
Certification Fees	
Supplies	
Travel	
Other (See question below)	
Total Budget for Credentialing:	\$0.00

Question: If you included an “Other” line item, please specify its purpose below.

SCO Data Submission Form – P4P (Credentialing)

P4P Initiative: Capacity Building for Person-Centered Planning Through Credentialing

Question: What is the total number of SCO staff who were trained or credentialed as of July 1, 2025?

Question: Please enter the target number and percent of SCO staff you plan to have credentialed by the end of each quarter beginning Jan 1, 2026.

Quarter	Target Number Credentialed	Target Percent Credentialed (%)
Q1 2026		
Q2 2026		
Q3 2026		
Q4 2026		

Question: What timelines and milestones has your SCO established to support implementation of these programs?

SCO Data Submission Form – P4P (Credentialing)

P4P Initiative: Capacity Building for Person-Centered Planning Through Credentialing

Question: SCO attests that:

- All representations and information provided in the preceding questions are accurate.
- Funding requested does not duplicate, but supplements, any funds received through prior ARPA Credentialing Initiative(s).

☐ I attest



Technology: NCI Question

Case manager/service coordinator has talked to them about technology that may help them in their everyday life

State	Average within State	N
PA	37%	555
NCI-IDD Average	32%	15069

SCO Data Submission Form – P4P (Technology)

P4P Initiative: Capacity Building for Person-Centered Applications of Technology

[If Capacity Building for Person-Centered Application of Technology is selected]

Access to technology is necessary for all people in our society, particularly for people with ID/A, to promote self-determination and to engage meaningfully in major aspects of life such as education, health promotion, employment, recreation, and community.¹ As a basic right, technology solutions advance independence, communication, and socialization opportunities and Supports Coordinators have a critical role in facilitating person-centered planning strategies that include technology. Supportive technology solutions are broad, complex, and require an ongoing commitment by an SCO to remain current in a quickly changing environment.

1. Adapted from https://stateofthestates.ku.edu/sites/stateofthestates/files/documents/Rights_Declaration.pdf

SCO Data Submission Form – P4P (Technology)

P4P Initiative: Capacity Building for Person-Centered Applications of Technology

Please answer the following questions about your SCO's plan related to Capacity Building for Person-Centered Applications of Technology. This initiative supports staff training so individuals can use technology for greater independence and participation in daily life. Your plan should focus on improving care and outcomes by expanding access to supportive technology.

Question: Please select the types of technology services and/or solutions the SCO plans to purchase or improve to enhance service delivery within ODP supports coordination services.

- ☐ Staff Training – Technology Systems
- ☐ Technology – Data Management Systems
- ☐ Technology – Customer Relationship Management Solutions
- ☐ Consulting
- ☐ Technology – Artificial Intelligence
- ☐ Other, please specify: _____

Question: Based on the response above, please provide details on the specific technology services or solutions the SCO will purchase or implement.

SCO Data Submission Form – P4P (Technology)

P4P Initiative: Capacity Building for Person-Centered Applications of Technology

Question: What are the specific goals or outcomes your SCO hopes to achieve through these investments in technology services and/or solutions ?

Question: What are the planned dates and timelines for implementing the new technology services and/or solutions ?

Question: Explain how the new technology services and/or solutions will help your SCO meet goals, improve services or achieve better results in areas that are measured or required by PBC.

SCO Data Submission Form – P4P (Technology)

P4P Initiative: Capacity Building for Person-Centered Applications of Technology

Question: What are the estimated costs associated with purchasing, leasing, or operationalizing the new technology services and/or solutions ? Complete the table below with specific line items for each investment or activity.

Expense Type	Amount
Staff Training – Technology Systems	
Program Administration Costs	
Technology – Data Management Systems	
Technology – Customer Relationship Management Solutions	
Consulting	
Technology – Artificial Intelligence	
Technology/Training Supplies	
Travel	
Other (See question below)	
Total Budget for Technology:	\$0.00

Question X: If you included an “Other” line item, please specify its purpose below.

SCO Data Submission Form – P4P (Technology)

P4P Initiative: Capacity Building for Person-Centered Applications of Technology

Question: SCO attests that:

- All representations and information provided in the preceding questions are accurate.
- Funding requested does not duplicate, but rather supplements, any funds received through prior ARPA Technology Initiative(s).

☐ I attest

Questions and Answers

Expect Email Regarding Claims Data



Pennsylvania
Department of Human Services
Office of Developmental Programs

- You will soon receive an email asking if your organization would like ODP to send you average per person aggregated costs from 2024 so you can compare your current experience to that of the new structure.
 - Payment
 - Claims with dates of service from 1/1/24 through 12/31/24, with paid dates through 3/31/25
 - Waiver services with procedure code W7210 and program codes for the P/FDS, Consolidated, and Community Living waivers
 - Targeted Supports Management services with procedure code T1017
 - Months of Service
 - Total months of service between January 2024 through December 2024.
 - Total months of service include each individual receiving Supports Coordination or Targeted Services Management. Individuals who received a TSM service and an SC service in the same month are counted twice. This occurs less than 1% of the time in 2024. While there is minimal duplication, it more accurately represents the actual services delivered.
 - Calculation
 - Total Payment divided by Total Months of Service.
 - Example: \$1,000,000 total payment divided by 4,902 months of service = \$204.00 payment per individual per month.


SCO Rate Structure: Stabilization and Adjustments

Shifting to any new payment system results in increases for some providers and decreases for others. FY26-27 through FY28-29, ODP will minimize these impacts to SCOs through:



Stabilization Payments

- Provide payment(s) to SCOs with a decline in aggregate average revenue per individual of at least 3%.
 - The stabilization payment will be calculated at the SCO level across all waivers and TSM.
 - The payment will not allow an SCO to lose more than 3% during transition to this new rate structure.



Overpayment Adjustment

- Collect payments from SCOs with an increase in aggregate average revenue per member of at least 10%.
 - The overpayment adjustments will be calculated at the SCO level across all waivers and TSM.
 - The payment will not allow any SCO to gain more than 10% during transition to this new rate structure.
 - SCOs with an excess increase in revenue may be required to submit cost reports.



NOTE!

- All SCOs will have the opportunity to apply for P4P initiatives.
- Up to 3% of total ODP-eligible SCO revenue (SCO revenue in FY24-25 [base funds and AAW revenue excluded]) can be requested.
- Payments received through P4P initiatives are not included in calculations for determining stabilization adjustments.

Sample Modeling



Exhibit 1b - Sample Reconciliation by Waiver/Program

For Demonstration Purposes Only, Actual Base Period for Reconciliation will be Different

SCO	CY 2024 Historical Summary Example ¹															
	Consolidated Waiver			Community Living			PIFDS and Intensive TSM			Standard TSM			CY 2024 Total			
	Members	Total 15-Minute Units	Total Payments at 15-minute Unit Rate	Members	Total 15-Minute Units	Total Payments at 15-minute Unit Rate	Members	Total 15-Minute Units	Total Payments at 15-minute Unit Rate	Members	Total 15-Minute Units	Total Payments at 15-minute Unit Rate	Total Members	Total Months of Service	Total Supports Coordination Payments	Average Payments Per Member Per Month
	A	B	\$27.21 * B = C	D	E	\$27.21 * E = F	G	H	\$27.21 * H = I	J	K	\$27.21 * K = L	A + D + G + J = M	M * 9 = N	C + F + I + L = O	O / N = P
SCO 1	30	4,320	\$ 117,547	10	1,440	\$ 39,182	20	1,800	\$ 48,978	10	540	\$ 14,693	70	630	\$ 220,401	\$ 350
SCO 2	30	3,780	\$ 102,854	10	1,260	\$ 34,285	20	1,440	\$ 39,182	10	360	\$ 9,796	70	630	\$ 186,116	\$ 295
SCO 3	30	2,970	\$ 80,814	10	990	\$ 26,938	20	1,080	\$ 29,387	10	180	\$ 4,898	70	630	\$ 142,036	\$ 225

SCO	SFY 2027 Example ²																	
	Consolidated Waiver			Community Living			PIFDS and Intensive TSM			Standard TSM			SFY 2027 Total					
	Members	Total Monthly Units	Total Payments at New Monthly Rate	Members	Total Monthly Units	Total Payments at New Monthly Rate	Members	Total Monthly Units	Total Payments at New Monthly Rate	Members	Total Monthly Units	Total Payments at New Monthly Rate	Total Members	Total Months of Service	Total Supports Coordination Payments	Total Plan Development Payments (W7199) ³	Average Payments Per Member Per Month	
	A	A * 9 = B	\$334.01 * B = C	D	D * 9 = E	\$334.01 * E = F	G	G * 9 = H	\$295 * H = I	J	J * 9 = K	\$101 * K = L	A + D + G + J = M	B + E + H + K = N	C + F + I + L = O	\$1,196.28 * M * (5%) = P	(O + P) / N = Q	
SCO 1	30	270	\$ 90,183	10	90	\$ 30,061	20	180	\$ 53,100	10	90	\$ 9,090	70	630	\$ 182,434	\$ 4,187	\$ 295	
SCO 2	30	270	\$ 90,183	10	90	\$ 30,061	20	180	\$ 53,100	10	90	\$ 9,090	70	630	\$ 182,434	\$ 4,187	\$ 296	
SCO 3	30	270	\$ 90,183	10	90	\$ 30,061	20	180	\$ 53,100	10	90	\$ 9,090	70	630	\$ 182,434	\$ 4,187	\$ 295	

SCO	Reconciliation Example ⁴									
	CY 2024 Total Months of Service	CY 2024 Average Payments per Member Per Month	SFY 2027 Average Payments per Member Per Month	Difference in Average Payments per Member Per Month	% Difference Average Payments per Member Per Month	Allowable PMPM Loss Threshold	Allowable PMPM Gain Threshold	Stabilization Payment (Adjustment) per Member per Month	Estimated Total Stabilization Payment (Adjustment)	
	A	B	C	C - B = D	(C / B) - 1 = E	B * -3% = F	B * 10% = G	E < -3% then F - D E > 10% then G - D else 0 = H	H * A = J	
	SCO 1	630	\$ 350	\$ 296	\$ (54)	-15.3%	\$ (10)	\$ 35	\$ 43	\$ 27,186
SCO 2	630	\$ 295	\$ 296	\$ 1	0.3%	\$ (9)	\$ 30	\$ -	\$ -	
SCO 3	630	\$ 225	\$ 296	\$ 71	31.4%	\$ (7)	\$ 23	\$ (48)	\$ (30,381)	

Notes

1) The data represented for the CY 2024 Historical Summary Example are for demonstration purposes only and assumes an average of 9 months of service per member.

2) SFY 2027 example assumes an average of 9 months of service per member.

3) Total Plan Development Payment calculation assumes 5% of total membership would be new and eligible for the one-time payment of \$1,196.28 (W7199). Actual results will vary.

4) In fiscal years 2026-2027 through 2028-2029, ODP may make additional stabilization payments to SCOs when the aggregated average revenue (payments) per member per month for Supports Coordination and TSM services results in a loss of 3% or greater compared to the prior year's aggregated average revenue per member per month. ODP may also adjust payments to an SCO if the aggregated average revenue per member per month results in a gain of 10% or greater compared to the prior year's aggregated average revenue per member per month. SCOs with an excess increase in revenue may be required to submit cost reports.

PBC Resources



- [PBC SCO Services – MyODP](#)
- Implementation guide
 - Appendix
 - Standards and measures
 - Minimum billing activities and documentation
 - Attestation language (will become part of the MyPBC Portal)
 - Submission tool PDF
 - Updated Provider Agreement
- Complete Planning Toolkit
 - Pre-planning Guide
 - Preparedness Self-assessment Workbook
 - Measures and process details

Next Steps



- SCO Summits, PAS Training, and VOHs

9/15 Payment and Billing	10/1 Virtual Office Hours
9/15 MyPBC Portal Training and Preparedness	10/8 Virtual Office Hours
9/18 Virtual Office Hours	10/16 Virtual Office Hours

- SCO Agreement must be signed and submitted by 9/30/25.