

# Purchase of Service— Authorization Process at HRC

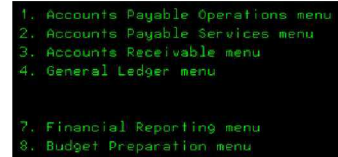
Service Provider Advisory  
Committee Meeting - April 4, 2023

## Client Services

**Virtual Chart**  
Case Management

1. Service Coordinator (SC) submits Purchase of Service (POS) Request in VirtualChart (HRC's case management system).
2. Depending on designated approval level, the POS Request is routed to the appropriate Client Services Manager (CSM) or Director of Client Services for their approval.
3. Once approved, the POS Request is routed to the assigned Accounting staff based on service code.

## Administration/Accounting



1. Accounting staff review the POS Request and enter information in the Uniform Fiscal System (UFS—DDS's accounting system) which generates the Purchase Order and authorization number. UFS bridges to VirtualChart so the SC can see the approved POS Request with the authorization number.
2. New Purchase Orders are automatically emailed weekdays at approximately 4:00 PM.
3. The software that distributes the Purchase Orders also generates an Excel report listing current open POS authorizations. The open authorization report is emailed with the Purchase Orders.

## Tips



- The email is sent encrypted from [HarborAuth@harborrc.org](mailto:HarborAuth@harborrc.org).
- The email is sent to the provider's eBilling Administrator unless another email address is provided.
- We recommend that service provider's use a generic dedicated email address to receive Purchase Orders so more than one person can view the email inbox, rather than assign to an individual.
- The Purchase Order does not capture all the information in the POS Request or Transportation Service Request (TSR). The POS Request also includes diagnosis, list of benefits, and justification of service. The TSR includes special characteristics and destination information.
- The Administration/Accounting contact list by service code can be found at: <https://www.harborrc.org/accounting-billing>.

## Thank you!

- If you have questions or want to check/change the email address receiving Purchase Orders, please email:  
[hrcaccounting@harborrc.org](mailto:hrcaccounting@harborrc.org).

## Sample Documents

1. Purchase of Service Request/Authorized Service  
Generated by Client Services in VirtualChart
2. Purchase Order  
Generated by Accounting in UFS
3. Open POS Authorizations Report  
Excel report sent with Purchase Order(s)

**AUTHORIZED SERVICE**  
HRC PURCHASE OF SERVICE

Authorization #: **2** [REDACTED] **209**

FCPP: No

Date: 02/22/2024

UCI #: [REDACTED]

Name: MICHAEL [REDACTED]

D.O.B.: [REDACTED] [REDACTED] Yrs [REDACTED] Mo

MW: YES

Residence Type: PARENT/RELATIVE/LEGAL GUARDIAN

Diagnosis

Intellectual Disability - Mild;

List of Benefits

SSI - Supplemental Security Income, Medi-Cal - Aid Code: 6E, Medicaid Waiver,

List of Generic Services

[REDACTED]

Vendor #: [REDACTED]

Reset

Start Date: 07/01/2023

Until Revoked

End Date: 04/30/2024

Vendor: [REDACTED]

Svc Code: 862 / In-Home Respite Services Agency

Address: [REDACTED]

Sub Code: AGCY /

[REDACTED]

# of Units: 60.0000 Type: HOURS DIRECT

Phone: 562 [REDACTED]

Fax: 0 - -

Rate: [REDACTED]

Frequency: \_\_\_\_\_

Medicaid Waiver qualifiers addressed by this service: Taking Prescription Meds, Personal Care - Residence, Safety Awareness

Description of Service

Description as entered by:  Initial  SC  Group  Accounting

60 HRS/QTR

**Sample**

Justification of Service

[REDACTED] Michael is a client due [REDACTED]

These hours allow for Michael's parents to take care of personal appointments and take care of their own needs.

Members Present

Review Group: ASA

Retroactive

Exception COVID-19  Planning Team Attachments Req.

Loss of Generic Resource

Entered By: Stacy [REDACTED]

SC: Stacy [REDACTED] (AS [REDACTED])

Consultation With: \_\_\_\_\_

Consultation Date: \_\_\_\_\_

Specialist: \_\_\_\_\_

Verified By: Patricia [REDACTED]

at 02/22/2024 01:28 PM

Authorized By: Marie [REDACTED]

at 02/26/2024 04:24 PM

**PURCHASE ORDER**

Provider of Care Copy



A Project of  
 HARBOR DEVELOPMENTAL DISABILITIES FOUNDATION, INC.  
 21231 Hawthorne Boulevard  
 Torrance, CA 90503  
 (310) 540-1711

Page 3 of 68

DATE: 02/27/24

AUTHORIZATION NO: 2[REDACTED]209

<p><b>VENDOR INFORMATION</b></p> <p>VENDOR NO [REDACTED]</p> <p>NAME [REDACTED]</p> <p>ADDRESS [REDACTED]                  LONG BEACH CA 90809</p> <p>PHONE 562-[REDACTED]</p>	<p><b>CLIENT INFORMATION</b></p> <p>CLIENT ID [REDACTED] BIRTH DATE [REDACTED]</p> <p>NAME [REDACTED] MICHAEL</p> <p>ADDRESS [REDACTED]                  TORRANCE CA 90501</p> <p>PHONE 310-[REDACTED]</p>
--	--

**OFFICE INFORMATION** CASEWORKER: [REDACTED], STACY CASEWORKER ID: AS[REDACTED]

DESCRIPTION OF SERVICES			AUTHORIZED FROM - TO		
AUTHORIZATION UNITS	ACCOUNT CODE	MAX NO. OF MONTHS	MAX. UNITS/MONTH	UNIT COST	MAX. AUTH. AMOUNT
862 AGCY	IN-HOME RESPITE SERV		RESPITE UP TO 90HR/OTR IN-HOME		
60.00	HRS-DIR F/F ONLY/MO		7/01/23 4/30/24		
65	65130	10	60.0000	[REDACTED]	[REDACTED]

Sample

FUNDING AFTER THE END OF CURRENT FISCAL YEAR (6/30 each year) CONTINGENT UPON ADEQUATE STATE FUNDING.

<p><b>COMMENTS</b></p> <p>60 HRS/QTR</p>	<table> <tr> <td>GROSS AUTHORIZED AMOUNT</td> <td>[REDACTED]</td> </tr> <tr> <td>LESS OTHER REVENUE TO VENDOR</td> <td>[REDACTED]</td> </tr> <tr> <td></td> <td>.00</td> </tr> <tr> <td></td> <td>.00</td> </tr> <tr> <td></td> <td>.00</td> </tr> <tr> <td>TOTAL OFFSET OF RC COST</td> <td>.00</td> </tr> <tr> <td>TOTAL RC LIABILITY</td> <td>[REDACTED]</td> </tr> </table>	GROSS AUTHORIZED AMOUNT	[REDACTED]	LESS OTHER REVENUE TO VENDOR	[REDACTED]		.00		.00		.00	TOTAL OFFSET OF RC COST	.00	TOTAL RC LIABILITY	[REDACTED]
GROSS AUTHORIZED AMOUNT	[REDACTED]														
LESS OTHER REVENUE TO VENDOR	[REDACTED]														
	.00														
	.00														
	.00														
TOTAL OFFSET OF RC COST	.00														
TOTAL RC LIABILITY	[REDACTED]														

This Purchase Order contains all of the terms and conditions upon which Harbor Developmental Disabilities Foundation, Inc. ("Harbor Regional Center" or "HRC") hereby purchases materials, supplies, or services from the above-named Service Provider. Please read it carefully. HRC's agreement to purchase such materials, supplies, or services is hereby expressly conditioned upon said Service Provider's unconditional acceptance of all terms and conditions contained herein.

Note also that any other services which involve costs to the Harbor Regional Center must be similarly authorized prior to performance of such service. Rates charged shall be in accordance with and restricted to the State of California Schedule of Maximum Allowance (Part II, Chapter I, Title 17, CAC), R.V.S. 1964, 1969, 1974, Medi-Cal and rates prescribed and set by the State of Calif. Dept. of Developmental Services. **Purchases are subject to all terms and conditions outlined in the Working Agreement between Harbor Regional Center and Service Provider Agreement.**

CLAIMS SUBMITTED BY THE FIFTH OF THE MONTH FOLLOWING THE MONTH OF SERVICE WILL BE PAID IN THE MONTH SUBMITTED. CLAIMS SUBMITTED LATER THAN 90 DAYS AFTER THE CLOSE OF THE FISCAL YEAR WILL NOT BE HONORED.

Administrative Approval \_\_\_\_\_

Date 02/27/2024

Provider ID	Auth No	Auth Date	UCI	Last Name	First Name	Service Code	Sub Code	Units	Unit Type	Frequency	Start Date	End Date	SC ID	SC Name	Unit
H	24	373	06/30/2023	7	R	JONATHAN	862 AGCY	90	HD	Q	07/01/2023	06/30/2024	Y	JACQUELINE	YOUTH EAST
H	24	646	06/30/2023	7	M	ANGEL	862 AGCY	72	HD	Q	07/01/2023	08/31/2024	A	JAMES	ADULT CENTRAL
H	24	020	06/30/2023	7	B	JUAN	862 AGCY	90	HD	Q	07/01/2023	02/28/2025	A	MARIA	ADULT WEST
H	24	209	06/30/2023	7	L	MICHAEL	862 AGCY	60	HD	Q	07/01/2023	04/30/2024	A	STACY	ADULT SOUTH
H	24	012	06/30/2023	8	C	MIA	862 AGCY	60	HD	Q	07/01/2023	04/30/2024	Y	RUBY	YOUTH EAST
H	24	866	06/30/2023	7	H	JULIAN	862 AGCY	90	HD	Q	07/01/2023	10/31/2024	C	MELISSA	CHILDREN WEST
H	24	216	06/30/2023	7	A	DAVID	862 AGCY	45	HD	Q	07/01/2023	05/31/2024	A	ALEJANDRA	ADULT EAST CENTRAL
H	24	144	06/30/2023	7	H	CHRISTIAN	862 AGCY	90	HD	Q	07/01/2023	07/31/2024	C	BRENDA	CHILDREN SOUTH CENTRAL
H	24	838	06/30/2023	7	S	EMILY	862 AGCY	72	HD	Q	07/01/2023	09/30/2024	A	SANDRA	ADULT SOUTH
H	24	387	06/30/2023	7	M	STEVEN	862 AGCY	36	HD	Q	07/01/2023	04/30/2024	C	CESAR	CHILDREN NORTH
H	24	032	06/30/2023	7	C	CHRISTOPHER	862 AGCY	90	HD	Q	07/01/2023	05/31/2024	C	SOFIA	CHILDREN CENTRAL
H	24	440	06/30/2023	7	M	MAX	862 AGCY	45	HD	Q	07/01/2023	05/31/2024	A	AMBER	ADULT SOUTH WEST
H	24	320	06/30/2023	8	B	LUKE	862 AGCY	63	HD	Q	07/01/2023	07/31/2024	C	CAROL	CHILDREN WEST
H	24	232	06/30/2023	8	F	KELLY	862 AGCY	45	HD	Q	07/01/2023	09/30/2024	C	SARAH	CHILDREN SOUTH CENTRAL
H	24	625	06/30/2023	8	J	BENJAMIN	862 AGCY	60	HD	Q	07/01/2023	10/31/2024	C	ROBERTO	CHILDREN EAST
H	24	688	06/30/2023	8	F	GABRIEL	862 AGCY	60	HD	Q	07/01/2023	06/30/2024	E	RICARDO	EARLY CHILDHOOD SOUTH WEST
H	24	045	06/30/2023	8	A	JACOB	862 AGCY	63	HD	Q	07/01/2023	06/30/2024	E	CRISTIAN	EARLY CHILDHOOD WEST CENTRAL
H	24	626	06/30/2023	8	D	JOHN	862 AGCY	63	HD	Q	07/01/2023	04/30/2024	C	DUSTIN	CHILDREN SOUTH
H	24	501	06/30/2023	7	C	JESUS	862 AGCY	90	HD	Q	07/01/2023	12/31/2024	Y	VICKY	YOUTH WEST
H	24	766	06/30/2023	8	B	JAMES	862 AGCY	30	HD	Q	07/01/2023	01/31/2025	C	SONIA	CHILDREN CENTRAL
H	24	466	06/30/2023	7	M	NICHOLAS	862 AGCY	42	HD	Q	07/01/2023	06/30/2024	Y	SANDY	YOUTH NORTH
H	24	717	06/30/2023	4	D	DANIEL	862 AGCY	42	HD	Q	07/01/2023	06/30/2024	A	VALERIE	ADULT NORTH
H	24	890	06/30/2023	7	B	SOPHIA	862 AGCY	60	HD	Q	07/01/2023	06/30/2024	E	BRENDA	EARLY CHILDHOOD CENTRAL
H	24	725	06/30/2023	8	C	MATTHEW	862 AGCY	90	HD	Q	07/01/2023	05/31/2024	C	CLAUDIA	CHILDREN CENTRAL
H	24	816	06/30/2023	7	C	DYLAN	862 AGCY	60	HD	Q	07/01/2023	05/31/2024	Y	ED	YOUTH EAST
H	24	965	06/30/2023	8	S	ROBERT	862 AGCY	45	HD	Q	07/01/2023	09/30/2024	E	ESTELLA	EARLY CHILDHOOD-WEST CENTRAL
H	24	260	06/30/2023	7	W	GRACE	862 AGCY	90	HD	Q	07/01/2023	09/30/2024	C	LATOIA	CHILDREN SOUTH
H	24	014	06/30/2023	7	E	MICHAEL	862 AGCY	60	HD	Q	07/01/2023	10/31/2024	A	LUIS	ADULT NORTH
H	24	263	06/30/2023	6	C	ANTHONY	862 AGCY	72	HD	Q	07/01/2023	09/30/2024	Y	WENDY	YOUTH WEST
H	24	254	06/30/2023	7	R	SARA	862 AGCY	90	HD	Q	07/01/2023	10/31/2024	C	CINDY	CHILDREN SOUTH
H	24	238	06/30/2023	8	M	JOHN	862 AGCY	90	HD	Q	07/01/2023	11/30/2024	C	LATOIA	CHILDREN SOUTH
H	24	705	06/30/2023	8	U	WILLIAM	862 AGCY	72	HD	Q	07/01/2023	09/30/2024	C	VALERIE	CHILDREN WEST
H	24	665	06/30/2023	7	D	IAN	862 AGCY	90	HD	Q	07/01/2023	02/28/2025	A	AMBER	ADULT SOUTH WEST
H	24	840	06/30/2023	8	T	ANTHONY	862 AGCY	72	HD	Q	07/01/2023	08/31/2024	C	TERESA	CHILDREN SOUTH
H	24	111	06/30/2023	7	W	JOSHUA	862 AGCY	90	HD	Q	07/01/2023	05/31/2024	A	AMY	ADULT WEST
H	24	749	06/30/2023	8	A	DANIEL	862 AGCY	45	HD	Q	07/01/2023	08/31/2024	C	MARIA	CHILDREN WEST
H	24	593	06/30/2023	8	T	THOMAS	862 AGCY	60	HD	Q	07/01/2023	05/31/2024	C	JULIA	CHILDREN SOUTH
H	24	489	07/28/2023	8	J	ERIC	862 AGCY	42	HD	Q	07/15/2023	01/31/2025	E	ERIKA	EARLY CHILDHOOD SOUTH WEST
H	24	285	08/02/2023	8	C	NOAH	862 AGCY	60	HD	Q	08/01/2023	07/31/2024	E	TAYLOR	EARLY CHILDHOOD-WEST CENTRAL
H	24	405	09/21/2023	7	A	EVAN	862 AGCY	75	HD	Q	10/01/2023	06/30/2024	Y	MICHELLE	YOUTH WEST
H	24	396	10/04/2023	8	S	ISAIAH	862 AGCY	60	HD	Q	10/01/2023	09/30/2024	E	KAREN	EARLY CHILDHOOD WEST CENTRAL
H	24	207	10/12/2023	5	A	SARAH	862 AGCY	90	HD	Q	10/01/2023	09/30/2024	A	DREW	ADULT CENTRAL
H	24	821	12/07/2023	8	R	ETHAN	862 AGCY	48	HD	Q	11/20/2023	08/31/2024	E	MAYRA	EARLY CHILDHOOD SOUTH WEST

Sample