

Office of Long-Term Living (OLTL) Fiscal Year 2026-2027 Annual Review Instructions for the Home and Community Services Information System (HCSIS)

COMMUNITY HEALTHCHOICES (CHC) WAIVER:

Please note that the HCSIS Annual Review Process described in this update does not apply to participants enrolled in the CHC Waiver.

ACT 150 and OBRA WAIVER:

Participants enrolled in the Fee for Service **Act 150** program and **OBRA Waiver** have their service plan data listed in HCSIS.

To confirm, Service Coordinators (SCs) are required to submit HCSIS Annual Reviews for all current **Act 150** participants and all current **OBRA Waiver** participants in all counties.

SCs need to submit Annual Reviews for **Act 150** and **OBRA Waiver** prior to the start of the new fiscal year to ensure that all existing services and required units are authorized on **Act 150** program and **OBRA Waiver** service plans for the next fiscal year.

HCSIS ANNUAL REVIEW PROCESS:

OLTL requires submission of an Annual Review service plan in HCSIS for all participants in the **Act 150** program and **OBRA Waiver** prior to the start of the new fiscal year to ensure that all existing services and required units are authorized for the next year.

SCs must complete Annual Reviews for all **Act 150** and **OBRA Waiver** participants between April 1, 2026, and June 30, 2026.

SCs should plan to submit at least 15% of their Annual Review service plans weekly starting on April 1, 2026, to allow for adequate submission and OLTL review time.

Please follow these guidelines when submitting HCSIS Annual Reviews:

- 30% of your agency's Annual Reviews submitted to OLTL by April 15, 2026
- 60% of your agency's Annual Reviews submitted to OLTL by April 29, 2026
- 90% of your agency's Annual Reviews submitted to OLTL by May 13, 2026
- 100% of your agency's Annual Reviews submitted to OLTL by May 29, 2026

By submitting at least 15% of required Annual Review service plans each week, SCs can assist OLTL to process these service plans quickly and prevent any backlog in service plan approvals.

If SCs do not follow this process and submit Annual Reviews before June 30, 2026, a backlog in service plan approvals may result in billing delays for Service Coordination Entities (SCEs) and Direct Service Providers.

OLTL expects the submitted Annual Review service plans to be the same as the current service plan with the existing services and supports simply transferred over to the Annual Review service plan.

ACT 150 and OBRA WAIVER SERVICE PLANS WITH NO CHANGES:

OLTL has implemented an auto approval process that will automatically approve Annual Review service plans that reflect **NO CHANGES**.

ACT 150 and OBRA WAIVER SERVICE PLANS WITH CHANGES:

OLTL recognizes that in some instances a change in a participant's needs will occur at the same time the SC is developing the Annual Review service plan.

In order to ensure that services and supports remain uninterrupted, OLTL recommends submitting the Annual Review service plan with current existing services and units so that it may be automatically approved, and then submitting a Critical Revision to include any necessary change in services or units.

HCSIS FILE CLOSURES:

For **Act 150** or **OBRA Waiver** participants who are deceased, no longer receiving services, or have transferred to the CHC Waiver, the SC must complete a Waiver/Program Transfer (WPT) to close out the HCSIS service plan and HCSIS file.

Please note that OLTL's Service Coordination Entity (SCE) Annual Review status reports will continue to show that the SC still needs to complete a Fiscal Year 2026-2027 Annual Review in these instances if the WPT is not completed.

HCSIS FILE TRANSFERS:

SCEs that are in the process of transferring any **Act 150** or **OBRA Waiver** HCSIS files to a new SCE should ensure that either the Annual Review is completed prior to the file transfer, or the transferring SCE needs to set a plan with the new SCE to have the new SCE complete the Annual Review.

Please contact Brian Lester if you have any questions about this process. blester@pa.gov 717-346-0716.

HCSIS ACT 150 and OBRA WAIVER ANNUAL REVIEW REMINDERS:

- ✓ Do not submit Annual Reviews for any CHC Waiver-enrolled participants.
- ✓ Process at least 15% of Annual Reviews weekly to avoid a backlog.
- ✓ Submit Annual Reviews with no changes.
- ✓ After Annual Reviews are approved, submit Critical Revisions for all changes in services, units, or providers.
- ✓ Submit WPTs for any files that need to be closed out.