



Instructions for Completion of the FY26 General Ledger Data Collection Template

Part 3 – Service Tabs

Service Category Information Tab

- Navigate to the Dashboard by selecting the “Template Submission Dashboard” in the top-right corner or by clicking on the unique access link provided via email.
- On the dashboard, select the “Service Categories Information” tab under “Step 2: Service Categories Information.”
- The Service Categories Information tab serves as the interface for service tab selection.

STEP 1: PROVIDER INFORMATION		
Date Created	Tab	Status
April 15, 2026 at 2:37 pm	Provider Information	in progress (1 month, 4d)
STEP 2: SERVICE CATEGORIES INFORMATION		
Date Created	Tab	
April 15, 2026 at 2:37 pm	Service Categories Information	
STEP 3: SERVICE TABS		
Date Created	Tab	Status
April 15, 2026 at 2:39 pm	DOA M1-CE	in progress (1 month, 4d)
STEP 4: SUMMARY TOTALS		
Review Summary Totals and Submit		

- Under “Services Provided”, select the general service categories that apply to your organization.
- For example, if the organization provides both *R3-CL.GHw: Community Living with Group Home – With Overnight Supervision* and *M2-CD: Community Development Services: 1 to 4 Clients*, select both the Residential and Meaningful Day categories (shown below) to view a full list of relevant service tabs.

SERVICE CATEGORIES INFORMATION

STEP 2: SERVICE CATEGORIES INFORMATION
Service Categories Information : Entry # 10071

*** indicates required fields

This tab will populate all relevant Service Tabs based on selections. Please carefully review selection guidelines under each general service category.
 Select a General Service Category and click submit to view appropriate service tabs forms. Be sure to select all tabs that correspond to services your organization provides and populate each relevant cost category with cost items. **All fields in this form are required.**

Provider Name

SAMPLE PROVIDER

SERVICES PROVIDED

☒ RESIDENTIAL
☒ MEANINGFUL DAY
☐ SUPPORT SERVICES

- Upon selecting the applicable service categories, a list of individual services with descriptions will populate beneath “Residential Service Name(s) and Billing System(s)”.
- Using the checkboxes on the left, select service tabs according to the services your organization provides.
- Select the region in which each service was delivered using the selections below the service name.
 - The Geographic Differential region includes the following counties: Montgomery, Prince George’s, Calvert, Charles, and Frederick.
 - For services delivered in all other counties, please select “Rest of State”.
 - If services were provided in both regions, please select “Both”.

☒ **R3-CL.GHw: Community Living with Group Home - With Overnight Supervision**

☐ Rest of State
☒ Geographic Differential (Montgomery, Prince George's, Calvert, Charles, and Frederick Counties.)
☐ Both

☒ **M2-CD: Community Development Services: 1 to 4 Clients - Staffing Ratios of 1:1 and 2:1; Community Learning Services**

☐ Rest of State
☐ Geographic Differential (Montgomery, Prince George's, Calvert, Charles, and Frederick Counties.)
☒ Both

- Save the selections on this tab by clicking “Save” in the bottom-left of the Form Status box, located below the list of selectable tabs.
- A popup window will appear to confirm the selected services, click “Continue” to be redirected back to the Template Submission Dashboard.
- In the forms section of the dashboard, the selected service tabs should appear as selectable forms under Step 3: Service Tabs (as pictured below).

- The appropriate region column(s) should be the only one(s) displayed – if this is not accurate, ensure the region selection for each service tab is correct on the Service Categories Information tab.
- Total revenue for the service should be entered beneath the General & Administrative cost items.
- To finalize cost item data, click the “Complete” option in the Form Status box at the bottom of each tab, then click “Save”.
- Note: Catch-all tabs that combined multiple services and/or group sizes for reporting purposes have been discontinued for the FY26 data collection. Organizations that do not track expenses at the individual service or group-size level requested in the template should apply a reasonable allocation methodology to distribute expenses across the applicable services. Acceptable allocation methods may include service revenue, employee time, or another approach that accurately reflects the organization's operational structure and cost distribution practices.

Participant Tables Tab

The Participant Tables tab contains embedded tables that correspond to the selected services on the Service Categories Information Tab. Participant counts must be reported for each service provided, with breakdowns by group size and staffing ratio where applicable. Completion of all participant tables populated in this tab is **required**.

- Tables referring to participant counts are embedded using Qualtrics - data is finalized upon submission of the table and cannot be revised.
- Total number of unduplicated participants refers to the unique number of participants who received that service during the fiscal year.
- For services with different group home sizes or participant group sizes (e.g., day habilitation), participants should be counted in each group in which they are served. For example, if a participant moves from a 2-bed group home to a 3-bed group home during the year, they would be counted in each group home size, but only once in the unduplicated count of participants.
- Data must be submitted individually by table, using the blue arrow beneath each table. Data submissions for participant tables are final and cannot be edited. **Any data left unsubmitted will not be saved.**

S4-PS: PERSONAL SUPPORTS

Total Number of Unduplicated Participants Served Annually

Number of Unduplicated Participants Served Annually

S4-PS - Personal Supports

S4-PS.E - Personal Supports Enhanced

Number of Participants Served

Powered by Qualtrics

The Form Status Box

The FY26 GL Portal contains a functionality that allows users to save their progress and return to data entry tabs for further edits. The Form Status Box does **not** apply to participant-related data.

There are two options for saving progress in the Form Status box, outlined below:

- **In Progress**
 - Allows the user to save all current entries and re-enter the tab as needed.
- **Complete**
 - Locks the tab with all current entries, users will not be able to re-open the tab from the Dashboard. Edits can be made using the link on the Summary Totals review table if needed.

FORM STATUS

Select "In progress" and click "Save" to save the data input into this tab for later additions/edits.

Select "Complete" and click "Save" after all data is input and reviewed, as the "Complete" option will lock the tab and prevent further additions/edits.

All tabs must be marked as "Complete" prior to submission of the template.

☒ In progress
☐ Complete

Additional Information on Cost Category Data within the Service Tabs

- All cost categories are available for all services. Collecting and reviewing the actual costs incurred provides essential data to DDA.
- Not all cost categories may be applicable for a given service or for a given provider.

- Providers are asked to include cost data associated with each cost item and hours where necessary:
 - For most items, *hours* may not be applicable. For example, unemployment insurance costs do not incur associated hours. In these instances, the *hours cell* will be grayed out, and no data can be entered. For all DSP wage cost items (both billable and unbillable), the corresponding cell will allow for the hours to be entered.
 - If the number of *hours* is not known but *hours* is an applicable data point, please leave blank BUT put a note in column K, *Notes to the Reviewer*.

Hilltop Review and Feedback

- Upon submission of the data, the Hilltop Institute will review templates to provide feedback. Tabs will be unlocked for edits according to the feedback given.

Technical Assistance

Providers with questions or in need of technical assistance when completing the template are encouraged to send an email to dda_rate@hilltop.umbc.edu

Data related to participants is collected in embedded tables, which exist separately from cost item entries for secure storage. Because of this, participant data must be entered and submitted within the same session, **data in participant tables will not be saved if it is not submitted.**