

Administration User Manual

A step by step navigational process

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Contents

1	Introduction	1
1.1	Background	1
1.2	Guide to navigate through user manuals	1
1.2.1	User Manuals Descriptions	1
1.2.2	Recommended approach.....	2
2	Getting Started.....	4
2.1	Agency Management Tutorial.....	4
2.1.1	Agency Search	4
2.1.2	Agency Creation	5
2.1.3	Agency Information.....	6
2.1.4	Agency Identifiers	7
2.1.5	Agency Locations	8
2.1.6	Location Profile	10
2.2	Staff Management Tutorial.....	13
2.2.1	Staff Search	13
2.2.2	Staff Creation	13
2.2.3	Staff Information.....	15
2.2.4	Staff Phone Numbers	15
2.3	Peer Profile Tutorial	16
2.3.1	Peer Profile Search.....	17
2.3.2	Peer Creation	17
2.4	My Location Tutorial	18
2.4.1	My Locations Search	19
2.4.2	Create Staff	19
2.5	My Profile	20
2.5.1	Editing My Profile.....	20
2.6	User Directory	21
2.7	Document Library	22
2.7.1	Search Document Library.....	23
2.7.2	Manage Archived Documents.....	26

2.7.3	Add/Edit/Delete Categories	26
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1 Introduction

1.1 Background

Maryland is currently embarking on a transformation and rebalancing of its long-term services and supports (LTSS). As programs change and evolve, the need for flexible, responsive technology to manage large volumes of data related to participant application, enrollment, and participation in LTSS is vital to the success of the programs. Federal requirements for quality monitoring and assurance cannot be met without technology support to gather, manage, and analyze data. To meet the need for technology, DHMH has decided to design the integrated LTSS software system.

The goal of the integrated solution is to have a system that is more client or “person” centric instead of being driven by the programs they apply for or are enrolled in. The centralized client record (referred as client profile in the document) will be the overarching umbrella module which will connect all the activities with the client and maintain historical records from the time the client record gets created in the system. With this new approach, every activity that has occurred with the client will be in one record, accessible in one place. The integrated system will assist in streamlining application and eligibility determinations across LTSS programs and increasing access to Home and Community based Services (HCBS).

1.2 Guide to navigate through user manuals

There are multiple LTSS user manuals describing, in detail, different aspects of the system. The goal of these user manuals is to provide you with information on how to navigate and complete tasks in the LTSS System. Below is a quick description of the various manuals and the order in which we recommend you use the manuals to familiarize yourself with the system.

1.2.1 User Manuals Descriptions

- **Common Functions** – This manual provides you with general information on system navigation and functionality that will be commonly used throughout your experience with LTSS. For example, this manual will contain descriptions of basic functionality such as menus, drop-downs, tables, actions/links, etc.
- **Client and Case Management** – This manual provides you with step-by-step instructions on how to create/view the centralized client record (profile) which will house information about the client that is program agnostic , such as demographic information, Medicaid number and eligibility, contact information, representative information, etc.. The manual will also provide information regarding program management for programs such as Money Follows the Person (MFP), Living at Home (LAH) waiver, Waiver for Older Adults (WOA) and Increased Community Services (ICS). The various programs referred to as case programs in the system will function as “containers” to store information that is specific to those programs such as application, various eligibility determinations, plans of service/care, etc. Information regarding adding/closing/reopening these case programs will be provided in this manual.
- **Administration** – This manual will provide information about various administration functions in the LTSS system, a major focus being agency and staff management. Note: This is mainly related to the

LTSS system administration and not the actual day-to-day administration functions. Agency management module contains information about the agency, multiple locations (if any), programs that the agency works with, type of agency (contractor/government agency, etc.). Staff Management module contains information about each agencies' staff, how to create/edit staff profiles when a new staff member joins your agency, staff contact information, etc. This is critical because the roles and permissions given to a user will determine functionality they will see within LTSS.

- **Money Follows the Person** – This manual will provide information about how to complete various steps involved in the MFP process such as the Resident Contact Sheet, Ongoing Peer Support, Options Counseling, Peer Mentoring, Housing Assistance, Quality of Life, etc. The manual will give details about the necessary steps to complete each module, as well as information about the interaction between MFP and the waiver programs in LTSS. The manual is catered to all agencies associated with the MFP process.
- **Waiver Programs** – This manual will take you through the entire application process from the time a person chooses to apply for LAH/WOA/ICS, through the various eligibility determinations, until the enrollment eligibility determination. Instructions on how to add/edit/discard program-related forms will be provided here. The manual is catered to case management agencies and state oversight agencies.
- **Standardized Assessment and Level of Care** – This manual will provide information about how to complete an assessment, recommended plan of care, level of care determination in LTSS. The manual is catered to staff from Adult Evaluation and Review Services (AERS) and Utilization Control Agent (UCA).
- **Financial and Overall Eligibility Determination** – This manual will provide information about various forms and letters involved in determining financial and overall eligibility for programs such as LAH/WOA/ICS. The manual is catered to Division of Eligibility for Waiver Services (DEWS) staff members.
- **Appeals** – This manual will provide information regarding the appeals process in case a client chooses to appeal. The manual is catered to the appeals staff at DHMH and other users that may have permissions/role to view appeals
- **Quality Care Review** – This manual will walk the user through the steps necessary for completing a Quality Care Review (QCR) Worksheet for a client. The QCR Worksheet is used to perform a review of services given to a client through a specific waiver program the client was enrolled in. The manual is broken down into sections, including: adding QCR Review Periods, selecting potential clients to review, assignments and the three levels of review performed by QCR staff. The manual is catered to DHMH staff members.

1.2.2 Recommended approach

Although there is no specific requirement/restriction about manuals you access or the order in which you access manuals, here's the approach we recommend to become experts at using LTSS. Please review manuals that impact your daily tasks in order to carry them out smoothly in the LTSS system.

- Every new LTSS user may want to start with the common functions manual to get familiar with overall look and feel and system navigation.
- You then continue with the client and case management user manual.
- From an administration standpoint, you may then want to continue on to the administration functions manual.
- After these preliminary manuals, the remaining ones are more functionality and agency specific.
 - Case management agencies and oversight agencies users - you may want to get into the program specific manuals such as the waiver programs manual and then any other manuals for forms that you view/use for your daily tasks.
 - Users associated with MFP – you may want to continue with the MFP manual
 - AERS and UCA users – you may want to continue with the Standardized Assessment and Level of Care manual
 - DEWS users - you may want to continue with the Financial and Overall eligibility determination manual
 - Users associated with appeals - you may want to continue with the Appeals manual
 - QCR users at DHMH – you may want to continue with the QCR manual

2 Getting Started

2.1 Agency Management Tutorial

This section of the manual walks you through the necessary steps to search for an existing agency or create a new agency profile in LTSS. Agency Management will only be available to staff members with a role of DHMH Administrator.

2.1.1 Agency Search

The Agency Search page allows the user to search for Agencies in LTSS using a combination of seven filters. The Agency Name filter searches for Legal Names and Short Names of Agencies that match the entered criteria. The Agency Type filter has options to filter by Government Agency, Contractor and Provider Organization. The user can filter by Jurisdiction using the All option or a specific jurisdiction. The Agency Attribute filters Agencies by attributes that have been associated to an agency. Status filters Agencies by Active and Inactive. Agencies can be filtered by entering a Phone Number and also by Contact Name for an Agency. The filter types highlighted in yellow or marked with an asterisk are required to *Search*.

Agency Name	Location Name	Status	Phone Number	Contact Name	Actions
Area Agency on Aging	MAC Incorporated	Active			Location Staff
Area Agency on Aging	Baltimore County Dept. of Aging	Active			Location Staff
LAHWU	LAHWU (Default All Jurisdictions)	Active			Location Staff
Local Health Department	LHD (Default All Jurisdictions)	Active			Location Staff
Maryland Department of Aging	The Maryland Department of Aging	Active			Location Staff
Maryland Department of Disabilities	The Maryland Department of Disability	Active			Location Staff
Department of Health and Mental Hygiene	DHMH	Active			Location Staff
Department of Health and Mental Hygiene	DHMH (Housing Assistance)	Active			Location Staff
Department of Health and Mental Hygiene	DDA	Active			Location Staff
Adult Evaluation and Review Services	AERS (Default All Jurisdictions)	Active			Location Staff
System	System	Active			Location Staff
Division of Eligibility Waiver Services	DEWS (Default All Jurisdictions)	Active			Location Staff
MMIS Waiver Unit	MMISWaiverUnit (Default All Jurisdictions)	Active			Location Staff

The Search results are grouped by Agency Name. The user can navigate to the Agency Profile by clicking the name of an Agency under the Agency Name column. The **Location** link under actions column allows the user to review and edit the Agency Location Profile information for the specified Location under the Location Name column, which will be discussed further in a later section of this manual. From the Agency Location Profile the user can navigate to the Agency Profile by clicking the **Back to Agency Profile link**. The **Staff link** under actions column takes the user to Staff Management and shows them a list of staff members associated to the specific Agency Location.

2.1.2 Agency Creation

For a new agency the user would click the **Create Agency link** located on the right side of the screen.

The screenshot shows the LTSS application's 'Agencies' list page. At the top, there are navigation links for 'Agencies', 'Staff', 'Peers', 'My Locations', 'My Profile', 'User Directory', and 'Document Library'. The 'Agencies' link is currently selected. The main area displays a table with columns for 'Agency Name', 'Agency Type', 'Jurisdiction', 'Agency Attribute', 'Status', 'Phone Number', and 'Contact Name'. The 'Agency Type' dropdown is set to 'Government Agency', which is highlighted with a yellow background. The 'Status' dropdown is set to 'Active'. At the bottom of the page, there is a search bar with 'Search' and 'Clear' buttons, and a 'Create Agency' button. An arrow points to the 'Create Agency' button, which is circled in blue.

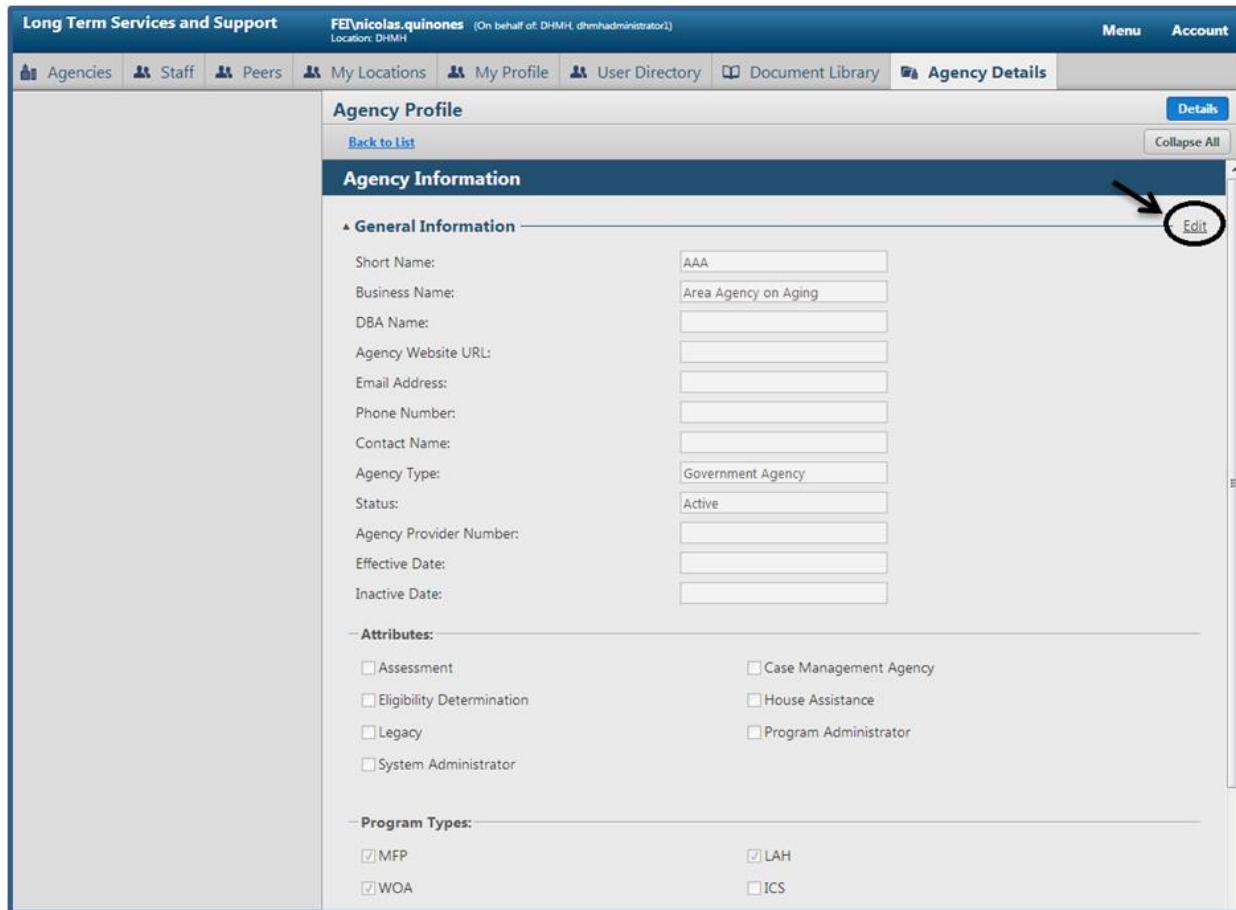
After clicking the Create Agency link the Agency Profile page appears. The user must enter all required information, which is highlighted yellow or marked with an asterisk to save. The user can also enter optional information such as Attributes and Program Types of the Agency. The Attributes section of the Agency Information section is directly related to the Agency Type field. Based on the user's selection of Agency Type, the Attributes section will be updated. The three Agency Types are Government Agency, Contractor and Provider Organization. The Program Types section of the Agency Information section is used to identify which programs in LTSS this agency is associated to, with options: MFP, LAH, ICS and WOA. When the user has entered all required information, clicking the **Save button** will capture the information and direct the user to the Agency Profile where additional information about the Agency can be added.

The screenshot shows the 'Agency Profile' page under the 'Long Term Services and Support' tab. The top navigation bar includes links for Agencies, Staff, Peers, My Locations, My Profile, User Directory, Document Library, and Agency Details. The user is logged in as FER\nicolas.quinones (On behalf of: DHMH, dhm\administrator). The 'Agency Details' tab is selected. The main content area is titled 'Agency Information' and contains two sections: 'General Information' and 'Attributes'. The 'General Information' section includes fields for Short Name*, Business Name*, DBA Name, Agency Website URL, Email Address*, Phone Number*, Contact Name*, Agency Type (set to 'Government Agency'), Status (set to 'Active'), Agency Provider Number, Effective Date (set to 01/05/2013), and Inactive Date. The 'Attributes' section lists several checkboxes for roles: Assessment, Eligibility Determination, Legacy, System Administrator, Case Management Agency, House Assistance, Program Administrator, MFP, WOA, LAH, and ICS. A green 'Save' button is located in the top right corner of the form.

The user would then be directed to the *Agency Profile* page where they would take the following steps in completing the agency profile. The user could add Agency Identifiers and Agency Locations. What follows is a section by section breakdown of how this information is added and managed.

2.1.3 Agency Information

The first section of the Agency Profile page gives the user the option to edit *Agency Information* about the agency. To perform this function, click the **Edit link** as seen in the figure below. To edit information click any text box, make the necessary changes and click the **Save button**. After saving the user is returned to the Agency Profile page.



The screenshot shows the 'Agency Profile' section under 'Agency Information'. It includes fields for General Information (Short Name: AAA, Business Name: Area Agency on Aging), Attributes (Assessment, Eligibility Determination, Legacy, System Administrator, Case Management Agency, House Assistance, Program Administrator), and Program Types (MFP, WOA, LAH, ICS). The 'Edit' button at the top right is circled.

2.1.4 Agency Identifiers

2.1.4.1 Add, Save and Edit Agency Identifiers

To add an Agency Identifier, click the **Add Identifier link** as show in the figure below. This will bring up the Agency Profile—Agency Identifier page.



The screenshot shows the 'Identifiers' section. It includes a 'Provider Base Number' table with rows for Identifier Number (2545655855), Effective Date (01/06/2013), and Expiration Date (N/A). The 'Add Identifier' link at the top right is circled.

From the *Agency Profile—Agency Identifier* page the user will enter all required information, which is highlighted in yellow or marked with an asterisk and optional information. Upon filling out this information click the **Save button** to save the Agency Identifier to the Agency Profile.

Agency Profile — Identifier

[Cancel](#)

Identifier Information

Identifier Type: *

Identifier Number: *

Effective Date: *

Expiration Date:

New **Save**

An Agency Identifier can be edited at any time by clicking the **Edit link** as shown in the figure below.

Identifiers [Add Identifier](#)

Provider Base Number

Identifier Number: 2545655855

Effective Date: 01/06/2013

Expiration Date: N/A

Edit

2.1.5 Agency Locations

The third section of the Agency Profile page is Agency Locations. An Agency Location is broken down into four sections: *Location Information*, *Identifiers*, *Phone Numbers* and *Addresses*. To manage the *Agency Location* section of the Agency Profile, click the **View Profile link** as shown in the figure below. The user can also add a new Agency Location by clicking the **Add Location link** as shown in the figure below.

Agency Locations [Add Location](#)

MAC Incorporated [View Profile](#)

Location Provider Number:
Email:
Contact Name:

Baltimore County Dept. of Aging [View Profile](#)

Location Provider Number:
Email:
Contact Name:

2.1.5.1 Add and Save Agency Location

After clicking the **Add Location link** the user will be directed to the *Agency Profile—Location Profile* page. All fields highlighted in yellow or marked with an asterisk are required to save the Agency Location. This page allows the user to set a Location Name and Location Provider Number as well as associate this Agency Location to specific jurisdictions/counties in the LTSS System. The user is also required to identify an agency location identifier, location address and location phone. After entering all required and optional information click the **Save button** as shown in the figure below.

Agency Profile — Location Profile

[Cancel](#) Save

Location Information

— General Information

Location Name: *

Location Provider Number: *

Email: *

Contact Name:

Status: *

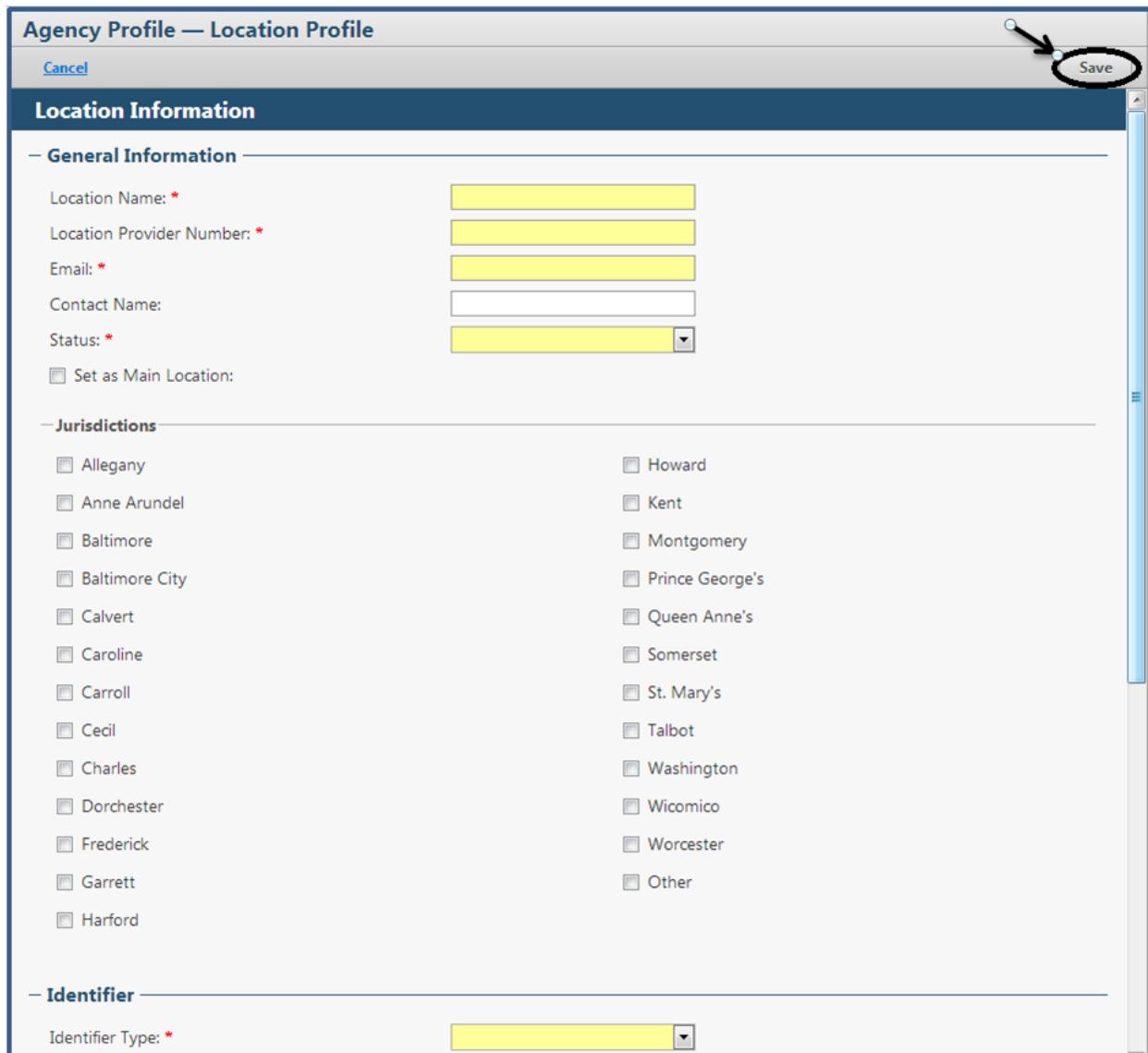
Set as Main Location:

— Jurisdictions

<input type="checkbox"/> Allegany	<input type="checkbox"/> Howard
<input type="checkbox"/> Anne Arundel	<input type="checkbox"/> Kent
<input type="checkbox"/> Baltimore	<input type="checkbox"/> Montgomery
<input type="checkbox"/> Baltimore City	<input type="checkbox"/> Prince George's
<input type="checkbox"/> Calvert	<input type="checkbox"/> Queen Anne's
<input type="checkbox"/> Caroline	<input type="checkbox"/> Somerset
<input type="checkbox"/> Carroll	<input type="checkbox"/> St. Mary's
<input type="checkbox"/> Cecil	<input type="checkbox"/> Talbot
<input type="checkbox"/> Charles	<input type="checkbox"/> Washington
<input type="checkbox"/> Dorchester	<input type="checkbox"/> Wicomico
<input type="checkbox"/> Frederick	<input type="checkbox"/> Worcester
<input type="checkbox"/> Garrett	<input type="checkbox"/> Other
<input type="checkbox"/> Harford	

— Identifier

Identifier Type: *

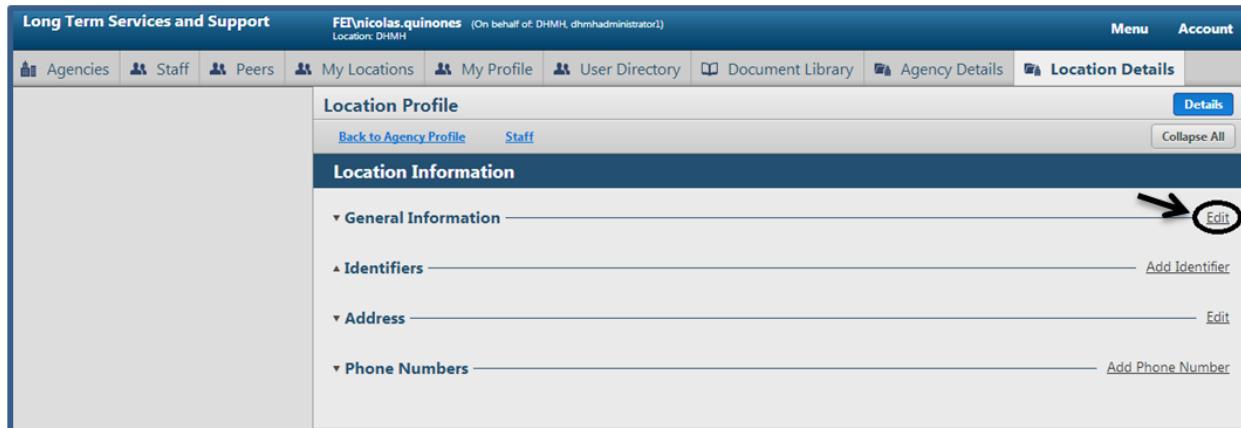


2.1.6 Location Profile

The Location Profile consists of four sections: Location Information, Identifiers, Address and Phone Numbers.

2.1.6.1 Location Information

The user can edit the *Location Information* section of the Location Profile by clicking the **Edit link** as seen in the figure below. Upon making updates to the Location Information click the Save button to return to the Location Profile.



The screenshot shows the 'Location Profile' section of the LTSSMaryland application. At the top, there's a navigation bar with links for Agencies, Staff, Peers, My Locations, My Profile, User Directory, Document Library, Agency Details, and Location Details. The 'Location Details' link is highlighted. Below the navigation is a 'Location Profile' header with 'Back to Agency Profile' and 'Staff' links. The main content area is titled 'Location Information'. It contains four expandable sections: 'General Information', 'Identifiers', 'Address', and 'Phone Numbers'. Each section has an 'Edit' link at the end. A red circle and an arrow point to the 'Edit' link next to 'General Information'.

2.1.6.2 Identifiers

The user can add *Location Identifiers* to the Location Profile by clicking the **Add Identifier link** in as seen in the figure below.



This screenshot shows the same 'Location Profile' page as the previous one, but focusing on the 'Identifiers' section. An arrow points to the 'Add Identifier' link, which is circled in red. The other sections ('General Information', 'Address', 'Phone Numbers') and their 'Edit' links are also visible.

After clicking the Add link in the Identifiers panel the user will see the Agency- Location Profile—Identifier page as seen in the figure below. Enter the required information, which will be highlighted yellow or marked with an asterisk. Upon entering all required information click the **Save button** to save the Identifier to the Location Profile as seen in the figure below.

Agency — Location Profile — Identifier

[Cancel](#) [New](#) [Save](#) 

Identifier Information

Identifier Type: *	<input type="text"/>
Identifier Number: *	<input type="text"/>
Effective Date: *	<input type="text" value="01/06/2013"/> 
Expiration Date:	<input type="text"/> 

The user can edit a location identifier by clicking the **Edit link** for an identifier entry as seen in the figure below. Upon clicking the Edit link the Agency-Location Profile—Identifier page will appear with the *last saved information* for that identifier and the user can make edits and save or return to the Location Profile.

[Add Identifier](#) 

Identifiers

Provider Base Number

Identifier Number::	6485654654
Effective Date::	01/06/2013
Expiration Date::	

2.1.6.3 Addresses

An Agency Location can only have one address, which is required to be entered when adding the Agency Location to the Agency Profile. The user can edit a location address by clicking the **Edit link** for the address entry as seen in the figure below. Upon clicking the Edit link the Agency- Location Profile—Address page will appear with the *last saved information* for that address and the user can make edits and save or return to the Location Profile.

[Edit](#) 

Address

Address Type:	Business
Address:	909 Progress Circle, Suite 100, Salisbury, MD 21804
Jurisdiction/County:	Baltimore

2.1.6.4 Phone Numbers

The user can add *Location Phone Numbers* to the Location Profile by clicking the **Add link** as seen in the figure below.

A screenshot of a web application interface titled "Phone Numbers". At the top left is a section labeled "Work #". Below it, there is a table with one row containing "Phone Number:" and "(410) 742-0505". To the right of the table is an "Edit" link. In the top right corner of the panel, there is a link labeled "Add Phone Number" with a circled arrow pointing to it.

After clicking the Add link in the Phone Numbers panel the user will see the Agency- Location Profile—Phone Number page as seen in the figure below. Enter the required information, which will be highlighted yellow or marked with an asterisk. The user can also choose to set this phone number as the Location Primary Phone. Upon entering all required information click the **Save button** to save the Phone Number to the Location Profile as seen in the figure below.

A screenshot of a web application interface titled "Agency — Location Profile — Phone Number". At the top right are "New" and "Save" buttons, with a circled arrow pointing to the "Save" button. Below the title is a "Cancel" link. A section titled "Phone Number Information" contains fields for "Phone Type:" (with a red asterisk), "Phone Number:" (highlighted in yellow), "Ext:" (with a small input field), and a checkbox for "Set as Primary Phone".

The user can edit a location phone number by clicking the **Edit link** for a phone number entry as seen in the figure below. Upon clicking the Edit link the Location Profile—Phone Number page will appear with the *last saved information* for that phone number and the user can make edits and save or return to the Location Profile.

A screenshot of a web application interface titled "Phone Numbers". At the top left is a section labeled "Work #". Below it, there is a table with one row containing "Phone Number:" and "(410) 742-0505". To the right of the table is an "Edit" link with a circled arrow pointing to it.

2.2 Staff Management Tutorial

2.2.1 Staff Search

The Staff Search page allows the user to search for Staff in LTSS using a combination of four filters. The First Name filter searches for staff with first names that match the entered criteria. The Last Name filter searches for staff with last names that match the entered criteria. Status filters staff by Active and Inactive. Staff can be filtered by entering an Agency Location Name, which will provide a list of staff members that are associated to the entered Agency Location Name.

The screenshot shows the LTSS Staff Search interface. At the top, there are input fields for First Name (Thomas), Last Name (Henderson), and Status (Active). Below these, there is a dropdown menu for Agency Name. A search button is highlighted with a red arrow. The results table shows one row for Thomas Henderson, with columns for Full Name, Business Title, Status, Agency Name, Allow Login, and Actions. The Actions column contains a link labeled "Details" which is also circled in red. A blue arrow points to the "Create Staff" link at the top right of the results table.

Full Name	Business Title	Status	Agency Name	Allow Login	Actions
Thomas Henderson	Case Manager	Active	DHMH	Yes	Details

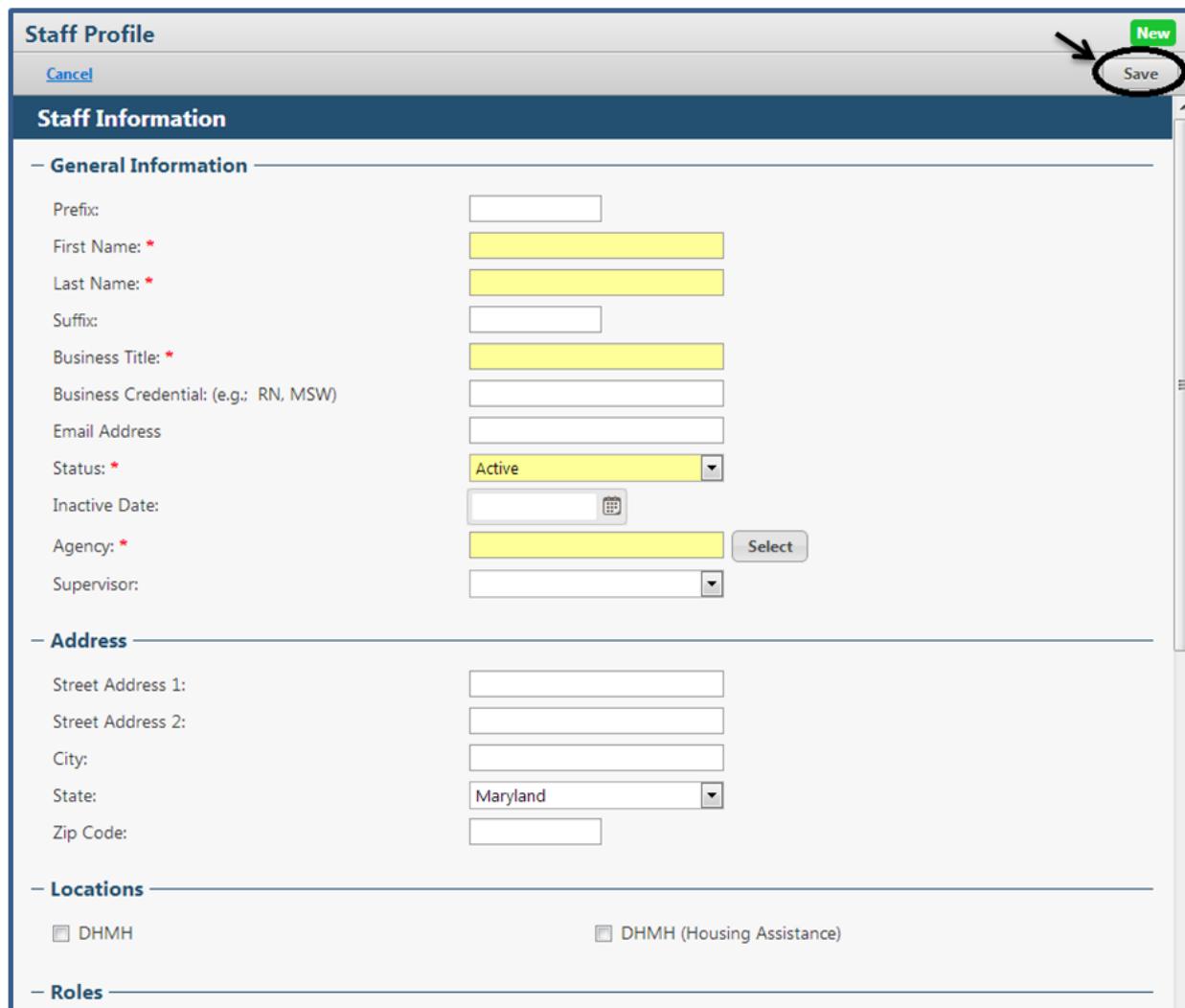
The **Details** link under actions column allows the user to review and edit the Staff Profile information, which will be discussed further in a later section of this manual.

2.2.2 Staff Creation

For a new staff the user would click the **Create Staff link** located on the right side of the screen.

The screenshot shows the LTSS Staff Search interface. At the top, there are input fields for First Name, Last Name, and Status. Below these, there is a dropdown menu for Agency Name. A search button is highlighted with a red arrow. The results table is empty and displays the message "No data available in table". A blue arrow points to the "Create Staff" link at the top right of the results table.

After clicking the Create Staff link the Staff Profile page appears. The user must enter all required information, which is highlighted yellow or marked with an asterisk to save. The required *Status* field will identify whether the staff is an active or inactive user. The user can also enter optional information such as Locations, Roles and Program Types. The Location and Roles sections are directly linked to the Agency selected under the General Information section. After making an Agency selection, the Location section will display Agency Location associated to the Agency selected and the Roles section will display the roles associated to the Agency selection. The Program Types section of the Staff Profile is used to identify which programs in LTSS this staff is associated to, with options: MAPC, MFP, LAH and WOA. There is also a section for Login Information, which will capture the staff members Login Name and identify if the staff is able to login.



The screenshot shows the 'Staff Profile' creation form. At the top right, there is a green 'New' button and a 'Save' button, which is circled in black with an arrow pointing to it. The form is divided into several sections:

- General Information:** Fields include Prefix, First Name (marked with an asterisk), Last Name (marked with an asterisk), Suffix, Business Title (marked with an asterisk), Business Credential (e.g., RN, MSW), Email Address, Status (Active is selected), Inactive Date, Agency (with a 'Select' button), and Supervisor.
- Address:** Fields include Street Address 1, Street Address 2, City, State (Maryland is selected), and Zip Code.
- Locations:** A checkbox for DHMH is shown, along with a note: "DHMH (Housing Assistance)".
- Roles:** This section is currently empty.

When the user has entered all required information, clicking the **Save button** will capture the information and direct the user to the Staff Profile. From the *Staff Profile* page the user can take the following steps in modifying the staff profile. The user could edit Staff Information and add additional Staff phone numbers. What follows is a section by section breakdown of how this information is added and edited.

2.2.3 Staff Information

The first section of the Staff Profile page gives the user the option to edit *Staff Information* about the staff. To perform this function, click the **Edit link** as seen in the figure below. To edit information click any text box, make the necessary changes and click the **Save button**. After saving the user is returned to the Staff Profile page.

Staff Profile

Back to List

Staff Information

General Information

Prefix:

First Name: Thomas

Last Name: Henderson

Suffix:

Business Title: Case Manager

Business Credential: (e.g.: RN, MSW)

Email Address

Status: Active

Inactive Date:

Agency Name: Department of Health and Mental Hygiene (DHMH)

Supervisor:

Details

2.2.4 Staff Phone Numbers

2.2.4.1 Add, Save and Edit Agency Identifiers

To add Staff Phone Numbers click the **Add Phone link** as show in the figure below. This will bring up the Staff Profile—Phone Number page.

Phone Numbers

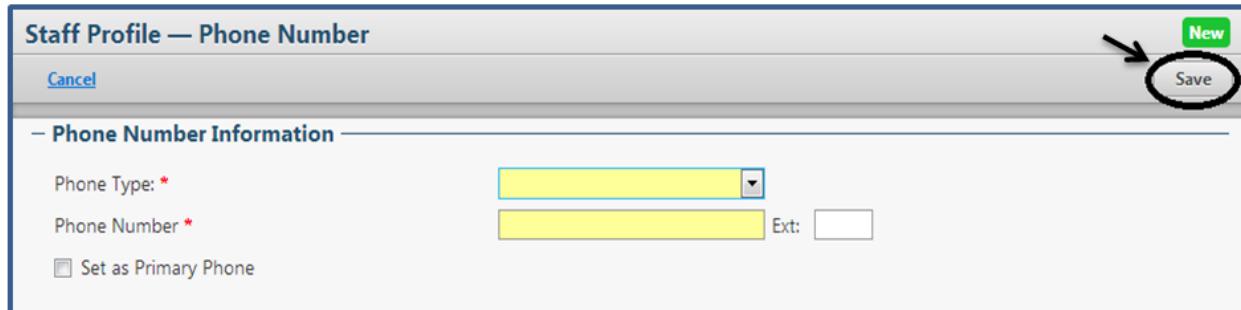
Home #

Phone Number: (301) 256-9658

Edit

Add Phone

From the *Staff Profile—Phone Number* page the user will enter all required information, which is highlighted in yellow or marked with an asterisk and optional information. The user can also identify if the phone number should be Set as Primary Phone. Upon filling out this information click the **Save button** to save the Staff Phone Number to the Staff Profile.



Staff Profile — Phone Number

[Cancel](#) [New](#) [Save](#)

— Phone Number Information —

Phone Type: *

Phone Number * Ext:

Set as Primary Phone

A Phone Number can be edited at any time by clicking the **Edit link** as shown in the figure below. By clicking the *Back to Profile link* the user is returned to the Staff Profile page.



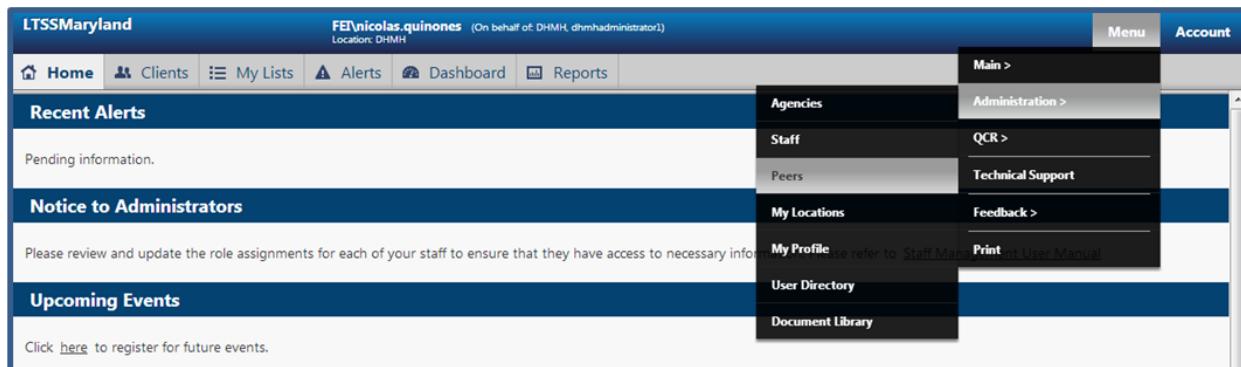
— Phone Numbers — [Add Phone](#)

— Home # —

Phone Number: (301) 256-9658 [Edit](#)

2.3 Peer Profile Tutorial

To access the Peer Profile Management section of LTSS, go through Menu, Administration and click Peers as seen in the figure below. The Peer Profile in LTSS is used to directly specify a Peer on the Resident Contact Sheet in MFP. Only users with the role of DHMH Administrator, CIL Administrator or MDOD Administrator will have access to the Peers section of LTSS.



LTSSMaryland FED\nicolas.quinones (On behalf of: DHMH, dhmhadministrator) Location: DHMH

[Home](#) [Clients](#) [My Lists](#) [Alerts](#) [Dashboard](#) [Reports](#) [Menu](#) [Account](#)

Recent Alerts
Pending information.

Notice to Administrators
Please review and update the role assignments for each of your staff to ensure that they have access to necessary information. For more information please refer to [Staff Management User Manual](#).

Upcoming Events
Click [here](#) to register for future events.

- Agencies** [Main >](#)
- Staff** [Administration >](#)
- Peers** [QCR >](#)
- My Locations** [Technical Support](#)
- My Profile** [Feedback >](#)
- [Print](#)
- User Directory**
- Document Library**

2.3.1 Peer Profile Search

After navigating to Peers through Administration the actor will have the ability to search for Peer Profiles by specifying a Location Name and the Status of the Peer. After selecting the two input criteria click the **Filter button** as seen in the figure below to see the Peers associated to the specified Location. After searching, if the user finds a Peer they would like to work with they can view the Peer Profile by clicking the **Details link** or edit the Peer Profile by clicking the **Edit link** as seen in the figure below. Each Location Name will specify which modules in MFP that location works with and each location is also designated to work with specific jurisdictions.

Peer Name	Region	Peer Status	Last Update	Actions
Richardtest Marxtest	Baltimore	Active	01/14/2013	Details Edit
Rick Springfield	Baltimore	Active	01/15/2013	Details Edit

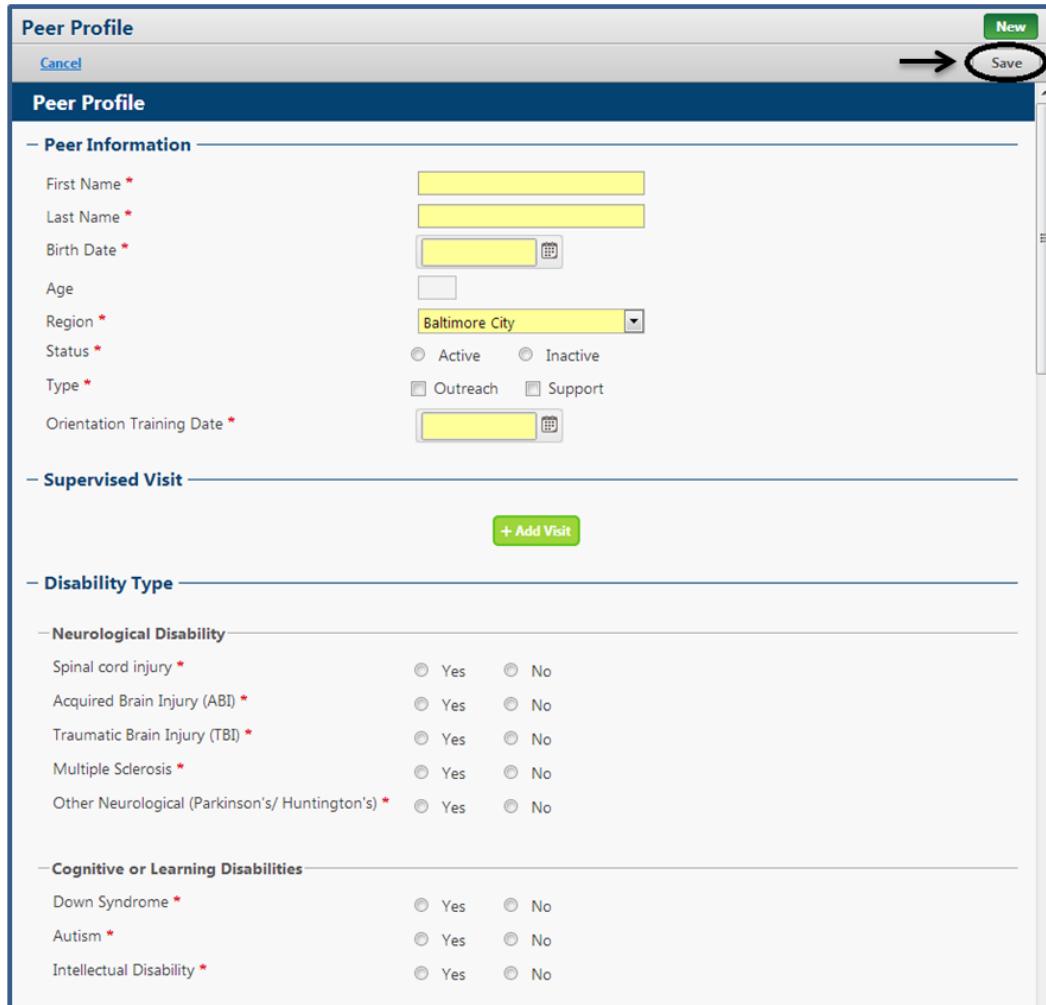
2.3.2 Peer Creation

If after searching for a Peer Profile and identifying that one does not exist for a specific Peer, an authorized user can add a Peer to LTSS for a given Location by using the **Create Peer Profile link** as seen in the figure below.

Peer Name	Region	Peer Status	Last Update	Actions
-----------	--------	-------------	-------------	---------

No data available in table

After clicking the Create Peer Profile link the Peer Profile Form will appear. The user will be required to enter all information that is either highlighted yellow or marked with an asterisk. In order for the Peer to show up in the Peer dropdown field on the Resident Contact Sheet the Status of the Peer must be Active as indicated on their Peer Profile. After entering all required and optional information, the user can save the Peer Profile by clicking the Save button as seen in the figure below. After saving the Peer Profile that Peer will be associated to the Location that the user first filtered by before clicking the Create Peer Profile link.



Peer Profile

[Cancel](#) [New](#) [Save](#) →

Peer Profile

Peer Information

First Name * [Input Field]
Last Name * [Input Field]
Birth Date * [Input Field]
Age [Input Field]
Region * **Baltimore City** [Dropdown]
Status * Active Inactive
Type * Outreach Support
Orientation Training Date * [Input Field]

Supervised Visit

[+ Add Visit](#)

Disability Type

Neurological Disability

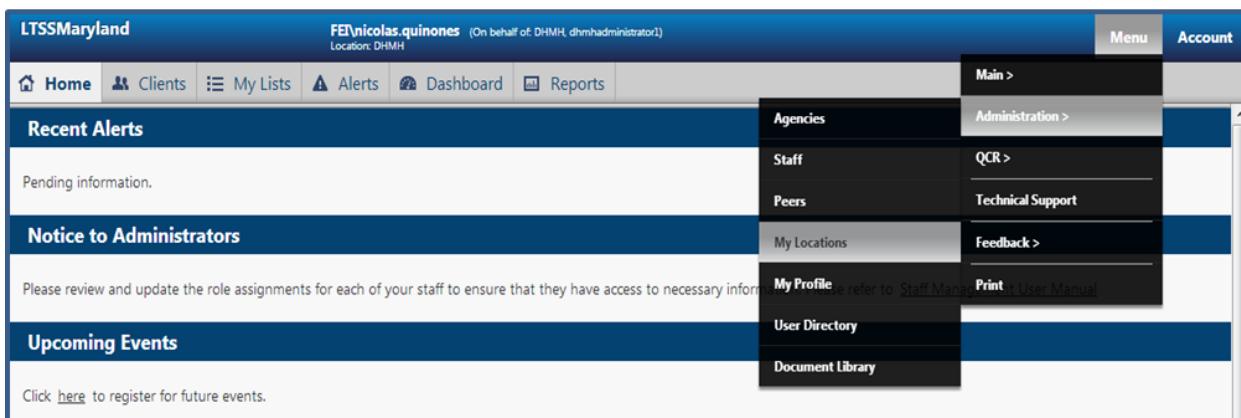
Spinal cord injury * Yes No
Acquired Brain Injury (ABI) * Yes No
Traumatic Brain Injury (TBI) * Yes No
Multiple Sclerosis * Yes No
Other Neurological (Parkinson's/ Huntington's) * Yes No

Cognitive or Learning Disabilities

Down Syndrome * Yes No
Autism * Yes No
Intellectual Disability * Yes No

2.4 My Location Tutorial

To navigate to the My Locations section of LTSS, the user will go to Menu, Administration and click on the My Locations option as seen in the figure below. My Locations in LTSS is used by Agency Administrators to manage the staff for the Agency Locations they oversee.



LTSSMaryland FEI\nicolas.quinones (On behalf of: DHMH, dhmadministrator)
Location: DHMH

[Home](#) [Clients](#) [My Lists](#) [Alerts](#) [Dashboard](#) [Reports](#) [Main >](#) [Menu](#) [Account](#)

Recent Alerts
Pending information.

Notice to Administrators
Please review and update the role assignments for each of your staff to ensure that they have access to necessary information.

Upcoming Events
Click [here](#) to register for future events.

Agencies [Administration >](#)
Staff [QCR >](#)
Peers [Technical Support](#)
My Locations [Feedback >](#)
My Profile refer to [Staff Manager](#) [Print](#) [User Manual](#)
User Directory
Document Library

2.4.1 My Locations Search

After navigating to My Locations through Administration the actor will have the ability to search for Staff Profiles by specifying a Location. The options available within the Locations dropdown will be driving by the logged in user. As the Agency Administrator, the user will see all Locations that they are related to in their individual staff profile and will have the ability to manage the staff profiles of any staff associated to those locations. After selecting a Location click the **Search button** as seen in the figure below to see the Staff associated to the specified Location. After searching, if the user finds a Staff they would like to work with they can view the Staff Profile by clicking the **Details link** as seen in the figure below.

The screenshot shows the LTSSMaryland Administration interface. The top navigation bar includes links for Agencies, Staff, Peers, My Locations (which is highlighted in blue), My Profile, User Directory, and Document Library. The user is identified as FEI\nicolas.quinones (On behalf of: DHMH, dhmadministrator1) with a location of DHMH. A dropdown menu for 'Locations' is open, showing 'DHMH' selected. Below this is a search bar with 'Search' and 'Clear' buttons, and a 'Create Staff' link. The main content area displays a table with columns: Full Name, Business Title, Status, Agency Short Name, Allow Login, and Actions. One row is shown for 'Thomas Henderson' with values: Case Manager, Active, DHMH, Yes, and a blue 'Details' link which is circled with a red arrow. The 'Actions' column for this row also has a circled red arrow pointing to it.

2.4.2 Create Staff

Agency Administrator will also have the ability to create new staff profile by clicking the Create Staff link as seen in the figure below. As Agency Administrators, when creating new Staff through My Locations the user will only be able to associate new and existing staff to Agencies and Locations that the Agency Administrator is associated to.

The screenshot shows the LTSSMaryland Administration interface. The top navigation bar includes links for Agencies, Staff, Peers, My Locations (which is highlighted in blue), My Profile, User Directory, and Document Library. The user is identified as FEI\nicolas.quinones (On behalf of: DHMH, dhmadministrator1) with a location of DHMH. A dropdown menu for 'Locations' is open, showing 'DHMH' selected. Below this is a search bar with 'Search' and 'Clear' buttons. On the right side of the screen, there is a large blue 'Create Staff' link which is circled with a red arrow. The main content area is currently empty, showing a table header for 'Full Name', 'Business Title', 'Status', 'Agency Short Name', 'Allow Login', and 'Actions'.

2.5 My Profile

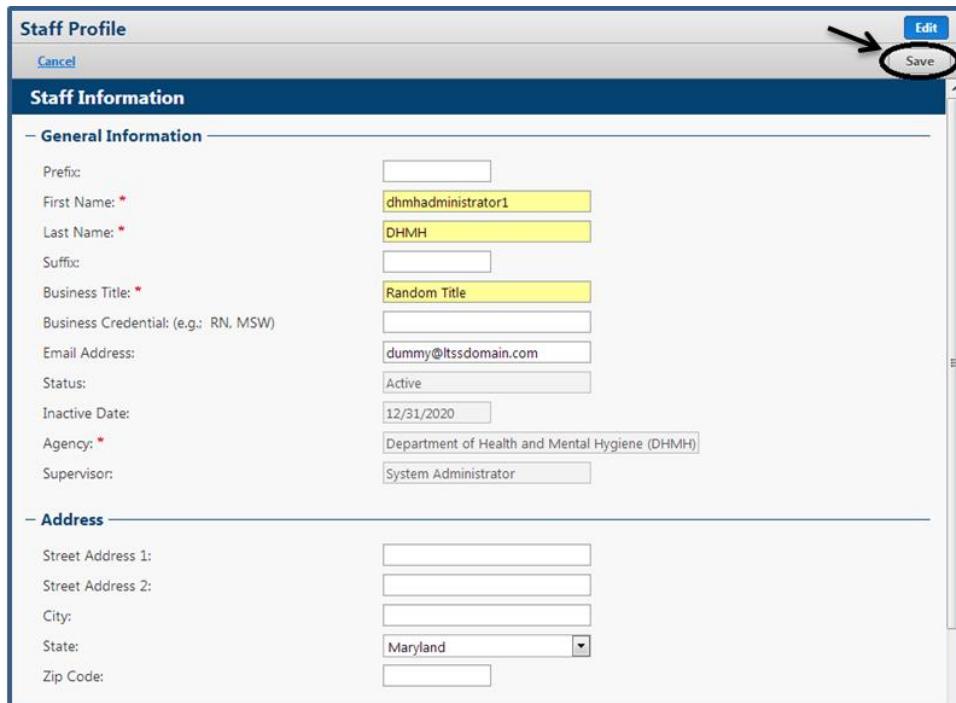
To navigate to the My Profile section of LTSS, the user will go to Menu, Administration and click on the My Profile option as seen in the figure below. My Profile in LTSS is accessible by all users. From My Profile, only certain aspects of the logged in staff's Staff Profile can be managed.

2.5.1 Editing My Profile

After clicking on Administration and My Profile on the Global Menu bar click on the Edit link as seen in the figure below.

Field	Value
Prefix:	
First Name:	dhmadministrator1
Last Name:	DHMH
Suffix:	
Business Title:	Random Title
Business Credential: (e.g.: RN, MSW)	
Email Address:	dummy@ltssdomain.com
Status:	Active
Inactive Date:	12/31/2020
Agency Name:	Department of Health and Mental Hygiene (DHMH)
Supervisor:	System Administrator

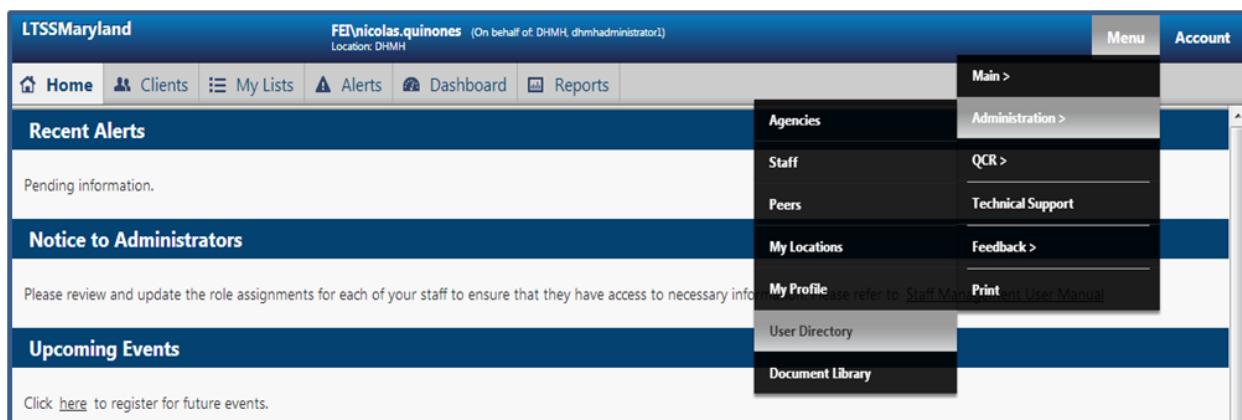
When managing your own Staff Profile only certain information can be updated. To edit information click any text box available for edit, make the necessary changes and click the **Save button**. After saving the user is returned to the Staff Profile details page.



The screenshot shows the 'Staff Profile' edit screen. At the top right, there is a blue 'Edit' button and a red-highlighted 'Save' button. The main area contains sections for 'General Information' and 'Address'. Under 'General Information', fields include Prefix (empty), First Name: * (dvhadministor1), Last Name: * (DHMH), Suffix (empty), Business Title: * (Random Title), Business Credential: (e.g.: RN, MSW) (empty), Email Address: (dummy@ltssdomain.com), Status: (Active), Inactive Date: (12/31/2020), Agency: * (Department of Health and Mental Hygiene (DHMH)), and Supervisor: (System Administrator). Under 'Address', fields include Street Address 1 (empty), Street Address 2 (empty), City (empty), State: (Maryland), and Zip Code (empty).

2.6 User Directory

To navigate to the User Directory section of LTSS, the user will go to Menu, Administration and click on the User Directory option as seen in the figure below. The User Directory in LTSS is accessible by all users. The user directory is the white pages of LTSS. From the directory you can obtain contact information for any active user of the system.



The screenshot shows the LTSS application interface. At the top, it displays 'LTSSMaryland' and 'FED\nicolas.quinones (On behalf of: DHMH, dvhadministor1) Location: DHMH'. The top navigation bar includes 'Home', 'Clients', 'My Lists', 'Alerts', 'Dashboard', 'Reports', 'Menu', and 'Account'. A dropdown menu under 'Menu' shows options like 'Main >', 'Agencies', 'Administration >', 'Staff', 'QCR >', 'Peers', 'Technical Support', 'My Locations', 'Feedback >', 'My Profile', 'Print', 'User Directory', and 'Document Library'. The 'User Directory' option is highlighted with a red box. Below the menu, there are sections for 'Recent Alerts' (Pending information), 'Notice to Administrators' (Please review and update the role assignments for each of your staff to ensure that they have access to necessary information. Please refer to Staff Management User Manual), and 'Upcoming Events' (Click [here](#) to register for future events).

After clicking on Administration and User Directory in the Global Menu bar simply enter the user's First and Last Name and click Search or select the name of the Agency the user works for to obtain a listing of all users for that organization. After entering filter criteria click the **Search button** as seen in the figure below to see the contact information for the users that meet the search criteria.

Name/Title	Agency	Phone	Fax	Email
DHMH, dhmhmpdirector1 Random Title	DHMH	(410) 715-6538 (ext) 1 (410) 715-6539 (ext) 1		dummy@ltssdomain.com
DHMH, dhmphysician1 Random Title	DHMH	(410) 715-6538 (ext) 1 (410) 715-6539 (ext) 1		dummy@ltssdomain.com
DHMH, dhmphysician2 Random Title	DHMH	(410) 715-6538 (ext) 1 (410) 715-6539 (ext) 1		dummy@ltssdomain.com
DHMH, dhmAppealstaff1 Random Title	DHMH	(410) 715-6538 (ext) 1 (410) 715-6539 (ext) 1		dummy@ltssdomain.com
DHMH, dhmAppealstaff2 Random Title	DHMH	(410) 715-6538 (ext) 1 (410) 715-6539 (ext) 1		dummy@ltssdomain.com
DHMH, dhmadministrator1 Random Title	DHMH	(410) 715-6538 (ext) 1 (410) 715-6539 (ext) 1		dummy@ltssdomain.com

2.7 Document Library

To navigate to the Document Library section of LTSS, the user will go to Menu, Administration and click on the Document Library option as seen in the figure below. The Document Library in LTSS is accessible by users associated to DHMH, MDOA, LAHWU, Schaefer Center, MMIS Waiver Unit and DDA.

- Main >
- Agencies
- Administration >
- Staff
- QCR >
- Peers
- Technical Support
- My Locations
- Feedback >
- My Profile
- Print
- User Directory
- Document Library

2.7.1 Search Document Library

When navigating to the Document Library through the Menu the user will be taken to the Main Document Library page as seen in the figure below. The user can search for documents related to a specific category by specifying the Category in the dropdown menu and clicking the **Filter button**. After filtering all documents that have been associated to that Category will appear in the table.

The screenshot shows the LTSSMaryland administration interface. The main navigation bar includes links for Agencies, Staff, Peers, My Locations, My Profile, User Directory, and Document Library. The Document Library tab is active. On the left, a sidebar titled 'Document Library Menu' lists 'Main Document Library', 'Archived Documents', and 'Add/Edit Categories'. The main content area is titled 'Main Document Library' and contains a search bar with a dropdown set to 'Data Entry Forms' and a 'Filter' button. Below the search is a table titled 'Data Entry Forms' with columns for File Name, Description, Created By, Date Created, and Action. One row is visible: 'test.docx' with 'Test' in the description, 'dhhmadministrator1 DHMH' in the created by field, and '1/22/2013 12:30:41 PM' in the date created field. Action buttons for Edit, Delete, and Archive are at the bottom of the table row.

2.7.1.1 Open Existing Documents

A user can open an existing document related to a Category in LTSS by clicking the name of the document under the File Name column as seen below.

This screenshot is identical to the one above, showing the 'Main Document Library' page with the 'Data Entry Forms' category filtered. The table displays one row for 'test.docx'. A red circle highlights the 'test.docx' link in the 'File Name' column. An arrow points from the accompanying text to this link.

2.7.1.2 Edit Existing Documents

A user can edit an existing document related to a Category in LTSS by clicking the **Edit link** for that document as seen below. After clicking the Edit link a pop up window will appear where the user can make the necessary changes and click the **Save button** once done editing.

The screenshot shows the LTSSMaryland Document Library interface. The main content area displays a table titled 'Data Entry Forms' with one row. The row contains the following data:

File Name	Description	Created By	Date Created	Action
test.docx	Test	dhmadministrator1 DHMH	1/22/2013 12:30:41 PM	Edit Delete Archive

2.7.1.3 Delete Existing Documents

A user can delete an existing document related to a Category in LTSS by clicking the **Delete** link for that document as seen below. After clicking the Delete link a pop up box will appear asking the user if they are sure they want to delete, if yes click the **OK** button and if no click the **Cancel** button.

The screenshot shows the LTSSMaryland Document Library interface. A confirmation dialog box is displayed in the foreground, asking 'Do you want to delete?'. The 'Delete' link in the Action column of the Data Entry Forms table is highlighted with a red circle. A red arrow points from the 'Delete' link in the table to the 'Delete' button in the dialog box.

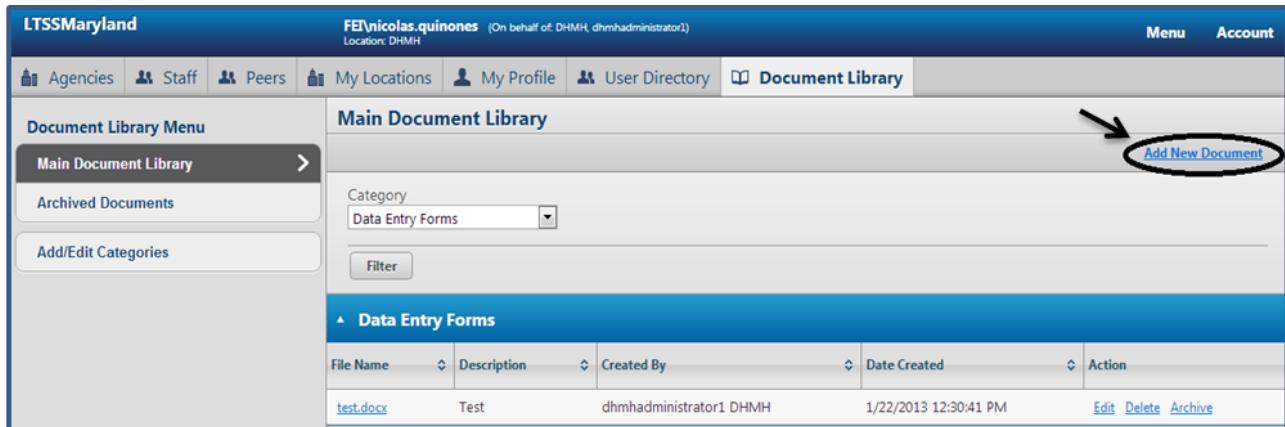
2.7.1.4 Archive Existing Documents

A user can archive an existing document related to a Category in LTSS by clicking the **Archive** link for that document as seen below. After clicking the Archive link the document will be sent to the Archived Documents section of the Document Library, which will be discussed in detail in a later section. The archive functionality can be used to store old documents that may no longer be relevant.

The screenshot shows the LTSSMaryland Document Library interface. The 'Archive' link in the Action column of the Data Entry Forms table is highlighted with a red circle. A red arrow points from the 'Archive' link in the table to the 'Archive' button in the confirmation dialog box.

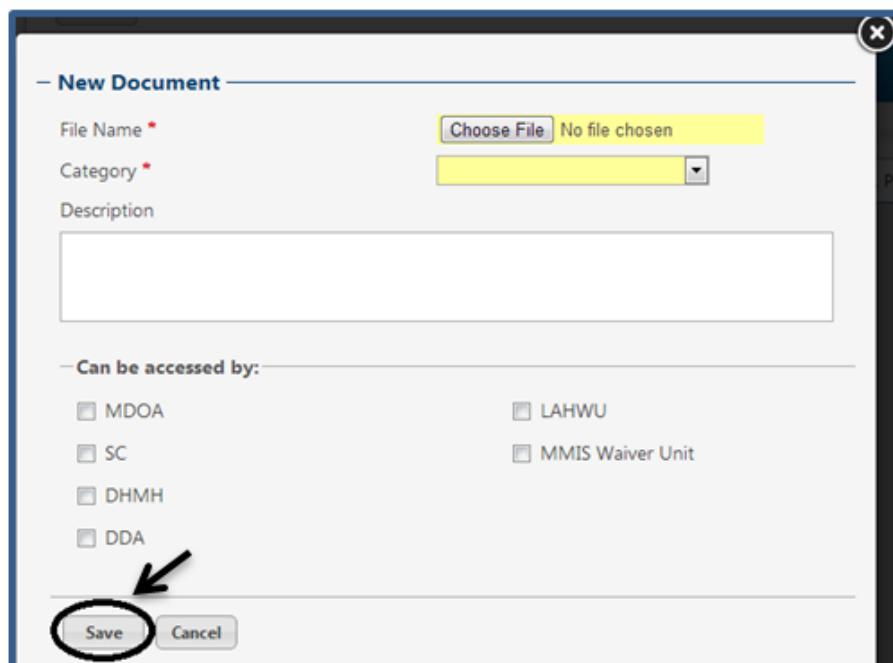
2.7.1.5 Add New Document

A user can add a new document in LTSS by clicking the **Add New Document** link as seen below.



The screenshot shows the LTSSMaryland administration interface. At the top, there's a header with the site name, user information (FEI\nicolas.quinones), and navigation links for Agencies, Staff, Peers, My Locations, My Profile, User Directory, and Document Library. The Document Library tab is active. On the left, a sidebar titled 'Document Library Menu' has 'Main Document Library' selected, with options for Archived Documents and Add/Edit Categories. The main content area is titled 'Main Document Library' and shows a 'Data Entry Forms' section. A table lists a single document: 'test.docx' (Description: Test, Created By: dhmadministrator1 DHMH, Date Created: 1/22/2013 12:30:41 PM). Below the table are 'Edit', 'Delete', and 'Archive' links. An arrow points to the 'Add New Document' button at the top right of the main content area, which is circled.

After clicking the Add New Document link a pop up window will appear asking the user for information about the document they wish to add. The user can search for a file to add using the Choose File button. After choosing a file the user will select a Category for the document to be associated to. Under the Can be accessed by section the user can specify what Agencies will be able to access the added document. When specifying agencies all the users in LTSS associated to those agencies will have access to the document through the Document Library. After entering all the required and optional information the user will click the **Save** button as seen below.



2.7.2 Manage Archived Documents

To access Archived Documents in the Document Library the user will select Archived Documents under the Document Library Menu in the left hand navigation. The user can then search for archived documents by either specifying a Category in the dropdown or by leaving the Category blank and clicking the **Filter button** the system will return all of the Archived Documents in LTSS. Similar to documents in the Main Document Library, archived documents can be opened, edited, deleted and can also be sent back to the Main Document Library using the **Move to Main Library link** as seen in the figure below.

The screenshot shows the LTSSMaryland Document Library interface. On the left, there's a navigation menu with 'Archived Documents' selected. In the center, under 'Archived Documents', there's a 'Category' dropdown set to 'Data Entry Forms'. Below it is a 'Filter' button with a red arrow pointing to it. On the right, a list of documents is shown with one entry: 'test.docx' (Description: Test, Created By: dhmadministrator1 DHMH, Date Created: 1/22/2013 12:30:41 PM). To the right of each document entry are 'Edit', 'Delete', and a circled 'Move to Main Library' link, with a red arrow pointing to it.

2.7.3 Add/Edit/Delete Categories

To access the Categories in the Document Library the user will select Add/Edit Categories under the Document Library Menu in the left hand navigation. Authorized users can then add a category by typing a name into the New Category textbox and clicking the **Add button** as seen below. The user will also have the ability to edit existing Category names by clicking the **Edit link** or delete existing Category names by clicking the **Delete link** as seen below.

The screenshot shows the LTSSMaryland Document Library interface. On the left, there's a navigation menu with 'Add/Edit Categories' selected. In the center, under 'Add Categories', there's a 'New Category' input field containing 'Data Entry Forms'. Below it is an 'Add' button with a red arrow pointing to it. On the right, a list of categories is shown with their respective 'Edit' and 'Delete' links. The 'MMIS Reports' category has its 'Delete' link highlighted with a red circle and a red arrow pointing to it.

If the user attempts to delete an existing Category a box up box will appear indicating that if the user delete the category any documents associated to that category will also be deleted. To continue and delete a Category click the **OK button** and to not delete a Category click the **Cancel button**.

