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# Quality Care Review User Manual

A step by step navigational process

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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

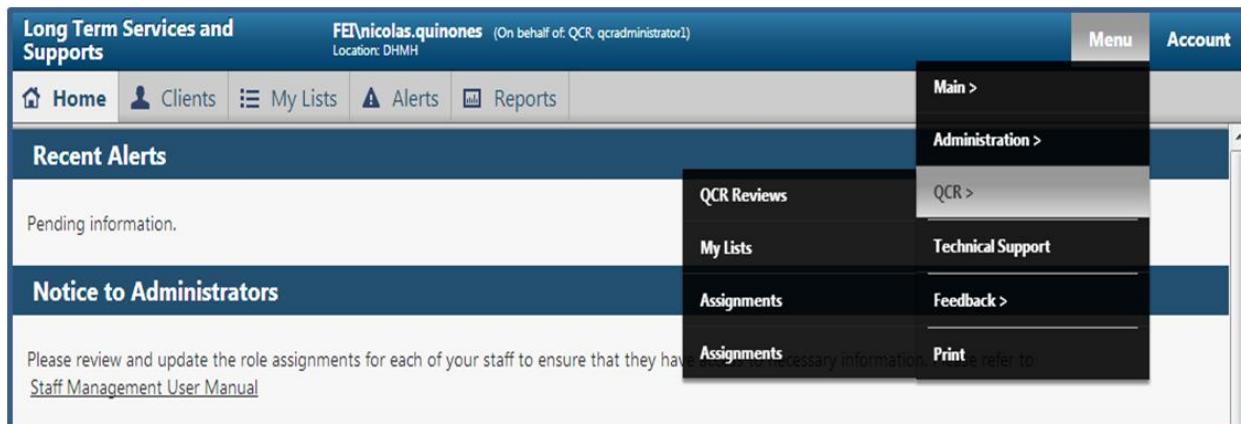
Although there is no specific requirement/restriction about manuals you access or the order in which you access manuals, here's the approach we recommend to become experts at using LTSS. Please review manuals that impact your daily tasks in order to carry them out smoothly in the LTSS system.

- 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 Accessing the QCR System

From the Menu tab of the LTSS System at the top of the screen, the QCR System can be accessed by navigating to QCR as seen in the figure below. The sections within QCR are dependent upon the role of the active user. These sections will be discussed further in the next section.



## 2.2 Tabs

The 3 tabs located along the top of the QCR sub-system are ***QCR Reviews, My Lists and Assignments.***

*QCR Reviews* will only be available to actors with the role of QCR Administrator. The options available within the QCR Reviews tab are *QCR Review Periods, Clients Enrolled and Letters*. The function and visual display of each of these options will be discussed in the Tutorials portion of this manual.

This screenshot shows the 'QCR - Review Periods' section of the QCR sub-system. The left sidebar has 'QCR Review Periods' selected under 'QCR Menu'. The main area displays a table with one entry:

Review Period Start Date	Review Period End Date	Date Created	Created By	Actions
01/01/2012	01/01/2014	01/09/2013	QCR, qcradministrator1	

At the bottom, it says 'Showing 1 to 1 of 1 entries' and 'Filter all columns: [ ]'.

*My Lists* is the second tab of QCR. This tab is used to search for existing clients in the QCR process. The QCR My List page will be discussed further in the Tutorials section of this manual.

This screenshot shows the 'QCR - My List' section of the QCR sub-system. The left sidebar has 'QCR My List' selected under 'My QCR Clients'. The main area displays a table with the message 'No data available in table'.

Last Name	First Name	County	ID	Program	Review Date	Status	Actions
-----------	------------	--------	----	---------	-------------	--------	---------

At the bottom, it says 'Showing 0 to 0 of 0 entries' and 'Filter all columns: [ ]'.

*Assignments* is the third tab of QCR. This tab is only available to actors with the role of QCR Branch Chief or QCR Team Leader. The QCR Branch Chief uses the Assignments tab to assign QCR Team Leaders to clients. The QCR Team Leader uses the Assignments tab to assign QCR Interviewers to clients. The Assignments tab will be discussed in greater detail in the Tutorials section of this manual.

The screenshot shows the 'Long Term Services and Supports' application interface. At the top, it displays the user information 'FEI\nicolas.quinones (On behalf of: QCR, qcadministrator)' and the location 'DMMH'. The top navigation bar includes links for 'QCR Reviews', 'My Lists', 'Assignments' (which is the active tab), and 'Assignments'. A secondary navigation menu on the left is titled 'QCR Assignment Menu' and lists 'QCR Team Leader' (selected) and 'QCR Interviewer'. The main content area is titled 'QCR - Team Leader Assignment'. It features two dropdown filters: 'QCR Review Period: \*\*' and 'Filter Type: \*\*', with 'Unassigned' selected. Below these is a 'Filter' button. A table header row is visible with columns for First Name, Last Name, Program, Team Lead, Interviewer, Status, and Actions. A message 'No data available in table' is displayed below the table. At the bottom, there is a search bar 'Assign to Team Leader: \*\*' with an 'Assign' button, and a 'Filter all columns:' input field.

## 3 Tutorials

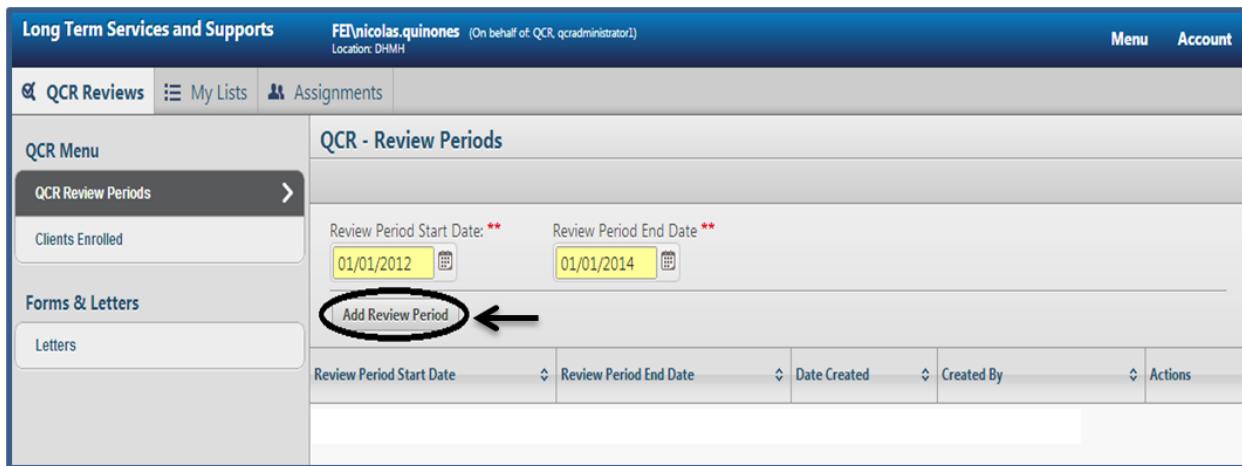
This section of the manual walks you through the necessary steps to add QCR Review Periods, list potential clients to review, assign QCR Team Leaders, assign QCR Interviews and complete the QCR Worksheet.

### 3.1 Adding QCR Review Periods

Actors with a role of QCR Administrator can navigate to the ***QCR Reviews*** section of QCR under the menu tab as seen in the figure below.



The actor will now be taken to the *QCR Review Periods* tab under the *QCR Menu* in the left hand navigation. To **add a QCR Review Period** to the *QCR Review Period List* the actor must enter a *Review Period Start Date* and *Review Period End Date*. After entering both requirements, which will be highlighted in yellow click the **Add Review Period button** as seen in the figure below.



After clicking the Add button the actor will see the added QCR Review Period in the QCR Review Period List. The list displays the Review Period Start Date and End Date, Date Created and who the QCR Review Period was created by.

The screenshot shows the 'QCR - Review Periods' page. On the left, a sidebar has 'QCR Review Periods' selected. The main area shows a table with one row:

Review Period Start Date: **	Review Period End Date: **	Date Created	Created By	Actions
01/01/2012	01/01/2014	01/09/2013	QCR, qcadministrator1	

### 3.2 List Potential Clients to Review

An actor with a role of QCR Administrator can navigate to the **Clients Enrolled** tab under QCR Menu to populate potential lists of clients to review. On the Clients Enrolled page the actor will select a *QCR Review Period*, which will be a dropdown menu containing all QCR Review Periods that have been added to the QCR Review Periods List. The actor will then designate a *Show Me* option, which will indicate whether they wish to view a list of clients that were enrolled in LAH or WOA during the specified QCR Review Period. The actor can also optionally narrow the potential list by selecting a *County* to filter the list by. After the required and optional filter criteria is selected, click the **Filter button** as seen in the figure below to see a potential list of clients to review.

The screenshot shows the 'QCR - Clients Enrolled' page. On the left, a sidebar has 'Clients Enrolled' selected. The main area shows a table with columns for County, QCR Review Period, Show Me, and a dropdown for 'Clients Enrolled In LAH'. A circled arrow points to the 'Filter' button at the bottom of the filter section. Below the table, a message says 'No data available in table'.

After clicking Filter, the actor will see a full list of clients in LTSS that match the specified filter criteria. To begin the QCR process for a potential client an actor with a role of QCR Administrator will **select clients using the checkbox** as seen in the figure below. After selecting the clients that should be reviewed in the specified QCR Review Period the actor will click the **Start QCR button** as seen below. Upon clicking this button any clients that were selected will be removed from the potential list to ensure that multiple QCR Worksheets cannot be started for a client in the same QCR Review Period. An *alert* will be sent to actors with a role of QCR Branch Chief to inform them that the QCR process has begun for clients and these clients need to be assigned a QCR Team Leader.

Select	First Name	Last Name	Facility	County	Age	Program	Enrollment Date	Actions
<input type="checkbox"/>	John	Jacobjingle	CATONSVILLE COMFORT CARE CENTER (test)	Baltimore	44	LAH		<a href="#">Client Summary</a>
<input checked="" type="checkbox"/>	John	Smith	Nursing Facility Baltimore 1	Baltimore	63	LAH	01/18/2013	<a href="#">Client Summary</a>

After starting the QCR process for clients when an actor with a role of QCR Branch Chief logs into the system they will navigate to the Alerts section of LTSS as seen in the figure below.

The actor will then be able to see an alert indicating that the QCR process has been started for the client. Click the **QCR Started link** under the Subject column as seen in the figure below to be taken to the QCR- Team Leader Assignment page. Here actors with a role of QCR Branch Chief will be able to assign actors with a role of QCR Team Leader to clients that have started the QCR process.

The screenshot shows the LTSSMaryland Quality Care Review (QCR) system. At the top, the user is identified as FED\ncarlos.quinones (On behalf of: QCR, qcrbranchchief). The main navigation bar includes Home, Clients, My Lists, Alerts, Reports, Menu, and Account. Below the navigation, there are date filters for Created From Date (01/15/2013), Created To Date (01/22/2013), Accepted From Date (01/21/2013), and Accepted To Date (01/22/2013). A 'Filter' button is also present. The main content area displays a client record for 'Smith, John - Baltimore'. The 'QCR Started' link is highlighted with a red circle and an arrow pointing to it.

After clicking the QCR Started link the actor is taken to the QCR Team Leader Assignment page where QCR Team Leaders can be assigned to clients.

The screenshot shows the 'QCR - Team Leader Assignment' page. The left sidebar has a 'QCR Assignment Menu' with 'QCR Team Leader' selected. The main content area has sections for 'QCR Review Period: \*\*' (dropdown menu) and 'Filter Type: \*\*' (dropdown menu set to 'Unassigned'). A 'Filter' button is below these. A table header row is shown with columns: First Name, Last Name, Program, Team Lead, Interviewer, Status, and Actions. A message 'No data available in table' is displayed. At the bottom, there is a 'Assign to Team Leader: \*\*' dropdown and an 'Assign' button, along with a 'Filter all columns:' input field.

### 3.3 Assign QCR Team Leader

An actor with a role of QCR Branch Chief can navigate to the QCR Team Leader Assignment page through the alerts link or through the *Assignments tab* of QCR through *Menu*.

The screenshot shows the LTSSMaryland homepage. The top navigation bar includes Home, Clients, My Lists, Alerts, Reports, Menu, and Account. The 'My Lists' and 'Assignments' buttons are highlighted in the dropdown menu under the 'Main >' section. Other menu items like 'Administration >', 'QCR >', 'Technical Support', and 'Feedback >' are also visible. A 'Recent Alerts' section indicates 'Pending information.' and a 'Notice to Administrators' section contains a message about reviewing staff roles.

From the QCR Team Leader Assignment page select a **QCR Review Period** and **Filter Type**. By default the Filter Type will be Unassigned because the actor will be assigning a QCR Team Leader to clients for the first time. However, Filter Type *Assigned* can be used to filter clients that have already been assigned a QCR Team Leader and to assign a new QCR Team Leader to clients. After selecting a QCR Review Period and Filter Type, click the **Filter button** as seen in the figure below.

This screenshot shows the 'QCR - Team Leader Assignment' page. At the top, there are dropdown menus for 'QCR Review Period' (set to '01/01/2012-01/01/2014') and 'Filter Type' (set to 'Unassigned'). Below these is a 'Filter' button, which is circled with a black oval and has a black arrow pointing to it. A horizontal table header follows, listing columns for First Name, Last Name, Program, Team Lead, Interviewer, Status, and Actions. The message 'No data available in table' is displayed below the table.

After filtering the actor will select clients in the list using their corresponding **checkboxes**. Choose a *QCR Team Leader* from the Assign to Team Leader dropdown menu and click the **Assign button** to assign the specified QCR Team Leader to the specified clients as seen in the figure below. The specified QCR Team Leader will receive an alert when clients are assigned to them.

This screenshot shows the same 'QCR - Team Leader Assignment' page after filtering. A single client record for 'John Smith' is listed in the table, with the 'First Name' column checked. To the right of the table, the status is 'Pending Team Lead Assignment' and a 'Client Summary' link is visible. At the bottom of the page, there is a dropdown menu for 'Assign to Team Leader' containing the value 'qcrteamleader1 QCR', and an 'Assign' button, which is circled with a black oval and has a black arrow pointing to it. There is also a 'Filter all columns:' input field.

After assigning an actor with role of QCR Team Leader that actor will receive an alert. The assigned QCR Team Leader logs into the system and will navigate to the Alerts section of LTSS as seen in the figure below.

The screenshot shows the LTSSMaryland Quality Care Review User Manual interface. At the top, there's a header with the system name and user information (FEI\nicolas.quinones On behalf of: QCR, qcteamleader). Below the header is a navigation bar with links for Home, Clients, My Lists, Alerts, and Reports. A dropdown menu is open under the 'Alerts' link, showing options like Home, Main >, Clients, Administration >, My Lists, QCR >, Alerts, Technical Support, Reports, and Feedback >. At the bottom of the page, there's a notice to administrators about role assignments and a link to the Staff Management Manual.

The actor will then be able to see an alert indicating that the client has been assigned to them for QCR. Click the **Client Assigned for QCR** link under the Subject column as seen in the figure below to be taken to the QCR- Interviewer Assignment page. Here actors with a role of QCR Team Leader will be able to assign actors with a role of QCR Interviewer to clients that have started the QCR process.

This screenshot shows the 'Alerts' page from the LTSSMaryland interface. It displays a list of alerts with columns for Subject, From, Received, and Accept?. One alert in the list is for 'Smith, John - Baltimore'. The 'Client Assigned for QCR' link in the Subject column is circled with a red arrow pointing to it.

After clicking the Client Assigned for QCR link the actor is taken to the QCR Interviewer Assignment page where QCR Interviewers can be assigned to clients.

This screenshot shows the 'QCR - Interviewer Assignment' page. The left sidebar has a 'QCR Assignment Menu' with 'QCR Interviewer' selected. The main area is titled 'QCR - Interviewer Assignment' and includes filters for 'QCR Review Period: \*\*' and 'Filter Type: \*\*' (set to 'Unassigned'). A table at the bottom shows columns for First Name, Last Name, Program, Team Lead, Interviewer, Status, and Actions. A message 'No data available in table' is displayed. At the bottom, there's a search bar for 'Assign to Interviewer: \*\*' and an 'Assign' button.

### 3.4 Assign QCR Interviewer

An actor with a role of QCR Team Leader can navigate to the QCR Interviewer Assignment page through the alerts link or through the *Assignments tab* of QCR through *Menu*.

From the QCR Interview Assignment page select a ***QCR Review Period*** and ***Filter Type***. By default the Filter Type will be Unassigned because the actor will be assigning a QCR Interviewer to clients for the first time. However, Filter Type *Assigned* can be used to find clients that have already been assigned a QCR Interviewer and to assign a new QCR Interviewer to clients. After selecting a QCR Review Period and Filter Type, click the **Filter button** as seen in the figure below.

After filtering the actor will select clients in the list using their corresponding ***checkboxes***. Choose a ***QCR Interviewer*** from the Assign to Interviewer dropdown menu and click the **Assign button** to assign the specified QCR Interviewer to the specified clients as seen in the figure below. The specified QCR Interviewer will receive an alert when clients are assigned to them.

The screenshot shows the 'QCR - Interviewer Assignment' page. On the left, there's a sidebar with 'QCR Assignment Menu' and 'QCR Interviewer'. The main area displays a client record: John Smith, LAH, qcrteamleader1 QCR, with a status of 'Pending Interviewer Assignment'. Below the record, there's a search bar with 'Assign to Interviewer: qcrinterviewer1 QCR' and an 'Assign' button. A red circle highlights the 'Assign' button, and a black arrow points to it from the right.

### 3.5 Navigate to Clients QCR Worksheet through My Lists

All actors with a QCR role will be able to navigate to My Lists under QCR as seen in the figure below. The My Lists page is the point of entry for a client's QCR Worksheet during a specified QCR Review Period. While all QCR actors will have the My List page under the QCR System, the Show Me options for each QCR role will vary based on the logged in user.

The screenshot shows the LTSSMaryland homepage. The top navigation bar includes links for Home, Clients, My Lists, Alerts, and Reports. A dropdown menu is open over the 'My Lists' link, showing options like Main >, Administration >, QCR >, Technical Support, Feedback >, and Print. The 'My Lists' link itself is highlighted with a red circle.

### 3.6 QCR Worksheet: QCR Interviewer

After a QCR Interviewer is assigned to a client, that client enters a Status of "In Progress." This identifies that client's QCR Worksheet is currently being filled out by the clients assigned QCR Interviewer. While a client is in a Status of "In Progress," only actors with a QCR Interviewer is able to Add and Edit sections of the clients QCR Worksheet. During a Status of "In Progress," the QCR Admin, QCR Branch Chief and Assigned QCR Team Leader will only be able to View the clients QCR Worksheet.

### 3.6.1 QCR Summary

After selecting a Show Me option and clicking the Filter button, navigate into a client's *QCR Worksheet* by clicking the ***Summary link*** as seen in the figure below.

The Summary link in the figure above will take the actor to the clients QCR Summary page. The QCR Summary page gives a brief overview of the content captured in each section of the QCR Worksheet. By clicking the Expand All button as seen in the figure below, the actor will see the details captured in each section, which will be discussed further in later sections of this manual.

The screenshot shows the LTSSMaryland Quality Care Review User Manual. The top navigation bar includes 'LTSSMaryland', 'FEI\nicolas.quinones (On behalf of: QCR, qcrinterviewer)', 'Menu', and 'Account'. The left sidebar has 'My Lists' and 'Client Details' tabs, with 'Client Details' selected. The main content area is titled 'QCR - Summary' with a status of 'In Progress'. It lists eight sections: I. Face Sheet \*\*, II. Services \*\*, III. Significant Changes \*\*, IV. Reportable Events \*\*, V. Registered Nurses \*\*, VI. Personal Care Aides \*\*, VII. Summary \*\*, and VIII. Status \*\*. Each section has 'View' and 'Edit' links. The 'Edit' link for Section I is circled with a red arrow pointing to it. Another red circle highlights the 'Expand All' button in the top right corner of the main content area.

### 3.6.2 Section I: Face Sheet

The Face Sheet panel on the QCR Summary page captures basic information from *Section I: Face Sheet* of the QCR Worksheet. To edit information on the Face Sheet click the **Edit link** as seen in the figure below.

The screenshot shows the 'I. Face Sheet \*\*' review information form. At the top right, there are 'View' and 'Edit' buttons, with 'Edit' circled in red and an arrow pointing to it. The form fields include: 'Participant: John Smith', 'Review Period: Start Date: 01/01/2012, End Date: 01/01/2014, Review Date: [empty input field]', 'Review County: Baltimore', 'Was an Interview Completed?: Yes/No', 'Is this a focused review?: Yes/No', 'QCRT Interviewer: qcrinterviewer1 QCR', and 'QCR Team Lead: qcrtteamleader1 QCR'.

The Face Sheet captures detailed information about the client, the client's case program under review, information from the client's POS/POC and notes from actors within QCR. Navigate through Section I: Face Sheet and fill out the *required information* to save, which will be *highlighted yellow* or marked with an *asterisk*. Fields within the form contain *validation checks* and will display error messages when the actor tries to enter information that does not meet those requirements as seen in the figure below. After entering all required and optional information click the **Save button** to save the Face Sheet as seen in the figure below.

The screenshot shows the 'I. Face Sheet Form' section of the QCR application. At the top right, there are 'View', 'Edit', and 'Save' buttons, with 'Save' being the target of a red arrow. The form contains several sections: 'Review Information' (Participant: John Smith), 'Review Period' (Start Date: 01/01/2012, End Date: 01/01/2014, Review Date: empty field with error message 'Review Date' is required.), 'Review County' (Baltimore), 'Interview Status' (Was an Interview Completed? Yes), 'Focused Review' (Is this a focused review? No), 'QCR Interviewer' (qcrinterviewer1 QCR), 'QCR Team Lead' (qcrteamleader1 QCR), 'Program Information' (Program: LAH), and 'Type of Residence' (Private home—lives alone selected). Error messages are displayed for required fields.

After saving the Face Sheet the updated information will be displayed in the Face Sheet panel on the QCR Summary page. By Team Leader Notes and By QCR Branch Chief Notes will only be visible in the Face Sheet panel if their associated checkboxes are selected. These fields are primarily used to identify problems with a section/entry, which will be discussed later in this manual.

### 3.6.3 Section II: Services

Under the Services panel on the QCR Summary page, the actor can click the ***POS/POC List link*** as seen in the figure below to see a full list of services and service related information from the clients associated case programs POS/POC under review.

The screenshot shows the 'II. Services \*\*' table. The header includes columns for Service, Provider, POC Date, Start Date, CAPA/ICI, Urgency, With Missing Data, and Actions. A link labeled 'No Services were Identified' is above the table, and a 'POS/POC List' link is highlighted with a red arrow. The table body displays the message 'No data available in table'.

After clicking the POS/POC List link the actor will see a pop-up window similar to the figure seen below. The actor can print this list prior to meeting with the client to have a full list of services that need to be reviewed with the client.

POS/POC Services							
Service Name	Provider	Start Date	End Date	Frequency	Frequency Type	Units	
Adult Medical Day Care	Service Provider, Independent - Baltimore 1	01/01/2013	10/01/2013	50	Daily	1	
Durable Medical Equipment	ABILITIES NETWORK, INC (test)	01/01/2013	10/01/2013	1	Hourly	1	
Home Delivered Meals	ALLIANCE, INC (test)	01/01/2013	10/01/2013	366	Daily	2	
Lab Services	Garrett Housing Authority	01/01/2013	10/01/2013	200	Hourly	1	
Speech Therapy	ALLIANCE, INC (test)	01/01/2013	10/01/2013	25	Hourly	1	

Within the Services panel, the actor has two additional options: click the **Add link** or **No Services were Identified link** as seen in the figure below. The No Services were Identified link will capture a value of 0 for the Services list. The Add link will bring up the *Services Form* and allow the actor to select a service to review for the client. It is a requirement that the actor either Add a service to the service list or click the No Services were Identified link to capture a value of 0 in order to Submit the QCR Worksheet. A visual display of this requirement can be seen in the Status Check table of Section VIII: Status of the QCR Worksheet and will be discussed later in this manual.

II. Services **										→	No Services were Identified	POS/POC List	Add
Service	Provider	POC Date	Start Date	CAPA/ICI	Urgency	With Missing Data							
No data available in table													

If the actor clicks the “No Services were Identified” link a value of 0 is captured in the Services list and the link will disappear as seen in the figure below. The actor will still have the option to click the Add link to add services to the Service list. If the actor adds a service(s) to the Service list and then deletes those entries to the point where no services remain in the Service list the “No Services were Identified” link will re-appear and the actor will once again be required to either click the “No Services were Identified” link or Add a service in order to Submit the QCR Worksheet.

II. Services **										POS/POC List	Add	
Service	Provider	POC Date	Start Date	CAPA/ICI	Urgency	With Missing Data						
No data available in table												

If the actor clicks the Add link from the Services panel, the Services Form will appear. The Services Form captures detailed information about a particular Service/Date Range from the client's associated case programs POS/POC under review. Navigate through Section II: Services and fill out *required information* to save, which will be *highlighted yellow* or marked with an *asterisk*. Fields within the form contain *validation checks* and will display error messages when the actor tries to enter information that does not meet those requirements as seen in the figure below. The Service/Date Range field is a dropdown that contains a full list of all services from the associated case programs POS/POC under review. There is a system check that will not allow the actor to perform a review on a service that is already present in the Services List on the QCR Summary page. After entering all required and optional information click the **Save button** to save the Service entry as seen in the figure below.

The screenshot shows the 'II. Services Form' page within the LTSSMaryland application. The top navigation bar includes 'My Lists', 'Client Details' (with user info: FEI\nicolas.quinones, On behalf of: QCR\_qcinterviewer1, Location: DHMH), 'Menu', and 'Account'. A sidebar on the left lists 'QCR Review Menu' items: 'QCR Summary' (selected), 'Services' (highlighted in blue), and 'Edit'. The main form area has a title 'QCR - II. Services' with a 'Back to Summary' link. It contains sections for 'Review Information' (Participant: John Smith) and 'Review Period' (Start Date: 01/01/2012, End Date: 01/01/2014, Review Date: 01/01/2013). The 'Service Information' section includes fields for 'Service/Date Range': a dropdown menu with a yellow background and error message 'This field is required.' containing options like 'Adult Medical Day Care-(01/01/2013-10/01/2013)', 'Durable Medical Equipment-(01/01/2013-10/01/2013)', etc. Other service fields include 'Service Name', 'Provider', 'Start Date', 'End Date', 'Frequency', 'Frequency Type', 'Units', and 'Jurisdiction'. Below these are sections for 'Service Problem?', 'Recommended by AERS?', 'Included in the Waiver POC/POS?', 'Date Created', and 'Status'. The 'Date Created' field has an error message 'Date Created' is required. The 'Status' field also has an error message 'This field is required.' At the bottom is a 'Service Status Comments' text area. The 'Save' button in the top right corner is circled with a red arrow.

After saving a Service Form entry the entry will appear in the Services list as seen in the figure below. The actor can edit a Service entry by clicking the **Edit link** as seen in the figure below. If the actor clicks the Edit link the Service Form for that entry will appear with fields pre-populated based on the last saved information. The actor will also have the option to delete a Service entry by clicking the **Delete link** as seen in the figure below.

<b>II. Services **</b>									<u>POS/POC List</u>	<u>Add</u>
Service	Provider	POC Date	Start Date	CAPA/ICI	Urgency	With Missing Data	Actions			
Adult Medical Day Care	Service Provider, Independent - Baltimore 1	12/30/2012	01/01/2013	CAPA - LAH	Moderate	No	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>			

When clicking the **Delete link** in any section a pop-up window will appear asking the actor to verify that they wish to delete the record. Click the *OK button* to continue and delete the record or click the *Cancel button* to return to the QCR Summary page.



### 3.6.4 Section III: Significant Changes

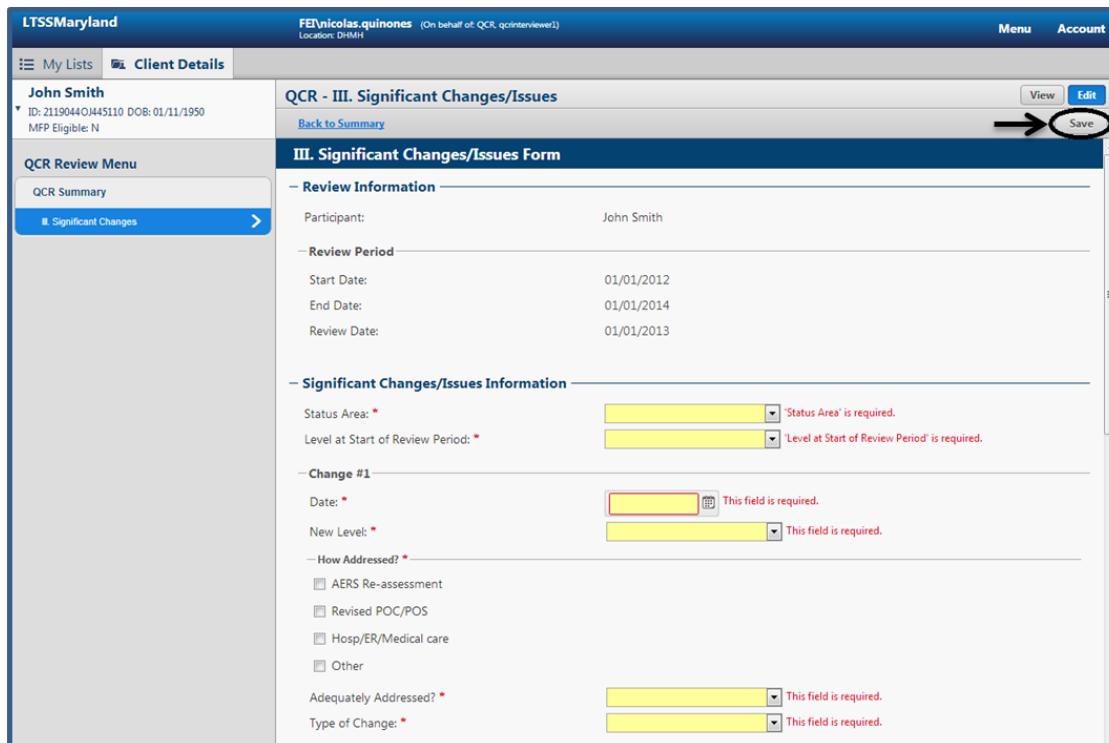
Within the Significant Changes panel, the actor has two options: click the **Add link** or **No Significant Changes were Identified link** as seen in the figure below. The No Significant Changes were Identified link will capture a value of 0 for the Significant Changes list. The Add link will bring up the *Significant Changes Form* and allow the actor to identify a significant change to review for the client. It is a requirement that the actor either Add a significant change to the significant change list or click the No Significant Changes were Identified link to capture a value of 0 in order to Submit the QCR Worksheet. A visual display of this requirement can be seen in the Status Check table of Section VIII: Status of the QCR Worksheet and will be discussed later in this manual.

<b>III. Significant Changes **</b>									→	<u>No Significant Changes were Identified</u>	<u>Add</u>
Status Area	Level Start	Date of Change	New Level	CAPA/ICI	Urgency	Actions					
No data available in table											

If the actor clicks the “No Significant Changes were Identified” link a value of 0 is captured in the Significant Change list and the link will disappear as seen in the figure below. The actor will still have the option to click the Add link to add a significant change to the Significant Change list. If the actor adds a significant change(s) to the Significant Change list and then deletes those entries to the point where no significant changes remain in the Significant Change list the “No Significant Changes were Identified” link will re-appear and the actor will once again be required to either click the “No Significant Changes were Identified” link or Add a significant change in order to Submit the QCR Worksheet.

<b>III. Significant Changes **</b>									<a href="#">Add</a>
Status Area	Level Start	Date of Change	New Level	CAPA/ICI	Urgency				Actions
No data available in table									

If the actor clicks the Add link from the Significant Changes panel, the Significant Changes Form will appear. The Significant Changes Form captures detailed information about a particular significant change for the client under review. Navigate through Section III: Significant Changes and fill out *required information* to save, which will be *highlighted yellow* or marked with an *asterisk*. Fields within the form contain *validation checks* and will display error messages when the actor tries to enter information that does not meet those requirements as seen in the figure below. The actors choice in the Status Area field will drive the options and visual display through the Significant Change Form. After entering all required and optional information click the **Save button** to save the Significant Change entry as seen in the figure below.

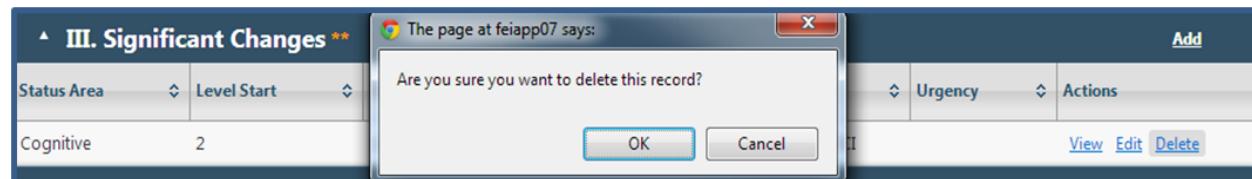


The screenshot shows the 'QCR - III. Significant Changes/Issues' form. At the top right, there are 'View' and 'Edit' buttons, with 'Edit' being highlighted. Below them is a large red arrow pointing to the 'Save' button, which is also highlighted with a red circle. The form has two main sections: 'Review Information' and 'Significant Changes/Issues Information'. Under 'Review Information', fields include 'Participant' (John Smith), 'Start Date' (01/01/2012), 'End Date' (01/01/2014), and 'Review Date' (01/01/2013). Under 'Significant Changes/Issues Information', several fields are marked as required: 'Status Area' (highlighted yellow), 'Level at Start of Review Period' (highlighted yellow), 'Date' (highlighted yellow), 'New Level' (highlighted yellow), 'How Addressed?' (checkboxes for AERS Re-assessment, Revised POC/POS, Hosp/ER/Medical care, Other), 'Adequately Addressed?' (highlighted yellow), and 'Type of Change?' (highlighted yellow). Error messages are displayed next to the required fields: "'Status Area' is required.", "'Level at Start of Review Period' is required.", "This field is required.", and "This field is required."

After saving a Significant Change Form entry the entry will appear in the Significant Change list as seen in the figure below. The actor can edit a Significant Change entry by clicking the **Edit link** as seen in the figure below. If the actor clicks the Edit link the Significant Change Form for that entry will appear with fields pre-populated based on the last saved information. The actor will also have the option to delete a Significant Change entry by clicking the **Delete link** as seen in the figure below.

III. Significant Changes **							Add
Status Area	Level Start	Date of Change	New Level	CAPA/ICI	Urgency	Actions	
Cognitive	2	11/26/2012	1	No CAPA/ICI		<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>	

When clicking the **Delete link** in any section a pop-up window will appear asking the actor to verify that they wish to delete the record. Click the *OK button* to continue and delete the record or click the *Cancel button* to return to the QCR Summary page.



### 3.6.5 Section IV: Reportable Events

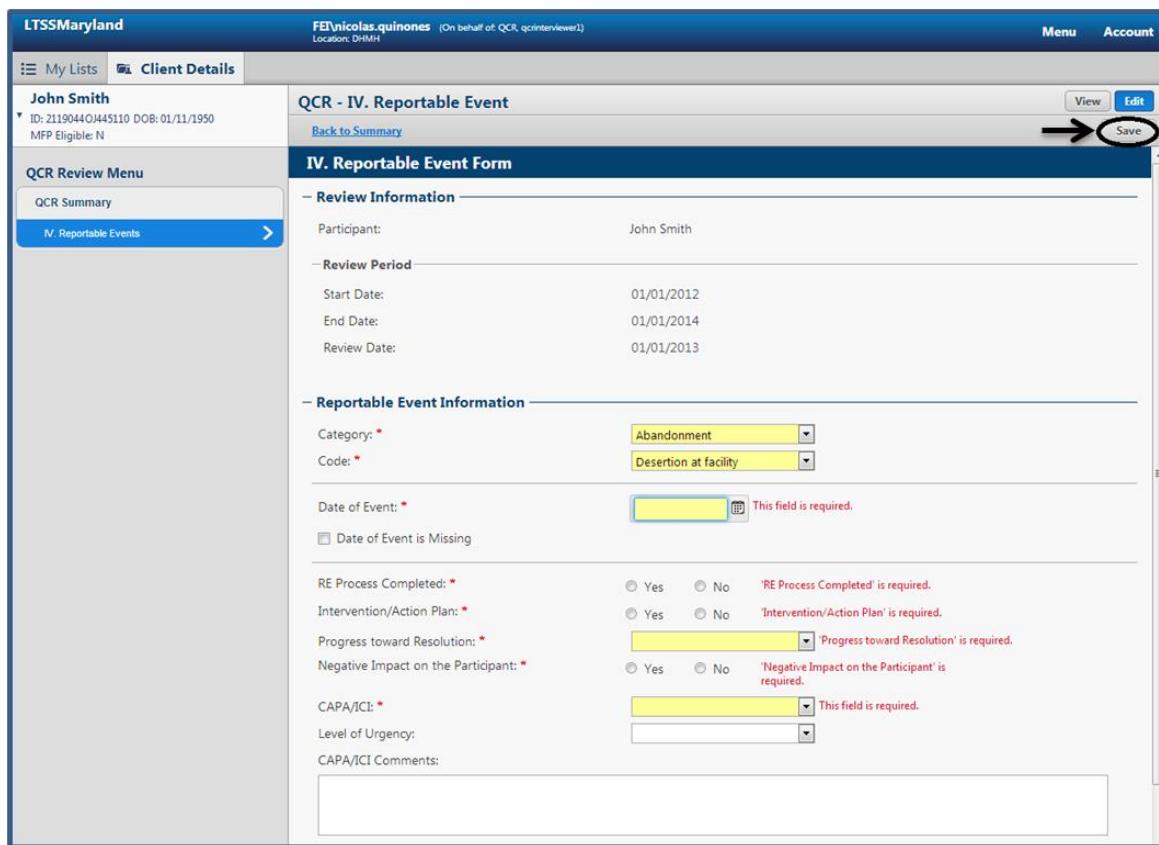
Within the Reportable Events panel, the actor has two options: click the **Add link** or **No Reportable Events were Identified link** as seen in the figure below. The No Reportable Events were Identified link will capture a value of 0 for the Reportable Events list. The Add link will bring up the *Reportable Events Form* and allow the actor to identify a reportable event to review for the client. It is a requirement that the actor either Add a reportable event to the reportable event list or click the No Reportable Events were Identified link to capture a value of 0 in order to Submit the QCR Worksheet. A visual display of this requirement can be seen in the Status Check table of Section VIII: Status of the QCR Worksheet and will be discussed later in this manual.

IV. Reportable Events **							→ No Reportable Events were Identified	Add
Category/Code	Date of Event	CAPA/ICI	Urgency	With Missing Data	Actions			
No data available in table								

If the actor clicks the “No Reportable Events were Identified” link a value of 0 is captured in the Reportable Event list and the link will disappear as seen in the figure below. The actor will still have the option to click the Add link to add a reportable event to the Reportable Event list. If the actor adds a reportable event to the Reportable Event list and then deletes those entries to the point where no reportable events remain in the Significant Change list the “No Significant Changes were Identified” link will re-appear and the actor will once again be required to either click the “No Reportable Events were Identified” link or Add a reportable event review in order to Submit the QCR Worksheet.

IV. Reportable Events **							Add
Category/Code	Date of Event	CAPA/ICI	Urgency	With Missing Data	Actions		
No data available in table							

If the actor clicks the Add link from the Reportable Events panel, the Reportable Events Form will appear. The Reportable Events Form captures detailed information about a particular reportable event for the client under review. Navigate through Section IV: Reportable Events and fill out *required information* to save, which will be *highlighted yellow* or marked with an *asterisk*. Fields within the form contain *validation checks* and will display error messages when the actor tries to enter information that does not meet those requirements as seen in the figure below. After entering all required and optional information click the **Save button** to save the Reportable Event entry as seen in the figure below.



The screenshot shows the 'IV. Reportable Event Form' page. The left sidebar has 'My Lists' and 'Client Details' tabs, and a 'QCR Review Menu' section with 'IV. Reportable Events' selected. The main area has a title 'QCR - IV. Reportable Event' with 'Back to Summary' and 'View' and 'Edit' buttons. A large red circle and arrow highlight the 'Save' button in the top right corner of the form area. The form fields include:

- Review Information:** Participant: John Smith
- Review Period:** Start Date: 01/01/2012, End Date: 01/01/2014, Review Date: 01/01/2013
- Reportable Event Information:**
  - Category: \* Abandonment
  - Code: \* Desertion at facility
  - Date of Event: \* (highlighted yellow) This field is required.
  - Date of Event is Missing:
  - RE Process Completed: \* (radio buttons) Yes, No. 'RE Process Completed' is required.
  - Intervention/Action Plan: \* (radio buttons) Yes, No. 'Intervention/Action Plan' is required.
  - Progress toward Resolution: \* (radio buttons) Yes, No. 'Progress toward Resolution' is required.
  - Negative Impact on the Participant: \* (radio buttons) Yes, No. 'Negative Impact on the Participant' is required.
  - CAPA/ICI: \*
  - Level of Urgency:
  - CAPA/ICI Comments:   
[Large text area]

After saving a Reportable Event Form entry the entry will appear in the Reportable Event list as seen in the figure below. The actor can edit a Reportable Event entry by clicking the **Edit link** as seen in the figure below. If the actor clicks the Edit link the Reportable Event Form for that entry will appear with fields pre-populated based on the last saved information. The actor will also have the option to delete a Reportable Event entry by clicking the **Delete link** as seen in the figure below.

IV. Reportable Events **						Add
Category/Code	Date of Event	CAPA/ICI	Urgency	With Missing Data	Actions	
Abandonment: Desertion at facility	12/31/2012	CAPA - LAH	High	No	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>	

When clicking the **Delete link** in any section a pop-up window will appear asking the actor to verify that they wish to delete the record. Click the *OK button* to continue and delete the record or click the *Cancel button* to return to the QCR Summary page.

IV. Reportable Events **						Add
Category/Code	With Missing Data					Actions
Abandonment: Desertion at facility	No					<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>

The page at feiapp07 says:

Are you sure you want to delete this record?

[OK](#) [Cancel](#)

### 3.6.6 Section V: Registered Nurses

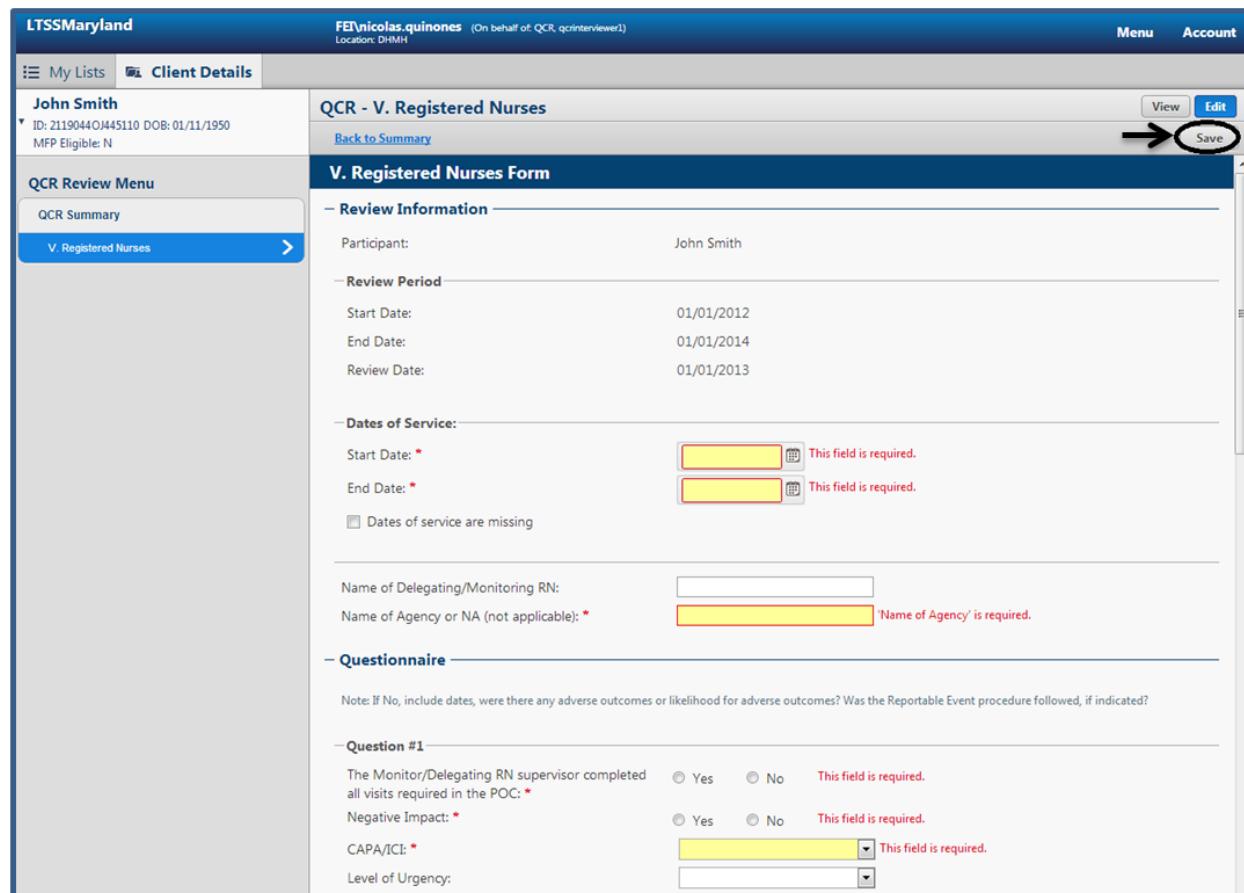
Within the Registered Nurses panel, the actor has two options: click the **Add link** or **No Registered Nurses were Identified link** as seen in the figure below. The No Registered Nurses were Identified link will capture a value of 0 for the Registered Nurse list. The Add link will bring up the *Registered Nurse Form* and allow the actor to identify a registered nurse to review for the client. It is a requirement that the actor either Add a registered nurse to the Registered Nurse list or click the No Registered Nurses were Identified link to capture a value of 0 in order to Submit the QCR Worksheet. A visual display of this requirement can be seen in the Status Check table of Section VIII: Status of the QCR Worksheet and will be discussed later in this manual.

V. Registered Nurses **						→	No Registered Nurses were Identified	Add
Name of RN	Agency	CAPA/ICI	Dates of Service From - To	With Missing Data	Actions			
No data available in table								

If the actor clicks the “No Registered Nurses were Identified” link a value of 0 is captured in the Registered Nurse list and the link will disappear as seen in the figure below. The actor will still have the option to click the Add link to add registered nurse to the Registered Nurse list. If the actor adds a registered nurse(s) to the Registered Nurse list and then deletes those entries to the point where no registered nurses remain in the Registered Nurse list the “No Registered Nurses were Identified” link will re-appear and the actor will once again be required to either click the “No Registered Nurses were Identified” link or Add a registered nurse review in order to Submit the QCR Worksheet.

V. Registered Nurses **							Add
Name of RN	Agency	CAPA/ICI	Dates of Service From - To	With Missing Data		Actions	
No data available in table							

If the actor clicks the Add link from the Registered Nurses panel, the Registered Nurses Form will appear. The Registered Nurses Form captures detailed information about a particular registered nurse for the client under review. Navigate through Section V: Registered Nurses and fill out *required information* to save, which will be *highlighted yellow* or marked with an *asterisk*. Fields within the form contain *validation checks* and will display error messages when the actor tries to enter information that does not meet those requirements as seen in the figure below. After entering all required and optional information click the **Save button** to save the Registered Nurse entry as seen in the figure below.

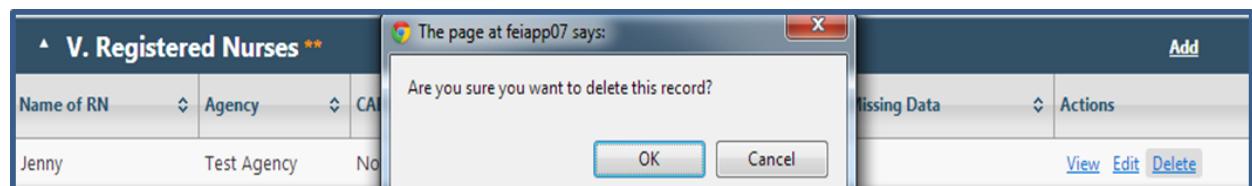


The screenshot shows the 'V. Registered Nurses' form within the LTSSMaryland system. The top navigation bar includes 'My Lists', 'Client Details', 'Menu', and 'Account'. On the left, a sidebar shows 'John Smith' details (ID: 21190440J45110, DOB: 01/11/1950, MFP Eligible: N) and a 'QCR Review Menu' with 'V. Registered Nurses' selected. The main form title is 'QCR - V. Registered Nurses'. It has sections for 'Review Information' (Participant: John Smith), 'Review Period' (Start Date: 01/01/2012, End Date: 01/01/2014, Review Date: 01/01/2013), and 'Dates of Service' (Start Date: \* [highlighted yellow], End Date: \* [highlighted yellow], Dates of service are missing). Below these are fields for 'Name of Delegating/Monitoring RN' and 'Name of Agency or NA (not applicable)' (both highlighted yellow). A note at the bottom of the form states: 'Note: If No, include dates, were there any adverse outcomes or likelihood for adverse outcomes? Was the Reportable Event procedure followed, if indicated?' The 'Questionnaire' section contains questions about supervisor completion, negative impact, CAPA/ICI, and level of urgency, with various input fields and validation messages. The 'Save' button is highlighted with a red circle and an arrow pointing to it.

After saving a Registered Nurse Form entry the entry will appear in the Registered Nurse list as seen in the figure below. The actor can edit a Registered Nurse entry by clicking the **Edit link** as seen in the figure below. If the actor clicks the Edit link the Registered Nurse Form for that entry will appear with fields pre-populated based on the last saved information. The actor will also have the option to delete a Registered Nurse entry by clicking the **Delete link** as seen in the figure below.

V. Registered Nurses **						Add
Name of RN	Agency	CAPA/ICI	Dates of Service From - To	With Missing Data	Actions	
Jenny	Test Agency	No	09/30/2012 - 12/31/2012	No	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>	

When clicking the **Delete link** in any section a pop-up window will appear asking the actor to verify that they wish to delete the record. Click the *OK button* to continue and delete the record or click the *Cancel button* to return to the QCR Summary page.



### 3.6.7 Section VI: Personal Care Aides

Within the Personal Care Aides panel, the actor has two options: click the **Add link** or **No Personal Care Aides were Identified link** as seen in the figure below. The No Personal Care Aides were Identified link will capture a value of 0 for the Personal Care Aides list. The Add link will bring up the *Personal Care Aide Form* and allow the actor to identify a personal care aide to review for the client. It is a requirement that the actor either Add a personal care aide to the Personal Care Aides list or click the No Personal Care Aides were Identified link to capture a value of 0 in order to Submit the QCR Worksheet. A visual display of this requirement can be seen in the Status Check table of Section VIII: Status of the QCR Worksheet and will be discussed later in this manual.

VI. Personal Care Aides **						<a href="#">No Personal Care Aides were Identified</a>	Add
Name of PCA	Agency	CAPA/ICI	Dates of Service From - To	With Missing Data	Actions		
No data available in table							

If the actor clicks the “No Personal Care Aides were Identified” link a value of 0 is captured in the Personal Care Aides list and the link will disappear as seen in the figure below. The actor will still have the option to click the Add link to add personal care aide to the Personal Care Aides list. If the actor adds a personal care aide(s) to the Personal Care Aides list and then deletes those entries to the point where no personal care aides remain in the Personal Care Aides list the “No Personal Care Aides were Identified” link will re-appear and the actor will once again be required to either click the “No Personal Care Aides were Identified” link or Add a personal care aide review in order to Submit the QCR Worksheet.

VI. Personal Care Aides **							Add
Name of PCA	Agency	CAPA/ICI	Dates of Service From - To	With Missing Data		Actions	
No data available in table							

If the actor clicks the Add link from the Personal Care Aides panel, the Personal Care Aide Form will appear. The Personal Care Aide Form captures detailed information about a particular personal care aide for the client under review. Navigate through Section VI: Personal Care aides and fill out *required information* to save, which will be *highlighted yellow* or marked with an *asterisk*. Fields within the form contain *validation checks* and will display error messages when the actor tries to enter information that does not meet those requirements as seen in the figure below. After entering all required and optional information click the **Save button** to save the Personal Care Aide entry as seen in the figure below.

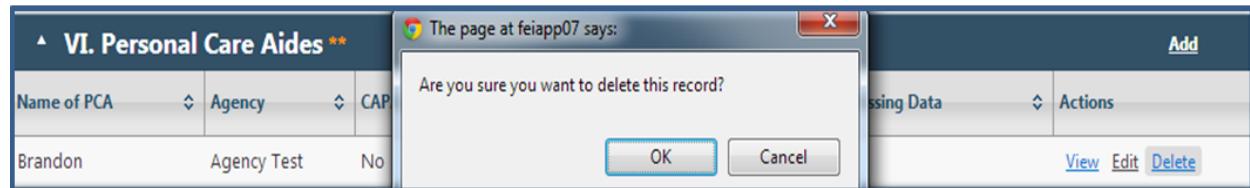
The screenshot shows the VI. Personal Care Aide Form. Key fields include:

- Participant:** John Smith
- Review Period:**
  - Start Date: 01/01/2012
  - End Date: 01/01/2014
  - Review Date: 01/01/2013
- Dates of Service:**
  - Start Date: \* (highlighted in yellow, required)
  - End Date: \* (highlighted in yellow, required)
  - Dates of service are missing
- Name of Agency or NA \*** (highlighted in yellow, required)
- Name of Personal Care Aide/ALF Staff/Attendant:** (empty field)
- Questionnaire** section:
  - Information: If Yes, include dates, was there an Action Taken, and what was the resolution, i.e. reportable event form completed, CAPA requested, or ICI, etc.
  - Question #1**
    - During the review period, was there any documentation that the participant had poor hygiene, was unkempt, etc.? \* (radio buttons: Yes, No, required)
    - Negative Impact: \* (radio buttons: Yes, No, required)
    - CAPA/ICI: \* (highlighted in yellow, required)
    - Level of Urgency: (dropdown menu)

After saving a Personal Care Aide Form entry the entry will appear in the Personal Care Aide list as seen in the figure below. The actor can edit a Personal Care Aide entry by clicking the **Edit link** as seen in the figure below. If the actor clicks the Edit link the Personal Care Aide Form for that entry will appear with fields pre-populated based on the last saved information. The actor will also have the option to delete a Personal Care Aide entry by clicking the **Delete link** as seen in the figure below.

VI. Personal Care Aides **					Add
Name of PCA	Agency	CAPA/ICI	Dates of Service From - To	With Missing Data	Actions
Brandon	Agency Test	No	09/30/2012 - 12/30/2012	No	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>

When clicking the **Delete link** in any section a pop-up window will appear asking the actor to verify that they wish to delete the record. Click the *OK button* to continue and delete the record or click the *Cancel button* to return to the QCR Summary page.

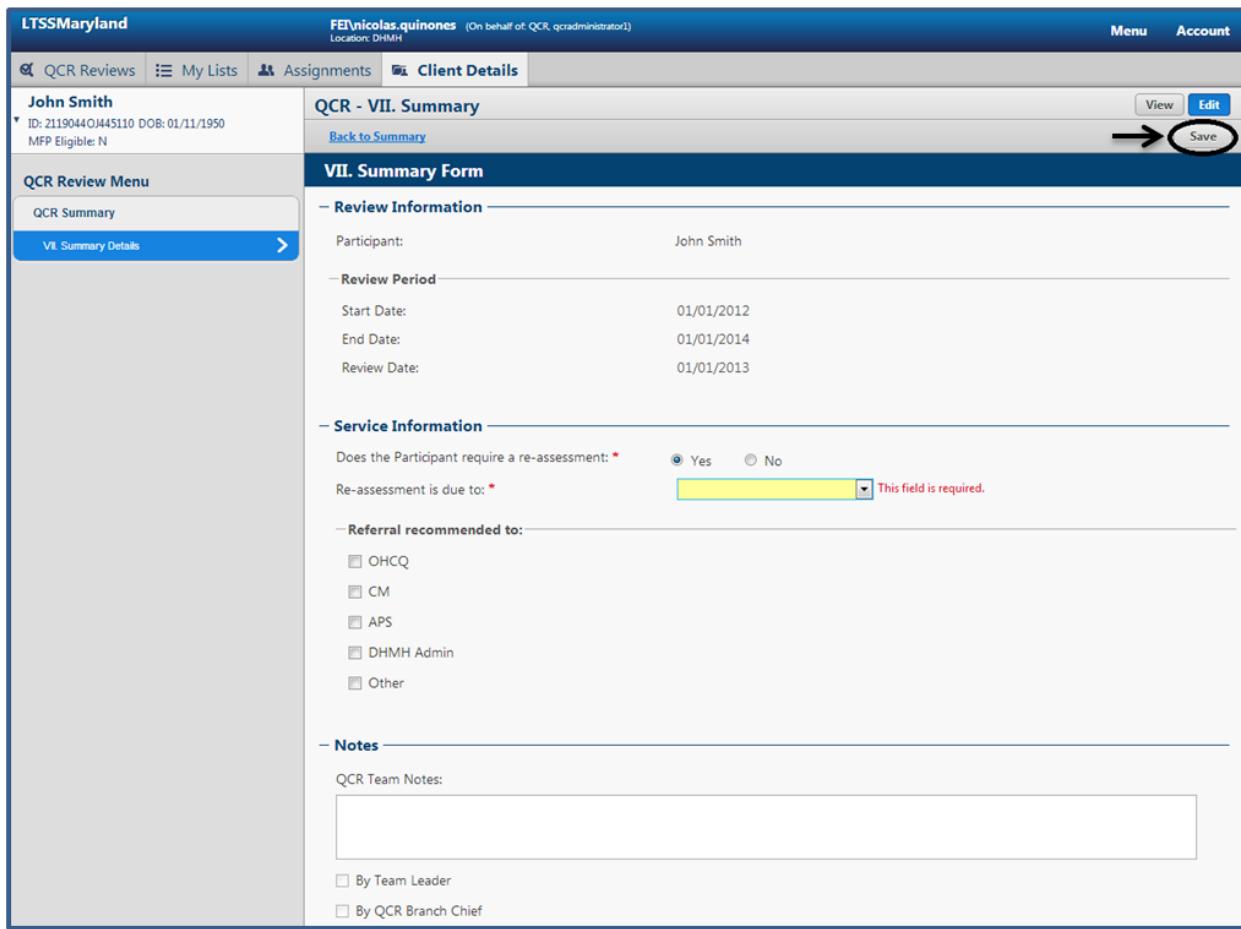


### 3.6.8 Section VII: Summary

The Summary panel on the QCR Summary page captures basic information from *Section VII: Summary* of the QCR Worksheet. To edit information on the Summary click the **Edit link** as seen in the figure below.

VII. Summary **	
<b>Service Information</b>	
Does the Participant require a re-assessment:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Re-assessment is due to:	Deterioration
<b>Referral recommended to:</b>	
<input type="checkbox"/> OHCQ <input checked="" type="checkbox"/> CM <input type="checkbox"/> APS <input type="checkbox"/> DHMH Admin <input type="checkbox"/> Other	

The Summary captures detailed information about the client, whether the client requires a re-assessment and notes from actors within QCR. Navigate through Section VII: Summary and fill out *required information* to save, which will be *highlighted yellow* or marked with an *asterisk*. Fields within the form contain *validation checks* and will display error messages when the actor tries to enter information that does not meet those requirements as seen in the figure below. After entering all required and optional information click the **Save button** to save the Summary as seen in the figure below.



The screenshot shows the LTSSMaryland Quality Care Review User Manual interface. The top navigation bar includes 'LTSSMaryland', the user 'FE\\nicolas.quinones (On behalf of: QCR, qcadministrator)', 'Location: DHMH', 'Menu', and 'Account'. The main content area is titled 'QCR - VII. Summary' and contains the 'VII. Summary Form'. The form is divided into sections: 'Review Information' (Participant: John Smith), 'Review Period' (Start Date: 01/01/2012, End Date: 01/01/2014, Review Date: 01/01/2013), 'Service Information' (Does the Participant require a re-assessment? Yes (radio button selected)), 'Re-assessment is due to: \*' (dropdown menu highlighted in yellow with an error message: 'This field is required.'), 'Referral recommended to:' (checkboxes for OHCQ, CM, APS, DHMH Admin, Other), and 'Notes' (QCR Team Notes: empty text area, checkboxes for 'By Team Leader' and 'By QCR Branch Chief'). The 'Save' button in the top right corner is circled in red.

After saving the Summary the updated information will be displayed in the Summary panel on the QCR Summary page. By Team Leader Notes and By QCR Branch Chief Notes will only be visible in the Face Sheet panel if their associated checkboxes are selected. These fields are primarily used to identify problems within a section/entry, which will be discussed later in this manual.

**VII. Summary \*\***

**Service Information**

Does the Participant require a re-assessment:  Yes  No

Re-assessment is due to: Deterioration

**Referral recommended to:**

- OHCQ
- CM
- APS
- DHMH Admin
- Other

### 3.6.9 Section VIII: Status

The Status panel on the QCR Summary page captures basic information from *Section VIII: Status* of the QCR Worksheet. The Status Checks table gives a snapshot into Sections II-VI of the QCR Worksheet. The text shown in red in the figure below is an indicator that the actor has not fulfilled the requirements for the corresponding section in order to Submit the QCR Worksheet. “Please verify that no Service were added,” is prompting the user to either Add a service or click the “No Services were Identified” link. This must happen for Sections II-VI in order to Submit the QCR Worksheet. To edit information in the Status section click the **Edit link** as seen in the figure below.

**VIII. Status \*\***

	Total	With CAPA/ICI	With missing data	Note:
Services	0	0	0	Please complete section "II. Services"
Significant Changes	0	0	N/A	Please complete section "III. SignificantChanges"
Reportable Events	0	0	0	Please complete section "IV. ReportableEvents"
Registered Nurses	0	0	0	Please complete section "V. RegisteredNurses"
Personal Care Aides	0	0	0	Please complete section "VI. PersonalCareAides"

The Status captures detailed information about the clients overall QCR Worksheet. The Status Checks table gives a snapshot into Section II-VI of the QCR Worksheet. The Interviewer Details, Team Leader Details and QCR Branch Chief Details sections provide information on where each actor is in the review process and problem areas that have been identified. Navigate through Section VIII: Status and fill out *required information* to save, which will be *highlighted yellow* or marked with an *asterisk*. Fields within the form contain *validation checks* and will display error messages when the actor tries to enter information that does not meet those requirements as seen in the figure below. After entering all required and optional information click the **Save button** to save the Status section as seen in the figure below.

The screenshot shows the 'VIII. Status' section of the QCR form. The 'Save' button is highlighted with a red circle and an arrow pointing to it.

	Total	With CAPA/ICI	With missing data	Note:
Services	0	0	0	Please complete section "II. Services"
Significant Changes	0	0	N/A	Please complete section "III. SignificantChanges"
Reportable Events	0	0	0	Please complete section "IV. ReportableEvents"
Registered Nurses	0	0	0	Please complete section "V. RegisteredNurses"
Personal Care Aides	0	0	0	Please complete section "VI. PersonalCareAides"

After saving the Status section the updated information will be displayed in the Status panel on the QCR Summary page.

<b>VIII. Status **</b>						<b>View</b>	<b>Edit</b>
	Total	With CAPA/ICI	With missing data	Note:			
Services	0	0	0	Please complete section "II. Services"			
Significant Changes	0	0	N/A	Please complete section "III. SignificantChanges"			
Reportable Events	0	0	0	Please complete section "IV. ReportableEvents"			
Registered Nurses	0	0	0	Please complete section "V. RegisteredNurses"			
Personal Care Aides	0	0	0	Please complete section "VI. PersonalCareAides"			

**Status Details**

Interviewer Status:	In Progress
---------------------	-------------

### 3.6.10 Submit QCR Worksheet: Interviewer Status “Request Replacement”

If a situation occurs where the QCR Interviewer cannot complete or has a problem with completing a client's QCR Worksheet, they can navigate to Edit mode of the Status section and set the *Interviewer Status as “Request Replacement.”* By selecting Request Replacement, the actor must identify why they are requesting a replacement. Upon entering the required information click the **Save button** as seen in the figure below.

This screenshot shows the 'QCR - VIII. Status' form for client 'John Smith'. The 'Save' button at the top right is highlighted with a red circle and an arrow pointing to it.

**Review Information:**  
Participant: John Smith

**Review Period:**  
Start Date: 01/01/2012  
End Date: 01/01/2014  
Review Date: 01/01/2013

**Status Checks:**

	Total	With CAPA/ICI	With missing data	Note:
Services	0	0	0	Please complete section "II. Services"
Significant Changes	0	0	N/A	Please complete section "III. SignificantChanges"
Reportable Events	0	0	0	Please complete section "IV. ReportableEvents"
Registered Nurses	0	0	0	Please complete section "V. RegisteredNurses"
Personal Care Aides	0	0	0	Please complete section "VI. PersonalCareAides"

**Interviewer Details:**  
Interviewer: qcrinterviewer1 QCR  
Interviewer Status: \* Request Replacement

Why Request Replacement? \*

After saving the Status Form with an Interviewer Status of “*Request Replacement*,” the actor will see a **Replacement button** on the QCR Summary page as seen in the figure below. By clicking the Replacement button the actor will be automatically discarding the clients QCR Worksheet and an alert will be sent to actor with a role of QCR Administrator informing them that a QCR could not be performed on the client and a new client should be started in the QCR process. After selecting the Replacement button the clients QCR Worksheet will enter into a Status of “*Discarded*,” and no QCR actor will be able to Add/Edit any sections of the clients QCR Worksheet.

This screenshot shows the 'QCR - Summary' page for client 'John Smith'. The 'Replacement' button at the top right is highlighted with a red circle and an arrow pointing to it.

**Summary:** Status: In Progress

**Sections:**

- I. Face Sheet \*\*
- II. Services \*\*
- III. Significant Changes \*\*
- IV. Reportable Events \*\*
- V. Registered Nurses \*\*
- VI. Personal Care Aides \*\*
- VII. Summary \*\*
- VIII. Status \*\*

**Actions:**

- View Edit
- No Services were Identified POS/POC List Add
- No Significant Changes were Identified Add
- No Reportable Events were Identified Add
- No Registered Nurses were Identified Add
- No Personal Care Aides were Identified Add
- View Edit
- View Edit

### 3.6.11 Submit QCR Worksheet: Interviewer Status “Completed”

When the QCR Interviewer completes the review process of the client they will navigate into Edit mode of the Status Form and set the *Interviewer Status as “Completed.”* By selecting Completed, the actor must identify Last Day of the Review, Date Submitted to Team Leader and Date Completed. Upon entering the required information click the **Save button** as seen in the figure below.

The screenshot shows the 'VIII. Status Form' page. At the top right, there are 'View', 'Edit', and 'Save' buttons. The 'Save' button is circled with a red arrow. The form contains sections for 'Review Information', 'Review Period', 'Status Checks', and 'Interviewer Details'. In the 'Interviewer Details' section, the 'Interviewer Status' dropdown is set to 'Completed'. The 'Last Day of the Review' field is set to '01/01/2013'. The 'Date Submitted to Team Leader' field is set to '01/22/2013'. The 'Date Completed' field is set to '01/15/2013'.

After saving the Status Form with an Interviewer Status of “*Completed*,” the actor will see a **Submit button** on the QCR Summary page as seen in the figure below. By clicking the Submit button the actor is submitting the clients QCR Worksheet to the clients *Assigned QCR Team Leader* to be reviewed. After clicking Submit the clients Status will change to “**Submitted to Team Lead**.”

The screenshot shows the 'QCR - Summary' page. At the bottom right, there are 'Submit', 'Discard', and 'Expand All' buttons. The 'Submit' button is circled with a red arrow. The page lists various sections of the QCR Worksheet with 'View' and 'Edit' buttons next to each. The sections listed are I. Face Sheet, II. Services, III. Significant Changes, IV. Reportable Events, V. Registered Nurses, VI. Personal Care Aides, VII. Summary, and VIII. Status.

By clicking the Submit button the actor is submitting the clients QCR Worksheet to the clients *Assigned QCR Team Leader* to be reviewed. After clicking Submit the clients Status will change to “**Submitted to Team Lead**.” When the clients Status is “Submitted to Team Lead,” only the Assigned QCR Team Leader will have the ability to Add/Edit sections/entries of the clients QCR Worksheet. Other QCR actors will only be able to View the clients QCR Summary page.

### 3.7 QCR Worksheet: QCR Team Leader

When the clients Assigned QCR Team Leader logs into LTSS they will navigate to the **Alerts tab** as shown in the figure below. The actor will see that they have an alert indicating that a review is required for the client. Click the **Client Requires QCR Review link** under the Subject column to navigate to the *My List tab* of QCR and find the clients QCR Worksheet.

After receiving an alert that a client's QCR Worksheet has been submitted for Team Lead review, the assigned QCR Team Leader will navigate to *My Lists* within the QCR sub-system. The actor will select Show Me option “**Reviews to Approve**,” and can optionally put in filters for *County* and *QCR Review Period*. To review the work done by the assigned QCR Interview navigate to the clients QCR Summary by clicking the **Summary link** as seen in the figure below.

The screenshot shows the 'QCR - Reviews To Approve' page. At the top, there are filters for 'County', 'QCR Review Period' (set to 01/01/2012-01/01/2014), and 'Show Me: \*\*'. A dropdown menu labeled 'Reviews to Approve' is open. Below the filters is a 'Filter' button. The main table lists clients with columns for Last Name, First Name, County, ID, Program, Review Date, Status, and Actions. In the 'Actions' column for a client named Smith, there is a link labeled 'Summary' which is circled in red. An arrow points from the text 'Clicking the Summary link will take the actor to the QCR Summary page.' to this circled link.

### 3.7.1 QCR Team Leader Review of QCR Summary

Clicking the Summary link will take the actor to the QCR Summary page. The assigned QCR Team Leader will now have the ability to Add/Edit all sections of the clients QCR Worksheet. The actor will go through each section of the clients QCR Worksheet and verify the information entered.

The screenshot shows the 'Client Details' page for a client named John Smith. The 'QCR Review Menu' sidebar includes a 'QCR Summary' link, which is highlighted. The main content area is titled 'QCR - Summary' and shows the status 'Submitted to Team Lead'. Below this, there is a list of sections: I. Face Sheet, II. Services, III. Significant Changes, IV. Reportable Events, V. Registered Nurses, VI. Personal Care Aides, VII. Summary, and VIII. Status. Each section has 'View' and 'Edit' links. There are also 'Discard' and 'Expand All' buttons at the top right of the summary area.

### 3.7.2 Identifying a Problem as QCR Team Leader in a Section

By clicking the Edit link in the Face Sheet panel the QCR Team Leader can review the information captured on the clients Face Sheet.

The screenshot shows the LTSSMaryland Quality Care Review User Manual interface. The top navigation bar includes 'LTSSMaryland', the user's name 'FE\nicolas.quinones (On behalf of: QCR, qcrtteamleader1)', 'Location: DHMH', 'Menu', and 'Account'. Below the navigation is a header with 'My Lists', 'Assignments', and 'Client Details'. The 'Client Details' tab is active, showing 'John Smith' with ID 21190440J445110, DOB 01/11/1950, and MFP Eligible: N. A sidebar titled 'QCR Review Menu' has 'QCR Summary' selected. The main content area displays 'QCR - Summary' status 'Submitted to Team Lead' with 'Discard' and 'Collapse All' buttons. Under 'I. Face Sheet \*\*', there are sections for 'Review Information' (Participant: John Smith) and 'Review Period' (Start Date: 01/01/2012, End Date: 01/01/2014, Review Date: 01/01/2013). Further down are fields for 'Review County: Baltimore', interview completion ('Was an Interview Completed?'), focused review ('Is this a focused review?'), QCRT Interviewer ('qcrinterviewer1 QCR'), and QCR Team Lead ('qcrtteamleader1 QCR'). The 'Edit' button in the top right of the 'I. Face Sheet' panel is circled with an arrow pointing to it.

To identify a problem with the Face Sheet, the assigned QCR Team Leader would navigate to the bottom of the page and put notes into the By Team Leader Notes field. Selecting the **checkbox** next to **By Team Leader** will highlight the notes upon save and put them into the Face Sheet panel on the QCR Summary page so that it can be easily identified that there is a problem with the Face Sheet.

This screenshot shows the same interface as the previous one, but the 'I. Face Sheet Details' section is selected in the sidebar. The 'Notes' section contains a 'QCR Team Notes:' field with an empty text area. Below it is a 'Notes:' field containing the text 'This is a problem with the Case Management Agency information.' A checkbox labeled 'By Team Leader' is checked. The 'Save' button in the top right of the 'I. Face Sheet Details' panel is circled with an arrow pointing to it.

Upon saving the Face Sheet with By Team Leader Notes that have its associated checkbox selected, the By Team Leader Notes will display in the Face Sheet panel as seen in the figure below.

▲ I. Face Sheet \*\* [View](#) [Edit](#)

— Review Information —

Participant: John Smith

— Review Period —

Start Date: 01/01/2012

End Date: 01/01/2014

Review Date:

Review County: Baltimore

Was an Interview Completed?  Yes  No

Is this a focused review?  Yes  No

QCRT Interviewer: qcrinterviewer1 QCR

QCR Team Lead: qcrteamleader1 QCR

— Notes —

Team Leader Notes:

This is a problem with the Case Management Agency information.

### 3.7.3 Identifying a Problem as QCR Team Leader in a List Entry

By clicking the Edit link for a specific entry within a list on the QCR Summary page, the assigned QCR Team Leader can review that entries information.

To *identify a problem with an entry*, the assigned QCR Team Leader would navigate to the bottom of the page and put notes into the *By Team Leader Notes* field. Selecting the **checkbox** next to **By Team Leader** will identify that this entry has a problem that needs review. Click the **Save button** to save the entry and mark it as a problem needing review.

After saving the entry with By Team Leader Notes checkbox selected the entry will be highlighted yellow in the list, identifying that it has a problem needing correction.

LTSSMaryland

FBI\nicolas.quinones (On behalf of: QCR, qcteamleader)  
Location: DHMH

Menu Account

My Lists Assignments Client Details

**John Smith**

ID: 21190440J445110 DOB: 01/11/1950  
MFP Eligible: N

**QCR - Summary** Status: Submitted to Team Lead

**QCR Review Menu**

**QCR Summary**

**I. Face Sheet \*\*** View Edit

**II. Services \*\*** POS/POC List Add

Service	Provider	POC Date	Start Date	CAPA/ICI	Urgency	With Missing Data	Actions
Adult Medical Day Care	Service Provider, Independent - Baltimore 1	01/29/2012	01/01/2013	CAPA - LAH	Moderate	No	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>

**III. Significant Changes \*\*** Add

**IV. Reportable Events \*\*** Add

**V. Registered Nurses \*\*** Add

**VI. Personal Care Aides \*\*** Add

**VII. Summary \*\*** View Edit

**VIII. Status \*\*** View Edit

### 3.7.4 Submit QCR Worksheet: Team Leader Status “Problem Identified”

If the QCR Team Leader completes the review process of the client and finds a problem they will navigate into Edit mode of the Status Form as seen in the figure below.

LTSSMaryland

FBI\nicolas.quinones (On behalf of: QCR, qcteamleader)  
Location: DHMH

Menu Account

My Lists Assignments Client Details

**John Smith**

ID: 21190440J445110 DOB: 01/11/1950  
MFP Eligible: N

**QCR Review Menu**

**QCR Summary**

**I. Face Sheet \*\*** View Edit

**II. Services \*\*** POS/POC List Add

**III. Significant Changes \*\*** Add

**IV. Reportable Events \*\*** Add

**V. Registered Nurses \*\*** Add

**VI. Personal Care Aides \*\*** Add

**VII. Summary \*\*** View Edit

**VIII. Status \*\*** View Edit

	Total	With CAPA/ICI	With missing data	Notes
Services	1	1	0	
Significant Changes	0	0	N/A	
Reportable Events	0	0	0	
Registered Nurses	0	0	0	
Personal Care Aides	0	0	0	

**Status Details**

Interviewer Status: Completed

The actor will set the *Team Leader Status* as “**Problem Identified**.” By selecting Problem Identified, the actor must identify Problem Areas and Problem Notes. The Problem Area selections should correspond to the QCR Worksheet sections where the QCR Team Leader found and marked problems using By Team Leader Notes fields. Upon entering the required information click the **Save button** as seen in the figure below.

LTSSMaryland

FE\nicolas.quinones (On behalf of: QCR, qcrtteamleader)

Location: DHMH

Menu Account

My Lists Assignments Client Details

John Smith

ID: 21190440J445110 DOB: 01/11/1950  
MF Eligible: N

QCR Review Menu

QCR Summary

VIII. Status

QCR - VIII. Status

Back to Summary

View Edit Save

Team Leader: qcrtteamleader1 QCR

Team Leader Status: \* Problem Identified

Problem Areas: \*

I. Face Sheet

II. Services

III. Significant Changes

IV. Reportable Events

V. Registered Nurses

VI. Personal Care Aides

VII. Summary

Problem Notes: \*

Problem with CAPA/ICI section

QCR Branch Chief Details

QCR Branch Chief:

QCR Branch Chief Status:

Date Approved:

Problem Notes:

After saving the Status Form with a Team Leader Status of “**Problem Identified**,” the actor will see a **Submit button** on the QCR Summary page as seen in the figure below. By clicking the Submit button the actor is submitting the clients QCR Worksheet to the clients *Assigned QCR Interviewer* for correction. After clicking Submit the clients Status will change to “**In Progress**,” because the QCR Team Leader is sending the clients QCR Worksheet back to the QCR Interviewer for the QCR Interviewer to make corrections to the problem areas.

FEI\nicolas.quinones (On behalf of: QCR, qcteamleader1)  
Location: DHMH

**Client Details**

**John Smith**  
ID: 21190440J445110 DOB: 01/11/1950  
MFP Eligible: N

**QCR Review Menu**  
QCR Summary >

**QCR - Summary** Status: Submitted to Team Lead

**Actions:** Submit (circled), Discard, Expand All

- ▼ I. Face Sheet \*\*
- ▼ II. Services \*\*
- ▼ III. Significant Changes \*\*
- ▼ IV. Reportable Events \*\*
- ▼ V. Registered Nurses \*\*
- ▼ VI. Personal Care Aides \*\*
- ▼ VII. Summary \*\*
- ▲ VIII. Status \*\*

**View Edit**      **POS/POC List Add**

	Total	With CAPA/ICI	With missing data	Note:
Services	1	1	0	
Significant Changes	0	0	N/A	
Reportable Events	0	0	0	
Registered Nurses	0	0	0	
Personal Care Aides	0	0	0	

**Status Details**

Interviewer Status: Completed

**Status Details**

Team Leader Status: Problem Identified

By clicking the Submit button the actor is submitting the clients QCR Worksheet to the clients *Assigned QCR Interviewer* to be corrected. After clicking Submit the clients Status will change to “**In Progress**.” When the clients Status is “In Progress,” only the Assigned QCR Interviewer will have the ability to Add/Edit sections/entries of the clients QCR Worksheet. Other QCR actors will only be able to View the clients QCR Summary page.

FEI\nicolas.quinones (On behalf of: QCR, qcteamleader1)  
Location: DHMH

**Client Details**

**John Smith**  
ID: 21190440J445110 DOB: 01/11/1950  
MFP Eligible: N

**QCR Review Menu**  
QCR Summary >

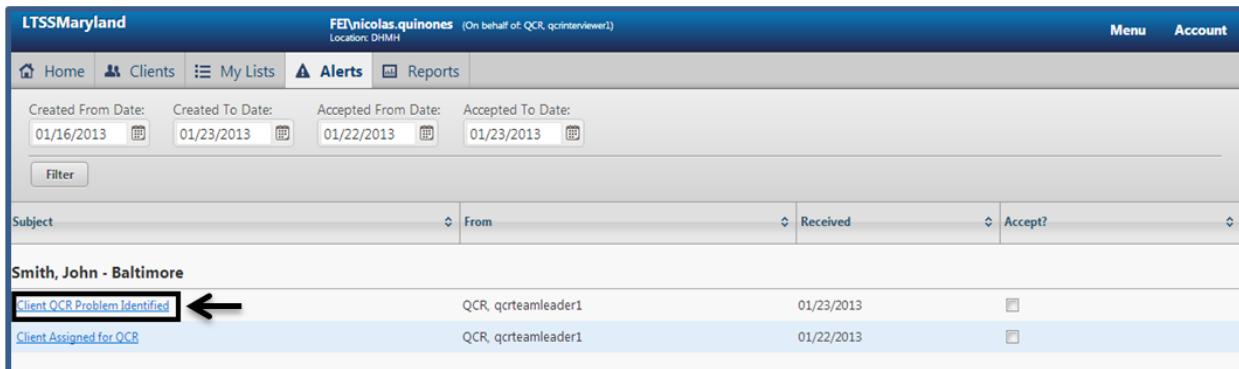
**QCR - Summary** Status: In Progress

**Actions:** Discard, Expand All

- ▼ I. Face Sheet \*\*
- ▼ II. Services \*\*
- ▼ III. Significant Changes \*\*
- ▼ IV. Reportable Events \*\*
- ▼ V. Registered Nurses \*\*
- ▼ VI. Personal Care Aides \*\*
- ▼ VII. Summary \*\*
- ▼ VIII. Status \*\*

**View**      **POS/POC List**

After the assigned QCR Team Leader Submits the clients QCR Worksheet with a Team Leader Status of “Problem Identified,” the assigned QCR Interviewer will receive an alert notifying them that corrective action is required on the clients QCR Worksheet. The assigned QCR Interviewer will log into LTSS and navigate to the Alerts tab where they will see the alert and click the **Client QCR Problem Identified link** as seen in the figure below. This will take the actor to the QCR My List where they can navigate into the clients QCR Worksheet through the Summary link.



The screenshot shows the LTSSMaryland software interface. At the top, there's a header bar with the title 'LTSSMaryland' and a user profile for 'FER\nicolas.quinones (On behalf of: QCR, qcrinterviewer1) Location: DHMH'. Below the header is a navigation menu with links for Home, Clients, My Lists, Alerts (which is currently selected), and Reports. Under the Alerts section, there are date filters for Created From Date (01/16/2013), Created To Date (01/23/2013), Accepted From Date (01/22/2013), and Accepted To Date (01/23/2013). A 'Filter' button is also present. The main area displays a list of alerts. One alert for 'Smith, John - Baltimore' is highlighted with a red box around the 'Client QCR Problem Identified' link. An arrow points to this link. The alert details show it was from 'QCR, qcrtteamleader1' on '01/23/2013' with an unchecked accept checkbox. Another alert for 'Client Assigned for QCR' is listed below it, also from 'QCR, qcrtteamleader1' on '01/22/2013' with an unchecked accept checkbox.

The assigned QCR Interviewer will navigate to the clients QCR Summary page, make corrections to all problems identified by the QCR Team Leader and Submit the clients QCR Worksheet back to the assigned QCR Team Leader after updating the Status section. When the assigned QCR Interviewer Submits the clients QCR Worksheet back to the assigned QCR Team Leader the clients Status will change to “Submitted to Team Lead.” The assigned QCR Team Leader will receive another alert to review the clients QCR Worksheet and navigate to the clients QCR Summary and verify the problem areas were corrected.

### 3.7.5 Submit QCR Worksheet: Team Leader Status “Approved”

When the QCR Team Leader completes the review process of the client and either verifies that the problem areas have been corrected or there are no problems they will navigate into Edit mode of the Status Form and set the *Team Leader Status as “Approved.”* By selecting Approved, the actor must identify the Date Approved. Upon entering the required information click the **Save button** as seen in the figure below.

This screenshot shows the 'Client Details' section of the QCR Status Form. It includes a sidebar for 'QCR Review Menu' with 'VII. Status' selected. The main area displays 'Status Checks' for services, significant changes, reportable events, registered nurses, and personal care aides. Below this are sections for 'Interviewer Details' and 'Team Leader Details'. The 'Team Leader Status' dropdown is set to 'Approved'. The 'Save' button is highlighted with a red arrow.

After saving the Status Form with a Team Leader Status of “Approved,” the actor will see a **Submit button** on the QCR Summary page as seen in the figure below. By clicking the Submit button the actor is submitting the clients QCR Worksheet to the QCR Branch Chief for review.

This screenshot shows the 'Client Details' section of the QCR Summary page. It includes a sidebar for 'QCR Review Menu' with 'QCR Summary' selected. The main area displays a summary of status checks and a table of service counts. At the bottom, there are 'Status Details' sections for Interviewer and Team Leader status. The 'Submit' button is highlighted with a red arrow.

After clicking Submit the clients Status will change to “**Submitted to Branch Chief**.” When the clients Status is “Submitted to Branch Chief,” only the QCR Branch Chief will have the ability to Add/Edit sections/entries of the clients QCR Worksheet. Other QCR actors will only be able to View the clients QCR Summary page.

### 3.8 QCR Worksheet: QCR Branch Chief

When the QCR Branch Chief logs into LTSS they will navigate to the **Alerts tab** as shown in the figure below. The actor will see that they have an alert indicating that a review is required for the client. Click the **Client Requires QCR Review** link under the Subject column to navigate to the *My List tab* of QCR and find the clients QCR Worksheet.

After receiving an alert that a client’s QCR Worksheet has been submitted for QCR Branch Chief review, the QCR Branch Chief will navigate to *My Lists* within the QCR sub-system. The actor will select Show Me option “**Reviews to Approve**,” and can optionally put in filters for *County* and *QCR Review Period*. To review the work done by the assigned QCR Interview and Team Leader navigate to the clients QCR Summary by clicking the **Summary link** as seen in the figure below.

The screenshot shows the 'QCR - Reviews To Approve' page. At the top, there are filters for 'County', 'QCR Review Period', and 'Show Me: \*\*'. Below the filters is a 'Filter' button. The main area contains a table with columns: Last Name, First Name, County, ID, Program, Review Date, Status, and Actions. In the 'Actions' column, there is a link labeled 'Summary' which is circled in red with an arrow pointing to it.

### 3.8.1 QCR Branch Chief Review of QCR Summary

Clicking the Summary link will take the actor to the QCR Summary page. The QCR Branch Chief will now have the ability to Add/Edit all sections of the clients QCR Worksheet. The actor will go through each section of the clients QCR Summary and verify the information entered.

The screenshot shows the 'Client Details' page for 'John Smith'. The 'QCR - Summary' section indicates the status is 'Submitted to Branch Chief'. Below this, there is a list of sections: I. Face Sheet, II. Services, III. Significant Changes, IV. Reportable Events, V. Registered Nurses, VI. Personal Care Aides, VII. Summary, and VIII. Status. Each section has 'View' and 'Edit' links. The 'VII. Summary' section also includes 'POS/POC List' and 'Add' links.

### 3.8.2 Identifying a Problem as QCR Branch Chief in a Section

By clicking the Edit link in the Face Sheet panel the QCR Branch Chief can review the information captured on the clients Face Sheet. To identify a problem with the Face Sheet, the QCR Branch Chief would navigate to the bottom of the page and put notes into the By QCR Branch Chief Notes field. Selecting the checkbox next to By QCR Branch Chief will highlight the notes upon save and put them into the Face Sheet panel on the QCR Summary page so that it can be easily identified that there is a problem with the Face Sheet.

The screenshot shows the 'Client Details' section for 'John Smith'. The 'QCR - I. Face Sheet' tab is selected. At the top right, there are 'View' and 'Edit' buttons, followed by a large 'Save' button with a red circle and arrow around it. On the left, a sidebar titled 'QCR Review Menu' has 'I Face Sheet Details' highlighted. In the main area, under 'Notes', there are two sections: 'QCR Team Notes:' (empty) and 'By Team Leader' (unchecked). Below that is 'By QCR Branch Chief' (checked, indicated by a red circle and arrow), which has a note box containing 'There is a problem with the Type of Residence section.'

Upon saving the Face Sheet with By QCR Branch Chief Notes that have its associated checkbox selected, the By QCR Branch Chief Notes will display in the Face Sheet panel as seen in the figure below.

This screenshot shows the 'I. Face Sheet \*\*' page. At the top right are 'View' and 'Edit' buttons. The 'Review Information' section includes fields for Participant (John Smith), Start Date (01/01/2012), End Date (01/01/2014), and Review Date (01/01/2013). The 'Notes' section contains 'QCR Branch Chief Notes:' with the text 'There is a problem with the Type of Residence section.' A red circle and arrow point to this note.

### 3.8.3 Identifying a Problem as QCR Branch Chief in a List Entry

By clicking the Edit link for a specific entry within a list, the QCR Branch Chief can review that entries information.

The screenshot shows the LTSSMaryland Quality Care Review system. The top navigation bar includes 'LTSSMaryland', the user's name 'FEI\nicolas.quinones (On behalf of: QCR, qcbranchchief)', and 'Menu Account'. The left sidebar has 'My Lists', 'Assignments', and 'Client Details' tabs, with 'Client Details' selected. Under 'Client Details', there is a summary for 'John Smith' with ID: 21190440J445110 DOB: 01/11/1950 and MFP Eligible: N. Below this is the 'QCR Review Menu' with 'QCR Summary' selected. The main content area is titled 'QCR - Summary' with status 'Submitted to Branch Chief'. It contains sections for 'I. Face Sheet \*\*', 'II. Services \*\*', 'III. Significant Changes \*\*', 'IV. Reportable Events \*\*', 'V. Registered Nurses \*\*', 'VI. Personal Care Aides \*\*', 'VII. Summary \*\*', and 'VIII. Status \*\*'. The 'II. Services \*\*' section lists a service entry for 'Adult Medical Day Care' provided by 'Service Provider, Independent - Baltimore 1' on '01/29/2012' starting '01/01/2013' with 'CAPA - LAH' as the 'Urgency' level and 'Moderate' as the 'With Missing Data' status. There are 'View', 'Edit', and 'Delete' links for this entry. The 'Edit' link is highlighted with a red box and an arrow pointing to it.

To *identify a problem with an entry*, the QCR Branch Chief would navigate to the bottom of the page and put notes into the *By QCR Branch Chief Notes field*. Selecting the checkbox next to *By QCR Branch Chief* will identify that this entry has a problem that needs correction. Click the **Save button** to save the entry and mark it as a problem needing correction.

This screenshot shows the 'QCR - II. Services' edit screen. The top navigation bar and sidebar are identical to the previous screenshot. The main content area is titled 'QCR - II. Services' with a 'Back to Summary' link. It contains fields for 'Negative Impact on Health/Well-being/Safety? \*' (radio buttons for Yes and No), 'Negative Impact on Program or Process? \*' (radio buttons for Yes and No), 'CAPA/ICI: \*' (dropdown menu showing 'CAPA - LAH'), 'Level of Urgency: \*' (dropdown menu showing 'Moderate'), and a 'CAPA/ICI Comments:' text area containing 'test'. Below these fields is a section for 'By QCR Team:' with a text area and two checkboxes: 'By Team Leader' (unchecked) and 'By QCR Branch Chief' (checked). At the bottom is a 'Notes:' text area with the note 'Problem with the Level of Urgency'. The 'Edit' button in the top right is circled in red, and an arrow points to the 'Save' button at the bottom right of the form.

After saving the entry with By QCR Branch Chief Notes checkbox selected the entry will be highlighted yellow in the list, identifying that it has a problem needing correction.

Service	Provider	POC Date	Start Date	CAPA/ICI	Urgency	With Missing Data	Actions
Adult Medical Day Care	Service Provider, Independent - Baltimore 1	01/29/2012	01/01/2013	CAPA - LAH	Moderate	No	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>

### 3.8.4 Submit QCR Worksheet: QCR Branch Chief Status “Problem Identified”

When the QCR Branch Chief completes the review process of the client and finds a problem they will navigate into Edit mode of the Status Form by clicking the **Edit** link as seen in the figure below.

	Total	With CAPA/ICI	With missing data	Note
Services	1	1	0	
Significant Changes	0	0	N/A	
Reportable Events	0	0	0	
Registered Nurses	0	0	0	
Personal Care Aides	0	0	0	

— Status Details —

Interviewer Status:	Completed
Team Leader Status:	Approved

The actor will set the *QCR Branch Chief Status* as “**Problem Identified**.” By selecting Problem Identified, the actor must identify Problem Areas and Problem Notes. The Problem Area selections should correspond to the QCR Worksheet sections where the QCR Branch Chief found and marked problems using By QCR Branch Chief Notes fields. Upon entering the required information click the **Save button** as seen in the figure below.

The screenshot shows the LTSSMaryland Quality Care Review User Manual interface. At the top, it displays the user's name, FEI\nicolas.quinones, and location, DHHH. The main navigation bar includes 'My Lists', 'Assignments', and 'Client Details' (which is currently selected). On the left, there's a sidebar titled 'QCR Review Menu' with options like 'QCR Summary' and 'VIII. Status' (which is highlighted with a blue background). The main content area shows 'John Smith' with ID 21190440J445110 DOB: 01/11/1950 and MFP Eligible: N. Below this, the 'QCR - VIII. Status' section has a 'Back to Summary' link. The 'QCR Branch Chief Details' section shows the status dropdown set to 'Problem Identified'. The 'Problem Areas' section lists several checkboxes: I. Face Sheet (checked), II. Services, III. Significant Changes, IV. Reportable Events, V. Registered Nurses, VI. Personal Care Aides, and VII. Summary. The 'Problem Notes' section contains the note: 'Problem with Type of Residence on Face Sheet. Problem with Level of Urgency for Service.' The top right of the form has 'View' and 'Edit' buttons, and a large red arrow points to the 'Save' button.

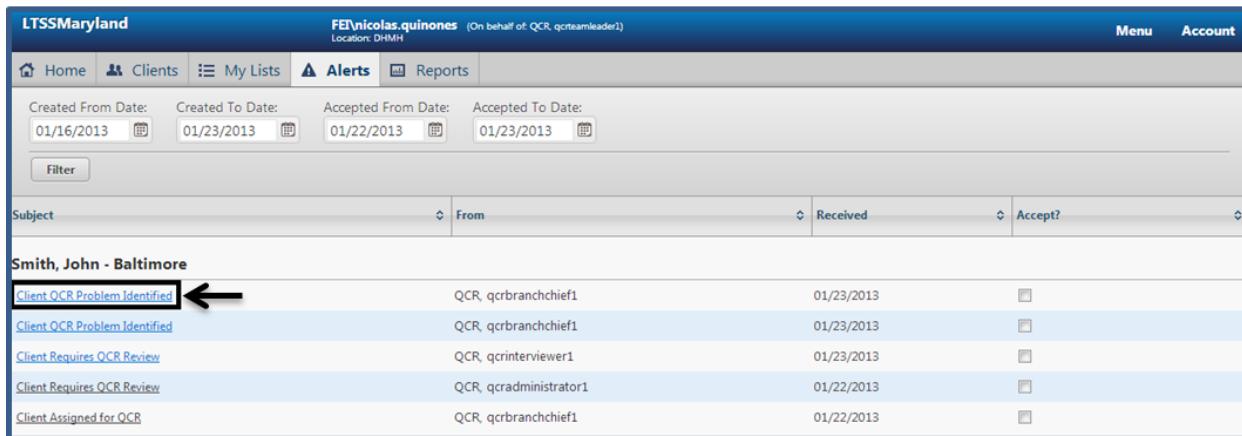
After saving the Status Form with a QCR Branch Chief Status of “*Problem Identified*,” the actor will see a **Submit button** on the QCR Summary page as seen in the figure below. By clicking the Submit button the actor is submitting the clients QCR Worksheet to the clients *Assigned QCR Team Leader* for correction. After clicking Submit the clients Status will change to “**Submitted to Team Lead**,” because the QCR Branch Chief is sending the clients QCR Worksheet back to the QCR Team Leader for the QCR Team Leader to make corrections to the problem areas.

The screenshot shows the LTSSMaryland QCR system interface. The top navigation bar includes 'LTSSMaryland', the user 'FE\nicolas.quinones (On behalf of: QCR, qcbranchchief)', and 'Menu Account'. The left sidebar shows 'My Lists', 'Assignments', and 'Client Details' (selected). Under 'Client Details', the client information for 'John Smith' is listed: ID 21190440J445110, DOB 01/11/1950, MFP Eligible: N. A 'QCR Review Menu' sidebar contains 'QCR Summary' (selected). The main content area displays the 'QCR - Summary' status as 'Submitted to Branch Chief'. Below this are sections for 'I. Face Sheet', 'II. Services', 'III. Significant Changes', 'IV. Reportable Events', 'V. Registered Nurses', 'VI. Personal Care Aides', 'VII. Summary', and 'VIII. Status'. The 'Status' section includes a table with columns for 'Services', 'Significant Changes', 'Reportable Events', 'Registered Nurses', and 'Personal Care Aides', each with counts of 1, 0, 0, 0, and 0 respectively. There are also three 'Status Details' sections: Interviewer Status (Completed), Team Leader Status (Approved), and QCR Branch Chief Status (Problem Identified). At the bottom right of the summary table is a 'Submit' button, which is circled in red with an arrow pointing to it.

By clicking the Submit button the actor is submitting the clients QCR Worksheet to the clients *Assigned QCR Team Leader* to be corrected. After clicking Submit the clients Status will change to “**Submitted to Team Lead**.” When the clients Status is “Submitted to Team Lead,” only the Assigned QCR Team Leader will have the ability to Add/Edit sections/entries of the clients QCR Worksheet. Other QCR actors will only be able to View the clients QCR Summary page.

This screenshot shows the same LTSSMaryland QCR system interface as the previous one, but the status has changed. The 'QCR - Summary' status is now 'Submitted to Team Lead'. The rest of the interface remains the same, including the sidebar, sections, and data tables.

After the QCR Branch Chief Submits the clients QCR Worksheet with a QCR Branch Chief Status of “Problem Identified,” the assigned QCR Team Leader will receive an alert notifying them that corrective action is required on the clients QCR Worksheet. The QCR Team Leader will log into LTSS and navigate to the Alerts tab where they will click the Client QCR Problem Identified link as seen in the figure below.

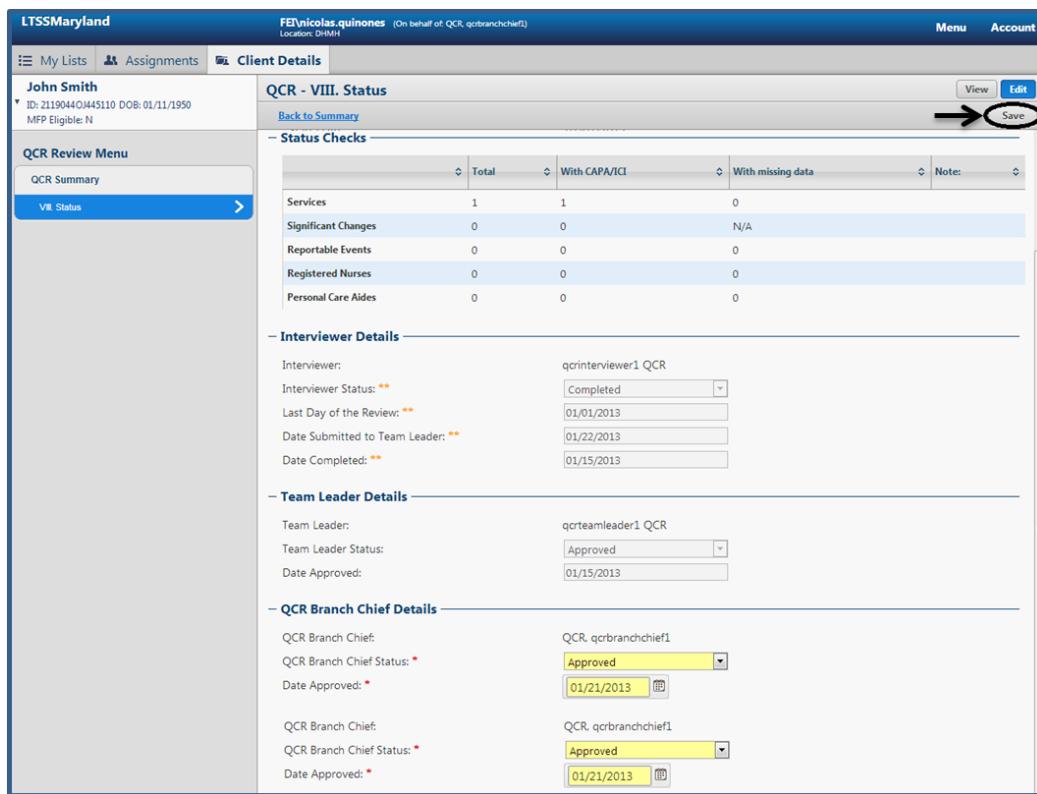


The screenshot shows the LTSSMaryland software interface. At the top, there's a header bar with the title "LTSSMaryland" and user information "FE\nicolas.quinones (On behalf of: QCR, qcrtteamleader1) Location: DHHH". Below the header are navigation tabs: Home, Clients, My Lists, Alerts (which is currently selected), and Reports. Under the Alerts tab, there are date filters: Created From Date (01/16/2013), Created To Date (01/23/2013), Accepted From Date (01/22/2013), and Accepted To Date (01/23/2013). A "Filter" button is also present. The main area displays a list of alerts for "Smith, John - Baltimore". The first item in the list, "Client QCR Problem Identified", is highlighted with a red box and has a red arrow pointing to it from the left side of the image. Other items in the list include "Client QCR Problem Identified", "Client Requires QCR Review", "Client Requires QCR Review", and "Client Assigned for QCR". Each alert entry includes columns for "Subject", "From", "Received", and "Accept?".

The assigned QCR Team Leader will navigate to the clients QCR Summary page, make corrections to all problems identified by the QCR Branch Chief and Submit the clients QCR Worksheet back to the QCR Branch Chief after updating the Status section. When the assigned QCR Team Leader Submits the clients QCR Worksheet back to the QCR Branch Chief the clients Status will change to “Submitted to Branch Chief.” The QCR Branch Chief will then navigate to the clients QCR Summary and verify the problem areas were corrected.

### 3.8.5 Submit QCR Worksheet: QCR Branch Chief Status “Approved”

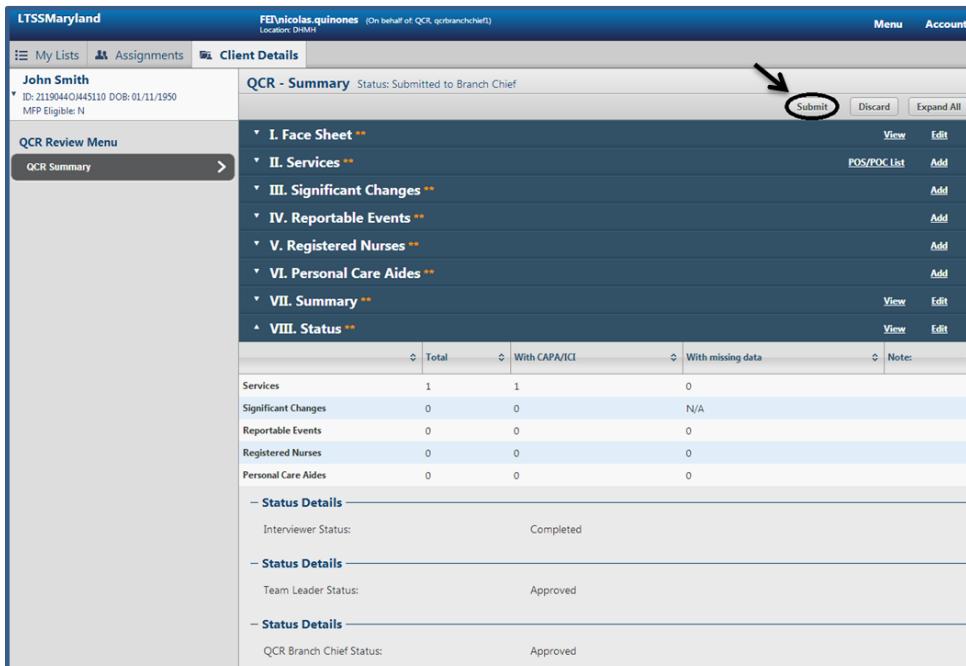
When the QCR Branch Chief completes the review process of the client and either verifies that the problem areas have been corrected or there are no problems they will navigate into Edit mode of the Status Form and set the *QCR Branch Chief Status as “Approved.”* By selecting Approved, the actor must identify the Date Approved. Upon entering the required information click the **Save button** as seen in the figure below.



This screenshot shows the 'QCR - VIII. Status' form. At the top right, there are 'View' and 'Edit' buttons, with 'Edit' being the active one. A red arrow points to the 'Save' button, which is located just below the edit buttons. The form includes sections for 'Status Checks', 'Interviewer Details', 'Team Leader Details', and 'QCR Branch Chief Details'. Each section contains fields for names, status, and dates.

	Total	With CAPA/ICI	With missing data	Note:
Services	1	1	0	
Significant Changes	0	0	N/A	
Reportable Events	0	0	0	
Registered Nurses	0	0	0	
Personal Care Aides	0	0	0	

After saving the Status Form with a QCR Branch Chief Status of “Approved,” the actor will see a **Submit** button on the QCR Summary page as seen in the figure below. By clicking the Submit button the actor is submitting the clients QCR Worksheet and the clients Status will change to “Complete.”



This screenshot shows the 'QCR - Summary' page. At the top right, there are 'Submit', 'Discard', and 'Expand All' buttons. A red arrow points to the 'Submit' button. The page displays a summary of the client's status across various categories like Face Sheet, Services, Significant Changes, etc., and includes sections for 'Status Details' showing Interviewer Status, Team Leader Status, and QCR Branch Chief Status, all of which are set to 'Approved'.

By clicking the Submit button the actor is submitting the clients QCR Worksheet for the final time. After clicking Submit the clients Status will change to “**Completed**.” When the clients Status is “Completed,” none of the actors within QCR will be able to modify anything on the clients QCR Worksheet.

### 3.9 Discard a Clients QCR Worksheet

Any actor that has access to a client’s QCR Summary page may discard the clients QCR Worksheet. The clients QCR Worksheet can be discarded by clicking the ***Discard button*** as seen in the figure below at any time by any QCR actor as long as the client is not in a Status of “Completed.” Once the client enters a Status of “Completed,” the QCR Worksheet can no longer be discarded.

### 3.10 Create QCR Letters

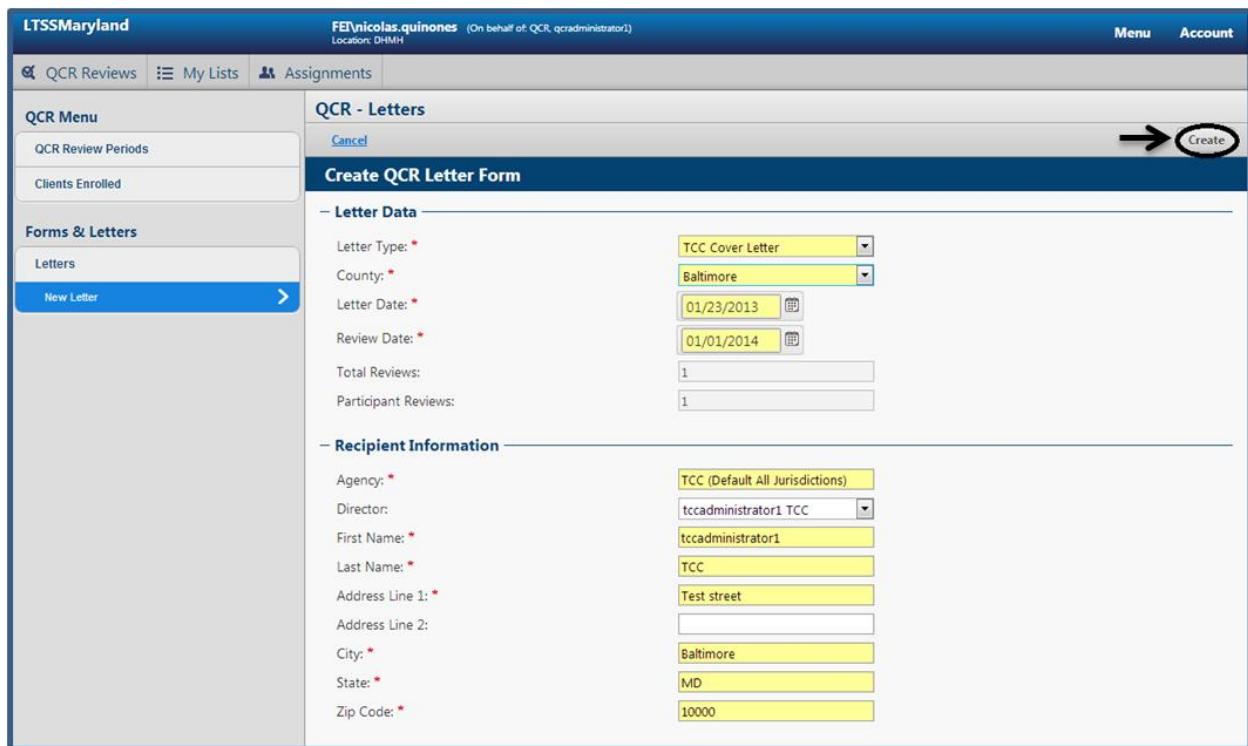
An actor with a role of QCR Administrator can create QCR Letters. To navigate to the QCR Letters page, go to the *QCR Reviews tab* in the QCR sub-system and click on the ***Letters tab*** under Forms & Letters as seen in the figure below. From the QCR Letters page the actor will select a *QCR Review Period* from the dropdown. Upon making the required selections, click the ***Filter button*** as seen in the figure below.

This screenshot shows the 'QCR - Letters' page. On the left, there's a sidebar with 'QCR Menu' and 'Forms & Letters' sections. Under 'Forms & Letters', the 'Letters' tab is highlighted with a dark grey background. In the main content area, there's a 'QCR Review Period Filter' dropdown set to '01/01/2012-01/01/2014'. Below it is a 'Filter' button. A double-headed arrow points to the 'Filter' button, indicating it needs to be clicked. In the bottom right corner of the main area, there's a 'Create New Letter' button.

After clicking the Filter button the page will refresh and show the QCR Letters table and Discard History table specific to that QCR Review Period as seen in the figure below. The actor will click the ***Create New Letter button*** to create a QCR Letter specific to that QCR Review Period as seen in the figure below.

This screenshot shows the 'QCR - Letters' page after applying the filter. The 'Letters' tab is still highlighted in the sidebar. The main content area now displays two tables: 'QCR Letters' and 'Discard History'. In the top right corner of the main content area, there's a 'Create New Letter' button. A red arrow points to this button, indicating it should be clicked to create a new letter.

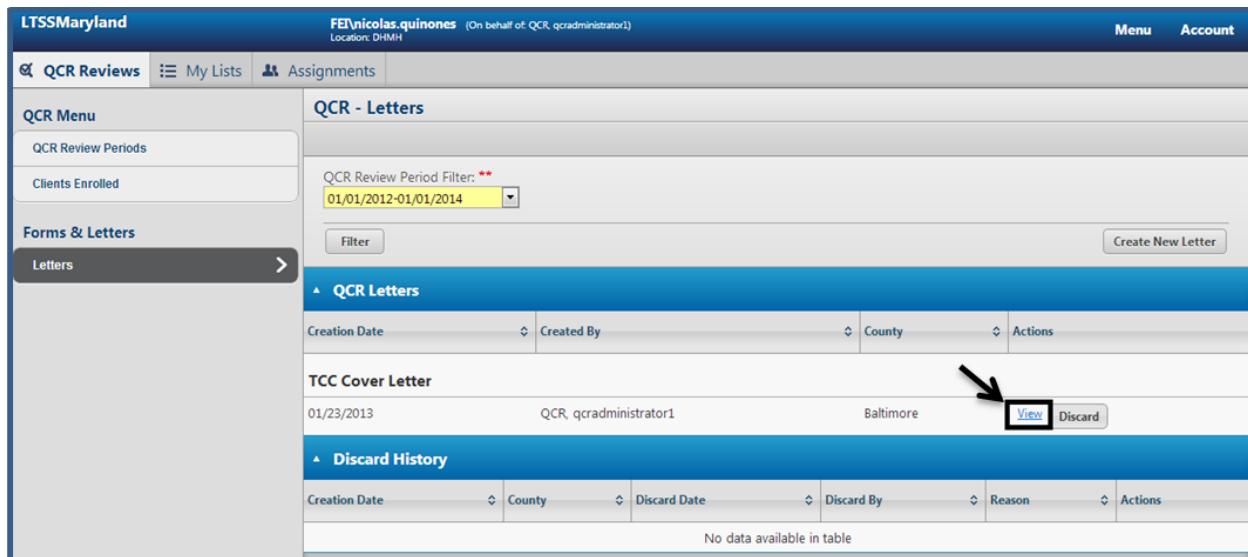
The *QCR Letter* page will appear and the actor will fill out the QCR Letter Form. The actor will enter all required information, which will be highlighted yellow or marked with an asterisk. Selection of a Letter Type and County will pre-populate all of the information in the Recipient Information section. After entering all required information click the ***Create button*** as seen in the figure below.



This screenshot shows the 'Create QCR Letter Form' page. The left sidebar has 'Letters' selected under 'Forms & Letters'. The main form has the following fields:

- Letter Data:**
  - Letter Type: TCC Cover Letter
  - County: Baltimore
  - Letter Date: 01/23/2013
  - Review Date: 01/01/2014
  - Total Reviews: 1
  - Participant Reviews: 1
- Recipient Information:**
  - Agency: TCC (Default All Jurisdictions)
  - Director: tccadministrator1 TCC
  - First Name: tccadministrator1
  - Last Name: TCC
  - Address Line 1: Test street
  - Address Line 2:
  - City: Baltimore
  - State: MD
  - Zip Code: 10000

After clicking the Create button the actor will be taken back to the QCR Letters page. The letter created will be placed into the QCR Letters list as seen in the figure below. The QCR Letters panel captures the letter created, creation date, who created the letter and the county the letter was created for. The actor can view a PDF of the letter by clicking the **View link** as seen in the figure below.



This screenshot shows the 'QCR Letters' list. The 'Letters' tab is selected in the sidebar. The table has columns: Creation Date, Created By, County, and Actions. One row is shown for a 'TCC Cover Letter' created on 01/23/2013 by 'QCR, qcadministrator1' in 'Baltimore'. The 'Actions' column for this row contains a 'View' button, which is highlighted with a red box and an arrow pointing to it.

After clicking the View link a PDF of the letter will be generated in a separate tab as seen in the figure below.

January 23, 2013

tccadministrator1 TCC  
TCC (Default All Jurisdictions)  
Test street  
Baltimore, MD 10000

Dear tccadministrator1 TCC:

On 01/01/2014, the Quality Care Review (QCR) Team completed an on-site review. The Department would like to thank you for your cooperation during the review process. Members of the team reviewed services provided to Living at Home Waiver (LAH) participants to assess how well participant's health, welfare, and safety needs were managed and to determine if identified services were being provided based on the plan of care/services and in accordance with COMAR regulations.

This process included staff interviews and a closed record review of pertinent clinical/medical information. Enclosed is the summary report of the findings. A correction and preventative action plan (CAPA) is required from TCC (Default All Jurisdictions) and from the provider agency. Please forward the finding report to the provider agency.

Instructions for how to respond to the identified problem areas are attached. A written response to each CAPA is due within 60 days of the date of this letter. Please send your response to Jane Sacco, Chief, Division of Long Term Care Services, Maryland Department of Health and Mental Hygiene at 201 West Preston Street, Room 120, Baltimore, MD 21201.

If you have any questions, please contact me at 410-767-1736. We appreciate your commitment to serving participants of the Living at Home Waiver Program.

Sincerely,

Jane Sacco, Chief  
Division of Long Term Care Services

Enclosure(s)

cc:

Warren Sraver, OAW Program Manager, Maryland Department of Aging  
Jane Wessely, Chief, Division of Waiver Programs, DHMH  
Hakeem Sule, QCR Coordinator, DHMH  
William T. Dorrill, Deputy Director, OHCQ

The actor can also discard a created QCR Letter by clicking the ***Discard button*** as seen in the figure below.

The screenshot shows the LTSSMaryland Quality Care Review User Manual interface. The top navigation bar includes 'LTSSMaryland', the user 'FEI\nicolas.quinones (On behalf of: QCR, qcadministrator)', and 'Menu Account'. Below the navigation is a toolbar with 'QCR Reviews', 'My Lists', 'Assignments', 'QCR Menu', 'QCR Review Periods', and 'Clients Enrolled'. On the left, a sidebar titled 'Forms & Letters' has 'Letters' selected. The main content area is titled 'QCR - Letters' and contains a 'QCR Review Period Filter' dropdown set to '01/01/2012-01/01/2014'. A 'Filter' button is available, along with a 'Create New Letter' link. The 'QCR Letters' section displays a table with columns: Creation Date, Created By, County, and Actions. A specific row for 'TCC Cover Letter' is shown with details: Creation Date 01/23/2013, Created By QCR, qcadministrator1, County Baltimore, and Actions. The 'Actions' column for this row contains a 'View' link and a 'Discard' button, which is circled in red with an arrow pointing to it. Below this is a 'Discard History' section with a similar table structure, currently showing 'No data available in table'.

When clicking the Discard button a pop-up window will appear prompting the actor to verify that they wish to discard the record and requiring the actor to input a comment to describe the reason for discarding. Upon entering the required information and clicking the Yes button the selected QCR Letter will be moved to the Discard History table on the QCR Letters page.

