Administration User Manual

A step by step navigational process

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Contents

1 Introduction

1.1 Background

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

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

1.2 Guide to navigate through user manuals

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

1.2.1 User Manuals Descriptions

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

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

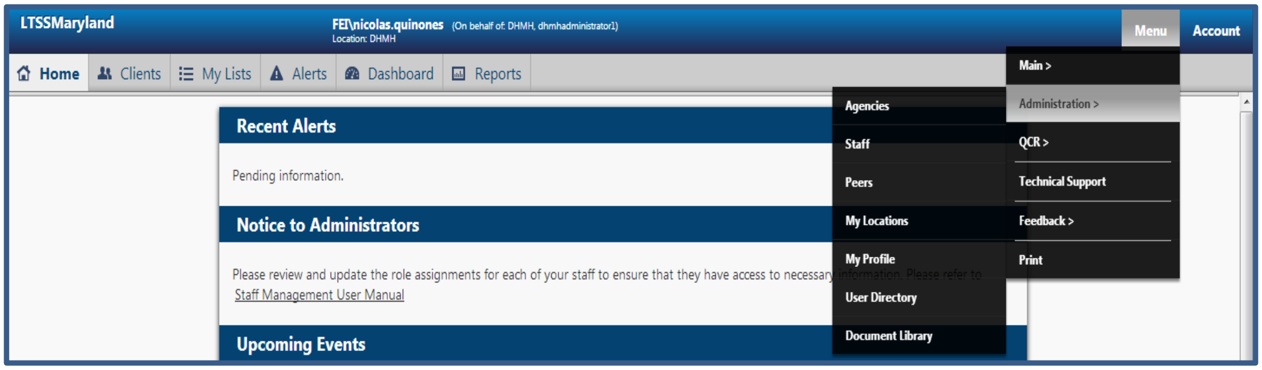
- **Money Follows the Person** – This manual will provide information about how to complete various steps involved in the MFP process such as the Resident Contact Sheet, Ongoing Peer Support, Options Counseling, Peer Mentoring, Housing Assistance, Quality of Life, etc. The manual will give details about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

1.2.2 Recommended approach

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

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

2 Getting Started

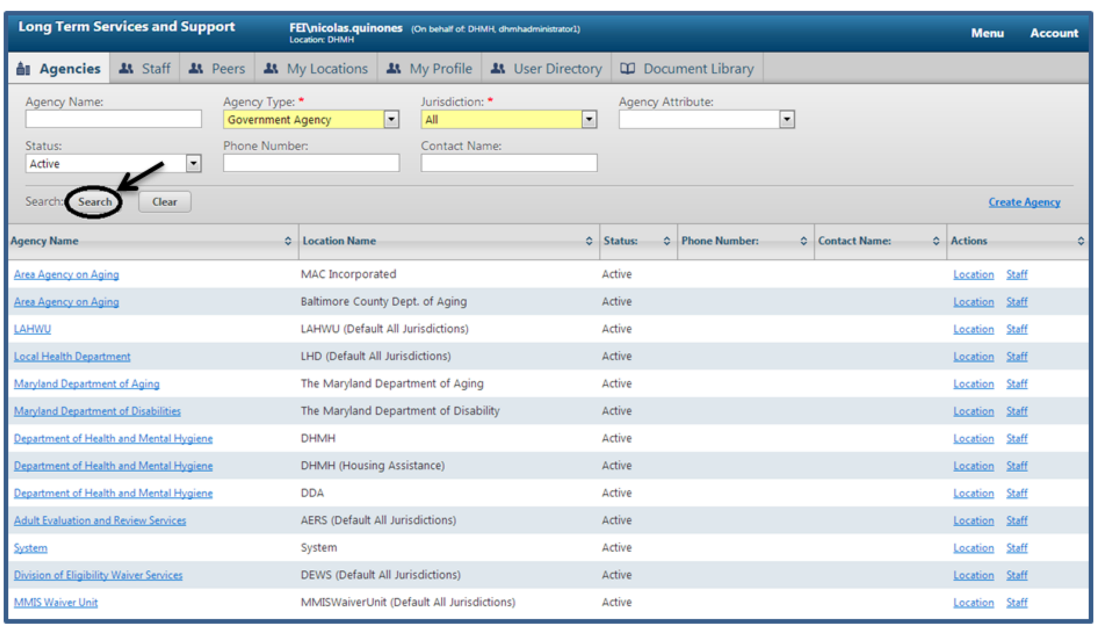


2.1 Agency Management Tutorial

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

2.1.1 Agency Search

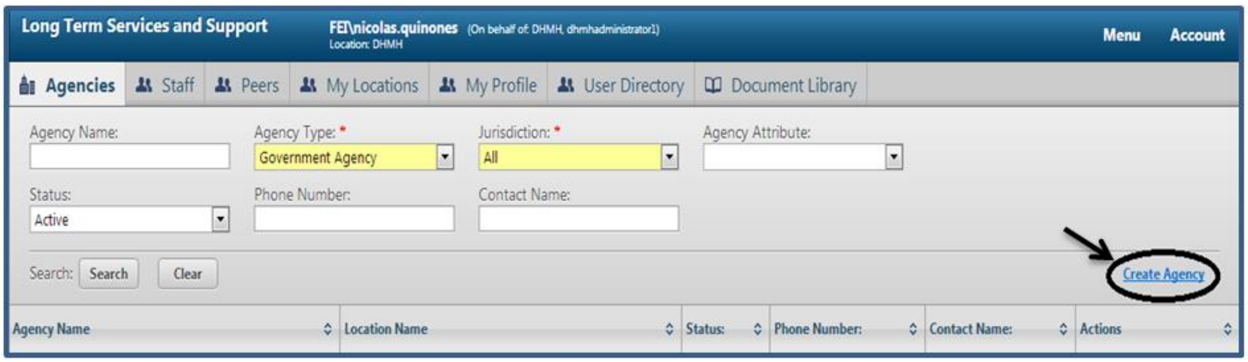
The Agency Search page allows the user to search for Agencies in LTSS using a combination of seven filters. The Agency Name filter searches for Legal Names and Short Names of Agencies that match the entered criteria. The Agency Type filter has options to filter by Government Agency, Contractor and Provider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



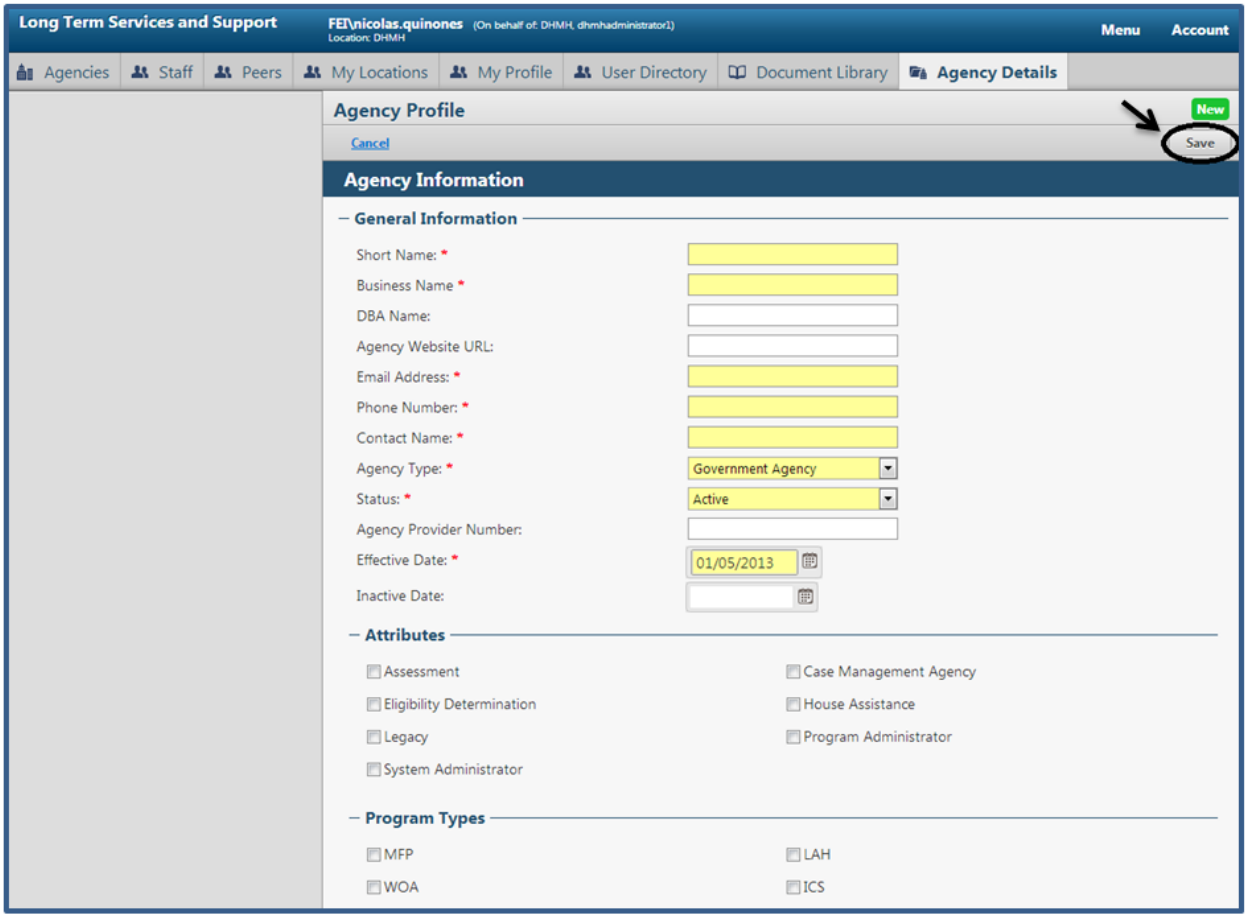
The Search results are grouped by Agency Name. The user can navigate to the Agency Profile by clicking the name of an Agency under the Agency Name column. The ***Location*** link under actions column allows the user to review and edit the Agency Location Profile information for the specified Location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

2.1.2 Agency Creation

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



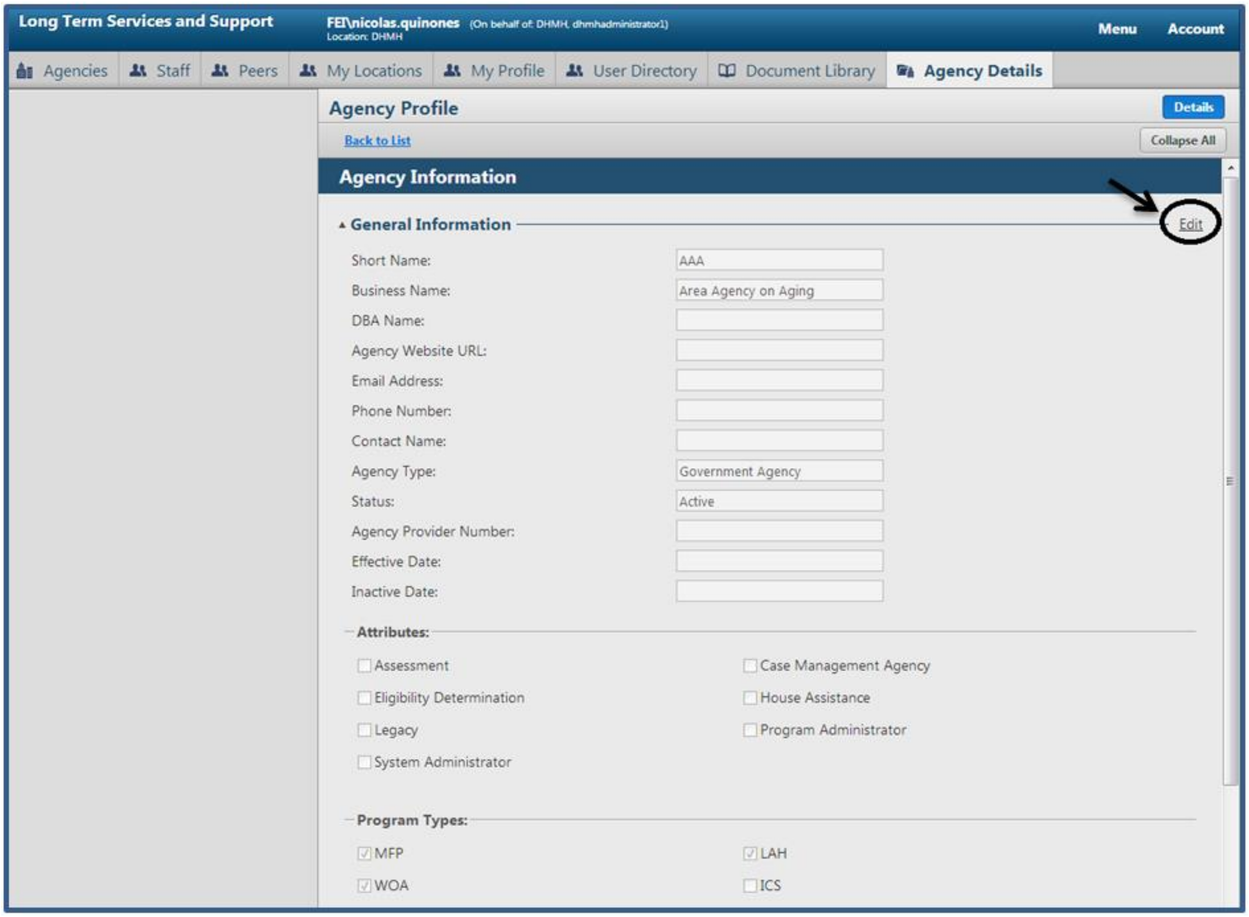
After clicking the Create Agency link the Agency Profile page appears. The user must enter all required information, which is highlighted yellow or marked with an asterisk to save. The user can also enter optional information such as Attributes and Program Types of the Agency. The Attributes section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



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

2.1.3 Agency Information

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

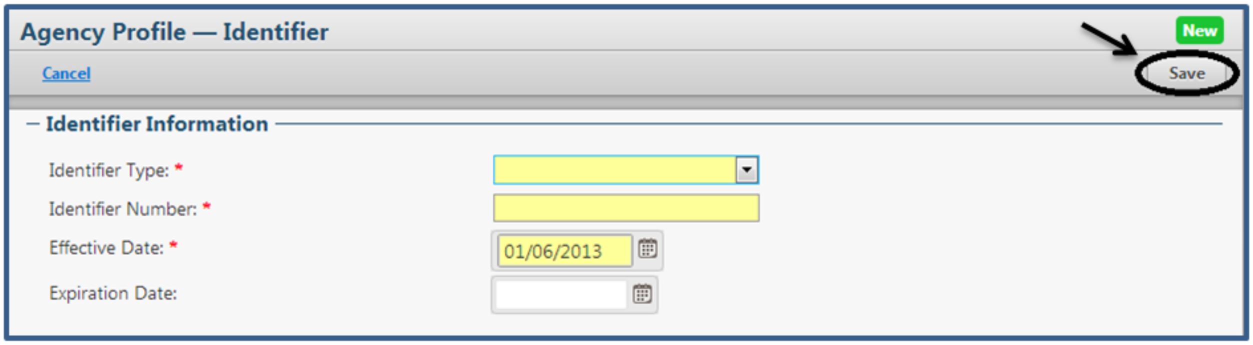


2.1.4 Agency Identifiers

2.1.4.1 Add, Save and Edit Agency Identifiers

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

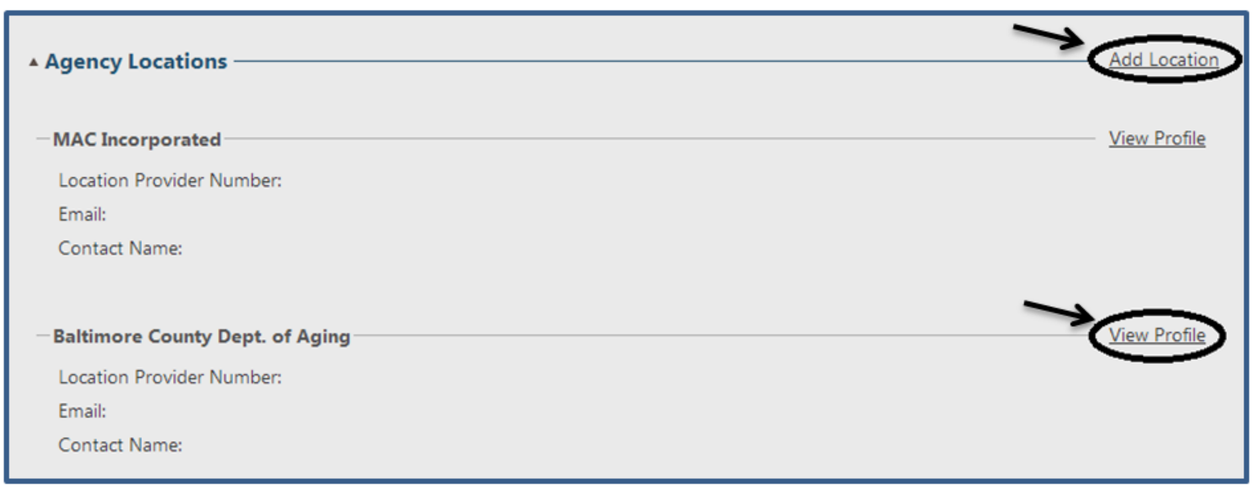
From the *Agency Profile—Agency Identifier* page the user will enter all required information, which is highlighted in yellow or marked with an asterisk and optional information. Upon filling out this information click the **Save button** to save the Agency Identifier to the Agency Profile.



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

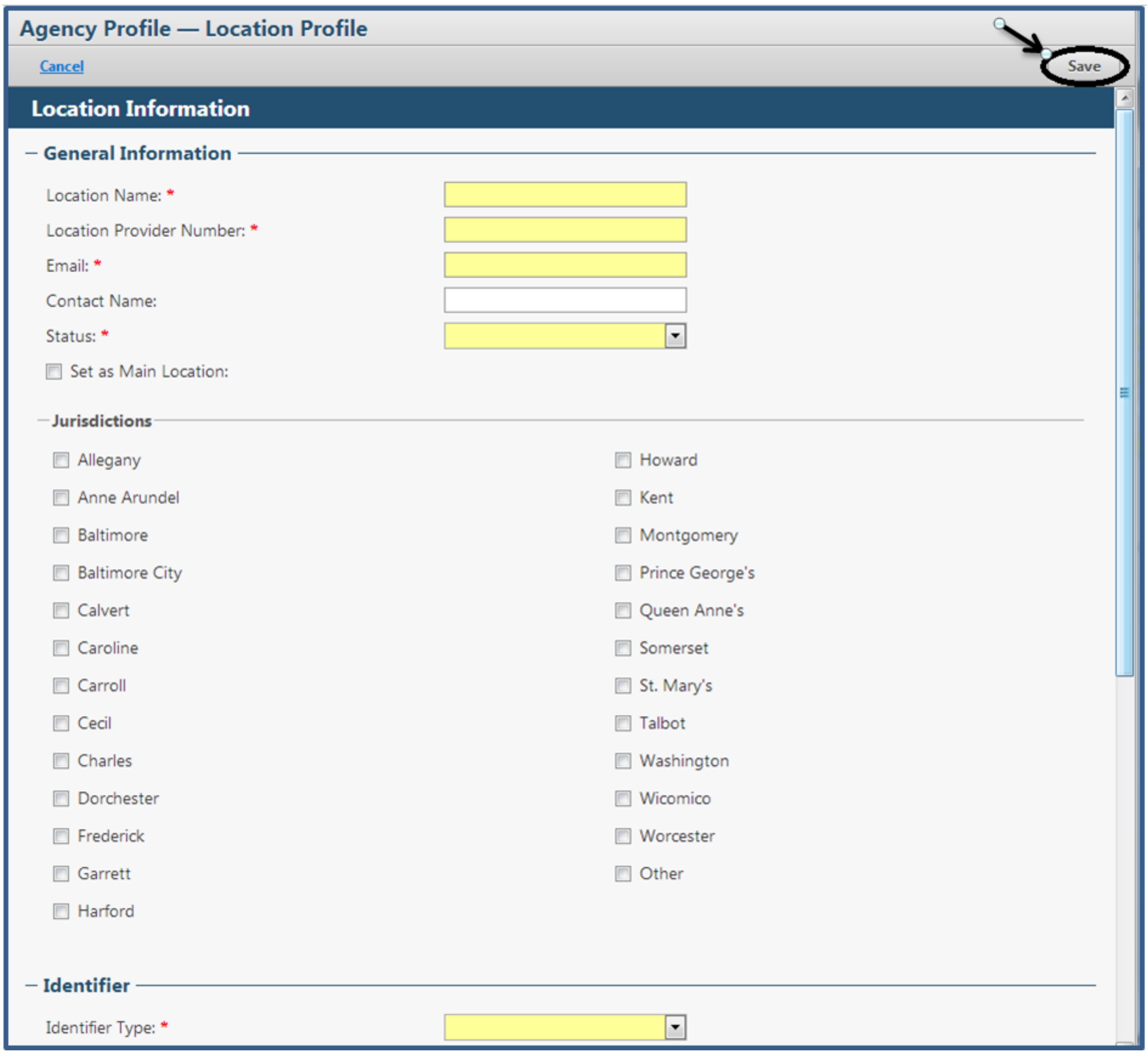
2.1.5 Agency Locations

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



2.1.5.1 Add and Save Agency Location

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



2.1.6 Location Profile

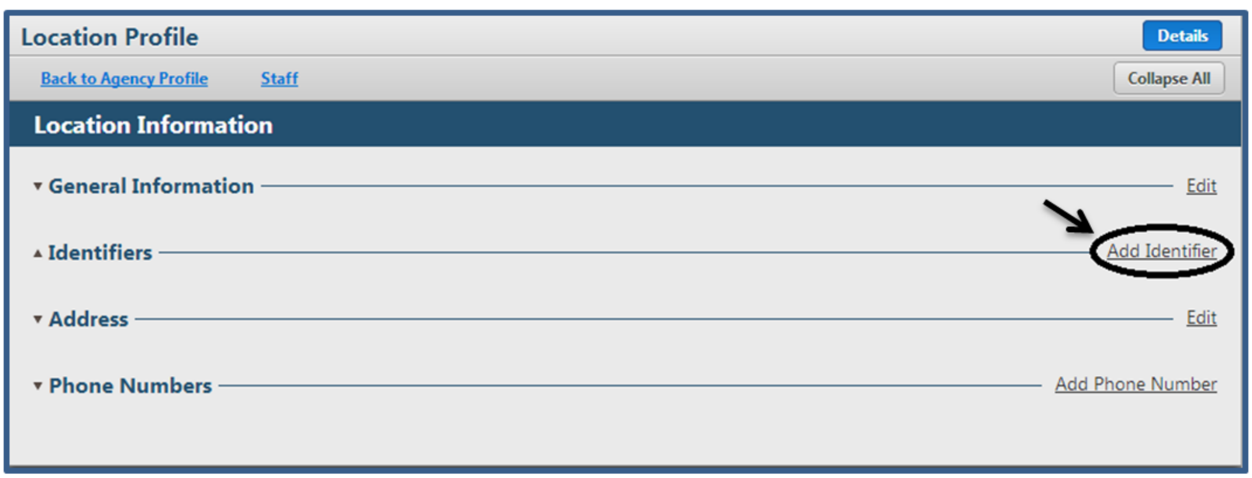
The Location Profile consists of four sections: Location Information, Identifiers, Address and Phone Numbers.

2.1.6.1 Location Information

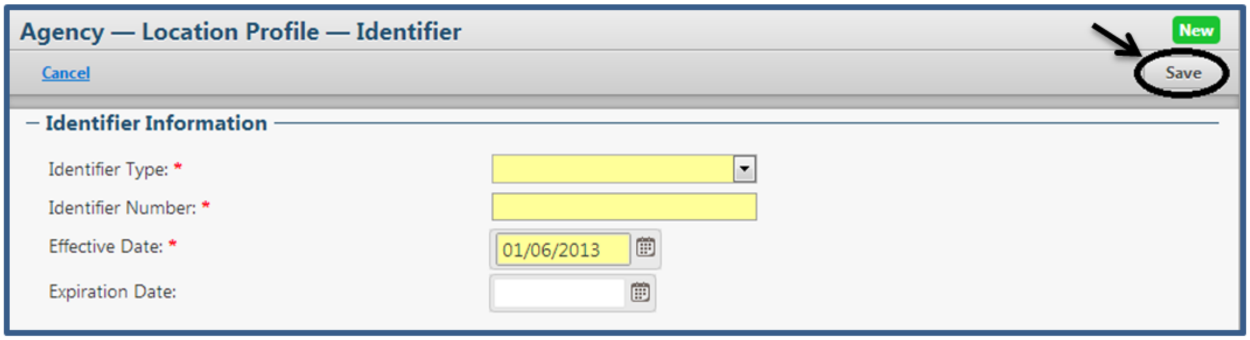
The user can edit the *Location Information* section of the Location Profile by clicking the ***Edit link*** as seen in the figure below. Upon making updates to the Location Information click the Save button to return to the Location Profile.

2.1.6.2 Identifiers

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



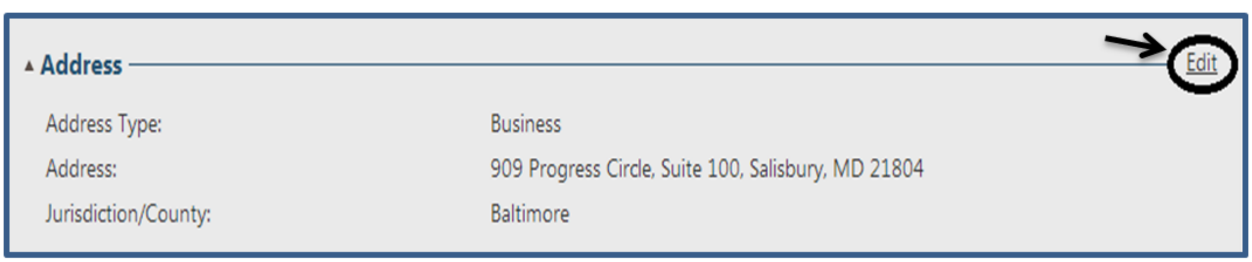
After clicking the Add link in the Identifiers panel the user will see the Agency- Location Profile—Identifier page as seen in the figure below. Enter the required information, which will be highlighted yellow or marked with an asterisk. Upon entering all required information click the ***Save button***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



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

2.1.6.3 Addresses

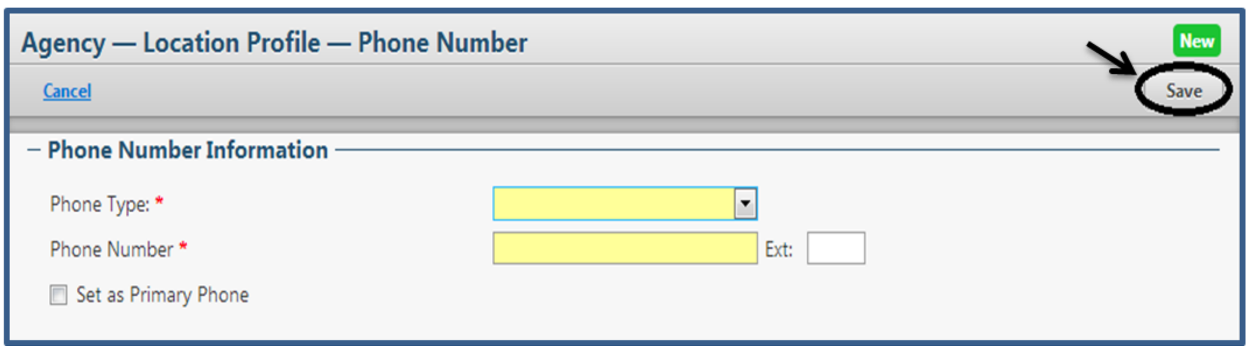
An Agency Location can only have one address, which is required to be entered when adding the Agency Location to the Agency Profile. The user can edit a location address by clicking the ***Edit link*** for the address entry as seen in the figure below. Upon clicking the Edit link the Agency- Location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



2.1.6.4 Phone Numbers

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

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

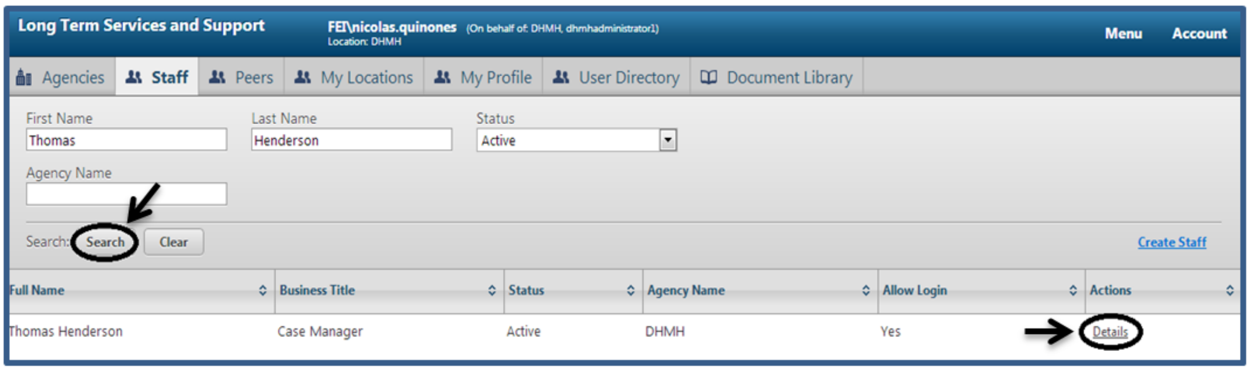


The user can edit a location phone number by clicking the ***Edit link*** for a phone number entry as seen in the figure below. Upon clicking the Edit link the Location Profile—Phone Number page will appear with the *last saved information* for that phone number and the user can make edits and save or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

2.2 Staff Management Tutorial

2.2.1 Staff Search

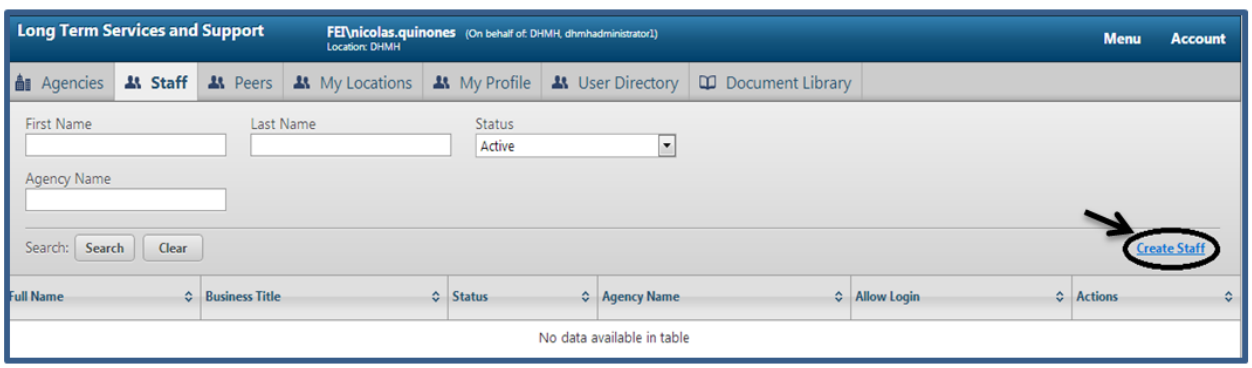
The Staff Search page allows the user to search for Staff in LTSS using a combination of four filters. The First Name filter searches for staff with first names that match the entered criteria. The Last Name filter searches for staff with last names that match the entered criteria. Status filters staff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



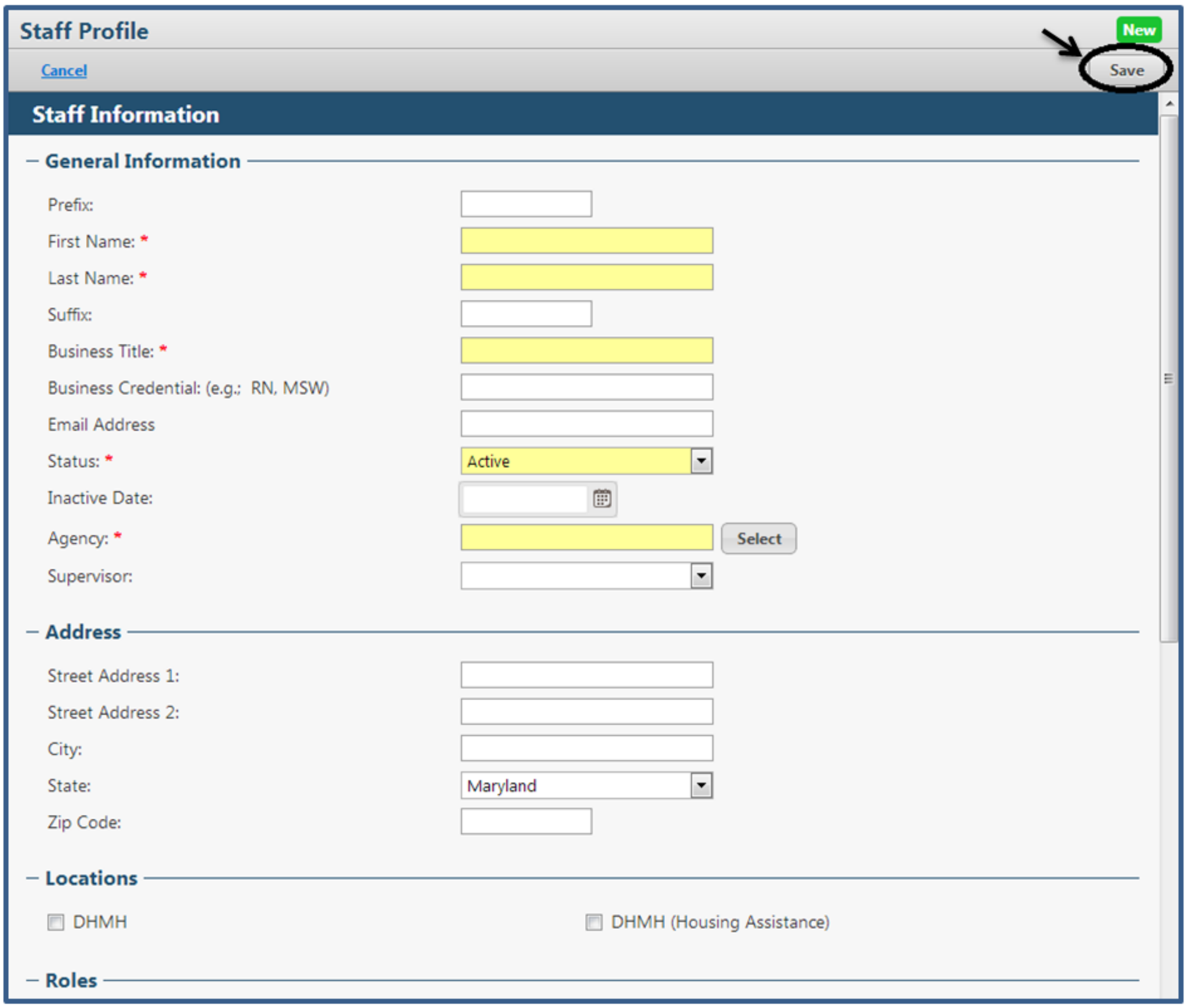
The ***Details*** link under actions column allows the user to review and edit the Staff Profile information, which will be discussed further in a later section of this manual.

2.2.2 Staff Creation

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



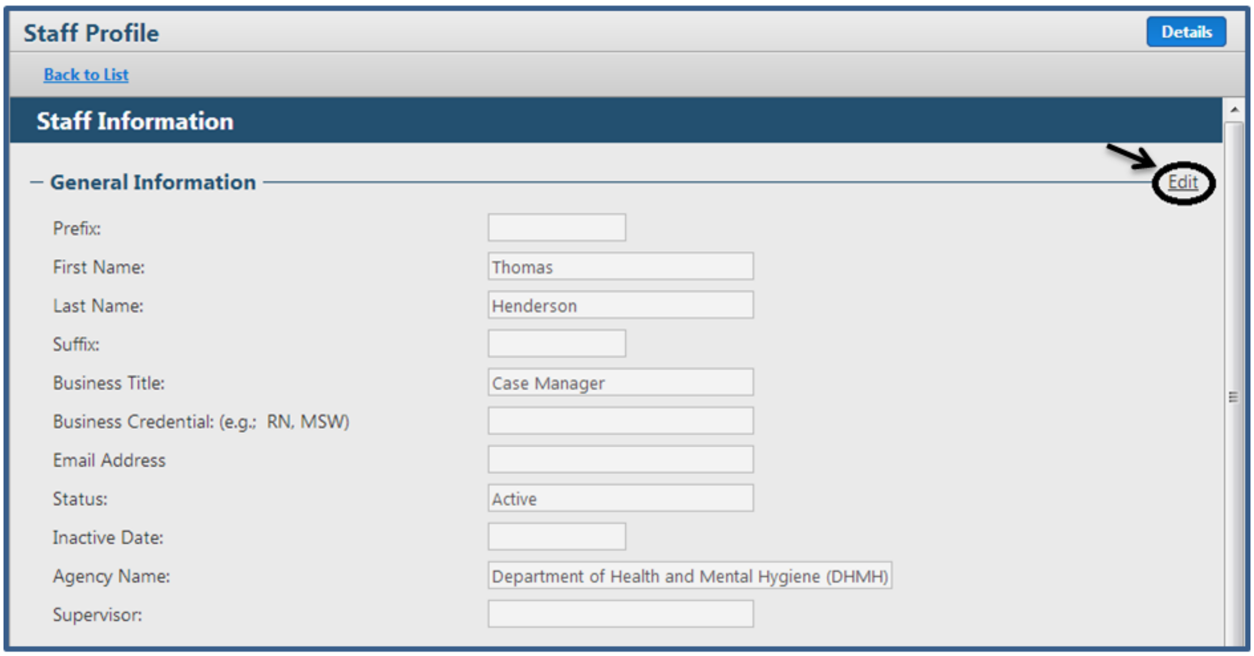
After clicking the Create Staff link the Staff Profile page appears. The user must enter all required information, which is highlighted yellow or marked with an asterisk to save. The required *Status* field will identify whether the staff is an active or inactive user. The user can also enter optional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



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

2.2.3 Staff Information

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

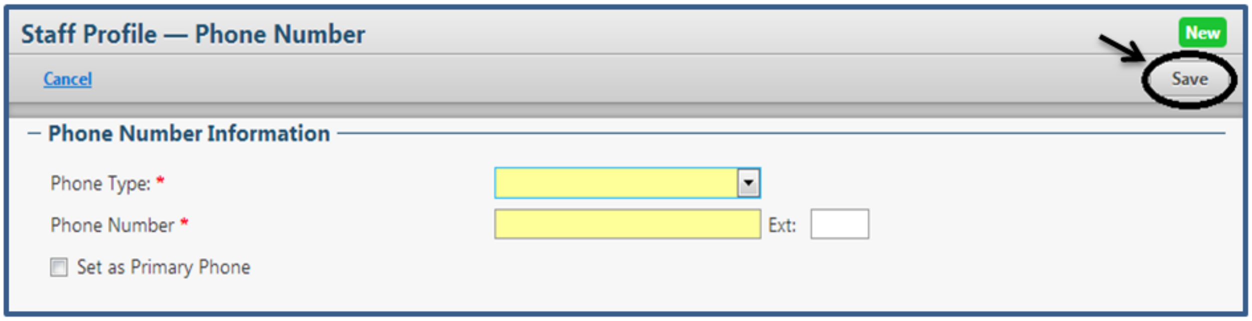


2.2.4 Staff Phone Numbers

2.2.4.1 Add, Save and Edit Agency Identifiers

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

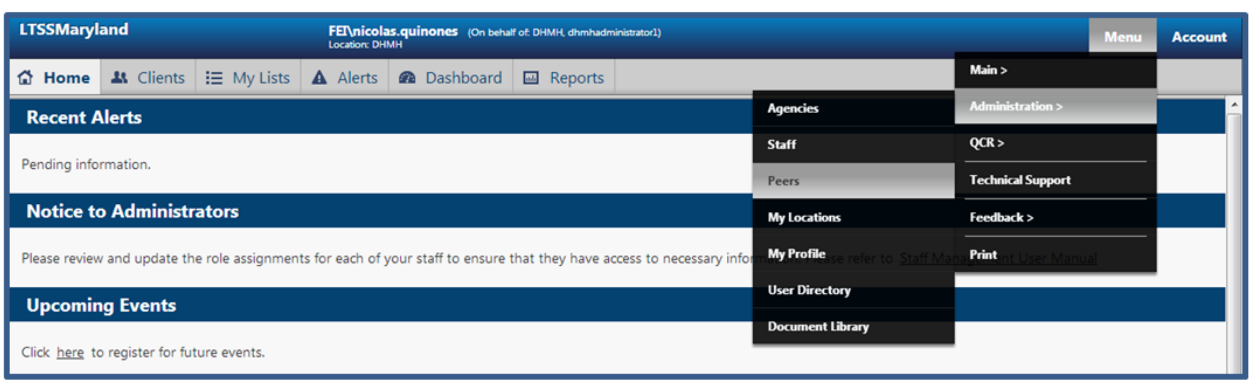
From the *Staff Profile—Phone Number* page the user will enter all required information, which is highlighted in yellow or marked with an asterisk and optional information. The user can also identify if the phone number should be Set as Primary Phone. Upon filling out this information click the ***Save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



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

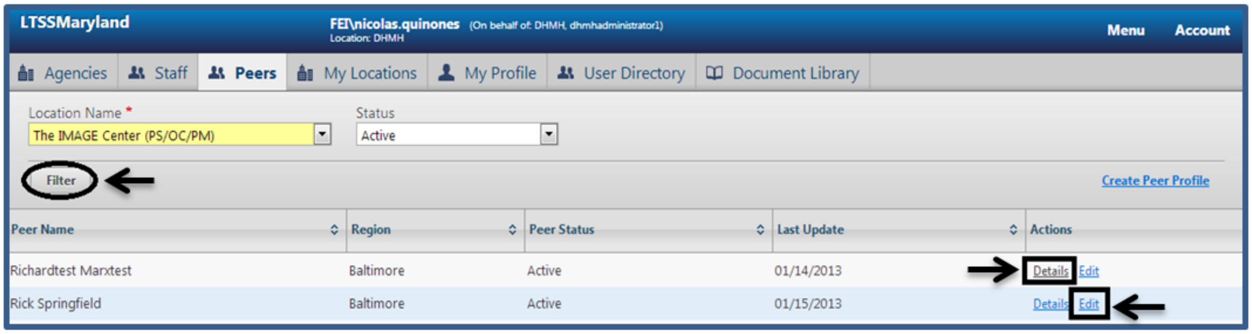
2.3 Peer Profile Tutorial

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



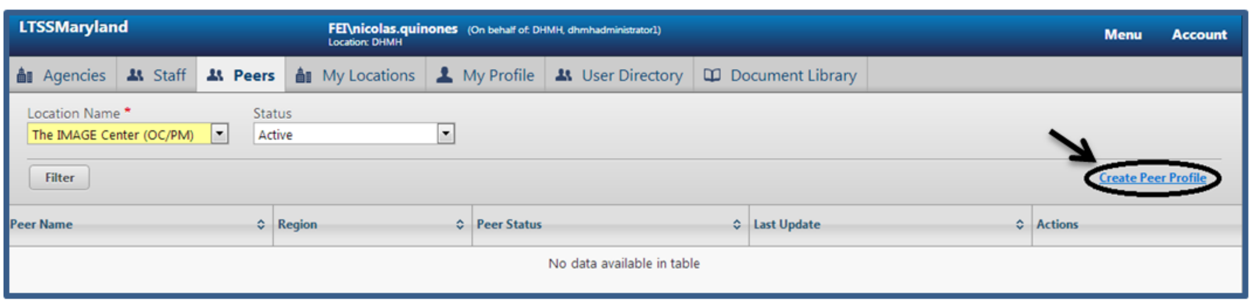
2.3.1 Peer Profile Search

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

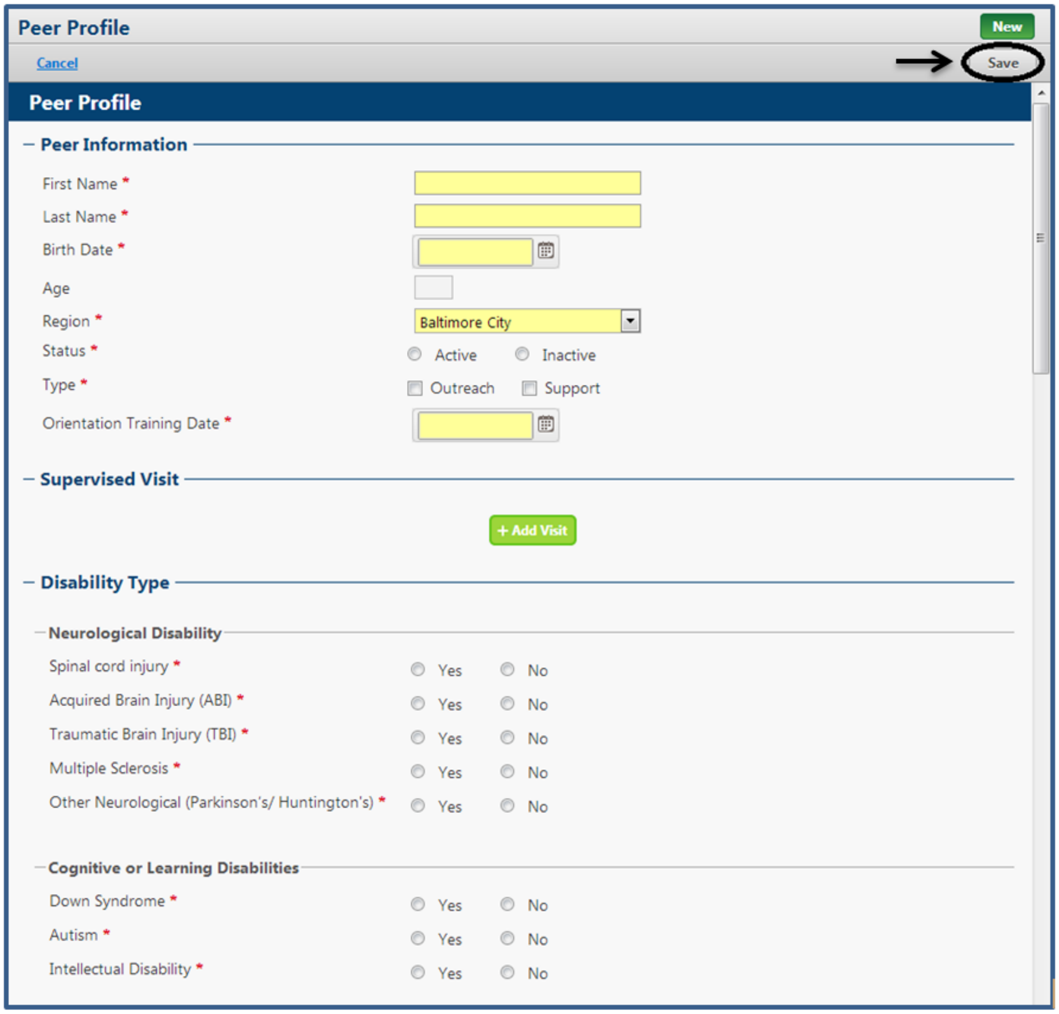


2.3.2 Peer Creation

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

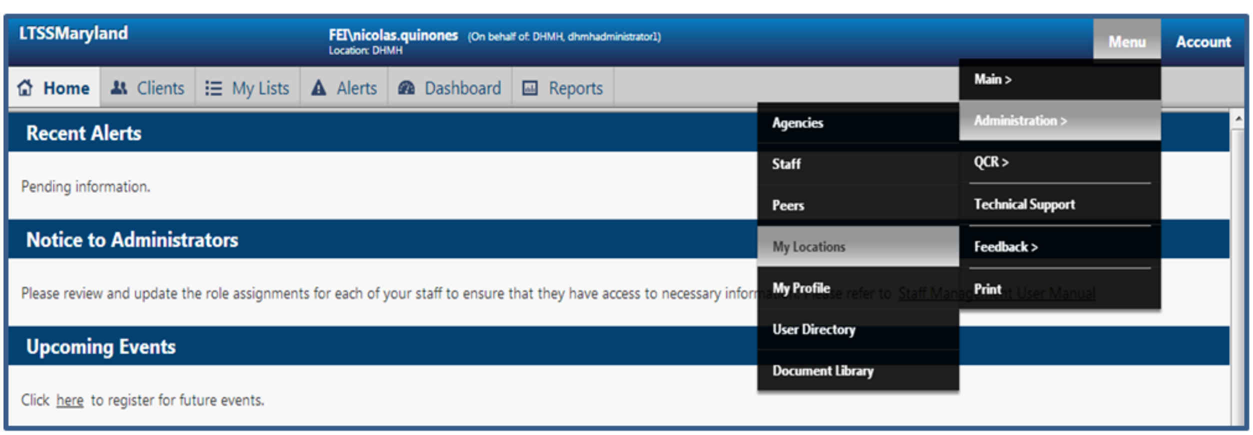


After clicking the Create Peer Profile link the Peer Profile Form will appear. The user will be required to enter all information that is either highlighted yellow or marked with an asterisk. In order for the Peer to show up in the Peer dropdown field on the Resident Contact Sheet the Status of the Peer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



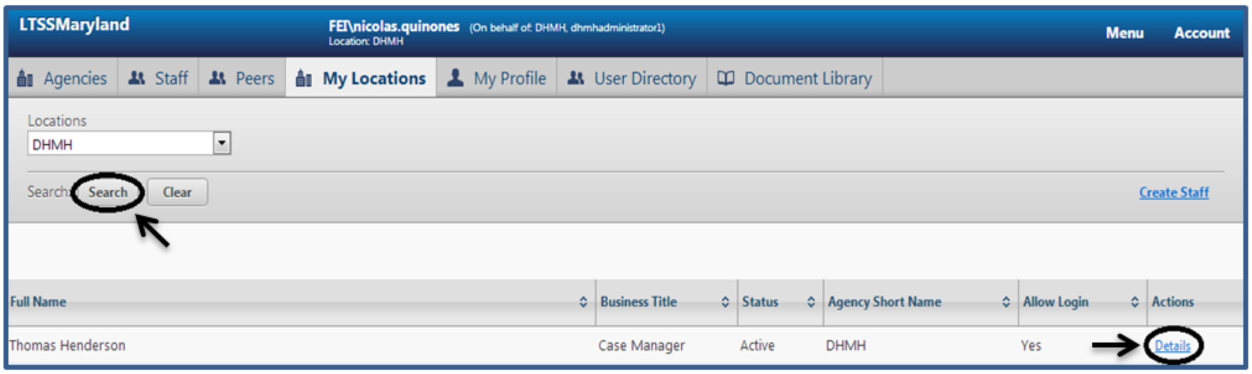
2.4 My Location Tutorial

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



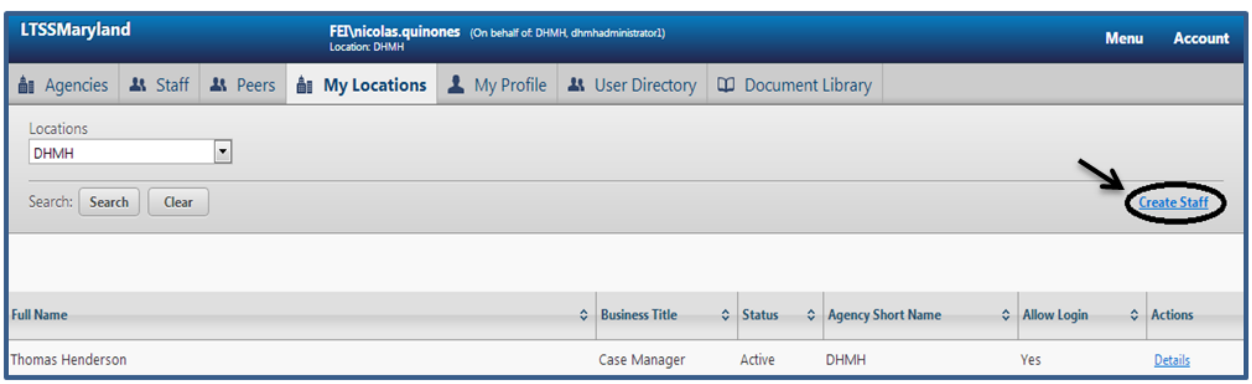
2.4.1 My Locations Search

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



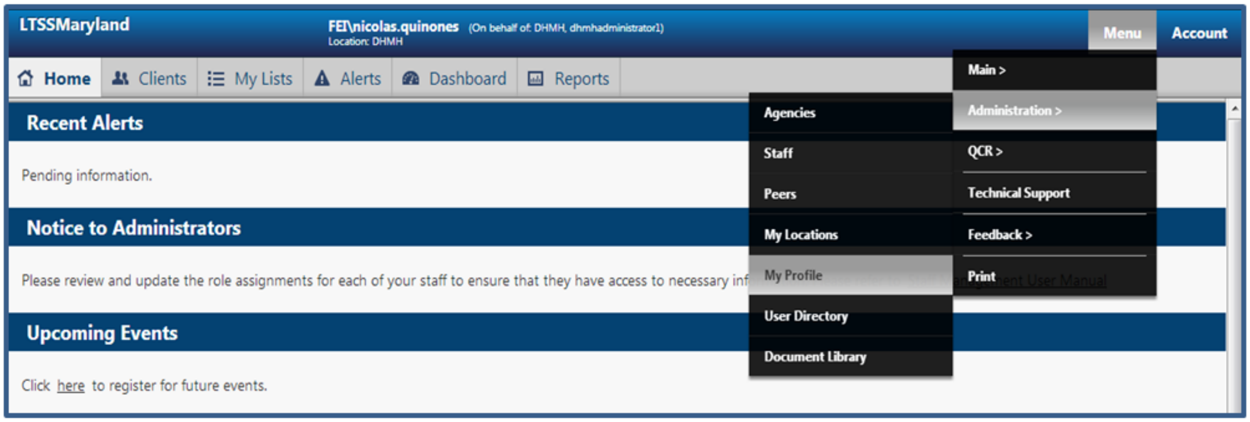
2.4.2 Create Staff

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



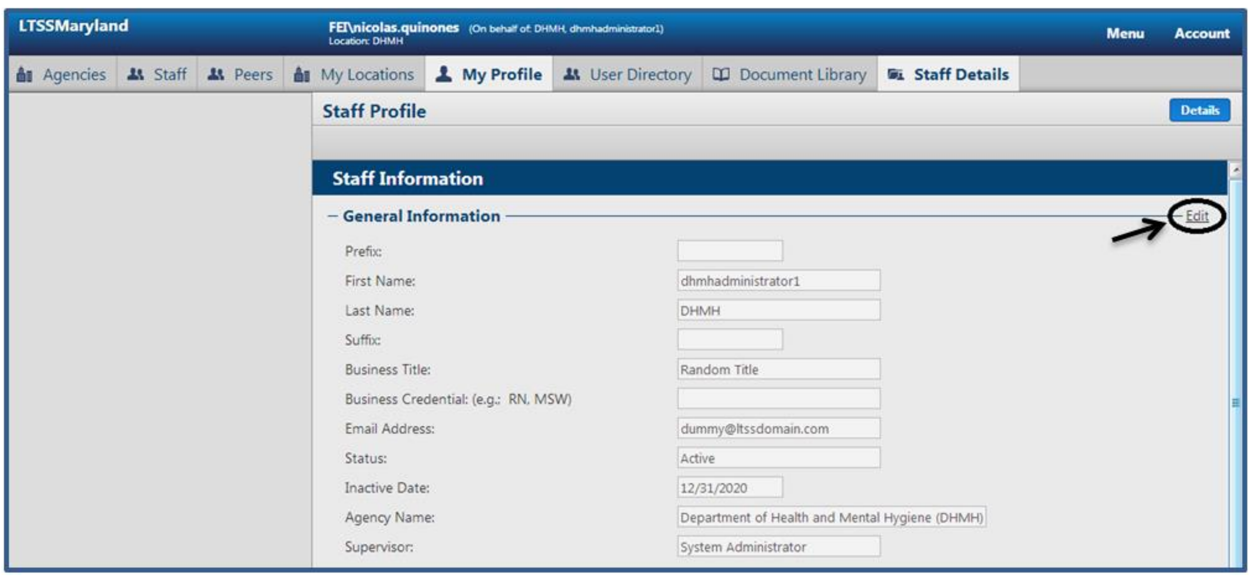
2.5 My Profile

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

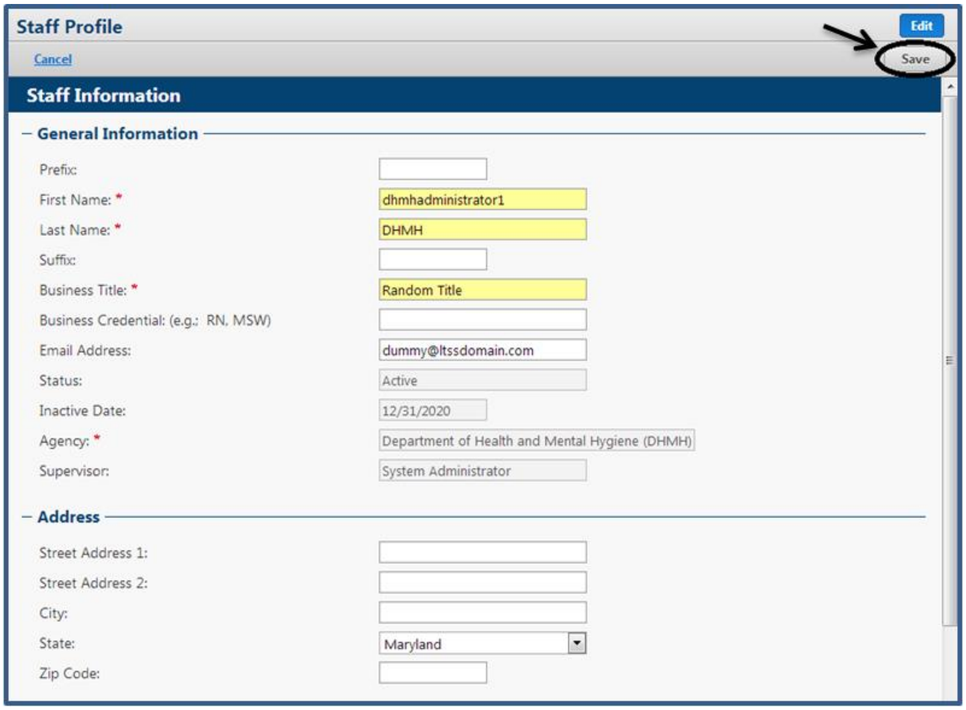


2.5.1 Editing My Profile

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

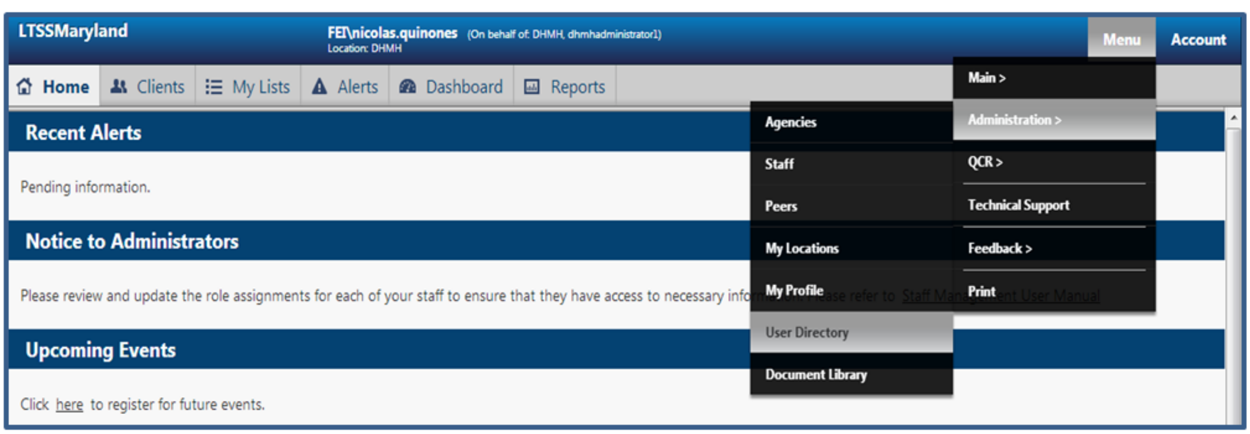


When managing your own Staff Profile only certain information can be updated. To edit information click any text box available for edit, make the necessary changes and click the ***Save button***. After saving the user is returned to the Staff Profile details page.

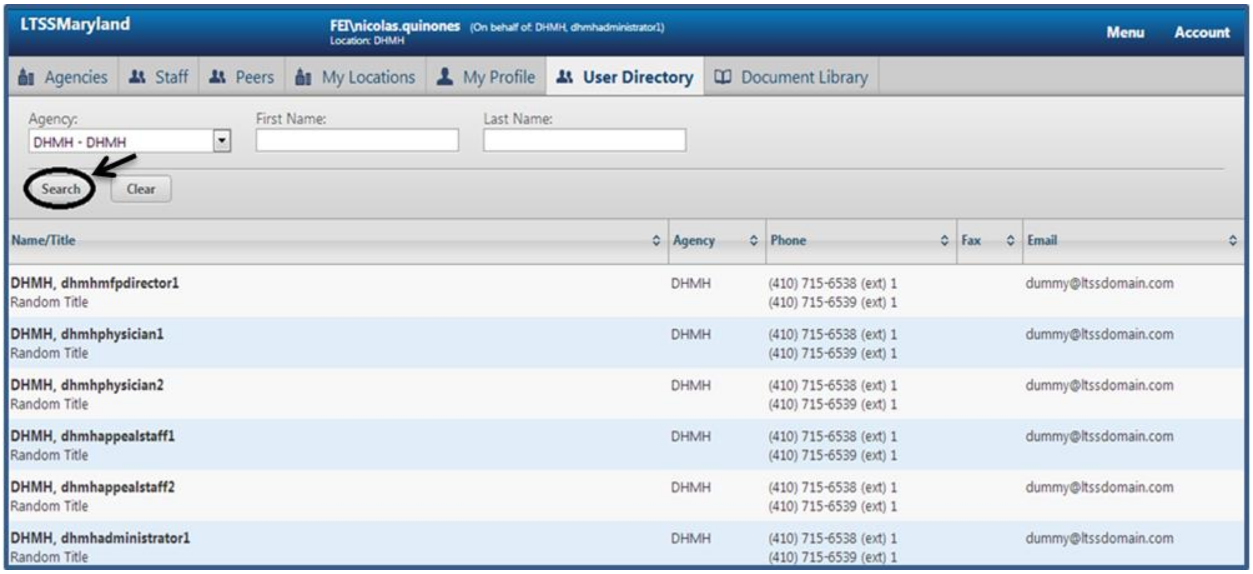


2.6 User Directory

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

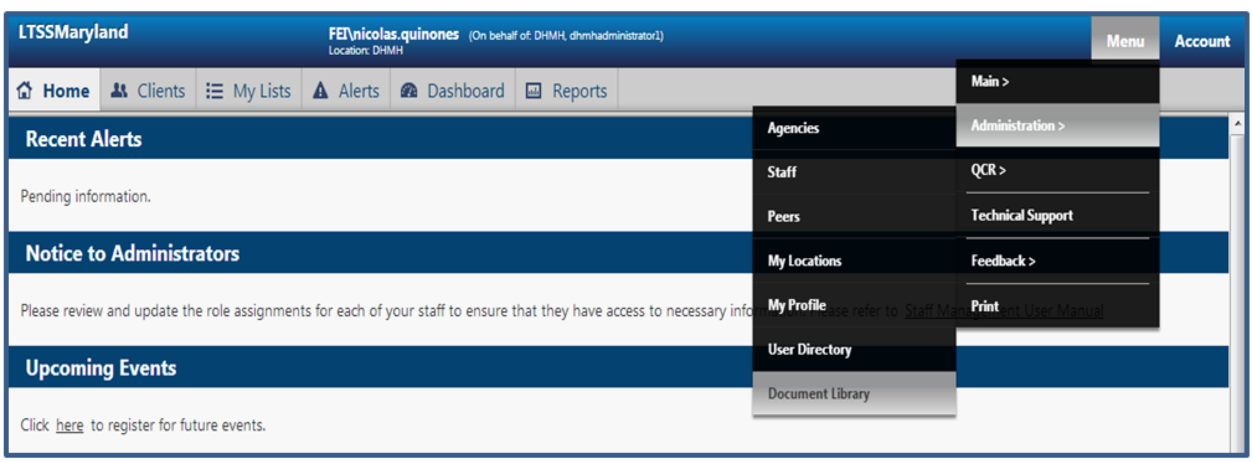


After clicking on Administration and User Directory in the Global Menu bar simply enter the user's First and Last Name and click Search or select the name of the Agency the user works for to obtain a listing of all users for that organization. After entering filter criteria click the **Search button**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



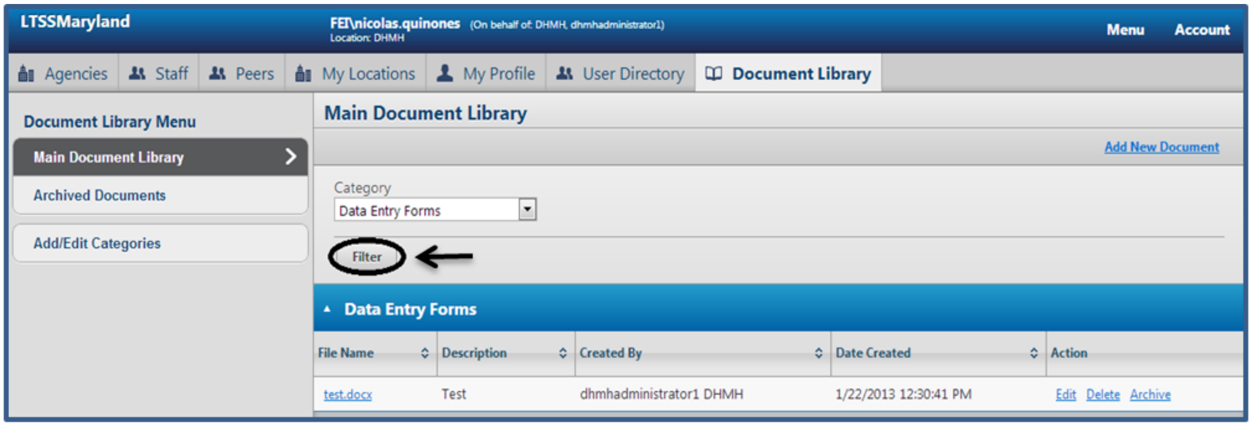
2.7 Document Library

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



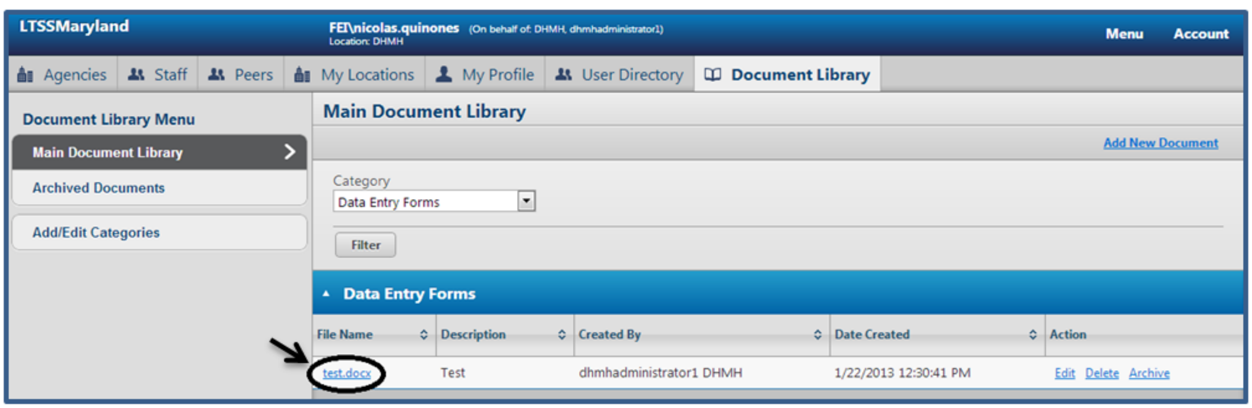
2.7.1 Search Document Library

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



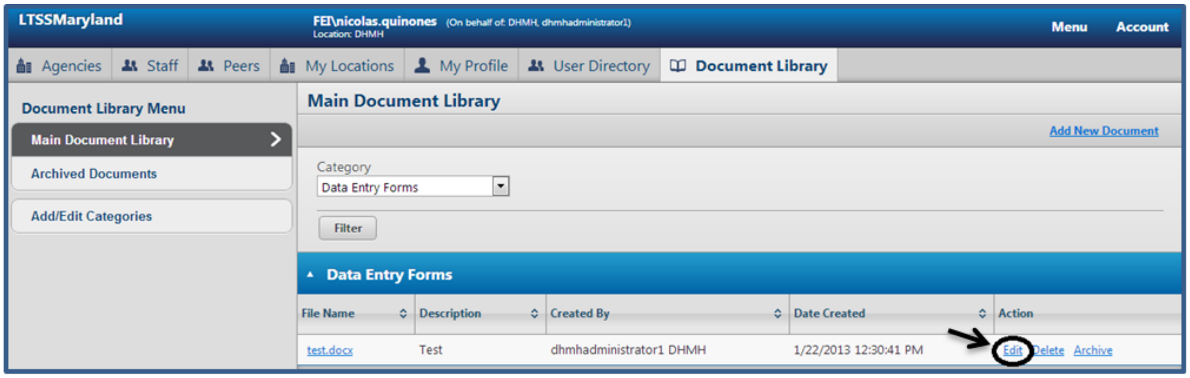
2.7.1.1 Open Existing Documents

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



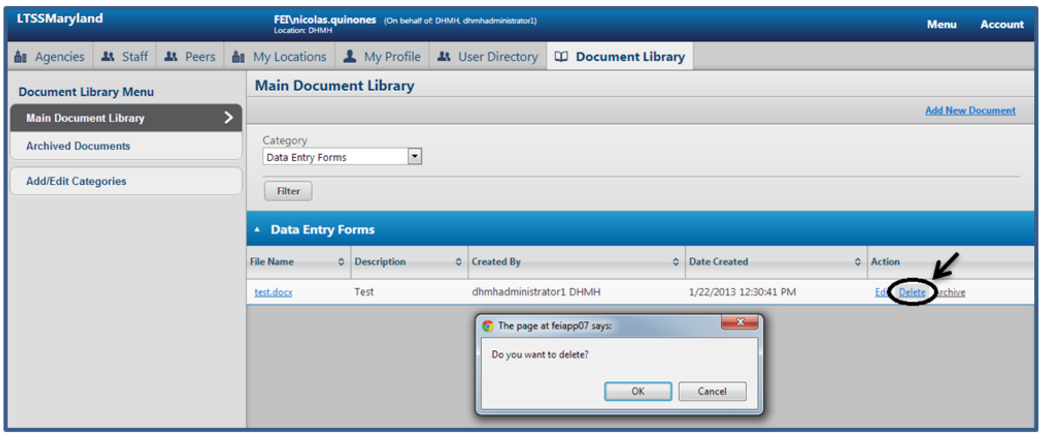
2.7.1.2 Edit Existing Documents

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



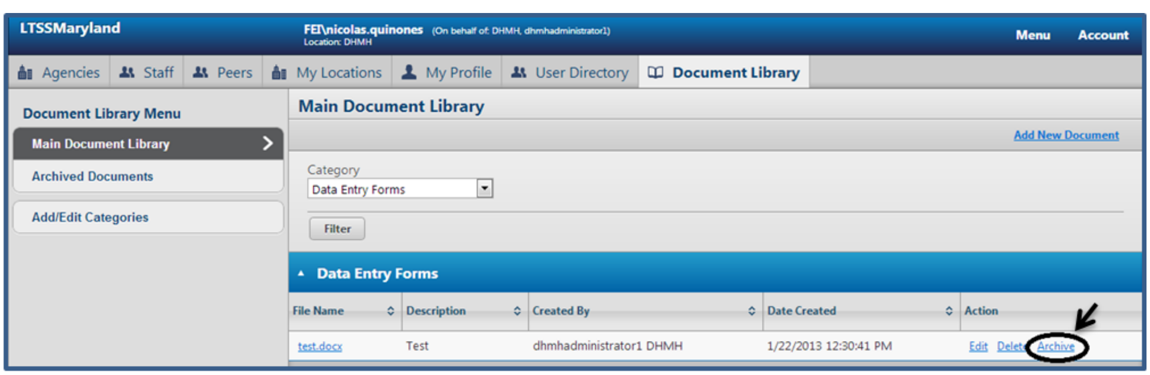
2.7.1.3 Delete Existing Documents

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



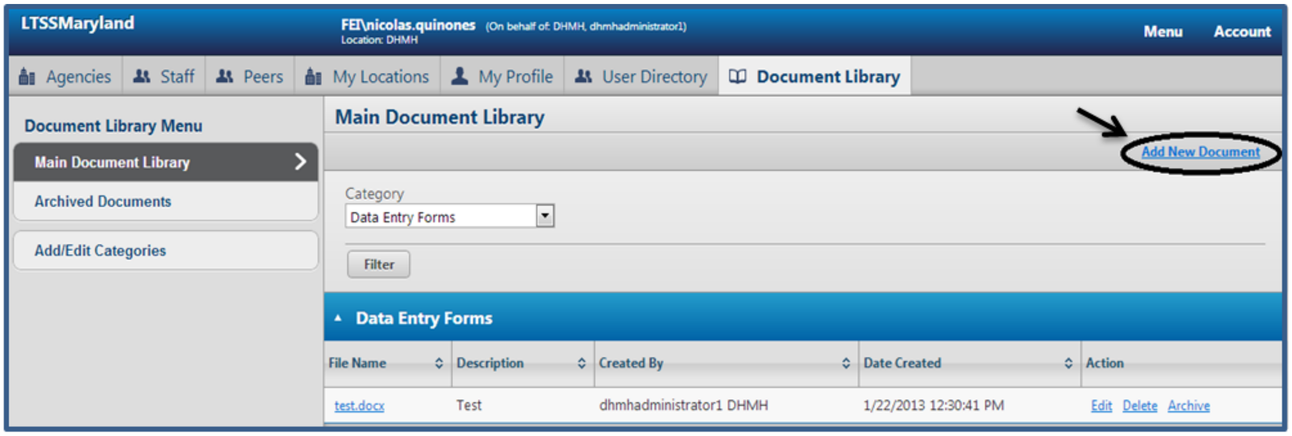
2.7.1.4 Archive Existing Documents

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

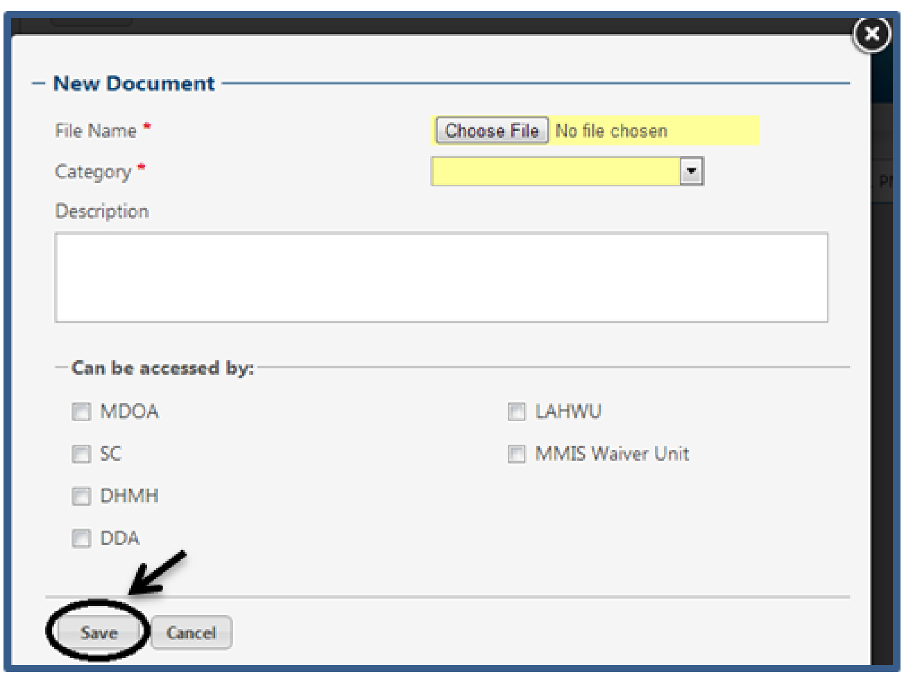


2.7.1.5 Add New Document

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

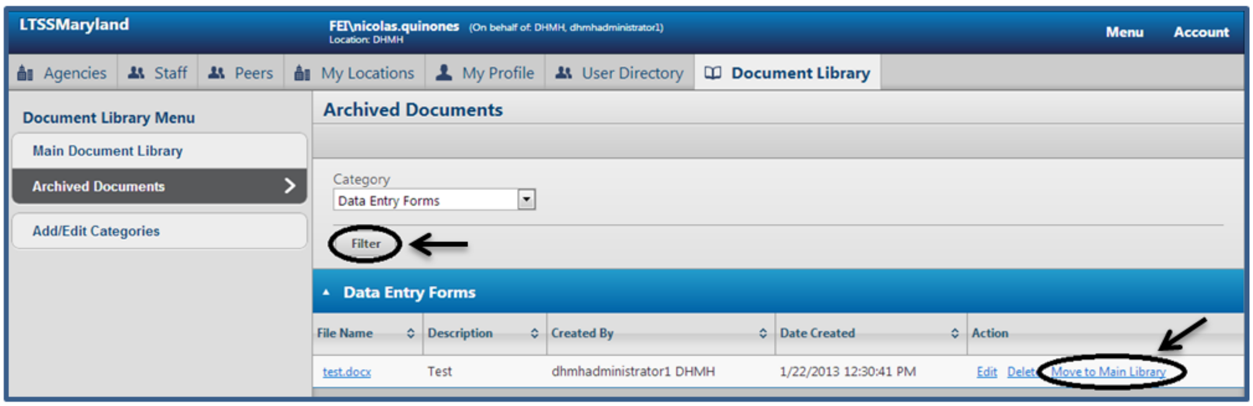


After clicking the Add New Document link a pop up window will appear asking the user for information about the document they wish to add. The user can search for a file to add using the Choose File button. After choosing a file the user will select a Category for the document to be associated to. Under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



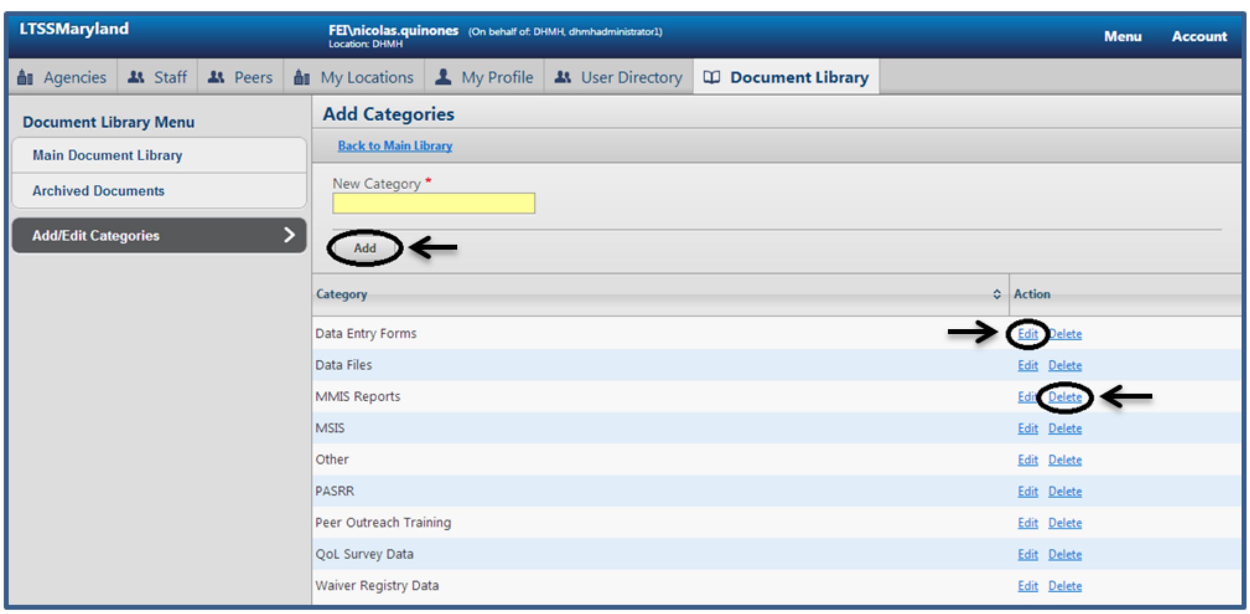
2.7.2 Manage Archived Documents

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



2.7.3 Add/Edit/Delete Categories

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



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