

Money Follows the Person User Manual

A step by step navigational process

January 2013

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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

This section gives an in depth navigation process through the MFP System. It begins by showing the process for assigning a client to the MFP Program. The tutorials will then step through each module within the MFP Program and show the user how to use all functions within the system.

2.1 Add MFP to the Client

2.1.1 Client Search

After navigating to the Clients tab through the Menu or along the top header bar, the actor will be able to search for a client. The **search** feature can be used to locate clients based on client ID, *last name, first name, SSN#, MA# and/or date of birth*. The search function can be used by entering any one of these items individually or by using a combination. The *Clients* tab will allow the user to search for an existing client and view the client profile or the client summary page, which can be used to assign that client to a program. In this case the user will be assigning the client to the MFP program.

Complete the following steps to begin a *Client Search*:

- Enter Smith in the Last Name text box.
- Enter Jonathan in the First Name text box.
- Click the **Cases** button to perform a client search.

The result shown below indicates that LTSS does have a record for Jonathan Smith. Click the **Client Summary** link under actions to review and add programs to the client on the *Client Summary* page.

The screenshot shows the LTSS Client Search results page. The search parameters are set to Last Name: 'smith' and First Name: 'jonathan'. The 'Cases' button in the search bar is highlighted with a red circle and an arrow pointing to it. The search results table shows one entry for Jonathan Smith, with his details: Client ID: 21190150J405110, Last Name: Smith, First Name: Jonathan, Date Of Birth: 01/11/1950, Jurisdiction: Baltimore, Facility: CATONSVILLE COMMONS, SSN #: ***-**-0145, Current MA #: 86320158745, Primary Phone #: 3012589654. The 'Actions' column contains a 'Client Summary' link, which is also highlighted with a red circle and an arrow pointing to it.

2.1.2 Add Program

The figure below shows how to add the MFP program to a client's Client Summary page. Click the **Add Case Program** button and a pop-up window will appear as seen in the figure below. Select MFP from the Case Program Name dropdown and enter other required information highlighted in yellow or marked with an asterisk. Click the Save and Close button to add an MFP case program to the Client Summary page. The actor can also add an MFP program to a client through the MFP Questionnaire, which will be discussed further in the MFP Questionnaire section of this manual.

The screenshot shows the 'Client Summary' page for Jonathan Smith. On the right, a 'Create Case Program' dialog box is open. The 'Case Program Information' section contains the following fields:

- Case Program Name: * MFP (highlighted in yellow)
- Case Program Start Date: 12/18/2012
- Reasons for Opening Case Program: * Other (highlighted in yellow)
- Comments: * (highlighted in yellow)

At the bottom of the dialog box are two buttons: 'Save & Close' (circled in red with an arrow pointing to it) and 'Cancel'.

Click the **Go to Tasks link** to see client details for the MFP Program, starting with the MFP Tasks List.

The screenshot shows the 'Client Summary' page for Jonathan Smith. In the 'MFP' section, there are two buttons: 'Close Case Program' and 'Go to Tasks' (circled in red with an arrow pointing to it). Below this, the 'Summary' section displays:

- Status: Open
- Reason for Opening Case Program: Other
- Assignments: (empty)

2.2 MFP Tasks List

The MFP Tasks List gives the user a snapshot of where the client is in the process of each sub-module in the MFP Program. By default, when a client is added to the MFP Program all of the listed sub-modules will be in an Inactive state. Refer to the *figure below* to see the default display of the **MFP Tasks List**. Each sub-module has different requirements for when they enter into an Active state. Please refer to the individual sub-modules below to get a better understanding of Inactive vs. Active statuses.

The screenshot shows the LTSSMaryland MFP Tasks List interface. At the top, there's a header bar with 'Long Term Services and Support', the user's name 'FEI nicolas.quinones (On behalf of: Snider, Devon)', and 'Location: DHMH'. Below the header are navigation tabs: Home, Clients, My Lists, Alerts, Dashboard, Assignments, Reports, and Client Details. A sidebar on the left lists various program modules: Profile, Client Summary, MFP Program Menu, Case Program Summary, Task List (which is selected), Resident Contact Sheets, Ongoing Peer Support, Options Counseling, Peer Mentoring, Housing Assistance, Quality Of Life, DDA, TBI, Flexible Funds, and Case Notes. The main content area is titled 'MFP — Task List Status: Open'. It contains several sections, each with a title and a 'History' table. The sections include:

- Ongoing Peer Support**: History table shows 0 In Progress Referral, 0 Active Referral, and 0 Inactive Referral.
- Options Counseling**: History table shows 0 Pending Referral, 0 Active Referral, and 0 Inactive Referral.
- Peer Mentoring**: History table shows 0 In Progress Referral, 0 Active Referral, and 0 Inactive Referral.
- Housing Assistance**: History table shows 0 In Progress Referral, 0 Active Referral, and 0 Inactive Referral.
- Quality of Life Survey**: Shows 'Active Quality of Life Survey Information' with a note: 'No active Quality of Life Survey information to display.'
- DDA**: Shows 'Active HA Referral Information' with a note: 'No active HA Referral information to display.'

2.3 Nursing Facility Search

The Nursing Facility Search page can be accessed through My List. Under the My List tab at the top of LTSS, authorized users will have access to the MFP User Activity section located in the left hand navigation. To access the Nursing Facility Search page click on **Nursing Facility Search** from the left hand navigation. From the Nursing Facility Search page an authorized user can search by specifying a specific County, by Nursing Facility name or by leaving search criteria blank and clicking the **Search button** the actor will see the full list of Nursing Facilities in LTSS as seen in the figure below.

Nursing Facility Search

by County: by Nursing Facility:

Search **Search** Clear

Facility	Address	Residents	Residents Last Contact Date	Non-Residents	Non-Residents Last Contact Date
CATONSVILLE COMFORT CARE CENTER (test)	Test Street 1, Baltimore 20103	View List	01/08/2013	View List	N/A
HOLLY HILL MANOR INC (test)	Test Street 1, Baltimore 20103	View List	01/08/2013	View List	N/A
LOCH RAVEN CENTER (test)	Test Street 1, Baltimore 20103	View List	N/A	View List	N/A
Nursing Facility Baltimore 1	Test Street 1, Baltimore 20103	View List	01/09/2013	View List	01/04/2013
Nursing Facility Baltimore 2	Test Street 1, Baltimore 20103	View List	01/03/2013	View List	N/A

To view a list of Residents for a particular Nursing Facility, click the **View List link** under the Residents column for the specific Nursing Facility.

Nursing Facility Search

by County: by Nursing Facility:

Search **Search** Clear

Facility	Address	Residents	Residents Last Contact Date	Non-Residents	Non-Residents Last Contact Date
CATONSVILLE COMFORT CARE CENTER (test)	Test Street 1, Baltimore 20103	View List	01/08/2013	View List	N/A
HOLLY HILL MANOR INC (test)	Test Street 1, Baltimore 20103	View List	01/08/2013	View List	N/A
LOCH RAVEN CENTER (test)	Test Street 1, Baltimore 20103	View List	N/A	View List	N/A
Nursing Facility Baltimore 1	Test Street 1, Baltimore 20103	View List	01/09/2013	View List	01/04/2013
Nursing Facility Baltimore 2	Test Street 1, Baltimore 20103	View List	01/03/2013	View List	N/A

From the Nursing Facility – Resident List the actor will see details on the specific Nursing Facility they are viewing as well as a full list of all clients in LTSS associated with that Nursing Facility. From the output list the actor can navigate to any particular client's Resident Contact Sheet by clicking the **Details link** as seen in the figure below. This will take the actor to the clients Resident Contact Sheet List, where Resident Contact Sheets for the client can be viewed and added.

Nursing Facility - Residents List

[Back To Search](#)

Residents List

Nurse Facility: CATONSVILLE COMFORT CARE CENTER (test)
Address: Test Street 1, Baltimore, MD 20103
Phone:

Last Name	First Name	Date of Birth	MA Eligibility Type	WOA Status	LAH Status	Referred to DCI	OC Status	Last Contact	Action
Dalton	Ginger	01/02/1960	Community	Active	No			N/A	Details
Howe	Hayley	01/08/1965		Active	Active	Yes	Active	01/08/2013	Details
TEST	ACL	01/26/1960		Active	No			N/A	Details
Jacobingle	John	11/22/1968	Community	Active	Active	No		N/A	Details

To view a list of Non-Resident Contact Sheets for a particular Nursing Facility, click the **View List link** under the Non-Residents column for the specific Nursing Facility as seen in the figure below.

Nursing Facility Search						
Facility	Address	Residents	Residents Last Contact Date	Non-Residents	Non-Residents Last Contact Date	
CATONSVILLE COMFORT CARE CENTER (test)	Test Street 1, Baltimore 20103	View List	01/08/2013	View List	N/A	
HOLLY HILL MANOR INC (test)	Test Street 1, Baltimore 20103	View List	01/08/2013	View List	N/A	
LOCH RAVEN CENTER (test)	Test Street 1, Baltimore 20103	View List	N/A	View List	N/A	
Nursing Facility Baltimore 1	Test Street 1, Baltimore 20103	View List	01/09/2013	View List	01/04/2013	
Nursing Facility Baltimore 2	Test Street 1, Baltimore 20103	View List	01/03/2013	View List	N/A	

From the Nursing Facility – Non-Resident Contact Sheets page the actor will see details on the specific Nursing Facility they are viewing as well as a full list of Non-Resident Contact Sheets in LTSS associated with that Nursing Facility. For the specific Nursing Facility authorized users will be able to view Non-Resident Contact Sheet information, edit existing Non-Resident Contact Sheets using the **Edit link**, discard existing Non-Resident Contact Sheet information using the **Discard link** and create new Resident Contact Sheets for the Nursing Facility using the **Create New link** as seen in the figure below.

When the actor clicks the **Create New link** as seen in the figure above the Nursing Facility – Non-Resident Contact Sheet form will appear. The actor will fill in all required information, which will be highlighted yellow or marked with an asterisk as seen in the figure below. The actor will have the option to add multiple activities for a given day by using the **Add Activity button**. After entering all required information the actor will click the **Save button** as seen in the figure below to add the Non-Resident Contact Sheet to the Nursing Facility. After saving, authorized users will have the ability to Edit and Discard the Non-Resident Contact Sheet at any time.

The screenshot shows the 'Nursing Facility - Non-Resident Contact Sheet' page. On the left, there's a sidebar with 'MFP List' (Ongoing Peer Support, Options Counseling, Peer Mentoring) and 'MFP User Activity' (Nursing Facility Search, Non-Residential Contact Sheets). The main area has sections for 'Resident Contact/Encounter Information' (Date of Visit: 01/21/2013, Peer dropdown, Notes text area) and 'Activity List' (Activity dropdown, Person Contacted dropdown, Contact Details dropdown, Type dropdown, Duration hrs: 0 min: 0). At the bottom right is a green 'Add Activity' button with a circled arrow pointing to it. Top right buttons include 'Update' and 'Save' (circled).

2.4 Resident Contact Sheets

The **Resident Contact Sheet** gives personal information about the client as well as capture peer, person contacted, and gives status updates and indicates whether the client is interested in receiving Ongoing *Peer Support* and *Options Counseling*. If the client indicates that they wish to receive one or both of these services and the Resident Contact Sheet is submitted a Referral is started for the client in the respective modules. A client can have multiple Resident Contact Sheets and they will be displayed on the **Resident Contact Sheet List** page as seen below.

The screenshot shows the 'MFP — Resident Contact Sheets List' page for client Jonathan Smith. The sidebar includes 'Profile', 'Client Summary', 'MFP Program Menu' (Case Program Summary, Task List), and 'Resident Contact Sheets' (circled with a green arrow). The main table has columns for Visit Date, Peer, Person Contacted, Resident Status, Peer Support, Options Counseling, Status, and Actions. A note at the bottom says 'No data available in table'. A blue 'Add Resident Contact Sheet' link is located at the top right of the table area.

2.4.1 Create Peer Profile

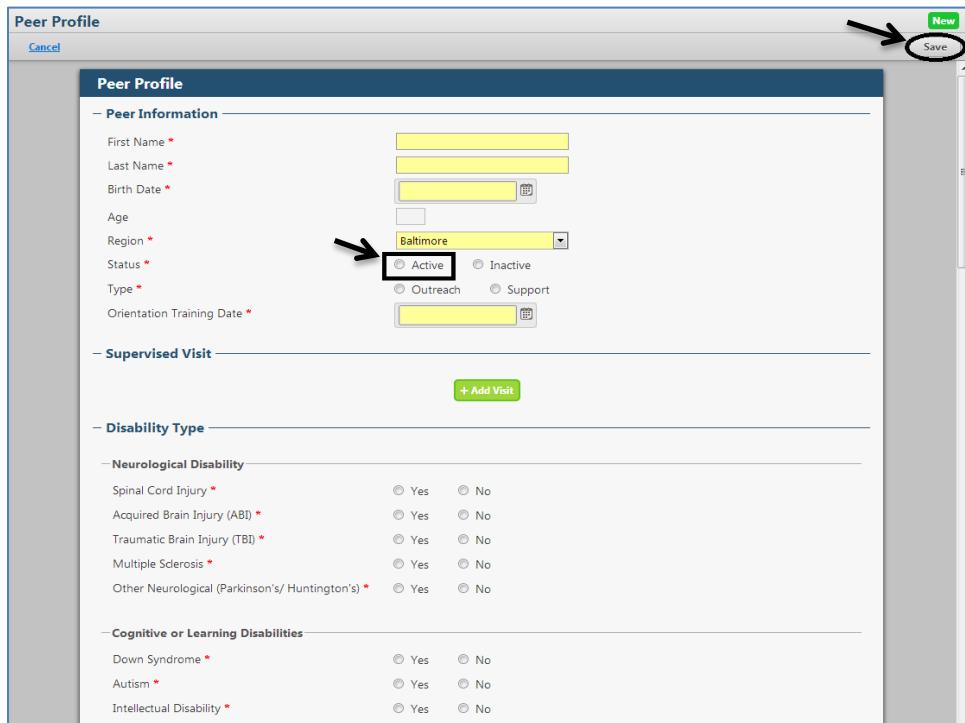
A precondition to being able to Save/Submit a Resident Contact Sheet is having at least 1 Peer Profile created within the Jurisdiction of the client you are trying to add the form for. To add a Peer Profile go through the **Menu tab** and navigate to **Administration and Peers** as seen in the figure below.

The screenshot shows the LTSSMaryland system's Home page. At the top, there is a header bar with the title "Long Term Services and Support" and a user info section for "FBI\nicolas.quinones (On behalf of: Snider, Devon) Location: DHMH". On the right of the header are "Menu" and "Account" buttons. Below the header is a navigation bar with links: Home, Clients, My Lists, Alerts, Dashboard, Assignments, Reports, Agencies, Staff, Peers, Administration, QR, Waiver Registry, Document Library, Technical Support, Feedback, and Print. A dropdown menu is open over the "Peers" link, showing the options: Agencies, Staff, Peers, Administration, QR, Waiver Registry, Document Library, Technical Support, Feedback, and Print. The main content area displays "Recent Alerts" and "Notice to Administrators".

After navigating to the Peer search page the actor will have to choose a **Location Name** from the dropdown seen in the figure below and click **Filter** to check to see if a Peer Profile already exists for the Peer they wish to add to the system. If the Peer the actor wants to add does not exist for that Location, the actor can click the **Create Peer Profile link** as seen in the figure below to be taken to the create Peer Profile page. The Create Peer Profile link will not appear until the actor first filters by a specific Location Name.

The screenshot shows the "Peers" search page. At the top, there is a header bar with the title "Long Term Services and Support" and a user info section for "FBI\nicolas.quinones (On behalf of: Snider, Devon) Location: DHMH". On the right of the header are "Menu" and "Account" buttons. Below the header is a navigation bar with links: Agencies, Staff, Peers, and Document Library. The "Peers" link is highlighted. The main content area has a search form with fields for "Location Name *" (containing "The IMAGE Center (Options C)" with a yellow highlight), "Status" (containing "Active"), and a "Filter" button (circled with a black arrow). To the right of the search form is a "Create Peer Profile" link (circled with a blue arrow). Below the search form is a table with columns: Peer Name, Region, Peer Status, Last Update, and Actions. The table message says "No data available in table".

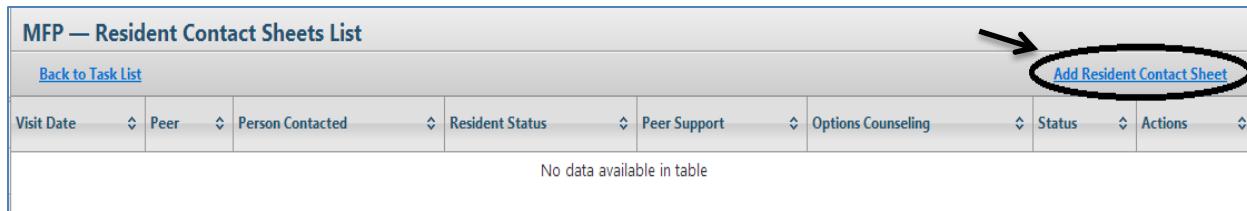
To create a **Peer Profile**, enter the required information which will be highlighted yellow or marked with an asterisk, as well as any optional information. In order for the Peer to show up in the Peer dropdown on the Resident Contact Sheet they must be set to "**Active**" as seen in the figure below. Upon entering all required information click the **Save button** to save the Peer Profile to LTSS for the specified Location.



The screenshot shows the 'Peer Profile' form. At the top right, there are two buttons: 'New' (green) and 'Save' (blue). A black arrow points from the text 'After completing, or while in progress, the user can click the **Save button** to **Save the Resident Contact Sheet** as seen below.' to the 'Save' button. On the form, the 'Region' dropdown is set to 'Baltimore'. The 'Status' section shows 'Active' as the selected radio button, which is highlighted with a black box. Other fields include 'First Name', 'Last Name', 'Birth Date', 'Age', 'Type', and 'Orientation Training Date'.

2.4.2 Add, Save and Edit Resident Contact Sheet

From the Resident Contact Sheet List click the **Add Resident Contact Sheet** link.



The screenshot shows the 'MFP — Resident Contact Sheets List' page. At the top right, there is a blue link 'Add Resident Contact Sheet' enclosed in a black oval. A black arrow points from the text 'After completing, or while in progress, the user can click the **Save button** to **Save the Resident Contact Sheet** as seen below.' to this link. The page includes a header with columns for Visit Date, Peer, Person Contacted, Resident Status, Peer Support, Options Counseling, Status, and Actions. Below the header, it says 'No data available in table'.

The Resident Contact Sheet form will appear. Section I is pre-populated with client information pulled from the Client Profile page. Section II is Contact Sheet Information. Enter the **required information**, which will either be *highlighted yellow* or marked with an *asterisk*. The actor will see that any Peer Profiles added for Locations that have jurisdiction over the clients current Jurisdiction will appear in the Peer dropdown field as seen in the figure below. After completing, or while in progress, the user can click the **Save button** to **Save the Resident Contact Sheet** as seen below.

MFP — Resident Contact Sheet

[Cancel](#)

[New](#) 

Resident Contact Sheet Form

I. Client Information

Client ID:	21190150J405110
First Name:	Jonathan
Last Name:	Smith
Gender:	Male
Date of Birth:	01/11/1950
Race:	Black Or African American
Hispanic:	not specified
Nursing Facility:	CATONSVILLE COMMONS
Medicaid Number:	86320158745 (LTC)
SSN:	952630145

II. Contact Sheet Information

Visit Date & Peer Information

Date of Visit: * 

Peer: * 

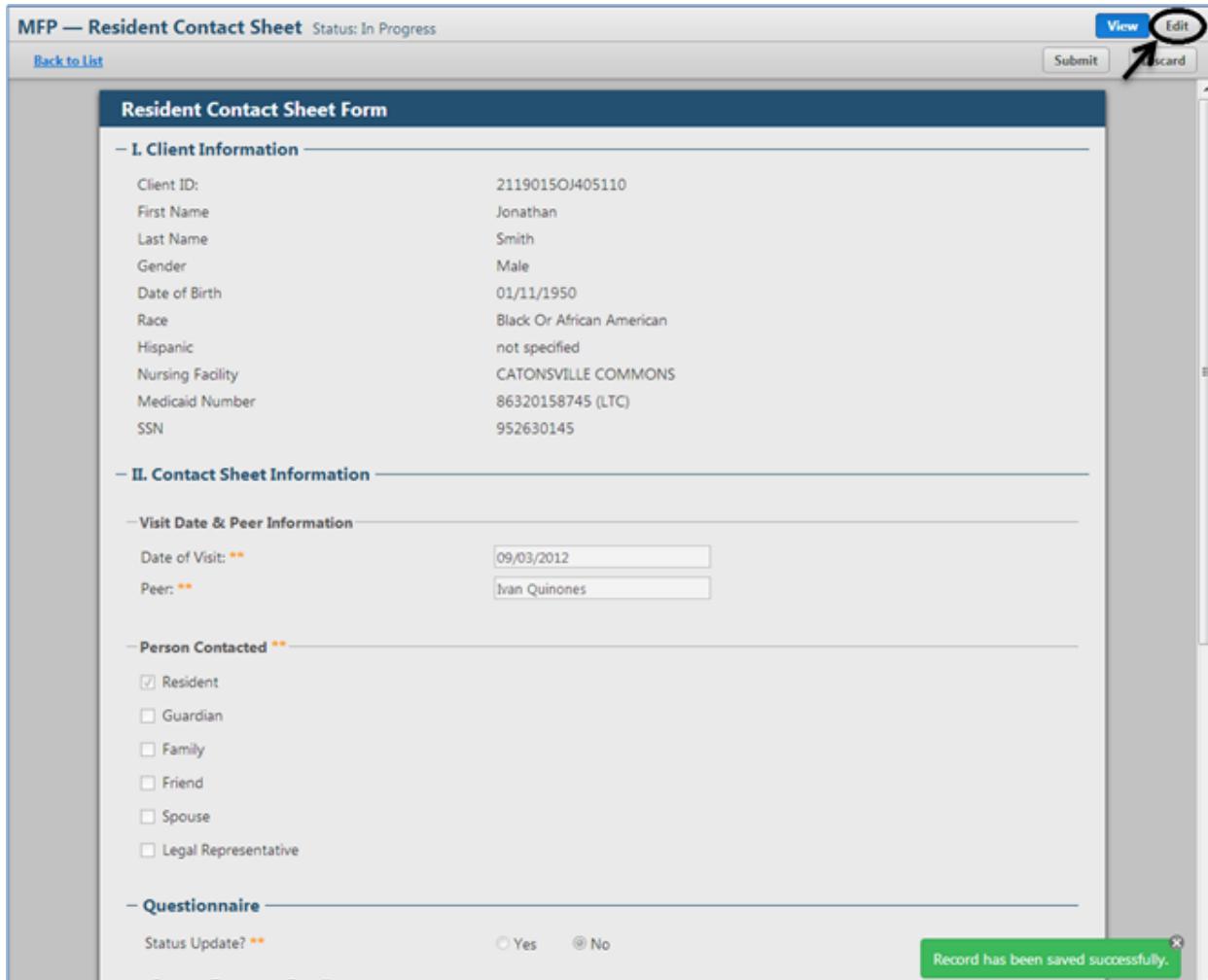
Person Contacted: *

Resident
 Guardian
 Family
 Friend
 Spouse
 Legal Representative

Questionnaire

Status Update? * Yes No

After clicking the Save button the user is taken to View-mode and will see the message indicating that the “Record has been saved successfully.” Click the **Edit button** to make changes to the Resident Contact Sheet as seen below. After making changes click the Save button again and the user will return to View-mode.



The screenshot shows the 'Resident Contact Sheet' form in 'Edit' mode. At the top right, there are 'View', 'Edit', 'Submit', and 'Discard' buttons. A circled 'Edit' button is shown with an arrow pointing to it. The form contains sections for 'Client Information' and 'Contact Sheet Information'. Under 'Client Information', fields include Client ID (2119015OJ405110), First Name (Jonathan), Last Name (Smith), Gender (Male), Date of Birth (01/11/1950), Race (Black Or African American), Hispanic (not specified), Nursing Facility (CATONSVILLE COMMONS), Medicaid Number (86320158745 (LTC)), and SSN (952630145). Under 'Contact Sheet Information', 'Visit Date & Peer Information' includes Date of Visit (09/03/2012) and Peer (Ivan Quinones). 'Person Contacted' includes checkboxes for Resident (checked), Guardian, Family, Friend, Spouse, and Legal Representative. Under 'Questionnaire', there is a Status Update section with 'Yes' and 'No' radio buttons, and a message 'Record has been saved successfully.' at the bottom.

2.4.3 View, Discard and Submit Resident Contact Sheet

The user can **View the Resident Contact Sheet** in two ways. The first way was shown above where the user is taken to View-mode after saving the Resident Contact Sheet. The user can also View the Resident Contact Sheet by clicking the ***View link*** on the *Resident Contact Sheet List* as shown below.



The screenshot shows a table titled 'MFP — Resident Contact Sheets List' with columns for Visit Date, Peer, Person Contacted, Resident Status, Peer Support, Options Counseling, Status, and Actions. The 'Actions' column contains 'Edit' and 'View' links. A circled 'View' link is shown with an arrow pointing to it. The table also includes a 'Back to Task List' link and an 'Add Resident Contact Sheet' link.

From View-mode the user can **Discard the Resident Contact Sheet** by clicking the ***Discard button*** as seen in the figure below. Once the Resident Contact Sheet is Submitted the user will no longer have the option to Discard.

MFP — Resident Contact Sheet Status: In Progress

[Back to List](#)

Resident Contact Sheet Form

I. Client Information

Client ID:	2119015OJ405110
First Name	Jonathan
Last Name	Smith
Gender	Male
Date of Birth	01/11/1950
Race	Black Or African American
Hispanic	not specified
Nursing Facility	CATONSVILLE COMMONS
Medicaid Number	86320158745 (LTC)
SSN	952630145

II. Contact Sheet Information

Visit Date & Peer Information

Date of Visit: **	09/03/2012
Peer: **	Ivan Quinones

View **Edit** **Submit** **Discard**

If the user does not wish to discard, click the **Submit button** to **Submit the Resident Contact Sheet** as seen in the figure below. Once submitted the Resident Contact sheet can no longer be discarded or edited.

MFP — Resident Contact Sheet Status: In Progress

[Back to List](#)

Resident Contact Sheet Form

I. Client Information

Client ID:	2119015OJ405110
First Name	Jonathan
Last Name	Smith
Gender	Male
Date of Birth	01/11/1950
Race	Black Or African American
Hispanic	not specified
Nursing Facility	CATONSVILLE COMMONS
Medicaid Number	86320158745 (LTC)
SSN	952630145

II. Contact Sheet Information

Visit Date & Peer Information

Date of Visit: **	09/03/2012
Peer: **	Ivan Quinones

View **Edit** **Submit** **Discard**

Upon Submit, if the actor chose Yes to either of the questions referring to Ongoing Peer Support or Options Counseling, a Referral will be created in the respective module for the clients in MFP program.

Would the resident like to develop goals plan for community integration and receive ongoing peer support? **

Yes

No

Would the resident like to receive Options Counseling? **

Yes

No

2.5 Ongoing Peer Support

Navigate to the Ongoing Peer Support module by clicking the ***Ongoing Peer Support tab*** as shown in the figure below. This will take you the **Ongoing Peer Support—Referral List**.

The screenshot shows the 'Long Term Services and Support' application interface. At the top, it displays the user's information: FEI\nicolas.quinones (On behalf of Snider, Devon) and Location: DHMH. The top navigation bar includes links for Home, Clients, My Lists, Alerts, Dashboard, Assignments, Reports, Client Details, Menu, and Account.

The main content area is titled 'MFP — Ongoing Peer Support — Referrals List'. It features a sub-header 'Back to Task List' and an 'Activity History' section. Below this is a table with columns: Referral Date, Anticipated Transition Date, Preferred Peer Support Type, Status, and Actions. The table shows one entry: 12/18/2012, N/A, In Progress, and a 'Summary' link.

On the left, there is a vertical sidebar titled 'MFP Program Menu' containing links for Case Program Summary, Task List, Resident Contact Sheets, Ongoing Peer Support (which is highlighted with a blue background and has a blue arrow pointing to it), Options Counseling, Peer Mentoring, Housing Assistance, Quality Of Life, DDA, TBI, Flexible Funds, and Case Notes.

2.5.1 Assign CIL Peer to Client

In order to proceed to creating an assessment and outcome for the client in the Ongoing Peer Support module, you must **Assign a CIL Peer** to the client. To assign a CIL Peer log in as an actor with the role of CIL Administrator that has access to the client's jurisdiction. From the Ongoing Peer Support Referral List an actor with role of CIL Administrator can assign an actor with role of CIL Peer by clicking the ***Assign Peer link*** as seen in the figure below.

The screenshot shows the 'MFP — Ongoing Peer Support — Referrals List' page. The left sidebar has a section titled 'MFP Program Menu' containing links for 'Case Program Summary', 'Task List', 'Resident Contact Sheets', 'Ongoing Peer Support' (which is highlighted with a blue background and a red arrow pointing to it), 'Flexible Funds', and 'Case Notes'. The top right corner features a 'Client Details' tab and navigation links for 'Menu' and 'Account'. The main content area displays a table with columns for 'Referral Date', 'Anticipated Transition Date', 'Preferred Peer Support Type', 'Status', and 'Actions'.

The actor will be taken to the *Ongoing Peer Support- Peer Assignment* page where they can assign and reassign a CIL Peer to the client by selecting a Peer from the dropdown menu and clicking the **Assign Peer button** as seen in the figure below.

The screenshot shows the 'MFP — Ongoing Peer Support — Peer Assignment' page. The left sidebar has a section titled 'MFP Program Menu' containing links for 'Case Program Summary', 'Task List', 'Resident Contact Sheets', 'Ongoing Peer Support' (which is highlighted with a blue background and a red arrow pointing to it), and 'Peer Assignment' (which is also highlighted with a blue background). The main content area has a 'Peer Assignment' header and a 'Peer Selection' section. It includes a dropdown menu labeled 'Peer: *' with two options: 'Lori Baskette' and 'Teandra Reid-Green'. The top right corner features a 'Client Details' tab and navigation links for 'Menu' and 'Account'. There is also an 'Update' button.

An actor with the role of CIL Administrator can also assign a CIL Peer to a client from the Assignments tab in LTSS. Click the **Assignments** tab at the top of the page and navigate to *Ongoing Peer Support* under the Assignment Menu section in the left hand navigation to perform **Batch Assignment**. Choose **Unassigned** from the Status dropdown menu and click the **Filter button**. Locate the client you wish to assign a CIL Peer to and click the **checkbox** next to them to select. Then choose a CIL Peer from the drop down menu at the bottom of the page and click the **Assign button**. The client will now have that CIL Peer assigned to them and an

Assessment and Outcome can now be performed by an authorized user for that client in Ongoing Peer Support.

	First Name	Last Name	MDS	Facility	County	Assigned To	Actions
<input checked="" type="checkbox"/>	Jonathan	Smith		CATONSVILLE COMMONS	Baltimore		View

Assign to Peer: * Lori Baskette ←

2.5.2 View Summary for a Specific Referral

From the Ongoing Peer Support—Referral List the user can click the **Summary link** to View the Ongoing Peer Support—Referral Summary for that specific referral as seen in the figure below.

Referral Date	Anticipated Transition Date	Preferred Peer Support Type	Status	Actions
12/18/2012	N/A	In Progress	Summary	←

2.5.3 Edit and Save Peer Support Referral

After clicking the Summary link for the client and going to the Ongoing Peer Support—Referral Summary page click the **Edit link** under the *Referral Form* panel as seen in the figure below.

MFP — Ongoing Peer Support — Referral Summary

[Back to List](#) [Collapse All](#)

▲ Referral

— Peer Assignment Information —

Assigned Peer: Lori Baskette

— Referral Information —

Referral Date: 12/18/2012

Anticipated Transition Date: N/A

Preferred Peer Support Type:

Status: In Progress

[View](#) [Edit](#)



The user will then enter the required information on the **Referral Form** as indicated by fields *highlighted in yellow* or fields marked with an asterisk and then click the **Save button**.

MFP — Ongoing Peer Support — Referral Status: In Progress

[View](#) [Edit](#)

Referral Form

— Referral Information —

Referral Date: * 12/18/2012 [\[Calendar\]](#)

Anticipated Transition Date: [\[Calendar\]](#)

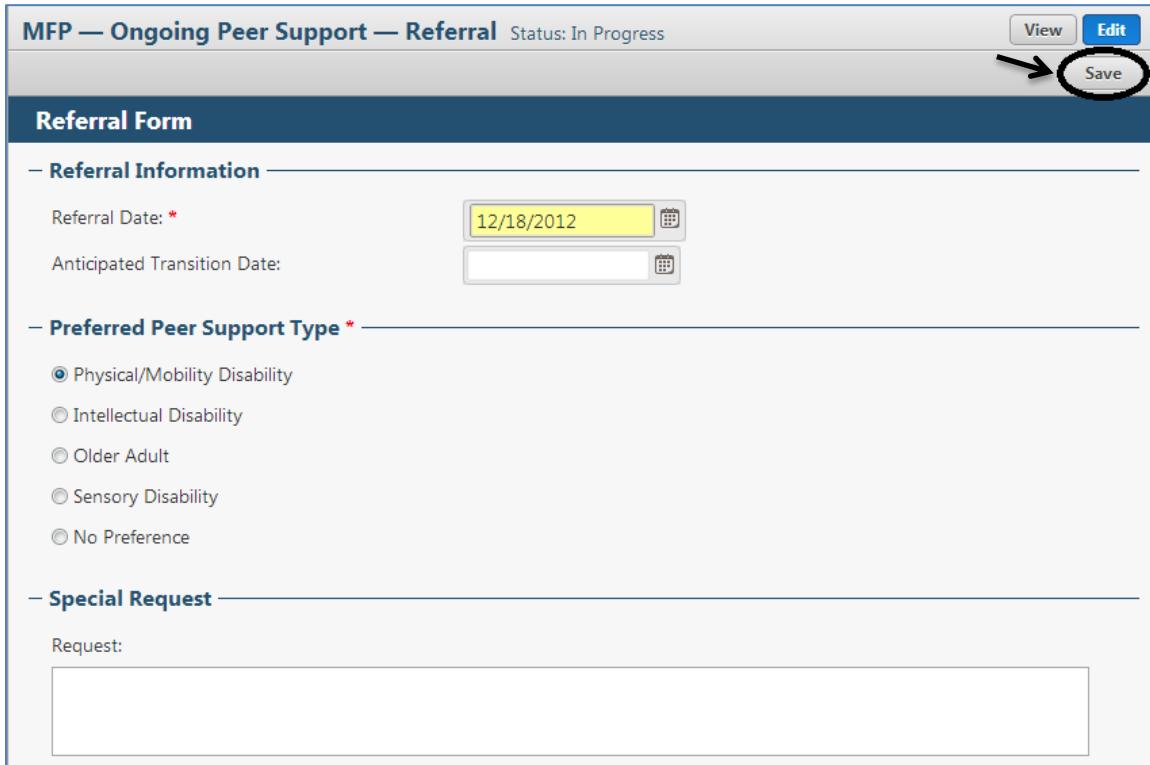
— Preferred Peer Support Type * —

Physical/Mobility Disability
 Intellectual Disability
 Older Adult
 Sensory Disability
 No Preference

— Special Request —

Request:

[Save](#)



2.5.4 View, Discard and Submit Peer Support Referral

The user can View the Referral Form in two ways. The first way was shown above as the user is taken to View-mode after saving the Referral Form. The user can also navigate to Ongoing Peer Support—Referral Summary page and click the **View link** to View the **Ongoing Peer Support—Referral**.

MFP — Ongoing Peer Support — Referral Summary

[Back to List](#) [Collapse All](#)

▲ Referral

— Peer Assignment Information

Assigned Peer:	Lori Baskette
----------------	---------------

— Referral Information

Referral Date:	12/18/2012
Anticipated Transition Date:	N/A
Preferred Peer Support Type:	Physical/Mobility Disability
Status:	In Progress

[View](#) [Edit](#)

From **View-mode** the user can **Discard the Ongoing Peer Support- Referral** by clicking the **Discard button** as seen in the figure below. The Ongoing Peer Support—Referral can be Discarded as long as a Peer Support Assessment is not “In Progress” or “Submitted.”

MFP — Ongoing Peer Support — Referral Status: In Progress

[View](#) [Edit](#) [Back to Summary](#) [Submit](#) [Discard](#)

Referral Form

— Referral Information

Referral Date: **	12/18/2012
Anticipated Transition Date:	

— Preferred Peer Support Type **

Physical/Mobility Disability
 Intellectual Disability
 Older Adult
 Sensory Disability
 No Preference

If the user does not wish to discard, click the **Submit button** to **Submit the Ongoing Peer Support- Referral** as seen in the figure below. Once submitted the Ongoing Peer Support--Referral can no longer be edited.

MFP — Ongoing Peer Support — Referral Status: In Progress

[View](#) [Edit](#)

[Back to Summary](#)

Referral Form

— Referral Information —

Referral Date: ** 12/18/2012

Anticipated Transition Date:

— Preferred Peer Support Type **

Physical/Mobility Disability
 Intellectual Disability
 Older Adult
 Sensory Disability
 No Preference

 [Submit](#) [Discard](#)

2.5.5 Ongoing Peer Support Status Change to Active

After a *Peer Support Referral* is “Submitted,” the Ongoing Peer Support changes to an **Active status** on the **MFP Tasks List** page as seen below.

▲ Ongoing Peer Support		Referral List
— History: —	— Active OPS Referral Information: —	Summary
In Progress Referral: 0	Referral Date: 12/18/2012	
Active Referral: 1	Anticipated Transition Date: N/A	
Inactive Referral: 0	Preferred OPS Type: Physical/Mobility Disability	
	Status: Active	

2.5.6 Add, Save and Edit Ongoing Peer Support Assessment

Navigate to the Ongoing Peer Support Referral List and click the **Summary link** for the referral you wish to create an assessment and/or an outcome for.

MFP — Ongoing Peer Support — Referrals List					
Back to Task List				Assign Peer	Activity History
Referral Date	Anticipated Transition Date	Preferred Peer Support Type	Status	Actions	
12/18/2012	N/A	Physical/Mobility Disability	Active	Summary	

From the Ongoing Peer Support—Referral Summary page click the **Add Assessment** link as seen in the figure below.

MFP — Ongoing Peer Support — Referral Summary

[Back to List](#) [Collapse All](#)

▲ Referral

— **Peer Assignment Information** —

Assigned Peer:	Lori Baskette
----------------	---------------

— **Referral Information** — [View](#)

Referral Date:	12/18/2012
Anticipated Transition Date:	N/A
Preferred Peer Support Type:	Physical/Mobility Disability
Status:	Active

▲ Assessment List

Assessment Completed?	Assessment Date	Status	Actions
No data available in table			

Add Assessment

The **Ongoing Peer Support-- Assessment** form will appear. The user will be prompted to answer whether or not an assessment was completed for the referred individual. By choosing Yes or No the user will see a different set of options as seen below. Enter the **required information**, which will either be *highlighted yellow* or marked with an *asterisk*. After completing, or while in progress, the user can click the **Save button** to **Save the Ongoing Peer Support—Assessment** as seen in the figure below.

MFP — Ongoing Peer Support — Assessment

[Cancel](#) New → **Save**

Assessment

— **Referral Information** —

Date of Referral:	12/18/2012
Was an assessment completed with the referred individual? *	<input type="checkbox"/> Yes <input type="checkbox"/> No

After clicking the Save button the user is taken to View-mode. Click the **Edit link** to make changes to the Ongoing Peer Support—Assessment as seen below. After making changes click the Save button again and the user will return to View-mode of the Ongoing Peer Support Assessment.

The screenshot shows the 'MFP — Ongoing Peer Support — Assessment' page. At the top right, there are three buttons: 'View' (blue), 'Edit' (white with blue border), and 'Discard'. A red circle and arrow point to the 'Edit' button. The status is listed as 'In Progress'. Below the buttons, there's a 'Back to Summary' link. The main section is titled 'Assessment' and contains three expandable sections: 'Referral Information', 'Assessment Information', and 'Ongoing Peer Support Goals'. Under 'Referral Information', the 'Date of Referral' is 12/18/2012 and the question 'Was an assessment completed with the referred individual? **' has a 'Yes' checkbox. Under 'Assessment Information', the 'Date of Assessment: **' is 10/01/2012. Under 'Ongoing Peer Support Goals', several checkboxes are listed, with 'Socialization' checked. A green success message at the bottom right says 'Record has been saved successfully.'

2.5.7 View, Discard and Submit Peer Support Assessment

The user can **View the Ongoing Peer Support-- Assessment** in two ways. The first way was shown above where the user is taken to View-mode after saving the Ongoing Peer Support-- Assessment. The user can also View the Ongoing Peer Support-- Assessment by clicking the **Edit link** on the Ongoing Peer Support—Referral Summary page as shown below.

Assessment List					Add Assessment
Assessment Completed?	Assessment Date	Status	Actions		
Yes	10/01/2012	In Progress	Edit View		

From View-mode the user can **Discard the Ongoing Peer Support-- Assessment** by clicking the **Discard button** as seen in the figure below. The user can discard an “In Progress” or “Submitted” Ongoing Peer Support-- Assessment if an Ongoing Peer Support—Assessment Outcome is not “In Progress” or “Submitted.”

MFP — Ongoing Peer Support — Assessment Status: In Progress

[View](#) [Edit](#)

[Back to Summary](#)

Assessment

— Referral Information

Date of Referral: 12/18/2012

Was an assessment completed with the referred individual? Yes

— Assessment Information

Date of Assessment: 10/01/2012

— Ongoing Peer Support Goals:

If the user does not wish to discard, click the **Submit button** to **Submit the Ongoing Peer Support—Assessment** as seen in the figure below. Once submitted the Ongoing Peer Support-- Assessment can no longer be edited.

MFP — Ongoing Peer Support — Assessment Status: In Progress

[View](#) [Edit](#)

[Back to Summary](#)

Assessment

— Referral Information

Date of Referral: 12/18/2012

Was an assessment completed with the referred individual? Yes

— Assessment Information

Date of Assessment: 10/01/2012

— Ongoing Peer Support Goals:

2.5.8 Add, Save and Edit Peer Support Assessment Outcome

From the Ongoing Peer Support—Referral Summary page click the **Add Outcome link** as seen in the figure below.

MFP — Ongoing Peer Support — Referral Summary

[Back to List](#) [Collapse All](#)

Referral

Peer Assignment Information

Assigned Peer:	Lori Baskette
----------------	---------------

Referral Information [View](#)

Referral Date:	12/18/2012
Anticipated Transition Date:	N/A
Preferred Peer Support Type:	Physical/Mobility Disability
Status:	Active

Assessment List

Assessment Completed?	Assessment Date	Status	Actions
Yes	10/01/2012	Submitted	View

[Add Assessment](#) [Add Outcome](#)




The **Ongoing Peer Support—Assessment Outcome** form will appear. Enter the **required information**, which will either be *highlighted yellow* or marked with an *asterisk*. After completing, or while in progress, click the **Save button** to **Save the Ongoing Peer Support—Assessment Outcome** as seen below.

MFP — Ongoing Peer Support — Assessment Outcome [New](#)

[Cancel](#)

Assessment Outcome Form

Assessment Outcome Information

Date Peer Support Ended: *	<input type="text" value="10/15/2012"/> Calendar
----------------------------	--

Reason *

- Referred for peer mentoring
- Achieved goals
- Died
- Withdrawn
- Other

[Save](#)




After clicking the Save button the user is taken to View-mode. Click the **Edit link** to make changes to the Ongoing Peer Support—Assessment Outcome as seen below. After making changes click the Save button again and the user will return to View-mode.

MFP — Ongoing Peer Support — Assessment Outcome Status: In Progress

[View](#) [Edit](#) [Submit](#) [Discard](#)

[Back to Summary](#)

Assessment Outcome Form

— Assessment Outcome Information

Date Peer Support Ended: **

— Reason **

Referred for peer mentoring
 Achieved goals
 Died
 Withdrawn
 Other

2.5.9 View, Discard and Submit Peer Support Assessment Outcome

The user can **View the Ongoing Peer Support—Assessment Outcome** in two ways. The first way was shown above where the user is taken to View-mode after saving the Ongoing Peer Support—Assessment Outcome. The user can also View the Ongoing Peer Support—Assessment Outcome by clicking the **View link** on the Ongoing Peer Support—Referral Summary page as seen below.

▲ Assessment List [Add Assessment](#)

Assessment Completed?	Assessment Date	Status	Actions
Yes	10/01/2012	Submitted	View

— Assessment Outcome

Date Peer Support Ended: 10/15/2012
Reason: Referred for peer mentoring
Status: In Progress

From View-mode the user can **Discard the Ongoing Peer Support—Assessment Outcome** by clicking the **Discard button** as seen in the figure below. The user can discard an “In Progress” or “Submitted” Ongoing Peer Support—Assessment Outcome if an Ongoing Peer Support—Reassessment is not “In Progress” or “Submitted.”

MFP — Ongoing Peer Support — Assessment Outcome Status: In Progress

[View](#) [Edit](#)

[Back to Summary](#)

Assessment Outcome Form

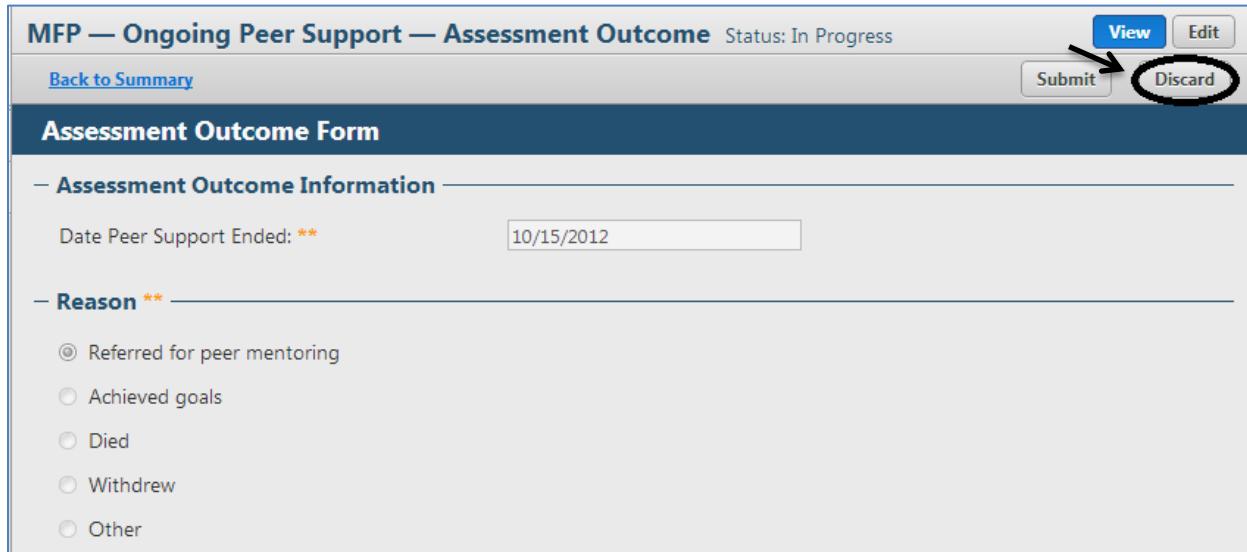
— **Assessment Outcome Information**

Date Peer Support Ended: ** 10/15/2012

— **Reason ****

Referred for peer mentoring
 Achieved goals
 Died
 Withdrawn
 Other

[Submit](#) [Discard](#)



If the user does not wish to discard, click the **Submit button** to **Submit** the **Ongoing Peer Support—Assessment Outcome** as seen in the figure below. Once submitted the Ongoing Peer Support—Assessment Outcome can no longer be edited.

MFP — Ongoing Peer Support — Assessment Outcome Status: In Progress

[View](#) [Edit](#)

[Back to Summary](#)

Assessment Outcome Form

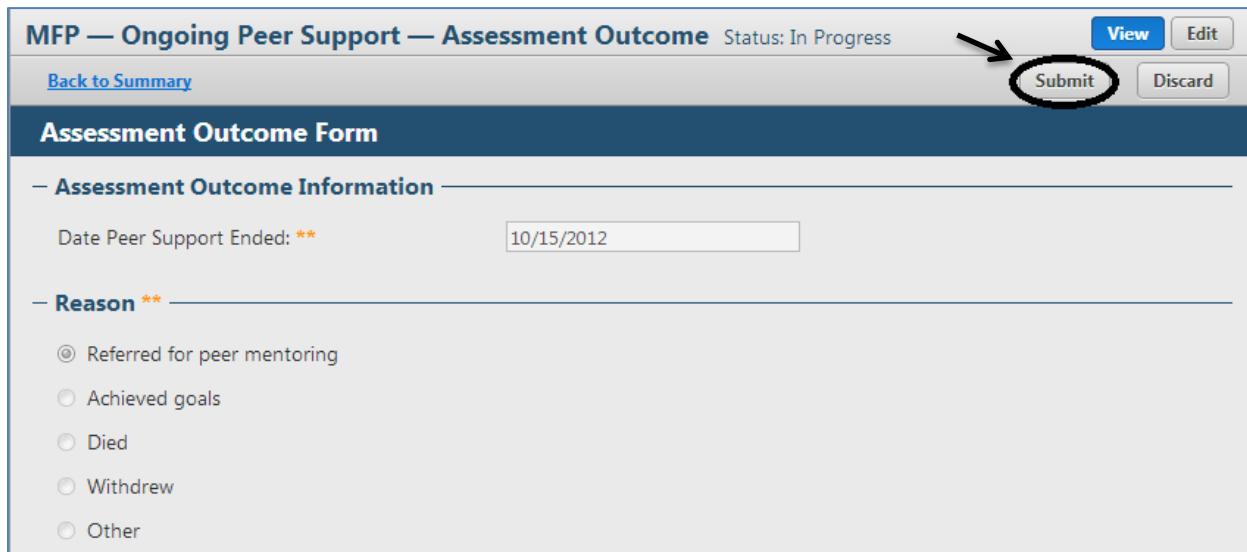
— **Assessment Outcome Information**

Date Peer Support Ended: ** 10/15/2012

— **Reason ****

Referred for peer mentoring
 Achieved goals
 Died
 Withdrawn
 Other

[Submit](#) [Discard](#)



2.5.10 Peer Support Status Change to Inactive

After an *Ongoing Peer Support—Assessment Outcome* is “Submitted,” the Ongoing Peer Support Referral changes to an **Inactive status** on the **MFP Tasks List** page as seen below.

▲ Ongoing Peer Support		Referral List
– History:		– Active OPS Referral Information:
In Progress Referral:	0	No active OPS Referral information to display.
Active Referral:	0	
Inactive Referral:	1	

2.5.11 Add, Save and Edit Peer Support Reassessment

From the Ongoing Peer Support—Referral Summary page click the **Add Reassessment link** as seen in the figure below.

▲ Reassessment List				
Reassessment Date	Reason	Status	Actions	
No data available in table				

The **Ongoing Peer Support-- Reassessment** form will appear. Enter the **required information**, which will either be *highlighted yellow* or marked with an *asterisk*. After completing, or while in progress, the user can click the **Save button** to **Save the Ongoing Peer Support—Reassessment** as seen below.

MFP — Ongoing Peer Support — Reassessment	
Cancel	New 
Reassessment Form	
– Reassessment Information	
Date of Reassessment: *	<input type="text" value="10/24/2012"/> 
– Reason for Reassessment *	
<input checked="" type="radio"/> Transferred to another nursing facility <input type="radio"/> Change in health status <input type="radio"/> Re Institutionalized <input type="radio"/> Other	
– Ongoing Peer Support Goals *	
<input checked="" type="checkbox"/> Socialization <input type="checkbox"/> Development of community roles <input type="checkbox"/> Self-advocacy <input type="checkbox"/> Development of natural, unpaid support networks <input type="checkbox"/> Effective use of natural resources for support <input type="checkbox"/> Development of community living-skills (e.g. public transport, communicating with, selecting, training providers, problem solving skills) <input type="checkbox"/> Increase awareness of community activities and opportunities <input type="checkbox"/> Vocational skills <input type="checkbox"/> Effective use of service delivery systems and natural resources	

After clicking the Save button the user is taken to View-mode. Click the **Edit link** to make changes to the Ongoing Peer Support-- Reassessment as seen below. After making changes click the Save button again and the user will return to View-mode.

MFP — Ongoing Peer Support — Reassessment Status: In Progress

Back to Summary

Submit Discard

Reassessment Form

— Reassessment Information —

Date of Reassessment: ** 10/24/2012

— Reason for Reassessment **

Transferred to another nursing facility
 Change in health status
 Reinstitutionalized
 Other

2.5.12 View, Discard and Submit Peer Support Reassessment

The user can **View the Ongoing Peer Support-- Reassessment** in two ways. The first way was shown above where the user is taken to View-mode after saving the Ongoing Peer Support-- Reassessment. The user can also View the Ongoing Peer Support-- Reassessment by clicking the **View link** on the Ongoing Peer Support—Referral Summary page as shown below.

Reassessment List				Add Reassessment
Reassessment Date	Reason	Status	Actions	
10/24/2012	Transferred to another nursing facility	In Progress	Edit View ←	

From View-mode the user can **Discard the Ongoing Peer Support-- Reassessment** by clicking the **Discard button** as seen in the figure below. The user can discard an “In Progress” or “Submitted” Ongoing Peer Support-- Reassessment if an Ongoing Peer Support—Reassessment Outcome is not “In Progress” or “Submitted.”

MFP — Ongoing Peer Support — Reassessment Status: In Progress

[View](#) [Edit](#)

[Back to Summary](#)

Reassessment Form

— Reassessment Information —

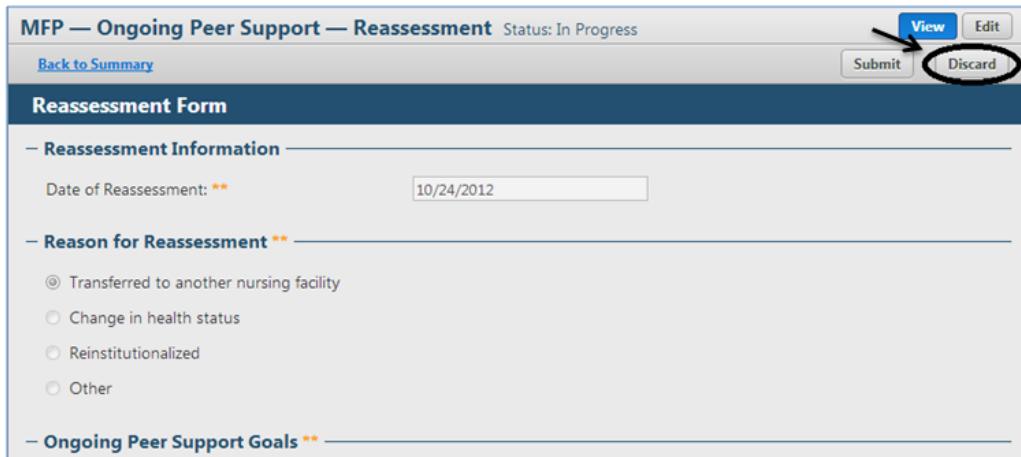
Date of Reassessment: **

— Reason for Reassessment **

Transferred to another nursing facility
 Change in health status
 Reinstitutionalized
 Other

— Ongoing Peer Support Goals **

[Submit](#) [Discard](#)



If the user does not wish to discard, click the **Submit button** to **Submit the Ongoing Peer Support-- Reassessment** as seen in the figure below. Once submitted the Ongoing Peer Support-- Reassessment can no longer be edited.

MFP — Ongoing Peer Support — Reassessment Status: In Progress

[View](#) [Edit](#)

[Back to Summary](#)

Reassessment Form

— Reassessment Information —

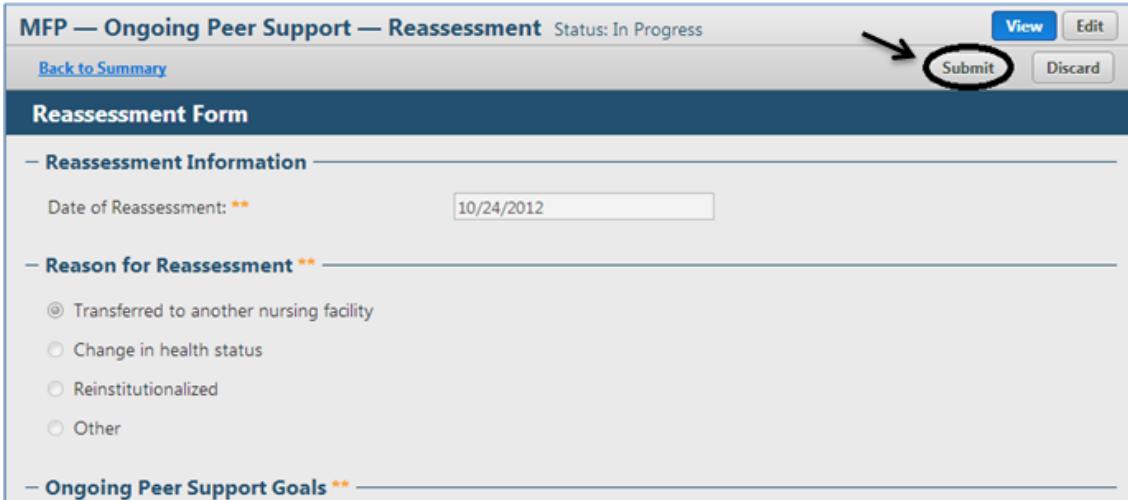
Date of Reassessment: **

— Reason for Reassessment **

Transferred to another nursing facility
 Change in health status
 Reinstitutionalized
 Other

— Ongoing Peer Support Goals **

[Submit](#) [Discard](#)



2.5.13 Peer Support Status Change to Active

After an *Ongoing Peer Support- Reassessment* is “Submitted,” the Ongoing Peer Support changes to an **Active status** on the **MFP Tasks List** page as seen below.

▲ Ongoing Peer Support		Referral List
– History:		– Active OPS Referral Information: Summary
In Progress Referral:	0	Referral Date: 12/18/2012
Active Referral:	1	Anticipated Transition Date: N/A
Inactive Referral:	0	Preferred OPS Type: Physical/Mobility Disability
		Status: Active

2.5.14 Add, Save and Edit Peer Support Reassessment Outcome

From the Ongoing Peer Support—Referral Summary page click the **Add Outcome link** as seen in the figure below.

▲ Reassessment List		Add Reassessment Add Outcome		
Reassessment Date	Reason	Status	Actions	
10/24/2012	Transferred to another nursing facility	Submitted	View	

The **Ongoing Peer Support—Reassessment Outcome** form will appear. Enter the **required information**, which will either be *highlighted yellow* or marked with an *asterisk*. After completing, or while in progress, click the **Save button** to **Save the Ongoing Peer Support—Reassessment Outcome** as seen below.

MFP — Ongoing Peer Support — Reassessment Outcome	
Cancel	New 
Reassessment Outcome Form	
– Reassessment Outcome Information	
Date Peer Support Ended: *	<input type="text" value="11/01/2012"/> 
– Reason *	
<input checked="" type="radio"/> Referred for peer mentoring <input type="radio"/> Achieved goals <input type="radio"/> Died <input type="radio"/> Withdrawn <input type="radio"/> Other	

After clicking the Save button the user is taken to View-mode. Click the **Edit button** to make changes to the Ongoing Peer Support—Reassessment Outcome as seen below. After making changes click the Save button again and the user will return to View-mode.

MFP — Ongoing Peer Support — Reassessment Outcome Status: In Progress

[View](#) **Edit** [Submit](#) [Discard](#)

[Back to Summary](#)

Reassessment Outcome Form

— Reassessment Outcome Information —

Date Peer Support Ended: **

— Reason **

- Referred for peer mentoring
- Achieved goals
- Died
- Withdrawn
- Other

2.5.15 View, Discard and Submit Peer Support Reassessment Outcome

The user can **View the Ongoing Peer Support—Reassessment Outcome** in two ways. The first way was shown above where the user is taken to View-mode after saving the Ongoing Peer Support—Reassessment Outcome. The user can also View the Ongoing Peer Support—Reassessment Outcome by clicking the **View link** on the Ongoing Peer Support—Referral Summary page as seen below.

▲ Reassessment List											
Reassessment Date	Reason	Status	Actions								
10/24/2012	Transferred to another nursing facility	Submitted	View								
— Reassessment outcome — <table border="1"> <tr> <td>Date Peer Support ended</td> <td>11/01/2012</td> </tr> <tr> <td>Reason:</td> <td>Referred for peer mentoring</td> </tr> <tr> <td>Status:</td> <td>In Progress</td> </tr> </table>						Date Peer Support ended	11/01/2012	Reason:	Referred for peer mentoring	Status:	In Progress
Date Peer Support ended	11/01/2012										
Reason:	Referred for peer mentoring										
Status:	In Progress										

From View-mode the user can **Discard the Ongoing Peer Support—Reassessment Outcome** by clicking the **Discard button** as seen in the figure below. The user can discard an “In Progress” or “Submitted” Ongoing Peer Support— Reassessment Outcome if another Ongoing Peer Support—Reassessment is not “In Progress” or “Submitted.”

MFP — Ongoing Peer Support — Reassessment Outcome Status: In Progress

[View](#) [Edit](#)

[Back to Summary](#)

Reassessment Outcome Form

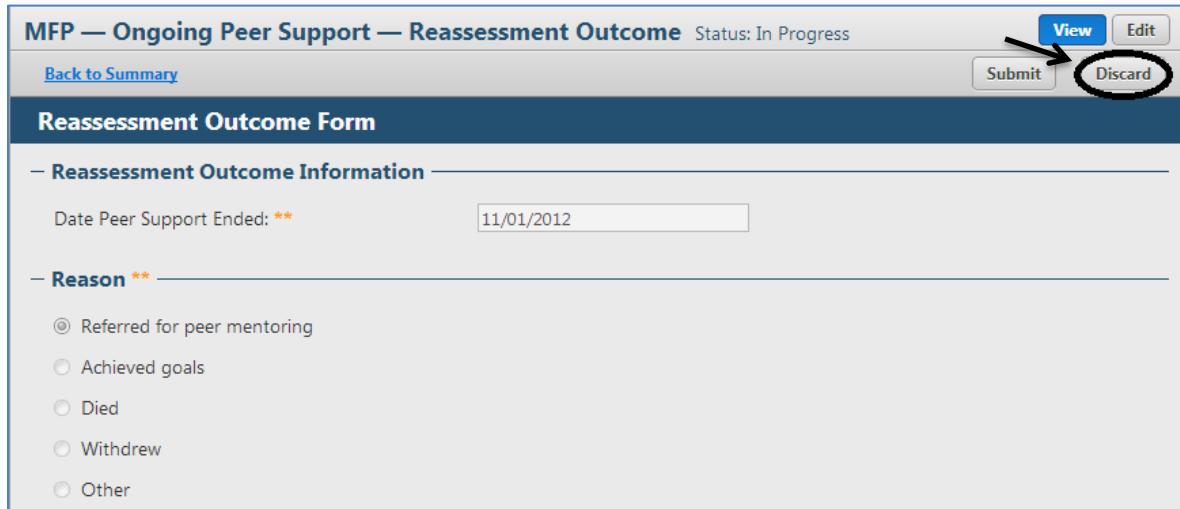
— Reassessment Outcome Information —

Date Peer Support Ended: **

— Reason **

Referred for peer mentoring
 Achieved goals
 Died
 Withdrawn
 Other

[Submit](#) [Discard](#)



If the user does not wish to discard, click the **Submit button** to **Submit the Ongoing Peer Support—Reassessment Outcome** as seen in the figure below. Once submitted the Ongoing Peer Support—Reassessment Outcome can no longer be edited.

MFP — Ongoing Peer Support — Reassessment Outcome Status: In Progress

[View](#) [Edit](#)

[Back to Summary](#)

Reassessment Outcome Form

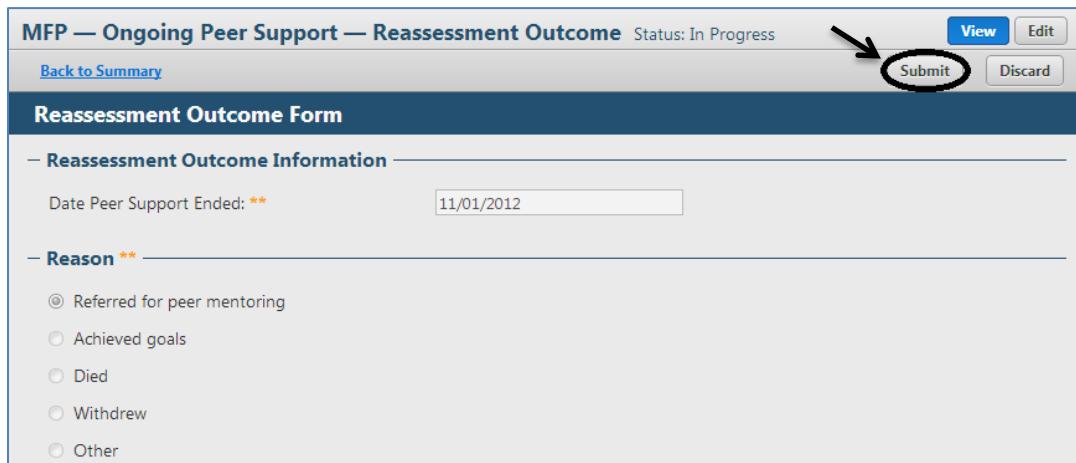
— Reassessment Outcome Information —

Date Peer Support Ended: **

— Reason **

Referred for peer mentoring
 Achieved goals
 Died
 Withdrawn
 Other

[Submit](#) [Discard](#)



2.5.16 Peer Support Status Change to Inactive

After an *Ongoing Peer Support—Reassessment Outcome* is “Submitted,” the Ongoing Peer Support changes to an **Inactive status** on the **MFP Tasks List** page as seen below.

▲ Ongoing Peer Support		Referral List
— History: —		— Active OPS Referral Information: —
In Progress Referral:	0	No active OPS Referral information to display.
Active Referral:	0	
Inactive Referral:	1	

2.5.17 Peer Support Activity History

When a client has an *Active Ongoing Peer Support Referral*, an authorized actor can add Activities to the clients Activity History under the Ongoing Peer Support module. Click the **Activity History link** on the Ongoing Peer Support Referral List page as seen in the figure below to navigate to the Ongoing Peer Support Activity History page.

MFP — Ongoing Peer Support — Referrals List						
					Actions	
Referral Date	Anticipated Transition Date	Preferred Peer Support Type	Status			
12/18/2012	N/A	Physical/Mobility Disability	Active		Summary	

From the Ongoing Peer Support Activity History page click the Add Activity link as seen in the figure below.

MFP — Ongoing Peer Support — Activity History	
Activity Summary	
There are currently no Activities.	

The Ongoing Peer Support Activity Sheet will appear. The actor will fill in required information which will be highlighted yellow or marked with an asterisk. The actor can add additional activities using the **Add Activity button** as seen in the figure below. After entering all required information click the **Save button** as seen in the figure below to save the activity to the Ongoing Peer Support Activity History page.

MFP — Ongoing Peer Support — Activity Sheet

[Back to Activity History](#)

Activity Sheet

— Activity Information

Date of Activity * [Calendar](#)

Staff *

Notes: *

(To view more content, re-size the text area by dragging the bottom-right corner.)

— Activity List *

Total Duration: 0 Min. Units used: 0

— Activity

[Delete](#)

Category *

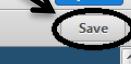
Location *

Type *

Activity *

Duration * hrs. min.

[+ Add Activity](#)

Update 

After saving an activity on the Ongoing Peer Support Activity History page, it will be updated as seen in the figure below. The actor can add additional activities using the Add Activity link, Edit an existing activity or Discard an existing activity.

MFP — Ongoing Peer Support — Activity History

[Back to List](#) [Add Activity](#) [Collapse All](#)

— Activity Summary

Total:	170 Min.
Units Used:	11

▲ Activity: 10/18/2012 Peer: Lori Baskette Total Duration: 170 Min. [Edit](#) [Discard](#)

Category	Location	Activity	Type	# of Group Members (Excluding Peer)	Duration
Telephone Support	Nursing Facility	Socialization	Group	4	150 Min.
Meeting	Community	Vocational skills	Individual		20 Min.

— Activity Notes

Notes: Provided services on this date

2.6 Options Counseling

Navigate to the Options Counseling module by clicking the **Options Counseling tab** as shown in the figure below. This will take you the **Options Counseling—Referral List**.

The screenshot shows the 'Long Term Services and Support' application interface. At the top, it displays 'FEI\nicolas.quinones (On behalf of: Boone, Angela)' and 'Location: Baltimore County Dept. of Aging'. The navigation bar includes links for Home, Clients, My Lists, Alerts, Dashboard, Assignments, Reports, and Client Details. The main content area is titled 'MFP — Options Counseling — Referrals List'. On the left, a sidebar titled 'MFP Program Menu' lists options like Case Program Summary, Task List, Options Counseling (which is highlighted with a blue background and has an arrow pointing to it), Peer Mentoring, Housing Assistance, Flexible Funds, and Case Notes. Below the sidebar is a table with columns: Referral Date, Days Left, Entered By, Source, OC Provided?, AAProvided, Status, and Actions.

2.6.1 Add and Submit Options Counseling Referral

From the Options Counseling—Referral List page, if the client does not have a Pending or Active Options Counseling Referral an authorized actor can click the **Add Referral link** as seen in the figure below.

The screenshot shows the 'Options Counseling — Referral List' page. The table header includes a column for 'Actions' which contains a link labeled 'Add Referral'. This link is circled in red with an arrow pointing to it from the left.

The **Options Counseling—Referral** form will appear. Enter the **required information**, which will either be *highlighted yellow* or marked with an *asterisk*. After completing the user can click the **Submit button** to **Save the Options Counseling—Referral** as seen below.

The screenshot shows a web-based form titled "Options Counseling — Referral". At the top right, there is a green "New" button and a red "Submit" button, which is circled with a red arrow. Below the title, there is a "Referral Form" section with a dark blue header. Underneath, there is a "Referral Information" section containing three input fields: "Referral Date" (set to 11/01/2011), "Referral Source" (set to "Self"), and "Name" (set to "Jonathan Smith").

2.6.2 View and Close Options Counseling Referral

The user can View the Options Counseling Referral Form in two ways. The first way was shown above as the user is taken to View-mode after saving the Options Counseling Referral Form. The user can also navigate to Options Counseling—Referral Summary page and click the ***View link*** to ***View the Options Counseling—Referral***.

The screenshot shows a web-based summary page titled "MFP — Options Counseling — Referral Summary". It includes a "Back to List" link and a "Close Referral" link. The main content area is divided into sections: "Assignment Information" and "Referral Information". The "Referral Information" section contains several data items: Referral Date (12/18/2012), Target Date (01/08/2013), Source (Peer), Entered By (Ivan Quinones), and Status (Pending). A red arrow points to the "View" link located at the bottom right of the "Referral Information" section.

From View-mode of the Options Counseling Referral the user can ***Close the Options Counseling- Referral*** by clicking the ***Close Referral button*** as seen in the figure below. An Options Counseling Referral cannot be closed if Options Counseling form has been submitted for selected referral and “Application Assistance Requested?” is “Yes” in the Option Counseling form.

MFP — Options Counseling — Referral Status: Pending

[Back to Summary](#)

Referral Form

Referral Information

Referral Date:	12/18/2012
Referral Source:	Peer
Name:	Ivan Quinones

[View](#) [Close Referral](#)

2.6.3 Assign AAA Case Manager or CIL Case Manager to Client

In order to proceed on to creating an Options Counseling Form and Options Counseling Application Assistance for the client in the Options Counseling module, you must **Assign a AAA Case Manager or CIL Case Manager** to the client. To assign a AAA Case Manager, log in as an actor with the role of AAA Administrator, who can either assign a AAA CM or refer the client to CIL, where the CIL Administrator can assign a CIL Case Manager to the client.

Long Term Services and Support

LTSS Maryland Login

User Name(Test Only)
FEI\nicolas.quinones

On Behalf Of
Angela Boone
[aaasupervisor, aaaintake, aaacasemanager, aaaadministrator]

Agency
AAA

Location
AAA - Baltimore County Dept. of Aging

[Login](#)

Click the **Assignments** tab at the top of the page and navigate to *Options Counseling* under the Assignment Menu section in the left hand navigation to perform **Batch Assignment**. Choose **Unassigned** from the Status dropdown menu and click the **Filter button**. Locate the client you wish to assign a AAA Case Manager to and **click the checkbox** next to them to select. Then **choose a AAA Case Manager** from the drop down menu at the bottom of the page and click the **Assign button**. The client will now have that AAA Case Manager assigned to them and an Options Counseling Form can now be performed by an authorized user for that client in Options Counseling. The user also has the option to **Refer the client to CIL** by clicking the **Refer to CIL button** instead of the Assign button. If referred to CIL log in as CIL Administrator and follow the same process.

Long Term Services and Support FEI\nicolas.quinones (On behalf of: Boone, Angela)
Location: Baltimore County Dept. of Aging

Menu Account

Home Clients My Lists Alerts Dashboard Assignments Reports

Assignment Menu

MFP

Options Counseling >

WOA

AAA

MFP — Options Counseling — Case Manager Assignment

Filter by Status: *
Unassigned

Filter

	First Name	Last Name	Age	MA Eligibility	MDS	Facility	County	Assigned To	Actions
<input checked="" type="checkbox"/>	Jonathan	Smith	62	LTC	No	CATONSVILLE COMMONS	Baltimore	View	

Assign to Case Manager: * [Angela Boone](#)

Assign Refer To CIL

2.6.4 Alert Assigned AAA Case Manager

When the assigned AAA Case Manager logs into LTSS, they will navigate to the Alerts tab and see that a client has been assigned to them for Options Counseling. Click the **OC Assigned link** as seen in the figure below to navigate into the clients MFP program.

Long-Term Services and Support FEI\nicolas.quinones (On behalf of: Baltimore,aaacasemanager1)
Agency: AAA | Location: Baltimore County Dept. of Aging

Menu Account

Home Clients My Lists Alerts Dashboard Assignments

Alerts

Client	County	Subject	From	Received	Accept?
Smith,Jonathan - Baltimore	Baltimore	OC Assigned	Baltimore,aaaadministrator1	8/30/2012 4:33:32 PM	<input type="checkbox"/>

Accept

2.6.5 Add, Save and Edit Options Counseling Form

Navigate to the Options Counseling Referral List and click the **Summary link** for the referral you wish to create an Options Counseling Form for.

MFP — Options Counseling — Referrals List

Referral Date	Days Left	Entered By	Source	OC Provided?	AAP Provided	Status	Actions
12/18/2012	20	Ivan Quinones	Peer	Pending		Pending	Summary

From the Options Counseling—Referral Summary page click the **Add Options Counseling Form** link as seen in the figure below.

MFP — Options Counseling — Referral Summary

Back to List Collapse All

▲ Referral Close Referral

— Assignment Information

Assigned To: Angela Boone

— Referral Information

Referral Date: 12/18/2012

Target Date: 01/08/2013

Source: Peer

Entered By: Ivan Quinones

Status: Pending

View

▲ Options Counseling Form

— Options Counseling Form Summary

There are no Options Counseling Form details to display.

Add Options Counseling Form

The **Options Counseling Form** will appear. The user will be prompted to answer whether or not options counseling was provided. By choosing Yes or No the user will see a different set of options as seen below. Enter the **required information**, which will either be *highlighted yellow* or marked with an *asterisk*. If the actor chooses Yes for “Does the resident want Application Assistance for the Community Pathways or New Direction Waivers or other DDA services?” and Submits the Options Counseling Form, a DDA Referral will be created for the client in a “Pending” status.

Does the resident want Application Assistance for the Community Pathways or New Directions Waivers or other DDA services? *

○ Yes ○ No

Note: If Yes, please refer residents to local DDA regional office.

After completing, or while in progress, the user can click the **Save button** to **Save the Options Counseling Form** as seen below.

MFP — Options Counseling

New

Cancel

Save

Options Counseling Form

— Referral Information

Referred to OC: 12/18/2012

Referral Source: Peer

Did you provide options counseling? * ○ Yes ○ No

After clicking the Save button the user is taken to View-mode. Click the **Edit link** to make changes to the Options Counseling Form as seen below. After making changes click the Save button again and the user will return to View-mode.

MFP — Options Counseling Form Status: In Progress

Back to Summary View **Edit** Submit Discard

Options Counseling Form

— Referral Information —

Referred to OC: 12/18/2012
Referral Source: Peer

Did you provide options counseling? ** Yes No

— Options Counseling Information —

Date of Options Counseling: ** 11/25/2012
Does the resident has an Incompetency Certificate? Yes No

— Provided To ** —

— Contact Information —

Relationship ** Self
Name ** Jonathan Smith
Method of Communication ** Phone

Record has been saved successfully.

2.6.6 View, Discard and Submit Options Counseling Form

The user can **View the Options Counseling Form** in two ways. The first way was shown above where the user is taken to View-mode after saving the Options Counseling Form. The user can also View the Options Counseling Form by clicking the **View link** on the Options Counseling—Referral Summary page as shown below.

▲ Options Counseling Form

— Options Counseling Form Summary —

Counseling Provided?	Yes
Counseling Date:	11/25/2012
AA requested?	Yes
DDA requested?	Yes
Status:	In Progress

From View-mode the user can **Discard the Options Counseling Form** by clicking the **Discard button** as seen in the figure below. The user can discard an “In Progress” or “Submitted”

Options Counseling Form if NO Options Counseling Application Assistance Form is “In Progress” or “Submitted.”

The screenshot shows the 'MFP — Options Counseling Form' page with a status of 'In Progress'. At the top right, there are 'View', 'Edit', 'Submit', and 'Discard' buttons. An arrow points to the 'Discard' button, which is circled in red. Below the buttons, the page title is 'Options Counseling Form' and it includes sections for 'Referral Information' and 'Options Counseling Information'. The 'Referral Information' section contains fields for 'Referred to OC:' (12/18/2012) and 'Referral Source:' (Peer). The 'Options Counseling Information' section contains fields for 'Did you provide options counseling? **' (radio buttons for Yes and No), 'Date of Options Counseling: **' (11/25/2012), and 'Does the resident has an Incompetency Certificate?' (radio buttons for Yes and No).

If the user does not wish to discard, click the **Submit button** to **Submit the Options Counseling Form** as seen in the figure below. Once submitted the Options Counseling Form can no longer be edited.

This screenshot is identical to the one above, showing the 'MFP — Options Counseling Form' page with a status of 'In Progress'. However, the 'Discard' button is now circled in red, and an arrow points to the 'Submit' button, which is also circled in red. The rest of the form fields and sections are identical to the previous screenshot.

2.6.7 Options Counseling Status Change to Active

After an *Options Counseling Form* is “*In Progress*,” Options Counseling changes to an **Active status** on the **MFP Tasks List** page as seen below.

▲ Options Counseling		Referral List
– History:		– Active OC Referral Information: Summary
Pending Referral:	0	Referral Date: 12/18/2012
Active Referral:	1	Source: Peer
Inactive Referral:	0	Entered By: Ivan Quinones
		Status: Active

2.6.8 Add, Save and Edit OC Application Assistance

From the Options Counseling—Referral Summary page click the **Add link** to **Add Options Counseling Application Assistance** as seen in the figure below.

▲ Application Assistance List							
AA Referral Date	AA Provided	AA Follow Up Date	Date to DEWS	Status	Actions		
No data available in table							

The **Options Counseling- Application Assistance Form** will appear. If the actor identifies that the client had Application Assistance provided for Living at Home or Waiver for Older Adults and specifies that the client is Technically Eligible, LTSS will add the corresponding case program to the client's Client Summary if that case program does not already exist in an Open state. The user will be prompted to answer whether or not supporting documentation was obtained. By choosing Yes or No the user will see a different set of options as seen below. Enter the **required information**, which will either be *highlighted yellow* or marked with an *asterisk*. After completing, or while in progress, the user can click the **Save button** to **Save the Options Counseling—Application Assistance Form** as seen below.

MFP — Options Counseling — Application Assistance New

[Cancel](#) Save

Application Assistance Form

— I. Application Assistance —

Note: The data can no longer be edited once you submit the date application mailed to DEWS.

Application Assistance Date: *

Date Application Mailed to DEWS: **

— Application Assistance Provided * —

Living at Home
 Waiver for Older Adults
 State Plan Services
 Medical Day Care

Obtained any Supporting Documentation: * Yes No

After clicking the Save button the user is taken to View-mode. Click the **Edit button** to make changes to the Options Counseling—Application Assistance Form as seen below. After making changes click the Save button again and the user will return to View-mode.

MFP — Options Counseling — Application Assistance Status: In Progress View Edit

[Back to Summary](#) Submit Discard

Application Assistance Form

— I. Application Assistance —

Note: The data can no longer be edited once you submit the date application mailed to DEWS.

Application Assistance Date: **

Date Application Mailed to DEWS: **

— Application Assistance Provided ** —

Living at Home

Technical Eligibility: ** Yes No

Waiver for Older Adults

Technical Eligibility: ** Yes No

Obtained any Supporting Documentation: ** Yes No

Record has been saved successfully. X

2.6.9 View, Discard and Submit OC Application Assistance

The user can **View the Options Counseling- Application Assistance Form** in two ways. The first way was shown above where the user is taken to View-mode after saving the Options Counseling—Application Assistance Form. The user can also View the Options Counseling—Application Assistance Form by clicking the ***View link*** on the Options Counseling—Referral Summary page as shown below.

Application Assistance List							Add
AA Referral Date	AA Provided	AA Follow Up Date	Date to DEWS	Status	Actions		
12/18/2012	LAH , WOA	N/A	11/14/2012	In Progress	View Edit		

From View-mode the user can **Discard the Options Counseling—Application Assistance Form** by clicking the ***Discard button*** as seen in the figure below. The user can discard an “In Progress” Options Counseling—Application Assistance Form. Once “Submitted,” the Options Counseling—Application Assistance Form can no longer be discarded.

MFP — Options Counseling — Application Assistance Status: In Progress

[View](#) [Edit](#)

[Back to Summary](#)

Application Assistance Form

I. Application Assistance

Note: The data can no longer be edited once you submit the date application mailed to DEWS.

Application Assistance Date: **

Date Application Mailed to DEWS: **

Application Assistance Provided **

Discard

If the user does not wish to discard, click the ***Submit button*** to **Submit the Options Counseling—Application Assistance Form** as seen in the figure below. Once submitted the Options Counseling—Application Assistance Form can no longer be edited or discarded.

MFP — Options Counseling — Application Assistance Status: In Progress

[View](#) [Edit](#)

[Back to Summary](#)

Application Assistance Form

I. Application Assistance

Note: The data can no longer be edited once you submit the date application mailed to DEWS.

Application Assistance Date: **	11/09/2012
Date Application Mailed to DEWS: **	11/14/2012

Application Assistance Provided **

2.7 MFP Questionnaire

In order to perform functions in Peer Mentoring, Housing Assistance, Quality of Life, DDA and TBI the client must be MFP Eligible. MFP Eligibility is determined through the MFP Questionnaire. Navigate to the MFP Questionnaire by clicking the **Client Summary tab** as shown in the figure below.

Long Term Services and Support

FELnicolas.quinones (On behalf of Snider, Devon)
Location: DHMH

[Menu](#) [Account](#)

[Home](#) [Clients](#) [My Lists](#) [Alerts](#) [Dashboard](#) [Assignments](#) [Reports](#) [Client Details](#)

Client Summary

MFP Case Program Start Date: 12/18/2012 Case Program End Date: N/A

[Add Case Program](#) [Close Case Program](#) [Go to Tasks](#)

Summary

Status:	Open
Reason for Opening Case Program:	Other
Assignments :	Lori Baskette (The IMAGE Center (Options Counseling)) Angela Boone (Baltimore County Dept. of Aging)

2.7.1 Navigate to the MFP Questionnaire List

Click the **MFP Questionnaire List tab** to navigate to the MFP Questionnaire List as seen in the figure below.

Long Term Services and Support		FEI\nicolas.quinones (On behalf of: Snider, Devon) Location: DHMH		Menu	Account				
Home	Clients	My Lists	Alerts	Dashboard	Assignments	Reports	Client Details		
Jonathan Smith ▾ ID: 21190150405110 DOB: 01/11/1950 MFP Eligible: N		MFP Questionnaire List Create New Questionnaire							
Profile Client Summary Assessment, POC & LOC Assessment & POC Level of Care		Last Submission Date ▾ Eligible (Y/N) ▾ Anticipated Discharge Date ▾ Status ▾ Actions ▾ No data available in table							
Additional Forms MFP Questionnaire List > MDS Data List									

2.7.2 Create, Save and Edit New MFP Questionnaire

From the MFP Questionnaire List click the **Create New Questionnaire link** as seen in the figure below.

Long Term Services and Support		FEI\nicolas.quinones (On behalf of: Snider, Devon) Location: DHMH		Menu	Account				
Home	Clients	My Lists	Alerts	Dashboard	Assignments	Reports	Client Details		
Jonathan Smith ▾ ID: 21190150405110 DOB: 01/11/1950 MFP Eligible: N		MFP Questionnaire List Create New Questionnaire							
Profile Client Summary Assessment, POC & LOC Assessment & POC Level of Care		Last Submission Date ▾ Eligible (Y/N) ▾ Anticipated Discharge Date ▾ Status ▾ Actions ▾ No data available in table							
Additional Forms MFP Questionnaire List > MDS Data List									

The **MFP Questionnaire** will appear. Enter the **required information**, which will either be *highlighted yellow* or marked with an *asterisk*. After completing, or while in progress, the user can click the **Save button** to **Save the MFP Questionnaire** as seen below.

MFP Questionnaire

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

Money Follows the Person Questionnaire Form

— Questionnaire —

Has the applicant resided in a nursing facility Yes No
for at least 90 continuous days? *

Is the individual moving to: *

- A home owned or leased by the individual or the individual's family member.
- An apartment with an individual lease, with lockable access and egress, and which includes living, sleeping, bathing, and cooking areas over which the individual or the individual's family has domain and control.
- An assisted living facility licensed to serve 4 or fewer unrelated individuals.
- An assisted living facility licensed to serve 5 or more unrelated individuals.

Anticipated Discharge Date: * 12/27/2012 [Calendar](#)

Note: A discharge date within the next 30 days will trigger an MFP Quality of Life survey to be completed.

Consent Form Signed: * Yes No

Consent Form Date: * 11/26/2012 [Calendar](#)

After clicking the Save button the user is taken to View-mode. Click the **Edit button** to make changes to the MFP Questionnaire as seen below. After making changes click the Save button again and the user will return to View-mode.

MFP — Questionnaire Status: In Progress

[Back to List](#) [View](#) [Edit](#) [Submit](#) [Discard](#)

Money Follows the Person Questionnaire Form

— Questionnaire —

Has the applicant resided in a nursing facility Yes No
for at least 90 continuous days? **

Is the individual moving to: **

- A home owned or leased by the individual or the individual's family member.
- An apartment with an individual lease, with lockable access and egress, and which includes living, sleeping, bathing, and cooking areas over which the individual or the individual's family has domain and control.
- An assisted living facility licensed to serve 4 or fewer unrelated individuals.
- An assisted living facility licensed to serve 5 or more unrelated individuals.

Anticipated Discharge Date: ** 12/27/2012

Note: A discharge date within the next 30 days will trigger an MFP Quality of Life survey to be completed.

Consent Form Signed: ** Yes No

Consent Form Date: ** 11/26/2012

Record has been saved successfully. X

2.7.3 View, Discard and Submit New MFP Questionnaire

The user can **View the MFP Questionnaire** in two ways. The first way was shown above where the user is taken to View-mode after saving the MFP Questionnaire. The user can also View the MFP Questionnaire by clicking the **View link** on the MFP Questionnaire List page as shown below.

MFP Questionnaire List						
Create New Questionnaire						
Last Submission Date	Eligible (Y/N)	Anticipated Discharge Date	Status	Actions		
12/18/2012 10:19:21 AM	Yes	12/27/2012	In Progress	Edit	View	

From View-mode the user can **Discard the MFP Questionnaire** by clicking the **Discard button** as seen in the figure below. The user can only discard the MFP Questionnaire if it is “In Progress.”

MFP — Questionnaire Status: In Progress

[Back to List](#)

Money Follows the Person Questionnaire Form

— Questionnaire —

Has the applicant resided in a nursing facility Yes No
for at least 90 continuous days? **

Is the individual moving to: **

A home owned or leased by the individual or the individual's family member.
 An apartment with an individual lease, with lockable access and egress, and which includes living, sleeping, bathing, and cooking areas over which the individual or the individual's family has domain and control.
 An assisted living facility licensed to serve 4 or fewer unrelated individuals.
 An assisted living facility licensed to serve 5 or more unrelated individuals.

Anticipated Discharge Date: **

Note: A discharge date within the next 30 days will trigger an MFP Quality of Life survey to be completed.

Consent Form Signed: ** Yes No

Consent Form Date: **

If the user does not wish to discard, click the **Submit button** to **Submit the MFP Questionnaire** as seen in the figure below. Once submitted the MFP Questionnaire can no longer be edited or discarded.

MFP — Questionnaire Status: In Progress

[Back to List](#) [View](#) [Edit](#) [Submit](#) [Discard](#)

Money Follows the Person Questionnaire Form

— Questionnaire —

Has the applicant resided in a nursing facility Yes No
for at least 90 continuous days? **

Is the individual moving to: **

A home owned or leased by the individual or the individual's family member.
 An apartment with an individual lease, with lockable access and egress, and which includes living, sleeping, bathing, and cooking areas over which the individual or the individual's family has domain and control.
 An assisted living facility licensed to serve 4 or fewer unrelated individuals.
 An assisted living facility licensed to serve 5 or more unrelated individuals.

Anticipated Discharge Date: **

Note: A discharge date within the next 30 days will trigger an MFP Quality of Life survey to be completed.

Consent Form Signed: ** Yes No

Consent Form Date: **

2.8 Peer Mentoring

Navigate to the Peer Mentoring module by clicking the **Peer Mentoring tab** as shown in the figure below. This will take you the **Peer Mentoring—Referral List**. An MFP Questionnaire, making the client MFP Eligible must have been submitted to continue and Add a Referral for Peer Mentoring.

Long Term Services and Support **FENicolas.quinones** (On behalf of: Snider, Devon) **Menu** **Account**

[Home](#) [Clients](#) [My Lists](#) [Alerts](#) [Dashboard](#) [Assignments](#) [Reports](#) [Client Details](#)

Jonathan Smith
ID: 21190150405110 DOB: 01/11/1950
MFP Eligible: Y (12/18/2012)

Profile	Referral Date	Anticipated Transition Date	MFP Eligible	Referral Source	Status	Actions
Client Summary	No data available in table					

MFP Program Menu

- [Case Program Summary](#)
- [Task List](#)
- [Resident Contact Sheets](#)
- [Ongoing Peer Support](#)
- [Options Counseling](#)
- Peer Mentoring** 
- [Housing Assistance](#)
- [Quality Of Life](#)
- [DDA](#)
- [TBI](#)
- [Flexible Funds](#)
- [Case Notes](#)

2.8.1 Add, Save and Edit Peer Mentoring Referral

From the Peer Mentoring Referral List click the **Add Referral link** to **Add Peer Mentoring—Referral** for the client as seen in the figure below.

MFP — Peer Mentoring — Referrals List

Referral Date	Anticipated Transition Date	MFP Eligible	Referral Source	Status	Actions
No data available in table					

Activity History **Add Referral**

The **Peer Mentoring—Referral** will appear. Enter the **required information**, which will either be *highlighted yellow* or marked with an *asterisk*. After completing, or while in progress, the user can click the **Save button** to **Save the Peer Mentoring—Referral** as seen below.

MFP — Peer Mentoring — Referral

Cancel **New**

Referral Form

Referral Information

Referral Source:

Referral Date: *

Anticipated Transition Date: *

Program: *

Is this individual MFP eligible? Yes

Preferred Peer Mentor Type *

Physical/Mobility Disability
 Intellectual Disability
 Multiple/Systematic Disability
 Older Adult
 No Preference

Special Request

Request:

After clicking the **Save button** the user is taken to View-mode. Click the **Edit button** to make changes to the Peer Mentoring—Referral as seen below. After making changes click the **Save button** again and the user will return to View-mode.

MFP — Peer Mentoring — Referral Status: In Progress

[View](#) [Edit](#)

[Back to Summary](#)

Referral Form

— Referral Information —

Referral Source:

Referral Date: ** 12/18/2012

Anticipated Transition Date: ** 12/26/2012

Program: ** LAH

Is this individual MFP eligible? Yes

— Preferred Peer Mentor Type ** —

- Physical/Mobility Disability
- Intellectual Disability
- Multiple/Systematic Disability
- Older Adult
- No Preference

— Special Request —

Request:

Record has been saved successfully.

2.8.2 View, Discard and Submit Peer Mentoring Referral

The user can View the Peer Mentoring—Referral in two ways. The first way was shown above as the user is taken to View-mode after saving the Referral Form. The user can also navigate to Peer Mentoring—Referral Summary page and click the **View link** to **View the Peer Mentoring—Referral**.

▲ Referral

— Peer Assignment Information —

Assigned Peer: Not Assigned

— Referral Information —

Referral Date: 12/18/2012

Anticipated Transition Date: 12/26/2012

Preferred Peer Mentoring Type: Physical/Mobility Disability

Status: In Progress

[View](#) [Edit](#)

From View-mode the user can **Discard the Peer Mentoring—Referral** by clicking the **Discard button** as seen in the figure below. An “In Progress” or “Submitted” Peer Mentoring—Referral can be discarded as long as NO Peer Mentoring—Assessment is “In Progress” or “Submitted.”

MFP — Peer Mentoring — Referral Status: In Progress

[View](#) [Edit](#)

[Back to Summary](#)

Referral Form

— Referral Information —

Referral Source:

Referral Date: ** 12/18/2012

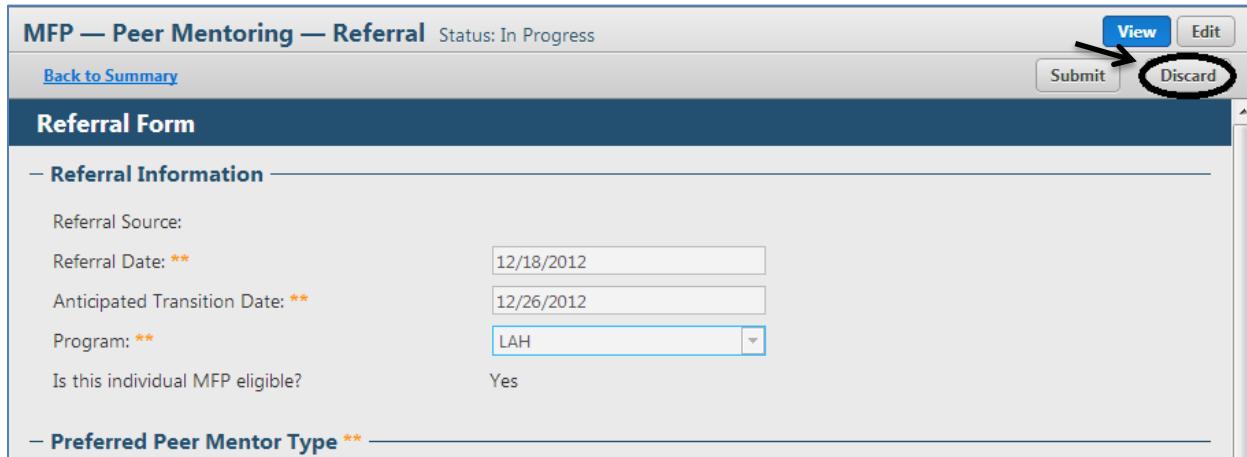
Anticipated Transition Date: ** 12/26/2012

Program: ** LAH

Is this individual MFP eligible? Yes

— Preferred Peer Mentor Type ** —

[Submit](#) [Discard](#)



If the user does not wish to discard, click the **Submit button** to **Submit the Peer Mentoring—Referral** as seen in the figure below. Once submitted the Peer Mentoring—Referral can no longer be edited.

MFP — Peer Mentoring — Referral Status: In Progress

[View](#) [Edit](#)

[Back to Summary](#)

Referral Form

— Referral Information —

Referral Source:

Referral Date: ** 12/18/2012

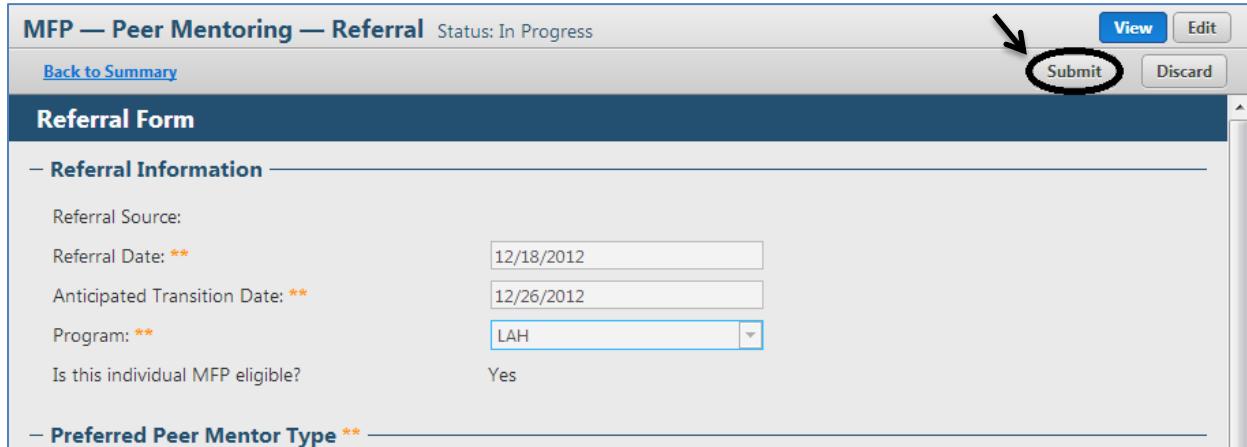
Anticipated Transition Date: ** 12/26/2012

Program: ** LAH

Is this individual MFP eligible? Yes

— Preferred Peer Mentor Type ** —

[Submit](#) [Discard](#)



2.8.3 Peer Mentoring Status Change to Active

After a *Peer Mentoring Referral* is “Submitted,” Peer Mentoring changes to an **Active status** on the **MFP Tasks List** page as seen below.

▲ Peer Mentoring		Referral List
— History: —		— Active PM Referral Information: — Summary
In Progress Referral:	0	Referral Date: 12/18/2012
Active Referral:	1	Anticipated Transition Date: 12/26/2012
Inactive Referral:	0	Preferred PM Type: Physical/Mobility Disability
		Status: Active

2.8.4 Assign CIL Peer Mentor to Client

In order to proceed with the Peer Mentoring process for the client, you must **Assign a CIL Peer Mentor** to the client. To assign a CIL Peer Mentor log in as an actor with the role of CIL Peer Mentoring Administrator for the clients jurisdiction.

The screenshot shows the LTSS Maryland Login interface. On the left, there is a large blue header with the text "Long Term Services and Support". On the right, there is a grey login form with the following fields:

- User Name (Test Only): FEI\nicolas.quinones
- On Behalf Of: Katie Collins-Ihrke [cilpeermentoringadministrator, cilpeermentor]
- Agency: PMC
- Location: PMC - The Arc of Maryland

A "Login" button is located at the bottom right of the form.

Click the **Assignments** tab at the top of the page and navigate to **Peer Mentoring** under the Assignment section in the left hand navigation to perform **Batch Assignment**. Choose **Unassigned** from the Status dropdown menu and click the **Filter button**. Locate the client you wish to assign a Peer Mentor to and **click the checkbox** next to them to select. Then **choose a CIL Peer Mentor** from the drop down menu at the bottom of the page and click the **Assign button**. The client will now have that CIL Peer Mentor assigned to them and an Assessment and Outcome can now be performed by an authorized user for that client in the Peer Mentoring module. Note that the CIL Peer Mentor can be reassigned, in both Active and Inactive statuses.

The screenshot shows the 'Assignment Menu' for 'MFP' under 'Peer Mentoring'. A row for 'Jonathan Smith' is selected. An arrow points to the 'Assign' button at the bottom right of the grid.

First Name	Last Name	Facility	County	Referral Date	Assigned To	Actions
Jonathan	Smith	CATONSVILLE COMMONS	Baltimore	12/18/2012		

2.8.5 Add, Save and Edit Peer Mentoring Assessment

Navigate to the Peer Mentoring Referral List and click the ***Summary link*** for the referral you wish to create an assessment and/or an outcome for.

The screenshot shows the 'Client Details' tab selected. In the 'MFP Program Menu', an arrow points to the 'Summary' link in the 'Peer Mentoring' section.

From the Peer Mentoring—Referral Summary page click the **Add Assessment link** as seen in the figure below.

MFP — Peer Mentoring — Referral Summary

[Back to List](#)

Referral

Peer Assignment Information

Assigned Peer:	Katie Collins-Ihrke
----------------	---------------------

Referral Information

Referral Date:	12/18/2012
Anticipated Transition Date:	12/26/2012
Preferred Peer Mentoring Type:	Physical/Mobility Disability
Status:	Active

Assessment List

Assessment Completed?	Assessment Date	Date Of Last attempt	Status	Actions
No data available in table				

 **Add Assessment**

The **Peer Mentoring—Assessment** form will appear. The user will be prompted to answer whether or not an assessment was completed for the referred individual. By choosing Yes or No the user will see a different set of options as seen below. Enter the **required information**, which will either be *highlighted yellow* or marked with an *asterisk*. After completing, or while in progress, the user can click the **Save button** to **Save the Peer Mentoring—Assessment** as seen below.

MFP — Peer Mentoring — Assessment

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

Assessment Form

Referral Information

Date of Referral:	12/18/2012
Was an assessment completed with the referred individual? *	<input style="background-color: #ffffcc; border: 1px solid black; width: 150px; height: 30px;" type="button" value="Yes"/> <input style="background-color: #ffffcc; border: 1px solid black; width: 150px; height: 30px;" type="button" value="No"/>

After clicking the Save button the user is taken to View-mode. Click the **Edit button** to make changes to the Peer Mentoring—Assessment as seen below. After making changes click the Save button again and the user will return to View-mode.

MFP — Peer Mentoring — Assessment Status: In Progress

[Back to Summary](#)

[View](#) [Edit](#) [Submit](#) [Discard](#)

Assessment Form

Referral Information

Date of Referral: 12/18/2012
 Was an assessment completed with the referred individual? ** Yes

Assessment Information

Date of Assessment: ** 10/03/2012

Peer Mentoring Goals **

- Socialization
- Development of community roles
- Self-advocacy
- Development of natural, unpaid support networks
- Effective use of natural resources for support
- Development of community living-skills (e.g. public transport, communicating with, selecting, training providers, problem solving skills)
- Increase awareness of community activities and opportunities
- Vocational skills
- Effective use of service delivery systems and natural resources

Record has been saved successfully.

2.8.6 View, Discard and Submit Peer Mentoring Assessment

The user can **View the Peer Mentoring—Assessment** in two ways. The first way was shown above where the user is taken to View-mode after saving the Peer Mentoring—Assessment. The user can also View the Peer Mentoring—Assessment by clicking the **View link** on the Peer Mentoring—Referral Summary page as shown below.

Add Assessment					
Assessment Completed?	Assessment Date	Date Of Last attempt	Status	Actions	
Yes	10/03/2012	N/A	In Progress	Edit View	

From View-mode the user can **Discard the Peer Mentoring-- Assessment** by clicking the **Discard button** as seen in the figure below. An “In Progress” or “Submitted” Peer Mentoring—Assessment can be discarded as long as no Peer Mentoring—Assessment Outcome is “In Progress” or “Submitted.”

MFP — Peer Mentoring — Assessment Status: In Progress

[View](#) [Edit](#)

[Back to Summary](#)

Assessment Form

— Referral Information —

Date of Referral: 12/18/2012

Was an assessment completed with the referred individual? **Yes**

— Assessment Information —

Date of Assessment: **10/03/2012**

— Peer Mentoring Goals ****** —

Submit **Discard**

If the user does not wish to discard, click the **Submit button** to **Submit the Peer Mentoring—Assessment** as seen in the figure below. Once submitted the Peer Mentoring-- Assessment can no longer be edited. However, the user can add multiple Peer Mentoring—Assessments for a given referral.

MFP — Peer Mentoring — Assessment Status: In Progress

[View](#) [Edit](#)

[Back to Summary](#)

Assessment Form

— Referral Information —

Date of Referral: 12/18/2012

Was an assessment completed with the referred individual? **Yes**

— Assessment Information —

Date of Assessment: **10/03/2012**

— Peer Mentoring Goals ****** —

Submit **Discard**

2.8.7 Add, Save and Edit Peer Mentoring Assessment Outcome

From the Peer Mentoring—Referral Summary page click the **Add Outcome link** as seen in the figure below.

Assessment List						Add Assessment	Add Outcome
Assessment Completed?	Assessment Date	Date Of Last attempt	Status	Actions			
Yes	10/03/2012	N/A	Submitted	View			

The **Peer Mentoring—Assessment Outcome** form will appear. Enter the **required information**, which will either be *highlighted yellow* or marked with an *asterisk*. After completing, or while in progress, click the **Save button** to **Save the Peer Mentoring—Assessment Outcome** as seen below.

MFP — Peer Mentoring — Assessment Outcome

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

Assessment Outcome Form

— **Assessment Outcome Information** —

Assessment Date:	10/03/2012
Peer Mentoring ended: *	<input type="text" value="10/18/2012"/> 
PM units Available:	192
PM units used:	0

— **Reason *** —

- Completed MFP Year
- Achieved Goals
- Died
- Reinstitutionalized
- Used all available PM units
- Withdrawn
- Other

After clicking the Save button the user is taken to View-mode. Click the **Edit link** to make changes to the Peer Mentoring—Assessment Outcome as seen below. After making changes click the Save button again and the user will return to View-mode.

MFP — Peer Mentoring — Assessment Outcome Status: In Progress

[View](#) [Edit](#) 

[Back to Summary](#) [Submit](#) [Discard](#)

Assessment Outcome Form

— **Assessment Outcome Information** —

Assessment Date:	10/03/2012
Date Peer Mentoring ended **	<input type="text" value="10/18/2012"/>
PM units Available:	192
PM units used:	0

— **Reason **** —

- Completed MFP Year
- Achieved Goals
- Died
- Reinstitutionalized
- Used all available PM units
- Withdrawn
- Other

 Record has been saved successfully.

2.8.8 View, Discard and Submit Peer Mentoring Assessment Outcome

The user can **View the Peer Mentoring—Assessment Outcome** in two ways. The first way was shown above where the user is taken to View-mode after saving the Peer Mentoring—Assessment Outcome. The user can also View the Peer Mentoring—Assessment Outcome by clicking the ***View link*** on the Peer Mentoring—Referral Summary page as seen below.

The screenshot shows a table titled "Assessment List" with columns: Assessment Completed?, Assessment Date, Date Of Last attempt, Status, and Actions. A row shows "Yes", "10/03/2012", "N/A", "Submitted", and a "View" link. Below this is a section titled "Assessment Outcome" with fields: Date Peer Mentoring ended (10/18/2012), Reason (Completed MFP Year), and Status (In Progress). A circled "View" link is highlighted with an arrow pointing to it.

Assessment List				
Assessment Completed?	Assessment Date	Date Of Last attempt	Status	Actions
Yes	10/03/2012	N/A	Submitted	View

— Assessment Outcome —

Date Peer Mentoring ended:	10/18/2012
Reason:	Completed MFP Year
Status:	In Progress

From View-mode the user can **Discard the Peer Mentoring—Assessment Outcome** by clicking the ***Discard button*** as seen in the figure below. An “In Progress” or “Submitted” Peer Mentoring—Assessment Outcome can be discarded as long as NO Peer Mentoring—Reassessment is “In Progress” or “Submitted.”

The screenshot shows a form titled "MFP — Peer Mentoring — Assessment Outcome" with status "In Progress". It has "View", "Edit", "Back to Summary", "Submit", and "Discard" buttons. The "Discard" button is circled with an arrow pointing to it. The form contains sections for "Assessment Outcome Form" and "Assessment Outcome Information" (with fields for Assessment Date, Date Peer Mentoring ended, PM units Available, and PM units used) and "Reason" (with a note about being required).

If the user does not wish to discard, click the ***Submit button*** to **Submit the Peer Mentoring—Assessment Outcome** as seen in the figure below. Once submitted the Peer Mentoring—Assessment Outcome can no longer be edited.

MFP — Peer Mentoring — Assessment Outcome Status: In Progress

[View](#) [Edit](#)

[Back to Summary](#)

Assessment Outcome Form

— **Assessment Outcome Information** —

Assessment Date:	10/03/2012
Date Peer Mentoring ended **	<input type="text" value="10/18/2012"/>
PM units Available:	192
PM units used:	0

— **Reason **** —

 **Submit** [Discard](#)

2.8.9 Peer Mentoring Status Change to Inactive

After a *Peer Mentoring—Assessment Outcome* is “Submitted,” Peer Mentoring changes to an **Inactive status** on the **MFP Active Tasks List** page as seen below. This status will also be reflected if reassigning a Peer Mentor, the client will be found using the “Inactive” filter in the Batch Assignment tool.

▲ **Peer Mentoring**

[Referral List](#)

— **History:** —

In Progress Referral:	0
Active Referral:	0
Inactive Referral:	1

— **Active PM Referral Information:** —

No active PM Referral information to display.

2.8.10 Add, Save and Edit Peer Mentoring Reassessment

From the Peer Mentoring—Referral Summary page click the **Add Reassessment link** as seen in the figure below.

MFP — Peer Mentoring — Referral Summary

[Back to List](#)

▲ **Referral**

— **Peer Assignment Information**

Assigned Peer:	Katie Collins-Ihrke
----------------	---------------------

— **Referral Information** [View](#)

Referral Date:	12/18/2012
Anticipated Transition Date:	12/26/2012
Preferred Peer Mentoring Type:	Physical/Mobility Disability
Status:	Inactive

▲ **Assessment List**

Assessment Completed?	Assessment Date	Date Of Last attempt	Status	Actions
Yes	10/03/2012	N/A	Submitted	View

— **Assessment Outcome** [View](#)

Date Peer Mentoring ended:	10/18/2012
Reason:	Completed MFP Year
Status:	Submitted

▲ **Reassessment List**

Reassessment Date	Reason	Status	Actions
No data available in table			

 **Add Reassessment**

The **Peer Mentoring—Reassessment** form will appear. Enter the **required information**, which will either be *highlighted yellow* or marked with an *asterisk*. After completing, or while in progress, the user can click the **Save button** to **Save the Peer Mentoring—Reassessment** as seen below.

MFP — Peer Mentoring — Reassessment

[Cancel](#)

[New](#)

Reassessment Form

— Reassessment Information —

Date of reassessment: * [Calendar](#)

— Reason for completing a Reassessment for individual * —

- Change in community residence
- New community living goals developed
- Change in health status
- Renewed interest
- New transition to community
- Other

— Peer Mentoring Goals: * —

- Socialization
- Development of community roles
- Self-advocacy
- Development of natural, unpaid support networks
- Effective use of natural resources for support
- Development of community living-skills (e.g. public transport, communicating with, selecting, training providers, problem solving skills)
- Increase awareness of community activities and opportunities
- Vocational skills
- Effective use of service delivery systems and natural resources

After clicking the Save button the user is taken to View-mode. Click the **Edit button** to make changes to the Peer Mentoring—Reassessment as seen below. After making changes click the Save button again and the user will return to View-mode.

MFP — Peer Mentoring — Reassessment Status: In Progress

[Back to Summary](#)

[View](#) [Edit](#)

[Submit](#) [Discard](#)

Reassessment Form

— Reassessment Information —

Date of reassessment: **

— Reason for completing a Reassessment for individual ** —

- Change in community residence
- New community living goals developed
- Change in health status
- Renewed interest
- New transition to community
- Other

Record has been saved successfully.

2.8.11 View, Discard and Submit Peer Mentoring Reassessment

The user can **View the Peer Mentoring—Reassessment** in two ways. The first way was shown above where the user is taken to View-mode after saving the Peer Mentoring—Reassessment.

The user can also View the Peer Mentoring—Reassessment by clicking the ***View link*** on the Peer Mentoring—Referral Summary page as shown below.

Reassessment List				Add Reassessment
Reassessment Date	Reason	Status	Actions	
11/21/2012	Change in community residence	In Progress	Edit View	

From View-mode the user can ***Discard the Peer Mentoring—Reassessment*** by clicking the ***Discard button*** as seen in the figure below. An “In Progress” or “Submitted” Peer Mentoring—Reassessment can be discarded as long as NO Peer Mentoring—Reassessment Outcome is “In Progress” or “Submitted.”

MFP — Peer Mentoring — Reassessment Status: In Progress

[View](#) [Edit](#)

[Back to Summary](#)

Reassessment Form

— Reassessment Information —

Date of reassessment: ** 11/21/2012

— Reason for completing a Reassessment for individual **

If the user does not wish to discard, click the ***Submit button*** to ***Submit the Peer Mentoring—Reassessment*** as seen in the figure below. Once submitted the Peer Mentoring—Reassessment can no longer be edited. However, the user can add multiple Peer Mentoring—Reassessments for a given referral.

MFP — Peer Mentoring — Reassessment Status: In Progress

[View](#) [Edit](#)

[Back to Summary](#)

Reassessment Form

— Reassessment Information —

Date of reassessment: ** 11/21/2012

— Reason for completing a Reassessment for individual **

2.8.12 Peer Mentoring Status Change to Active

After a *Peer Mentoring- Reassessment* is “Submitted,” Peer Mentoring changes to an ***Active status*** on the ***MFP Tasks List*** page as seen below.

Peer Mentoring		Referral List
History:		Active PM Referral Information:
In Progress Referral:	0	Referral Date: 12/18/2012
Active Referral:	1	Anticipated Transition Date: 12/26/2012
Inactive Referral:	0	Preferred PM Type: Physical/Mobility Disability
		Status: Active

2.8.13 Add, Save and Edit Peer Mentoring Reassessment Outcome

From the Peer Mentoring—Referral Summary page click the **Add Outcome link** under the Reassessment List section as seen in the figure below.

Reassessment List		Add Assessment	Add Outcome
Reassessment Date	Reason	Status	Actions
11/21/2012	Change in community residence	Submitted	View

The **Peer Mentoring—Reassessment Outcome** form will appear. Enter the **required information**, which will either be *highlighted yellow* or marked with an *asterisk*. After completing, or while in progress, click the **Save button** to **Save the Peer Mentoring—Reassessment Outcome** as seen below.

MFP — Peer Mentoring — Reassessment Outcome	
Cancel	New 
Reassessment Outcome Form	
Reassessment Outcome Information	
Reassessment Date:	11/21/2012
Date Peer Mentoring ended: *	<input type="text" value="11/28/2012"/> 
PM units Available:	192
PM units used:	0
Reason *	
<input checked="" type="radio"/> Completed MFP Year <input type="radio"/> Achieved Goals <input type="radio"/> Died <input type="radio"/> Reinstitutionalized <input type="radio"/> Used all available PM units <input type="radio"/> Withdrawn <input type="radio"/> Other	

After clicking the Save button the user is taken to View-mode. Click the **Edit button** to make changes to the Peer Mentoring—Reassessment Outcome as seen below. After making changes click the Save button again and the user will return to View-mode.

MFP — Peer Mentoring — Reassessment Outcome Status: InProgress

[View](#) **Edit** [Discard](#)

[Back to Summary](#)

Reassessment Outcome Form

— Reassessment Outcome Information —

Reassessment Date:	11/21/2012
Date Peer Mentoring ended **	<input type="text" value="11/28/2012"/>
PM units Available:	192
PM units used:	0

— Reason ** —

- Completed MFP Year
- Achieved Goals
- Died
- Reinstitutionalized
- Used all available PM units
- Withdrawn
- Other

Record has been saved successfully.

2.8.14 View, Discard and Submit Peer Mentoring Reassessment Outcome

The user can **View the Peer Mentoring—Reassessment Outcome** in two ways. The first way was shown above where the user is taken to View-mode after saving the Peer Mentoring—Reassessment Outcome. The user can also View the Peer Mentoring—Reassessment Outcome by clicking the **View link** on the Peer Mentoring—Referral Summary page as seen below.

▲ **Reassessment List**

Reassessment Date	Reason	Status	Actions
11/21/2012	Change in community residence	Submitted	View

— **Reassessment Outcome** —

Date Peer Mentoring ended:	11/28/2012
Reason:	Completed MFP Year
Status:	InProgress

From View-mode the user can **Discard the Peer Mentoring—Reassessment Outcome** by clicking the **Discard button** as seen in the figure below. An “In Progress” or “Submitted” Peer Mentoring—Reassessment Outcome can be discarded as long as no additional Peer Mentoring—Reassessment is “In Progress” or “Submitted.”

MFP — Peer Mentoring — Reassessment Outcome Status: InProgress

[View](#) [Edit](#)

[Back to Summary](#)

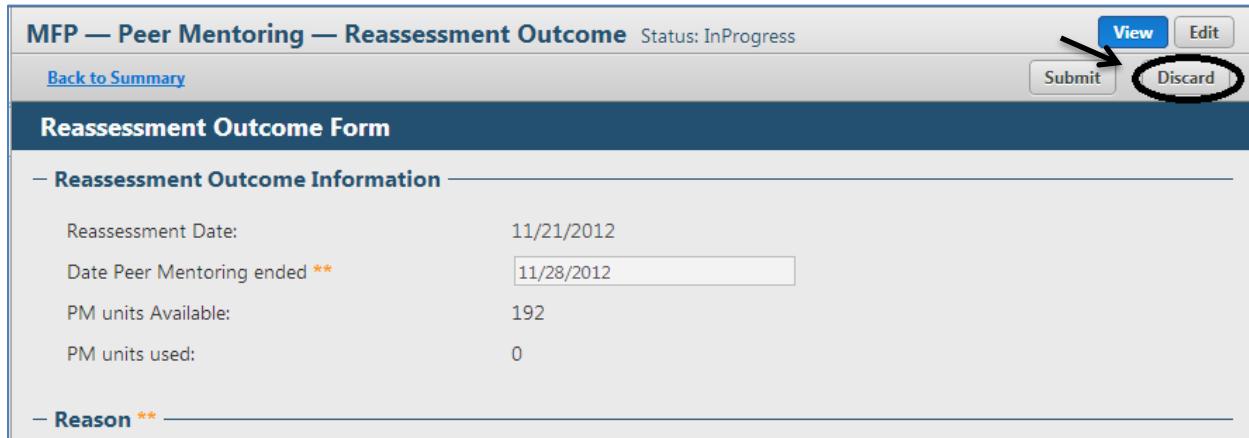
Reassessment Outcome Form

— Reassessment Outcome Information —

Reassessment Date:	11/21/2012
Date Peer Mentoring ended **	<input type="text" value="11/28/2012"/>
PM units Available:	192
PM units used:	0

— Reason ** —

[Submit](#) [Discard](#)



If the user does not wish to discard, click the **Submit button** to **Submit the Peer Mentoring—Reassessment Outcome** as seen in the figure below. Once submitted the Peer Mentoring—Reassessment Outcome can no longer be edited.

MFP — Peer Mentoring — Reassessment Outcome Status: InProgress

[View](#) [Edit](#)

[Back to Summary](#)

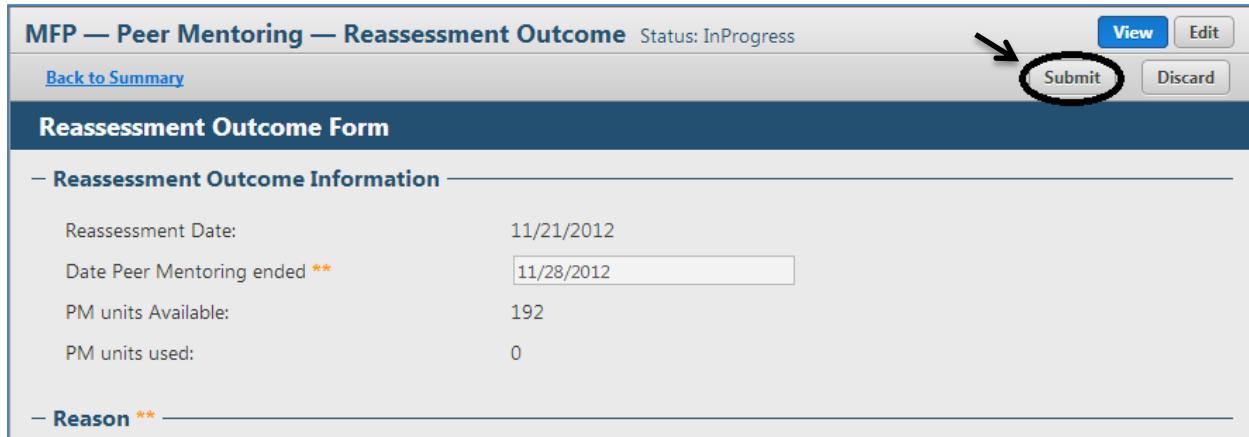
Reassessment Outcome Form

— Reassessment Outcome Information —

Reassessment Date:	11/21/2012
Date Peer Mentoring ended **	<input type="text" value="11/28/2012"/>
PM units Available:	192
PM units used:	0

— Reason ** —

[Submit](#) [Discard](#)



2.8.15 Peer Mentoring Status Change to Inactive

After a *Peer Mentoring—Reassessment Outcome* is “Submitted,” Peer Mentoring changes to an **Inactive status** on the **MFP Active Tasks List** page as seen below.

▲ Peer Mentoring [Referral List](#)

— History: — — Active PM Referral Information: —

In Progress Referral:	0	No active PM Referral information to display.
Active Referral:	0	
Inactive Referral:	1	

2.8.16 View Peer Mentoring Activity History

While the Peer Mentoring Referral is in an Active status on the MFP Active Tasks list the user can add Activities to the client Activity History page. Navigate to the Peer Mentoring—Referral List and click the **Activity History link** as shown in the figure below.

MFP — Peer Mentoring — Referrals List							
Referral Date	Anticipated Transition Date	MFP Eligible	Referral Source	Status	Actions		
12/18/2012	12/26/2012	Yes	DHMH-Devon Snider	Active	Summary		

2.8.17 Create, Save, Edit and Delete Peer Mentoring Activity History

From the **Peer Mentoring—Activity Sheet History** the user can add new activities by clicking the **Add Activity link** as shown in the figure below.

MFP — Peer Mentoring — Activity History	
Back to List	Add Activity
Activity Summary	
There are currently no Activities.	

The **Peer Mentoring—Activity Sheet** will appear. Enter the **required information**, which will either be *highlighted yellow* or marked with an *asterisk*. After entering the required information the user can click the **Add Activity button** to add additional activities for that date or they can click the **Save button** as shown in the figure below.

MFP — Peer Mentoring — Activity Sheet

[Back to Activity History](#)

Activity Sheet

— Activity Information —

Date of Activity *

Peer Mentor *

Notes: *

Test Note

(To view more content, re-size the text area by dragging the bottom-right corner.)

— Activity List * —

Total Duration: 60 Min. Units used: 4

Activity		Delete
Category *	<input type="text" value="Drop-in Center"/>	
Location *	<input type="text" value="Office"/>	
Type *	<input type="text" value="Group"/>	
Number in group (Not including Peer) *	<input type="text" value="4"/>	
Activity *	<input type="text" value="Socialization"/>	
Duration *	<input type="text" value="1 hrs. 0 min."/>	

[+ Add Activity](#)

After clicking the Save button the user is taken to the Peer Mentoring—Activity Sheet List. Click the **Edit link** to make changes to the Peer Mentoring—Activity Sheet as seen below. After making changes click the Save button again and the user will return back to the Peer Mentoring—Activity Sheet List.

MFP — Peer Mentoring — Activity History

[Back to List](#) [Add Activity](#) [Collapse All](#)

— Activity Summary —

Total: 60 Min.

Units Used: 4

▲ **Activity: 11/18/2012** Peer Mentor: Katie Collins-Ihrke Total Duration: 60 Min. [Edit](#) [Discard](#)

Category	Location	Activity	Type	Number In Group (not including Peer)	Duration
Drop-in Center	Office	Socialization	Group	4	60 Min.

— Activity Notes —

Notes: Test Note

From the Peer Mentoring—Activity Sheet List the user can **Discard an Activity Sheet** by clicking the ***Discard link*** as seen in the figure below. The user can only Edit or Discard the Peer Mentoring—Activity Sheet while the referral is in an Active status.

The screenshot shows the 'MFP — Peer Mentoring — Activity History' page. At the top right, there are buttons for 'Add Activity' and 'Collapse All'. Below that is an 'Activity Summary' section with fields for 'Total' (60 Min.) and 'Units Used' (4). A summary row at the top indicates an activity on '11/18/2012' by 'Peer Mentor: Katie Collins-Ihrke' with a 'Total Duration: 60 Min.'. To the right of this row are 'Edit' and 'Discard' buttons, with 'Discard' circled in red and an arrow pointing to it. The main table below has columns for Category, Location, Activity, Type, Number In Group (not including Peer), and Duration. A single row is shown: 'Drop-in Center' at 'Office' for 'Socialization' as a 'Group' activity involving '4' people with a duration of '60 Min.'. Below the table is an 'Activity Notes' section with a note 'Test Note'.

2.9 Housing User Activity History

The Housing User Activity History page can be accessed through My List. Under the My List tab at the top of LTSS, authorized users will have access to the MFP User Activity section located in the left hand navigation. To access the Housing User Activity History page click on **Housing User Activity History** from the left hand navigation. From the Housing User Activity History page an authorized user can search by Housing Specialist, Start Date, End Date or by leaving search criteria blank and clicking the **Filter button** the actor will see the full list of Housing User Activity Sheets. To add a new Activity Sheet click the **Add Activity link** as seen in the figure.

The screenshot shows the 'Housing User Activity History' page under the 'My Lists' tab. The left sidebar includes 'My Client List', 'MFP List' (with 'Housing Assistance' selected), and 'MFP User Activity' (with 'Housing User Activity History' selected). At the top right are 'Menu' and 'Account' buttons. The main area has a search bar for 'Housing Specialist', 'Start Date', and 'End Date', with a 'Filter' button and an 'Add Activity' link (circled in red with an arrow pointing to it). Below the search is an 'Activity Summary' section stating 'There are currently no Activities.'

After clicking the Add Activity link the Activity Sheet will appear as seen in the figure below. The actor will be required to enter all required information, which will be highlighted yellow or marked with asterisk. The actor will have the option to add multiple activities for a given date by using the **Add Activity link** as seen in the figure below. After entering all required information click the **Save button** to save the Activity Sheet to the Housing User Activity History page.

The screenshot shows the 'Housing User Activity Sheet' page. On the left, there's a sidebar with 'My Client List' and 'MFP User Activity' sections. The main area has fields for 'Date of Activity' (01/21/2013), 'Housing Staff' (a dropdown menu), and 'Notes' (a large text area). Below these is a section for 'Add Activity' with dropdowns for staff and duration, and buttons for 'Delete' and 'Units used: 0'. A large red arrow points to the 'Add Activity' button.

After adding an Activity Sheet to the Housing User Activity History page, authorized users will be able to view Activity Sheet information, edit Activity Sheet information by clicking the **Edit link** and discard Activity Sheet information by clicking the **Discard link** as seen in the figure below.

The screenshot shows the 'Housing User Activity History' page. It displays a summary for the date 01/21/2013, showing a total duration of 60 Min. and 4 units used. Below this is a detailed table for the same date. The table has columns for 'Partnership', 'Activity', and 'Duration'. One row shows 'AAA' with 'Community Inventory' and a duration of 60. At the bottom of the table, there's an 'Activity Info' section with 'Housing Staff: dhmhousingcoordinator1 DHMHhousing' and 'Total: 60'. Two red arrows point to the 'Edit' and 'Discard' buttons located at the bottom right of the summary row.

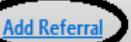
2.10 Housing Assistance

Navigate to the Housing Assistance module by clicking the **Housing Assistance tab** as shown in the figure below. This will take you the **Housing Assistance—Referral List**.

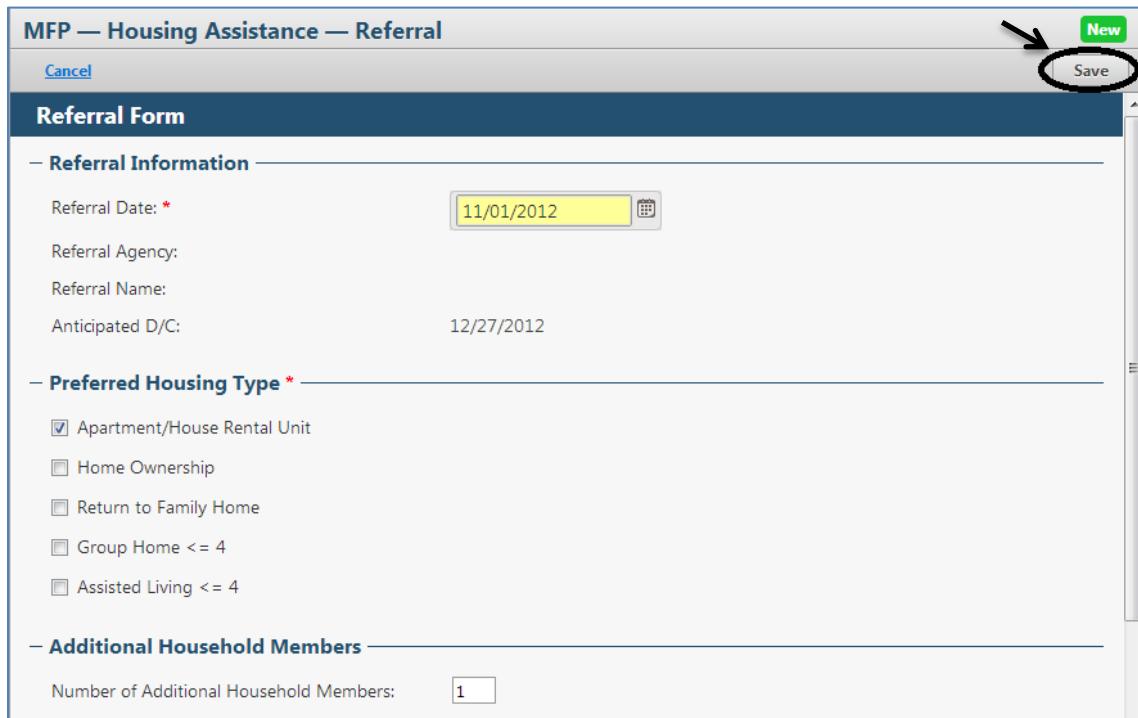
Long Term Services and Support		FEDnickolas.quinones (On behalf of: Snider, Devon) Location: DHMH		Menu		Account																	
Home	Clients	My Lists	Alerts	Dashboard	Assignments	Reports	Client Details																
Jonathan Smith ▾ ID: 21190150405110 DOB: 01/11/1950 MFP Eligible: Y (12/18/2012)		MFP — Housing Assistance — Referrals List <div style="text-align: right;"> Activity History Add Referral </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Referral Date</th> <th>Target Date</th> <th>Referral Source</th> <th>Assigned To</th> <th>Outcome Form Date</th> <th>Outcome Final Status</th> <th>Status</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td colspan="8" style="text-align: center;">No data available in table</td> </tr> </tbody> </table>						Referral Date	Target Date	Referral Source	Assigned To	Outcome Form Date	Outcome Final Status	Status	Actions	No data available in table							
Referral Date	Target Date	Referral Source	Assigned To	Outcome Form Date	Outcome Final Status	Status	Actions																
No data available in table																							
Profile Client Summary																							
MFP Program Menu <ul style="list-style-type: none"> Case Program Summary Task List Resident Contact Sheets Ongoing Peer Support Options Counseling Peer Mentoring Housing Assistance >  Quality Of Life DDA TBI Flexible Funds Case Notes 																							

2.10.1 Add, Save and Edit Housing Assistance Referral

From the Housing Assistance—Referral List click the **Add Referral link** to **Add Housing Assistance—Referral** for the client as seen in the figure below.

MFP — Housing Assistance — Referrals List <div style="text-align: right;"> Activity History  Add Referral </div>								
Referral Date	Target Date	Referral Source	Assigned To	Outcome Form Date	Outcome Final Status	Status	Actions	
No data available in table								

The **Housing Assistance—Referral** will appear. Enter the **required information**, which will either be *highlighted yellow* or marked with an *asterisk*. After completing, or while in progress, the user can click the **Save button** to **Save the Housing Assistance—Referral** as seen below.



MFP — Housing Assistance — Referral

[Cancel](#) New

Referral Form

— Referral Information —

Referral Date: * 

Referral Agency:

Referral Name:

Anticipated D/C: 12/27/2012

— Preferred Housing Type * —

Apartment/House Rental Unit

Home Ownership

Return to Family Home

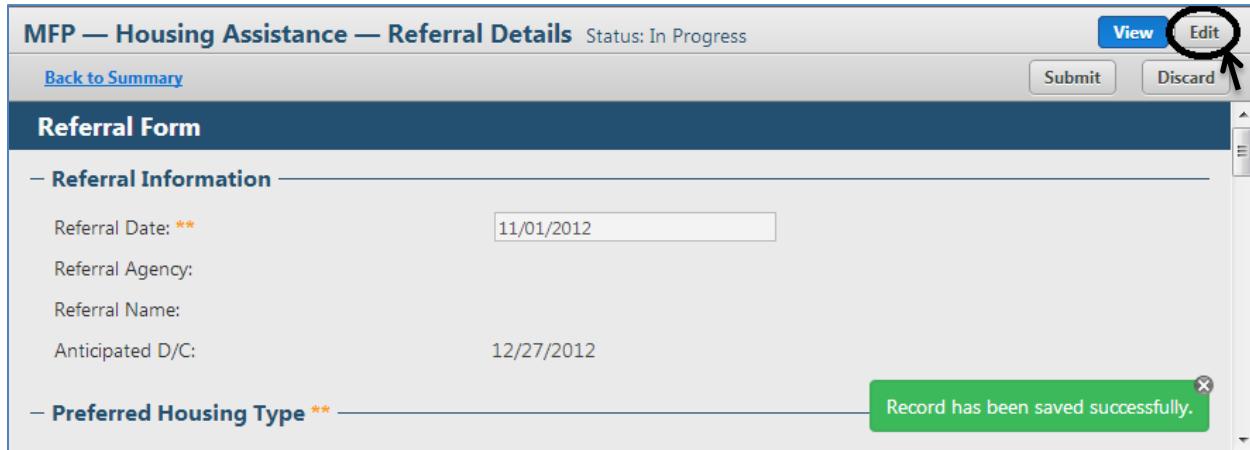
Group Home <= 4

Assisted Living <= 4

— Additional Household Members —

Number of Additional Household Members:

After clicking the **Save** button the user is taken to View-mode. Click the **Edit button** to make changes to the Housing Assistance—Referral as seen below. After making changes click the **Save** button again and the user will return to View-mode.



MFP — Housing Assistance — Referral Details Status: In Progress

[View](#) [Edit](#)

[Back to Summary](#) [Submit](#) [Discard](#)

Referral Form

— Referral Information —

Referral Date: **

Referral Agency:

Referral Name:

Anticipated D/C: 12/27/2012

— Preferred Housing Type ** —

Record has been saved successfully.

2.10.2 View, Discard and Submit Housing Assistance Referral

The user can View the Referral in two ways. The first way was shown above as the user is taken to View-mode after saving the Referral. The user can also navigate to Housing Assistance—Referral Summary page and click the **View link** to **View the Housing Assistance—Referral**.

MFP — Housing Assistance — Referral Summary

[Back to List](#) [Public Housing Assistance List](#) [Collapse All](#)

▲ **Referral**

— **Housing Specialist Assignment Information**

Housing Specialist:

— **Referral Information**

Referral Date: 11/01/2012
Anticipated D/C: 12/27/2012
Status: In Progress

[View](#) [Edit](#)

From View-mode the user can **Discard the Housing Assistance—Referral** by clicking the ***Discard button*** as seen in the figure below. An “In Progress” or “Submitted” Housing Assistance—Referral can be discarded as long as NO Housing Assistance—Assessment is “In Progress” or “Submitted.”

MFP — Housing Assistance — Referral Details Status: In Progress

[Back to Summary](#) [View](#) [Edit](#) [Submit](#) [Discard](#)

Referral Form

— **Referral Information**

Referral Date: ** 11/01/2012
Referral Agency:
Referral Name:
Anticipated D/C: 12/27/2012

— **Preferred Housing Type ****

If the user does not wish to discard, click the ***Submit button*** to **Submit the Housing Assistance—Referral** as seen in the figure below. Once submitted the Housing Assistance—Referral can no longer be edited.

MFP — Housing Assistance — Referral Details Status: In Progress

[View](#) [Edit](#)

[Back to Summary](#)

Referral Form

— Referral Information —

Referral Date: ** 11/01/2012

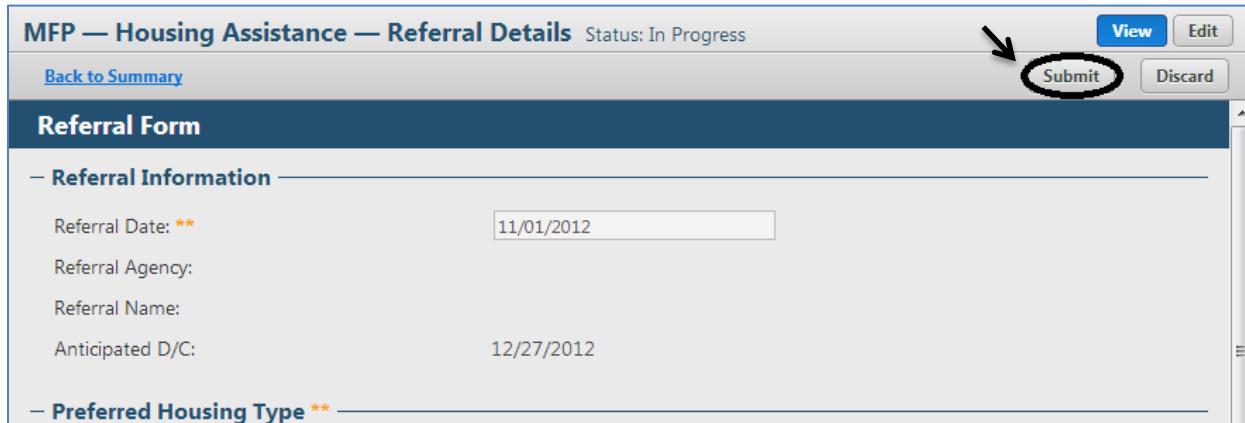
Referral Agency:

Referral Name:

Anticipated D/C: 12/27/2012

— Preferred Housing Type **

Submit [Discard](#)



2.10.3 Housing Assistance Status Change to Active

After a *Housing Assistance Referral* is “Submitted,” Housing Assistance changes to an **Active status** on the **MFP Tasks List** page as seen below.

▲ Housing Assistance		Referral List
— History: —		— Active HA Referral Information: — Summary
In Progress Referral:	0	Referral Date: 11/01/2012
Active Referral:	1	Anticipated D/C Date: N/A
Inactive Referral:	0	Preferred HA Type: Apartment/House Rental Unit
		Status: Active

2.10.4 Assign DHMH Housing Specialist to Client

A DHMH Housing Specialist needs to be assigned to continue the Housing Assistance process for the client in the Housing Assistance module. A DHMH Housing Specialist cannot create a Referral nor do any task unless they have been assigned by the DHMH Housing Coordinator. To assign a Housing Specialist log in as the DHMH Housing Coordinator that oversees the clients Jurisdiction.

Long Term Services and Support

LTSS Maryland Login

User Name (Test Only)
FED\nicolas.quinones

On Behalf Of
Adenike Dobson
[dhhousingspecialist, dhhhousingcoordinator]

Agency
DHMH

Location
DHMH - DHMH (Housing Assistance)

Click the **Assignments** tab at the top of the page and navigate to *Housing Assistance* under the Assignment Menu section in the left hand navigation to perform **Batch Assignment**. Choose **Unassigned** from the Status dropdown menu and click the **Filter button**. Locate the client you wish to assign a Housing Specialist to and **click the checkbox** next to them to select. Then **choose a Housing Specialist** from the drop down menu at the bottom of the page and click the **Assign button**. The client will now have that Housing Specialist assigned to them and an Assessment and Outcome can now be performed by an authorized user for that client in the Housing Assistance module.

First Name	Last Name	Facility	County	Referral Date	Assigned To	Actions
Jonathan	Smith	CATONSVILLE COMMONS	Baltimore	11/01/2012		View

Assign to Housing Specialist: * Adenike Dobson

2.10.5 Public Housing Assistance Form List

Navigate to the **Public Housing Assistance Form List** by clicking the **Public Housing Assistance Forms link** on the Housing Assistance—Referral Summary page as shown in the figure below.

MFP — Housing Assistance — Referral Summary

[Back to List](#) [Public Housing Assistance List](#) [Collapse All](#)

▲ Referral

— Housing Specialist Assignment Information —

Housing Specialist: Adenike Dobson

— Referral Information — [View](#)

Referral Date: 11/01/2012
Anticipated D/C: 12/27/2012
Status: Active

▲ Assessments List [Add Assessment](#)

Assessed By	County	Assessment Date	Assessment Summary	Status	Actions
No data available in table					

2.10.6 Add, Save and Edit Public Housing Assistance Form

From the Public Housing Assistance Form page click the **Add PHA link** as seen in the figure below. This will only be possible if the Housing Assistance referral is in an *Active status*.

MFP — Housing Assistance — Public Housing Assistance Forms List

[Back to Summary](#) [Add PHA](#)

Creation Date	PHA Name	Status	Actions
No data available in table			

The **Housing Assistance—Public Housing Assistance Form** will appear. Enter the **required information**, which will either be *highlighted yellow* or marked with an *asterisk*. After completing, or while in progress, the user can click the **Save button** to **Save the Housing Assistance—Public Housing Assistance Form** as seen below.

MFP — Housing Assistance — Public Housing Assistance

[Cancel](#) New 

Public Housing Assistance Form

— Public Housing Assistance Information —

Date: * 

PHA Name: *

PHA Status: *

— Voucher Information —

Applicant Currently Has Voucher? * Yes No

Voucher Extension Requested? * Yes No

— Waiting List Information —

PHA Verified Status on Waiting List? * Yes No

— History —

Previous PHA Participant? * Yes No

Previously Terminated from Assistance? * Yes No

After clicking the Save button the user is taken to View-mode. Click the **Edit link** to make changes to the Housing Assistance—Public Housing Assistance Form as seen below. After making changes click the Save button again and the user will return to View-mode.

MFP — Housing Assistance — Public Housing Assistance Status: In Progress

[Back to List](#) View  Submit Discard

Public Housing Assistance Form

— Public Housing Assistance Information —

Date: **

PHA Name: **

PHA Status:

— Voucher Information —

Applicant Currently Has Voucher? ** Yes No

Voucher Extension Requested? ** Yes No

Record has been saved successfully. 

2.10.7 View, Discard and Submit Public Housing Assistance Form

The user can **View the Housing Assistance—Public Housing Assistance Form** in two ways. The first way was shown above where the user is taken to View-mode after saving the Housing Assistance—Public Housing Assistance Form. The user can also View the Housing Assistance—Public Housing Assistance Form by clicking the **View link** on the Public Housing Assistance Form List page as shown below.

MFP — Housing Assistance — Public Housing Assistance Forms List

Back to Summary		Add PHA	
Creation Date	PHA Name	Status	Actions
12/18/2012	Charles County Commissioners	In Progress	Edit View 

From View-mode the user can **Discard the Housing Assistance—Public Housing Assistance Form** by clicking the ***Discard button*** as seen in the figure below. The user can only discard an “In Progress” or “Submitted” Housing Assistance—Public Housing Assistance Form if a Housing Assistance—Outcome Form is not “Submitted.”

MFP — Housing Assistance — Public Housing Assistance Status: In Progress

Back to List		View	Edit
Public Housing Assistance Form			
— Public Housing Assistance Information —			
Date: **	12/18/2012	Submit	Discard 
PHA Name: **	Charles County Commissioners		
PHA Status:	Unknown		
— Voucher Information —			

If the user does not wish to discard, click the ***Submit button*** to **Submit the Housing Assistance—Public Housing Assistance Form** as seen in the figure below. Once submitted the Housing Assistance—Public Housing Assistance Form can no longer be edited.

MFP — Housing Assistance — Public Housing Assistance Status: In Progress

Back to List		View	Edit
Public Housing Assistance Form			
— Public Housing Assistance Information —			
Date: **	12/18/2012	Submit 	Discard
PHA Name: **	Charles County Commissioners		
PHA Status:	Unknown		
— Voucher Information —			

2.10.8 Add, Save and Edit Housing Assistance Assessment

Navigate to the Housing Assistance Referral List and click the ***Summary link*** for the referral you wish to create a Housing Assistance Assessment and/or a Housing Assistance Outcome for.

MFP — Housing Assistance — Referrals List

										Activity History	Add Referral
Referral Date	Target Date	Referral Source	Assigned To	Outcome Form Date	Outcome Final Status	Status	Actions				
11/01/2012	11/16/2012	[DHMH] - DHMH - Devon Snider	Adenike Dobson	N/A	Active	Summary 					

From the Housing Assistance—Referral Summary page click the **Add Assessment link** as seen in the figure below.

The screenshot shows the 'MFP — Housing Assistance — Referral Summary' page. At the top right, there are links for 'Public Housing Assistance List' and 'Collapse All'. Below this, under the 'Referral' section, there are two expandable sections: 'Housing Specialist Assignment Information' and 'Referral Information'. Under 'Referral Information', fields include 'Referral Date' (11/01/2012), 'Anticipated D/C' (12/27/2012), and 'Status' (Active). At the bottom of the page, under the 'Assessments List' section, there is a table header with columns: Assessed By, County, Assessment Date, Assessment Summary, Status, and Actions. A red arrow points to the 'Add Assessment' button in the Actions column, which is circled in red.

The **Housing Assistance—Assessment** form will appear. Enter the **required information**, which will either be *highlighted yellow* or marked with an *asterisk*. After completing, or while in progress, the user can click the **Save button** to **Save the Housing Assistance—Assessment** as seen below.

The screenshot shows the 'MFP — Housing Assistance — Assessment' form. At the top right, there are 'New' and 'Save' buttons, with a red arrow pointing to the 'Save' button which is circled in red. The form is divided into several sections: 'Assessment Form', 'Referral Information', 'Assessment Information', 'Preference Information', and 'Accessibility Needed'. In the 'Assessment Information' section, the 'Date of Assessment' field (12/18/2012) is highlighted in yellow. In the 'Preference Information' section, the 'County of Choice' dropdown and the 'Community of Choice (specific building/neighborhood)' text area are highlighted in yellow. At the bottom, there is a question 'Does the Applicant Report Being on Any Waiting List? *' with 'Yes' and 'No' radio buttons.

After clicking the Save button the user is taken to View-mode. Click the **Edit button** to make changes to the Housing Assistance—Assessment as seen below. After making changes click the Save button again and the user will return to View-mode.

MFP — Housing Assistance — Assessment Status: In Progress

Back to Summary Add Expense Submit Discard

Assessment Form

— Referral Information —

Referral Date: 11/01/2012
Target Date: 11/16/2012

— Assessment Information —

Date of Assessment: ** 12/18/2012
Assessed By: Dobson, Adenike
Assessment Summary: **

Record has been saved successfully.

2.10.9 Add, Save, Edit and View Housing Assistance Assessment Expense

From the **Housing Assistance—Assessment View Page**, click the **Add Expense link** as shown in the figure below. An authorized actor will only be able to Add/Edit an Expense Form for a Housing Assistance Assessment if the Assessment is in a Status of “In Progress.”

MFP — Housing Assistance — Assessment Status: In Progress

Back to Summary Add Expense Submit Discard

Assessment Form

— Referral Information —

Referral Date: 11/01/2012
Target Date: 11/16/2012

— Assessment Information —

The **Housing Assistance—Assessment Expense** form will appear. Enter the **required information**, which will either be *highlighted yellow* or marked with an *asterisk*. After completing, or while in progress, the user can click the **Save button** to **Save the Housing Assistance—Assessment Expense** as seen below.

MFP — Housing Assistance — Assessment Expense

Assessment Expense Form

Referral Information

- Date of Referral: 11/01/2012
- Target Date: 11/16/2012

Assessment Information

- Date of Assessment: 12/18/2012
- Assessed By: Adenike Dobson
- Assessment Summary: test

Monthly Expenses

Category	Amount
Rent	\$0
Groceries	\$0
Utilities	\$0
Debts/Obligations	\$0
Transportation	\$0
Medical Costs	\$0
Supplemental Care	\$0
Assistive Technology	\$0
Service/Companion Animal	\$0
Telephone	\$0
Cable/Internet	\$0
Cigarettes	\$0
Clothes	\$0
Other #1	\$0
Other #2	\$0
Other #3	\$0

Total Monthly Expenses

After clicking the Save button the user is taken to Housing Assistance—Assessment Expense View-mode. Click the **Edit button** to make changes to the Housing Assistance—Assessment Expense as seen below. After making changes click the Save button again and the user will return to View-mode.

MFP — Housing Assistance — Assessment Expense

[Back to Assessment](#)

Assessment Expense Form

Referral Information

- Date of Referral: 11/01/2012
- Target Date: 11/16/2012

Assessment Information

- Date of Assessment: 12/18/2012
- Assessed By: Adenike Dobson
- Assessment Summary: test

Record has been saved successfully.

The user can **View the Housing Assistance—Assessment Expense** in two ways. The first way was shown above where the user is taken to View-mode after saving the Housing Assistance—

Assessment Expense. The user can also View the Housing Assistance—Assessment Expense by clicking the ***Expense Details link*** on the Housing Assistance—Assessment page as shown below. After an Expense Form is Saved for a HA Assessment the Expense Details link will remain available after the HA Assessment is Submitted.

MFP — Housing Assistance — Assessment Status: In Progress

[Back to Summary](#) [View](#) [Edit](#) [Expense Details](#) [Submit](#) [Discard](#)

Assessment Form

- Referral Information

Referral Date:	11/01/2012
Target Date:	11/16/2012

- Assessment Information

2.10.10 View, Discard and Submit Housing Assistance Assessment

The user can **View the Housing Assistance—Assessment** in two ways. The first way was shown above where the user is taken to View-mode after saving the Housing Assistance—Assessment. The user can also View the Housing Assistance—Assessment by clicking the ***View link*** on the Housing Assistance—Referral Summary page as shown below.

MFP — Housing Assistance — Referral Summary

[Back to List](#) [Public Housing Assistance List](#) [Collapse All](#)

▲ Referral

- Housing Specialist Assignment Information

Housing Specialist:	Adenike Dobson
---------------------	----------------

- Referral Information

Referral Date:	11/01/2012	View
Anticipated D/C:	12/27/2012	
Status:	Active	

▲ Assessments List

Assessed By	County	Assessment Date	Assessment Summary	Status	Actions
Dobson, Adenike	Baltimore	12/18/2012	test	Submitted	View

From View-mode the user can **Discard the Housing Assistance—Assessment** by clicking the ***Discard button*** as seen in the figure below. An “In Progress” or “Submitted” Housing Assistance—Assessment can be discarded as long as no Housing Assistance—Assessment Outcome is “In Progress” or “Submitted.”

MFP — Housing Assistance — Assessment Status: Submitted

[View](#) [Expense Details](#) [Discard](#)

Assessment Form

— Referral Information —

Referral Date:	11/01/2012
Target Date:	11/16/2012

— Assessment Information —

If the user does not wish to discard, click the **Submit button** to **Submit the Housing Assistance—Assessment** as seen in the figure below. Once submitted the Housing Assistance—Assessment can no longer be edited. However, the user can add multiple Housing Assistance—Assessments for a given referral.

MFP — Housing Assistance — Assessment Status: In Progress

[View](#) [Edit](#) [Expense Details](#) [Submit](#) [Discard](#)

Assessment Form

— Referral Information —

Referral Date:	11/01/2012
Target Date:	11/16/2012

— Assessment Information —

2.10.11 Add, Save and Edit Housing Assistance Assessment Outcome

From the Housing Assistance—Referral Summary page click the **Add Outcome link** as seen in the figure below.

▲ Assessments List

[Add Assessment](#) [Add Outcome](#)

Assessed By	County	Assessment Date	Assessment Summary	Status	Actions
Dobson, Adenike	Baltimore	11/18/2012	test	Submitted	View

The **Housing Assistance—Assessment Outcome** form will appear. Enter the **required information**, which will either be *highlighted yellow* or marked with an *asterisk*. After completing, or while in progress, click the **Save button** to **Save the Housing Assistance—Assessment Outcome** as seen below.

MFP — Housing Assistance — Assessment Outcome

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

Assessment Outcome Form

— Outcome Information

Date housing application process ended: *

Final status: *

Date MFP transition process ended: *

Did individual successfully transition as an MFP participant? * Yes No

— Reason

— What is the main reason why this individual could not be transitioned or enrolled in the MFP program? *

- Individual's physical health needs exceeded capacity of program to meet them
- Individual's mental health needs exceeded capacity of program to meet them
- Guardian refused to participate
- Could not locate appropriate housing arrangement
- Could not secure affordable housing
- Individual did not choose MFP qualified residence
- Individual changed his/her mind about wanting to leave the institution
- Individual would not cooperate in plan care development
- Service needs in the community greatly exceed costs in institution, or waiver cost caps
- Individual was denied for financial reasons - Income denial
- Individual was denied for financial reasons - Asset denial
- Deceased
- Demonstration project ended prior to transition
- Individual withdrew for other reasons
- No longer meets institutional level of care

After clicking the Save button the user is taken to View-mode. Click the **Edit button** to make changes to the Housing Assistance—Assessment Outcome as seen below. After making changes click the Save button again and the user will return to View-mode.

MFP — Housing Assistance — Assessment Outcome Status: In Progress

[View](#) [Edit](#) [Submit](#) [Discard](#)

Assessment Outcome Form

— Outcome Information

Date housing application process ended: **

Final status: **

Date MFP transition process ended: **

Did individual successfully transition as an MFP participant? ** Yes No

— Reason

Record has been saved successfully.

2.10.12 View, Discard and Submit Housing Assistance Assessment Outcome

The user can **View the Housing Assistance—Assessment Outcome** in two ways. The first way was shown above where the user is taken to View-mode after saving the Housing Assistance—Assessment Outcome. The user can also View the Housing Assistance—Assessment Outcome by clicking the ***View link*** on the Housing Assistance—Referral Summary page as seen below.

Assessments List											
Assessed By	County	Assessment Date	Assessment Summary	Status	Actions						
Dobson, Adenike	Baltimore	11/18/2012	test	Submitted	View						
— Assessment Outcome — <table> <tr> <td>Housing Application Process End Date:</td> <td>11/25/2012</td> </tr> <tr> <td>Status:</td> <td>In Progress</td> </tr> </table>								Housing Application Process End Date:	11/25/2012	Status:	In Progress
Housing Application Process End Date:	11/25/2012										
Status:	In Progress										

From View-mode the user can **Discard the Housing Assistance—Assessment Outcome** by clicking the ***Discard button*** as seen in the figure below. An “In Progress” or “Submitted” Housing Assistance—Assessment Outcome can be discarded as long as NO Housing Assistance—Reassessment is “In Progress” or “Submitted.” Note that if a Housing Assistance—Assessment Outcome is discarded the Referral will return to Active status on the MFP Tasks List.

MFP — Housing Assistance — Assessment Outcome Status: In Progress	
Back to Summary	View Edit Discard
Assessment Outcome Form	
— Outcome Information —	
Date housing application process ended: **	<input type="text" value="11/25/2012"/>
Final status: **	<input type="text" value="Transitioned"/>
Date MFP transition process ended: **	<input type="text" value="11/25/2012"/>
Did individual successfully transition as an MFP participant? **	<input type="radio"/> Yes <input checked="" type="radio"/> No
— Reason —	

If the user does not wish to discard, click the ***Submit button*** to **Submit the Housing Assistance—Assessment Outcome** as seen in the figure below. Once submitted the Housing Assistance—Assessment Outcome can no longer be edited.

MFP — Housing Assistance — Assessment Outcome Status: In Progress

[Back to Summary](#)

Assessment Outcome Form

— Outcome Information —

Date housing application process ended: ** 11/25/2012

Final status: ** Transitioned

Date MFP transition process ended: ** 11/25/2012

Did individual successfully transition as an MFP participant? ** Yes No

— Reason —

View Edit Submit Discard

2.10.13 Housing Assistance Status Change to Inactive

After a *Housing Assistance—Assessment Outcome* is “Submitted,” Housing Assistance changes to an **Inactive status** on the **MFP Tasks List** page as seen below.

▲ Housing Assistance [Referral List](#)

— History: —

In Progress Referral:	0	No active HA Referral information to display.
Active Referral:	0	
Inactive Referral:	1	

2.10.14 Add, Save and Edit Housing Assistance Reassessment

From the *Housing Assistance—Referral Summary* page click the **Add Reassessment** link as seen in the figure below.

▲ Reassessment List

Assessed By	County	Assessment Date	Assessment Summary	Status	Actions
No data available in table					

The **Housing Assistance—Reassessment** form will appear. Enter the **required information**, which will either be *highlighted yellow* or marked with an *asterisk*. After completing, or while in progress, the user can click the **Save button** to **Save the Housing Assistance—Reassessment** as seen below.

MFP — Housing Assistance — Reassessment

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

Reassessment Form

— Referral Information —

Referral Date: 11/01/2012
Target Date: 11/16/2012

— Assessment Information —

Date of Assessment: * 12/18/2012

Assessed By: Adenike Dobson

Assessment Summary: *

— Preference Information —

County of Choice:

1st: *

2nd:

3rd:

Community of Choice (specific building/neighborhood):

Does the Applicant Report Being on Any Waiting List? *

Yes No

— Accessibility Needed *

After clicking the Save button the user is taken to View-mode. Click the **Edit button** to make changes to the Housing Assistance—Reassessment as seen below. After making changes click the Save button again and the user will return to View-mode.

MFP — Housing Assistance — Reassessment Status: In Progress

[View](#) [Edit](#) [Add Expense](#) [Submit](#) [Discard](#)

Reassessment Form

— Referral Information —

Referral Date: 11/01/2012
Target Date: 11/16/2012

— Assessment Information —

Record has been saved successfully.

2.10.15 Add, Save, Edit and View Housing Assistance Reassessment Expense

From the **Housing Assistance—Reassessment View Page**, click the **Add Expense link** as shown in the figure below. This link will only be available when the Housing Assistance—Reassessment is in a Status of “In Progress.”

The screenshot shows the 'MFP — Housing Assistance — Reassessment' page. At the top right, there are buttons for 'View', 'Edit', 'Back to Summary', 'Add Expense' (which is circled in red), 'Submit', and 'Discard'. Below the header, it says 'Status: In Progress'. The main section is titled 'Reassessment Form' and contains two sections: 'Referral Information' and 'Assessment Information'. Under 'Referral Information', there are fields for 'Referral Date' (11/01/2012) and 'Target Date' (11/16/2012). Under 'Assessment Information', there are no visible fields.

The **Housing Assistance—Reassessment Expense Form** will appear. Enter the **required information**, which will either be *highlighted yellow* or marked with an *asterisk*. After completing, or while in progress, the user can click the **Save button** to **Save the Housing Assistance—Reassessment Expense** as seen below.

The screenshot shows the 'MFP — Housing Assistance — Reassessment Expense' page. At the top right, there are buttons for 'View', 'Edit', and 'Save' (which is circled in red). The main section is titled 'Reassessment Expense Form' and contains three sections: 'Referral Information', 'Reassessment Information', and 'Monthly Expenses'. Under 'Referral Information', there are fields for 'Date of Referral' (11/01/2012) and 'Target Date' (11/16/2012). Under 'Reassessment Information', there are fields for 'Date of Reassessment' (12/18/2012), 'Reassessed By' (Adenike Dobson), and 'Reassessment Summary' (test). Under 'Monthly Expenses', there is a table with 18 rows, each representing a category of expense with a yellow input field. The categories are: Rent, Groceries, Utilities, Debts/Obligations, Transportation, Medical Costs, Supplemental Care, Assistive Technology, Service/Companion Animal, Telephone, Cable/Internet, Cigarettes, Clothes, Other #1, Other #2, and Other #3. The last row is labeled 'Total Monthly Expenses'.

After clicking the Save button the user is taken to Housing Assistance—Reassessment Expense View-mode. Click the **Edit button** to make changes to the Housing Assistance—Reassessment Expense as seen below. After making changes click the Save button again and the user will return to View-mode.

MFP — Housing Assistance — Reassessment Expense

[View](#) [Edit](#)

[Back to Reassessment](#)

Reassessment Expense Form

— Referral Information —

Date of Referral: 11/01/2012
Target Date: 11/16/2012

— Reassessment Information —

Record has been saved successfully.

The user can **View the Housing Assistance—Reassessment Expense** in two ways. The first way was shown above where the user is taken to View-mode after saving the Housing Assistance—Reassessment Expense. The user can also View the Housing Assistance—Reassessment Expense by clicking the **Expense Details link** on the Housing Assistance—Assessment page as shown below.

MFP — Housing Assistance — Reassessment Status: In Progress

[View](#) [Edit](#)

[Back to Summary](#)

Reassessment Form

— Referral Information —

Referral Date: 11/01/2012
Target Date: 11/16/2012

— Assessment Information —

2.10.16 View, Discard and Submit Housing Assistance Reassessment

The user can **View the Housing Assistance—Reassessment** in two ways. The first way was shown above where the user is taken to View-mode after saving the Housing Assistance—Reassessment. The user can also View the Housing Assistance—Reassessment by clicking the **View link** on the Housing Assistance—Referral Summary page as shown below.

Reassessment List								Add Reassessment
Assessed By	County	Assessment Date	Assessment Summary	Status	Actions			
Adenike Dobson	Baltimore	12/18/2012	test	In Progress	Edit View			

From View-mode the user can **Discard the Housing Assistance—Reassessment** by clicking the **Discard button** as seen in the figure below. An “In Progress” or “Submitted” Housing Assistance—Reassessment can be discarded as long as no Housing Assistance—Reassessment Outcome is “In Progress” or “Submitted.”

MFP — Housing Assistance — Reassessment Status: In Progress

[View](#) [Edit](#)

[Back to Summary](#) [Expense Details](#) [Submit](#) [Discard](#)

Reassessment Form

– Referral Information

Referral Date: 11/01/2012
Target Date: 11/16/2012

– Assessment Information

If the user does not wish to discard, click the **Submit button** to **Submit the Housing Assistance—Reassessment** as seen in the figure below. Once submitted the Housing Assistance—Reassessment can no longer be edited. However, a user can add multiple Housing Assistance—Reassessments for a given referral.

MFP — Housing Assistance — Reassessment Status: In Progress

[View](#) [Edit](#)

[Back to Summary](#) [Expense Details](#) [Submit](#) [Discard](#)

Reassessment Form

– Referral Information

Referral Date: 11/01/2012
Target Date: 11/16/2012

– Assessment Information

2.10.17 Housing Assistance Status Change to Active

After a *Housing Assistance- Reassessment* is “Submitted,” Housing Assistance changes to an **Active status** on the **MFP Tasks List** page as seen below.

▲ Housing Assistance		Referral List	
– History:		– Active HA Referral Information:	
In Progress Referral:	0	Referral Date:	11/01/2012
Active Referral:	1	Anticipated D/C Date:	N/A
Inactive Referral:	0	Preferred HA Type:	Apartment/House Rental Unit
		Status:	Active

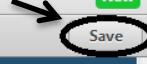
2.10.18 Add, Save and Edit Housing Assistance Reassessment Outcome

From the *Housing Assistance—Referral Summary* page click the **Add Outcome link** as seen in the figure below.

▲ Reassessment List							
Assessed By	County	Assessment Date	Assessment Summary	Status	Actions	Add Reassessment	Add Outcome
Adenike Dobson	Baltimore	12/18/2012	test	Submitted	View		

The **Housing Assistance—Reassessment Outcome** form will appear. Enter the **required information**, which will either be *highlighted yellow* or marked with an *asterisk*. After completing, or while in progress, click the **Save button** to **Save the Housing Assistance—Reassessment Outcome** as seen below.

MFP — Housing Assistance — Reassessment Outcome

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

Reassessment Outcome Form

Outcome Information

Date housing application process ended: *

Final status: *

Date MFP transition process ended: *

Did individual successfully transition as an MFP participant? * Yes No

Reason

— What is the main reason why this individual could not be transitioned or enrolled in the MFP program? * _____

- Individual's physical health needs exceeded capacity of program to meet them
- Individual's mental health needs exceeded capacity of program to meet them
- Guardian refused to participate
- Could not locate appropriate housing arrangement
- Could not secure affordable housing
- Individual did not choose MFP qualified residence
- Individual changed his/her mind about wanting to leave the institution
- Individual would not cooperate in plan care development
- Service needs in the community greatly exceed costs in institution, or waiver cost caps
- Individual was denied for financial reasons - Income denial
- Individual was denied for financial reasons - Asset denial
- Deceased
- Demonstration project ended prior to transition
- Individual withdrew for other reasons
- No longer meets institutional level of care

After clicking the Save button the user is taken to View-mode. Click the **Edit button** to make changes to the Housing Assistance—Reassessment Outcome as seen below. After making changes click the Save button again and the user will return to View-mode.

MFP — Housing Assistance — Reassessment Outcome Status: In Progress

[View](#) [Edit](#) 

[Back to Summary](#) [Submit](#) [Discard](#)

Reassessment Outcome Form

Outcome Information

Date housing application process ended: **

Final status: **

Date MFP transition process ended: **

Did individual successfully transition as an MFP participant? ** Yes No

Reason

Record has been saved successfully.

2.10.19 View, Discard and Submit Housing Assistance Reassessment Outcome

The user can **View the Housing Assistance—Reassessment Outcome** in two ways. The first way was shown above where the user is taken to View-mode after saving the Housing Assistance—Reassessment Outcome. The user can also View the Housing Assistance—Reassessment Outcome by clicking the ***View link*** on the Housing Assistance—Referral Summary page as seen below.

A screenshot of a web-based application interface titled "Reassessment List". The table has columns for Assessed By, County, Assessment Date, Assessment Summary, Status, and Actions. A row shows data for "Adenike Dobson" from "Baltimore" on "12/18/2012" with status "test" and "Submitted". In the "Actions" column, there is a blue link labeled "View" which is circled in red with a black arrow pointing to it.

From View-mode the user can **Discard the Housing Assistance—Reassessment Outcome** by clicking the ***Discard button*** as seen in the figure below. An “In Progress” or “Submitted” Housing Assistance—Reassessment Outcome can be discarded as long as no additional Housing Assistance—Reassessment is “In Progress” or “Submitted.” Note that if a Housing Assistance—Reassessment Outcome is discarded the Referral will return to Active status on the MFP Tasks List.

A screenshot of a web-based application interface titled "MFP — Housing Assistance — Reassessment Outcome" with status "In Progress". The top navigation bar includes "View", "Edit", "Back to Summary", "Submit", and a circled "Discard" button. The main form is titled "Reassessment Outcome Form" and contains sections for "Outcome Information" and "Reason". Under "Outcome Information", fields include "Date housing application process ended: **" (11/25/2012), "Final status: **" (Transitioned), "Date MFP transition process ended: **" (12/04/2012), and a radio button question "Did individual successfully transition as an MFP participant? **" with options "Yes" and "No".

If the user does not wish to discard, click the ***Submit button*** to **Submit the Housing Assistance—Reassessment Outcome** as seen in the figure below. Once submitted the Housing Assistance—Reassessment Outcome can no longer be edited.

MFP — Housing Assistance — Reassessment Outcome Status: In Progress

[View](#) [Edit](#)

[Back to Summary](#)

Reassessment Outcome Form

— Outcome Information —

Date housing application process ended: ** 11/25/2012

Final status: ** Transitioned

Date MFP transition process ended: ** 12/04/2012

Did individual successfully transition as an MFP participant? ** Yes No

— Reason —

[Submit](#) [Discard](#)

2.10.20 Housing Assistance Status Change to Inactive

After a *Housing Assistance—Reassessment Outcome* is “Submitted,” Housing Assistance changes to an **Inactive status** on the **MFP Tasks List** page as seen below.

▲ Housing Assistance [Referral List](#)

— History:

In Progress Referral:	0
Active Referral:	0
Inactive Referral:	1

— Active HA Referral Information:

No active HA Referral information to display.

2.10.21 View Housing Assistance Activity History

While the Housing Assistance module is in an Active status on the MFP Active Tasks list the user can add Activities to the client Activity History page. Navigate to the **Housing Assistance—Referral List** and click the **Activity History link** as shown in the figure below.

MFP — Housing Assistance — Referrals List

[Activity History](#) [Add Referral](#)

Referral Date	Target Date	Referral Source	Assigned To	Outcome Form Date	Outcome Final Status	Status	Actions
11/01/2012	11/16/2012	[DHMH] - DHMH - Devon Snider	Adenike Dobson	N/A		Active	Summary

2.10.22 Create, Save, Edit and Delete Housing Assistance Activity History

From the **Housing Assistance—Activity History** page the user can add new activities by clicking the **Add Activity link** as shown in the figure below.

MFP — Housing Assistance — Activity History

[Back to List](#)

Activity Summary

There are currently no Activities.

[Add Activity](#)



The **Housing Assistance—Activity Sheet** will appear. Enter the **required information**, which will either be *highlighted yellow* or marked with an *asterisk*. After entering the required information the user can click the **Add Activity link** to add additional activities for that date or they can click the **Save button** as shown in the figure below.

MFP — Housing Assistance Activity Sheet

[Back to List](#)

Activity Sheet

— Activity Information

Date of Activity *

Housing Specialist *

Current Status *

Notes: *

(To view more content, re-size the text area by dragging the bottom-right corner.)

— Activity List * Total Duration: 0 Min. Units used: 0

Activity [Delete](#)

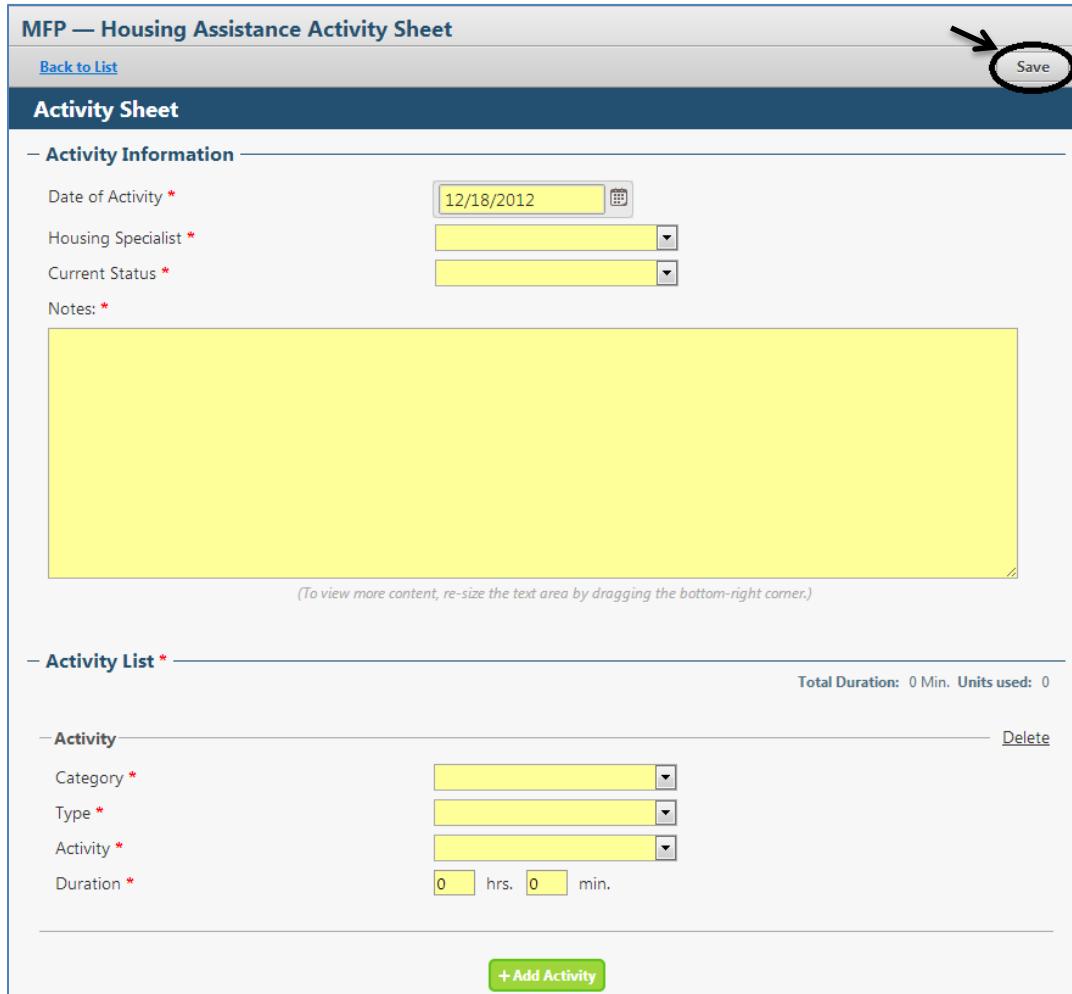
Category *

Type *

Activity *

Duration * hrs. min.

[+ Add Activity](#)



After clicking the Save button the user is taken to the Housing Assistance—Activity History page. Click the **Edit link** to make changes to the Housing Assistance—Activity Sheet as seen below. After making changes click the Save button again and the user will return back to the Housing Assistance—Activity History page.

MFP — Housing Assistance — Activity History

[Back to List](#) [Add Activity](#) [Collapse All](#)

Activity Summary

Total: 133 Min.
Units Used: 8

Activity: 12/18/2012 Current Status: Waiting for Voucher Housing Specialist: Adenike Dobson Total Duration: 133 Min.

Category	Activity	Type	Duration
Clerical Service	Coordination with Case Management Agency	Email	133 Min.

Activity Notes

Notes: test

From the Housing Assistance—Activity History page the user can **Discard an Activity Sheet** by clicking the **Discard link** as seen in the figure below.

MFP — Housing Assistance — Activity History

[Back to List](#) [Add Activity](#) [Collapse All](#)

Activity Summary

Total: 133 Min.
Units Used: 8

Activity: 12/18/2012 Current Status: Waiting for Voucher Housing Specialist: Adenike Dobson Total Duration: 133 Min.

Category	Activity	Type	Duration
Clerical Service	Coordination with Case Management Agency	Email	133 Min.

Activity Notes

Notes: test

2.11 Quality of Life

Navigate to the Quality of Life module by clicking the **Quality of Life tab** as shown in the figure below. This will take you to the **Quality of Life—Summary** page.

Long Term Services and Support

FELnicolas.quirones (On behalf of: Wells, Bill)
Location: The Schaefer Center

[Menu](#) [Account](#)

[Home](#) [Clients](#) [My Lists](#) [Alerts](#) [Assignments](#) [Reports](#) [Client Details](#)

Jonathan Smith
ID: 21190150405110 DOB: 01/11/1950
MFP Eligible: Y (12/18/2012)

Client Summary

MFP Program Menu

- Case Program Summary
- Task List
- Quality Of Life**
- Case Notes

MFP — Quality of Life — Summary Status: Pending Baseline Target Date: 11/27/2012

[Back to Task List](#) [Collapse All](#)

BaseLine Survey [Add](#)

Survey Details

Year One Survey

Survey Details

Year Two Survey

Survey Details

2.11.1 Meeting Requirements to Add Baseline Survey- Anticipated Discharge Date

In order for the Quality of Life module to be available for the user to add surveys, an *MFP Questionnaire* must be “Submitted” in the system for that client. Within that MFP Questionnaire, the **Anticipated Discharge Date** must be ***within the next 30*** days for an MFP Quality of Life survey to be completed as seen in the figure below.

The screenshot shows the LTSSMaryland system interface. On the left, there's a sidebar with links like Home, Clients, My Lists, Alerts, Dashboard, Assignments, Reports, Client Details, Profile, Client Summary, Assessment, POC & LOC, and Additional Forms (with MFP Questionnaire List and Questionnaire Form Details selected). The main content area is titled "MFP — Questionnaire Status: Submitted". It has a section for "Money Follows the Person Questionnaire Form" with a "Questionnaire" section. Inside, it asks if the applicant has resided in a nursing facility for at least 90 continuous days, with radio buttons for Yes or No. Below that is a section for individual movement with four radio button options. A highlighted box contains the "Anticipated Discharge Date: **" field set to "12/27/2012" and a note: "Note: A discharge date within the next 30 days will trigger an MFP Quality of Life survey to be completed." At the bottom, there are fields for "Consent Form Signed: **" (radio buttons Yes or No) and "Consent Form Date: **" (text input "11/26/2012").

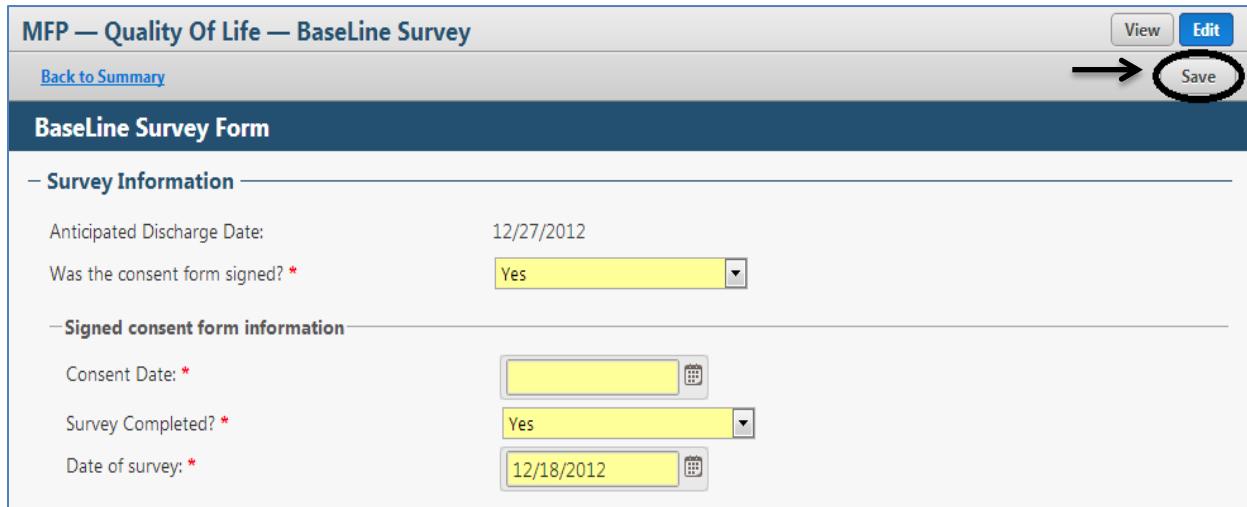
2.11.2 Add, Save and Edit QoL Baseline Survey

From the Quality of Life —Summary page click the **Add link** in the Baseline Survey panel as seen in the figure below.

The screenshot shows the "MFP — Quality of Life — Summary" page. The status is "Pending Baseline" and the target date is "11/27/2012". There's a "BaseLine Survey" section with an "Add" button (circled in red with an arrow pointing to it). Below it are sections for "Year One Survey" and "Year Two Survey", each with a "Survey Details" section. The "Add" button is located in the top right corner of the "BaseLine Survey" panel.

The **Quality of Life—Baseline Survey** form will appear. The form view and required fields on the form will alter based on the actors answers to questions on the Quality of Life—Baseline

Survey. Enter the **required information**, which will either be *highlighted yellow* or marked with an *asterisk*. After completing, or while in progress, the user can click the **Save button** to **Save the Quality of Life—Baseline Survey** as seen below.



MFP — Quality Of Life — BaseLine Survey

View Edit

Back to Summary

BaseLine Survey Form

— Survey Information —

Anticipated Discharge Date: 12/27/2012

Was the consent form signed? * Yes

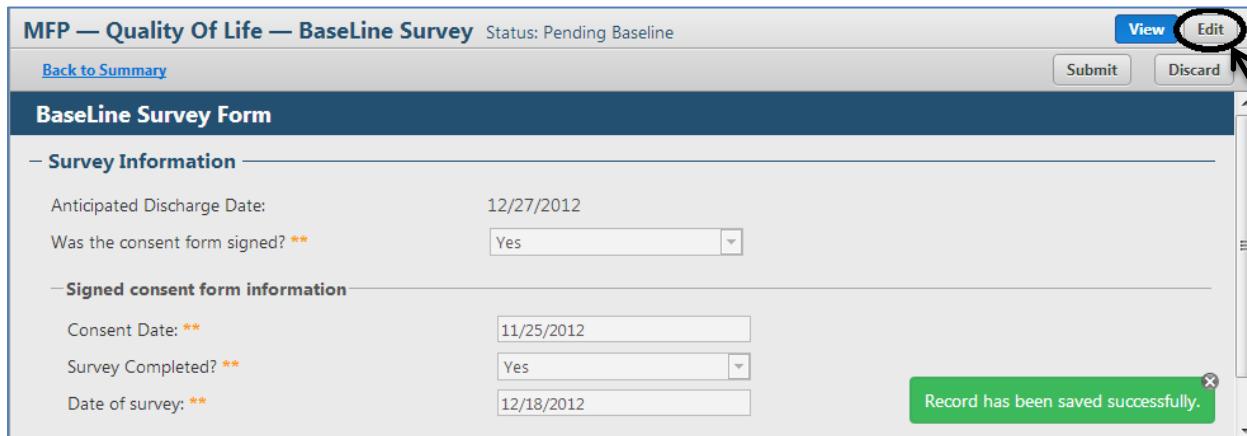
— Signed consent form information —

Consent Date: * [Calendar icon]

Survey Completed? * Yes

Date of survey: * 12/18/2012 [Calendar icon]

After clicking the Save button the user is taken to View-mode. Click the **Edit link** to make changes to the Quality of Life—Baseline Survey as seen below. After making changes click the Save button again and the user will return to View-mode.



MFP — Quality Of Life — BaseLine Survey Status: Pending Baseline

View Edit

Back to Summary

Submit Discard

BaseLine Survey Form

— Survey Information —

Anticipated Discharge Date: 12/27/2012

Was the consent form signed? ** Yes

— Signed consent form information —

Consent Date: ** 11/25/2012

Survey Completed? ** Yes

Date of survey: ** 12/18/2012

Record has been saved successfully.

2.11.3 Quality of Life Status Change to Baseline Survey Pending

After a *Quality of Life- Baseline Survey* is “*In Progress*,” Quality of Life changes to a Status of “**Baseline Survey Pending**” on the **MFP Tasks List** page as seen below.

▲ Quality of Life Survey Summary

– Active Quality of Life Survey Information:

Target Date:	11/27/2012
Status:	Baseline Survey Pending

2.11.4 View, Discard and Submit QoL Baseline Survey

The user can **View the Quality of Life—Baseline Survey** in two ways. The first way was shown above where the user is taken to View-mode after saving the Quality of Life—Baseline Survey. The user can also View the Quality of Life—Baseline Survey by clicking the **View link** on the Quality of Life Survey—Summary page as shown below.

MFP — Quality of Life — Summary Status: Pending Baseline Target Date: 11/27/2012

[Back to Task List](#) Collapse All

▲ BaseLine Survey View Edit

– Survey Details

Survey Completed:	Yes
Anticipated Discharge Date:	12/27/2012
Eligibility Start:	N/A
Consent Form Date:	11/25/2012
Date of survey:	12/18/2012
Status:	In Progress

From View-mode the user can **Discard the Quality of Life—Baseline Survey** by clicking the **Discard button** as seen in the figure below. An “In Progress” or “Submitted” Quality of Life—Baseline can be discarded as long as no Quality of Life—Year One or Quality of Life—Year Two is “In Progress” or “Submitted.”

MFP — Quality Of Life — BaseLine Survey Status: Pending Baseline

[Back to Summary](#) View Edit

BaseLine Survey Form

– Survey Information

Anticipated Discharge Date:	12/27/2012
Was the consent form signed? **	<input type="checkbox"/> Yes

– Signed consent form information

Consent Date: **	11/25/2012
Survey Completed? **	<input type="checkbox"/> Yes
Date of survey: **	12/18/2012

Submit Discard

If the user does not wish to discard, click the **Submit button** to **Submit the Quality of Life—Baseline Survey** as seen in the figure below. Once submitted the Quality of Life—Baseline Survey can no longer be edited.

MFP — Quality Of Life — BaseLine Survey Status: Pending Baseline

Back to Summary

BaseLine Survey Form

— Survey Information —

Anticipated Discharge Date: 12/27/2012

Was the consent form signed? ** Yes

— Signed consent form information —

Consent Date: ** 11/25/2012

Survey Completed? ** Yes

Date of survey: ** 12/18/2012

View Edit Submit Discard

2.11.5 Quality of Life Status Change to Year One Survey Pending

After a *Quality of Life- Baseline Survey* is “Submitted,” Quality of Life changes to a Status of “**Year One Survey Pending**” on the **MFP Tasks List** page as seen in the figure below.

▲ Quality of Life Survey Summary

— Active Quality of Life Survey Information: —

Target Date: N/A

Status: Year One Survey Pending

2.11.6 Add, Save and Edit QoL Year One Survey

From the Quality of Life—Summary page click the **Add link** in the Year One Survey panel as seen in the figure below.

MFP — Quality of Life — Summary Status: Pending Year One Target Date: N/A

[Back to Task List](#) [Collapse All](#)

Baseline Survey [View](#)

Survey Details

Survey Completed:	Yes
Anticipated Discharge Date:	12/27/2012
Eligibility Start:	N/A
Consent Form Date:	11/25/2012
Date of survey:	12/18/2012
Status:	Submitted

Year One Survey [Add](#)

Survey Details

Year Two Survey

Survey Details

The **Quality of Life—Year One Survey** form will appear. The form view and required fields on the form will alter based on the actors answers to questions on the Quality of Life—Baseline Survey. Enter the **required information**, which will either be *highlighted yellow* or marked with an *asterisk*. After completing, or while in progress, the user can click the **Save button** to **Save the Quality of Life—Year One Survey** as seen below.

MFP — Quality Of Life — Year One Survey [View](#) [Edit](#)

[Back to Summary](#)

Year One Survey Form

Survey Information

Baseline Survey:	12/18/2012
Eligibility Start:	N/A
Consent Form:	11/25/2012
Survey Completed? *	Yes
Date of survey: *	12/18/2012 <input type="button" value="Calendar"/>

Type of residence at follow-up survey *

- Home owned by participant
- Home owned by family member
- Apartment leased by participant, not assisted living
- Apartment leased by participant, assisted living
- Group home of no more than 4 people
- Group home of 5 or more people
- Long term care facility

Does participant lives with family members: *

After clicking the Save button the user is taken to View-mode. Click the **Edit link** to make changes to the Quality of Life—Year One Survey as seen below. After making changes click the Save button again and the user will return to View-mode.

MFP — Quality Of Life — Year One Survey Status: Pending Year One

Back to Summary

Submit Discard

Year One Survey Form

— Survey Information —

Baseline Survey:	12/18/2012
Eligibility Start:	N/A
Consent Form:	11/25/2012
Survey Completed? **	Yes
Date of survey: **	12/18/2012

— Type of residence at follow-up survey **

Record has been saved successfully.

2.11.7 View, Discard and Submit QoL Year One Survey

The user can **View the Quality of Life—Year One Survey** in two ways. The first way was shown above where the user is taken to View-mode after saving the Quality of Life—Year One Survey. The user can also **View the Quality of Life—Year One Survey** by clicking the **View link** on the Quality of Life—Summary page as shown below.

▲ Year One Survey → Edit

— Survey Details —

Survey Completed:	Yes
Survey Date:	12/18/2012
Type of residence at follow-up survey:	Home owned by participant
Status:	In Progress

From View-mode the user can **Discard the Quality of Life—Year One Survey** by clicking the **Discard button** as seen in the figure below. An “In Progress” or “Submitted” Quality of Life—Year One Survey can be discarded as long as no Quality of Life—Year Two is “In Progress” or “Submitted.”

MFP — Quality Of Life — Year One Survey Status: Pending Year One

[View](#) [Edit](#) [Submit](#) [Discard](#)

[Back to Summary](#)

Year One Survey Form

— Survey Information —

Baseline Survey:	12/18/2012
Eligibility Start:	N/A
Consent Form:	11/25/2012
Survey Completed? **	Yes
Date of survey: **	12/18/2012

— Type of residence at follow-up survey ** —

If the user does not wish to discard, click the **Submit button** to **Submit the Quality of Life—Year One Survey** as seen in the figure below. Once submitted the Quality of Life—Year One Survey can no longer be edited.

MFP — Quality Of Life — Year One Survey Status: Pending Year One

[View](#) [Edit](#) [Submit](#) [Discard](#)

[Back to Summary](#)

Year One Survey Form

— Survey Information —

Baseline Survey:	12/18/2012
Eligibility Start:	N/A
Consent Form:	11/25/2012
Survey Completed? **	Yes
Date of survey: **	12/18/2012

— Type of residence at follow-up survey ** —

2.11.8 Quality of Life Status Change to Year Two Survey Pending

After a *Quality of Life- Baseline Survey* is “*In Progress*,” Quality of Life changes to a Status of “**Year Two Survey Pending**” on the **MFP Tasks List** page as seen in the figure below.

▲ Quality of Life Survey [Summary](#)

— Active Quality of Life Survey Information: —

Target Date:	N/A
Status:	Year Two Survey Pending

2.11.9 Add, Save and Edit QoL Year Two Survey

From the Quality of Life—Summary page click the **Add link** on the Year Two Survey panel as seen in the figure below.

MFP — Quality of Life — Summary Status: Pending Year Two Target Date: N/A

[Back to Task List](#) [Collapse All](#)

▲ **BaseLine Survey** [View](#)

— **Survey Details**

Survey Completed:	Yes
Anticipated Discharge Date:	12/27/2012
Eligibility Start:	N/A
Consent Form Date:	11/25/2012
Date of survey:	12/18/2012
Status:	Submitted

▲ **Year One Survey** [View](#)

— **Survey Details**

Survey Completed:	Yes
Survey Date:	12/18/2012
Type of residence at follow-up survey:	Home owned by participant
Status:	Submitted

▲ **Year Two Survey** [View](#) [Add](#)

— **Survey Details**



The **Quality of Life—Year Two Survey** form will appear. The form view and required fields on the form will alter based on the actors answers to questions on the Quality of Life—Baseline Survey. Enter the **required information**, which will either be *highlighted yellow* or marked with an *asterisk*. After completing, or while in progress, the user can click the **Save button** to **Save the Quality of Life—Year Two Survey** as seen below.

MFP — Quality Of Life — Year Two Survey

[Back to Summary](#)

Year Two Survey Form

— **Survey Information**

Baseline Survey:	12/18/2012
Eligibility Start:	N/A
Year One:	12/18/2012
Consent Form:	11/25/2012
Survey Completed? *	Yes
Date of survey: *	12/11/2012

— **Type of residence at follow-up survey ***

- Home owned by participant
- Home owned by family member
- Apartment leased by participant, not assisted living
- Apartment leased by participant, assisted living
- Group home of no more than 4 people
- Group home of 5 or more people
- Long term care facility

Does participant lives with family members: * [Yes](#)

— **Save**

After clicking the Save button the user is taken to View-mode. Click the **Edit button** to make changes to the Quality of Life—Year Two Survey as seen below. After making changes click the Save button again and the user will return to View-mode.

MFP — Quality Of Life — Year Two Survey Status: InProgressYearTwoSurvey

[Back to Summary](#) [Submit](#) [Discard](#)

Year Two Survey Form

Survey Information

Baseline Survey:	12/18/2012
Eligibility Start:	N/A
Year One:	12/18/2012
Consent Form:	11/25/2012
Survey Completed? **	Yes
Date of survey:	12/11/2012

— Type of residence at follow-up survey **

Record has been saved successfully.

2.11.10 View, Discard and Submit QoL Year Two Survey

The user can **View the Quality of Life—Year Two Survey** in two ways. The first way was shown above where the user is taken to View-mode after saving the Quality of Life—Year Two Survey. The user can also View the Quality of Life—Year Two Survey by clicking the **View link** on the Quality of Life—Summary page as shown below.

▲ Year Two Survey → [View](#) [Edit](#)

Survey Details

Survey Completed:	Yes
Survey Date:	12/11/2012
Type of residence at follow-up survey:	Home owned by participant
Status:	In Progress

From View-mode the user can **Discard the Quality of Life—Year Two Survey** by clicking the **Discard button** as seen in the figure below. The user can always discard the Quality of Life—Year Two Survey.

MFP — Quality Of Life — Year Two Survey Status: InProgressYearTwoSurvey

[Back to Summary](#) [Submit](#) [Discard](#)

Year Two Survey Form

Survey Information

Baseline Survey:	12/18/2012
Eligibility Start:	N/A
Year One:	12/18/2012
Consent Form:	11/25/2012
Survey Completed? **	Yes
Date of survey:	12/11/2012

— Type of residence at follow-up survey **

If the user does not wish to discard, click the **Submit button** to Submit the Quality of Life—Year Two Survey as seen in the figure below. Once submitted the Quality of Life—Year Two Survey can no longer be edited.

The screenshot shows a web-based survey form titled "MFP — Quality Of Life — Year Two Survey". The status is listed as "InProgressYearTwoSurvey". At the top right are three buttons: "View", "Edit", and "Submit". An arrow points to the "Submit" button, which is circled in red. Below the buttons, there is a "Discard" button. The main content area is titled "Year Two Survey Form" and contains a section for "Survey Information". It includes fields for Baseline Survey (12/18/2012), Eligibility Start (N/A), Year One (12/18/2012), Consent Form (11/25/2012), Survey Completed? (Yes), and Date of survey (12/11/2012). There is also a section for "Type of residence at follow-up survey".

2.11.11 Quality of Life Status Change to Complete

After a *Quality of Life- Year Two Survey* is “Submitted,” Quality of Life changes to a Status saying “**Completed**” on the **MFP Tasks List** page as seen below.

The screenshot shows the "MFP Tasks List" page. A specific task is highlighted, showing its details. The task is titled "Quality of Life Survey" and has a "Summary" link. Under "Active Quality of Life Survey Information", it shows a "Target Date" of "N/A" and a "Status" of "Complete".

2.12 DDA

Navigate to the DDA module by clicking the **DDA tab** in the left hand navigation as shown in the figure below. This will take you to the **DDA—Referral List**.

The screenshot shows the Long Term Services and Support application interface. At the top, it displays the user's name (FEI\nicolas.quinones) and location (DHMH). The main navigation bar includes Home, Clients, My Lists, Alerts, Dashboard, Assignments, Reports, and Client Details. Below this is a sub-navigation bar for the MFP — DDA — Referrals List, featuring columns for Referral Date, Referral Source, Referral Name, Entered by, Status, and Actions. An 'Add Referral' link is located at the top right of this list. On the left, there is a sidebar titled 'MFP Program Menu' containing links for Case Program Summary, Task List, Resident Contact Sheets, Ongoing Peer Support, Options Counseling, Peer Mentoring, Housing Assistance, Quality Of Life, DDA (which has a blue arrow pointing to it), TBI, Flexible Funds, and Case Notes.

2.12.1 Add and Submit DDA Referral

From the DDA—Referral List click the **Add Referral link** to **Add DDA—Referral** for the client as seen in the figure below.

This screenshot shows the 'MFP — DDA — Referrals List' page. It features a header with the title and a search bar. Below is a table with columns for Referral Date, Referral Source, Referral Name, Entered by, Status, and Actions. At the top right of the table, there is an 'Add Referral' link, which is circled with a red arrow.

The **DDA—Referral** will appear. Enter the **required information**, which will either be *highlighted yellow* or marked with an *asterisk*. After completing the user can click the **Submit button** to **Submit the DDA—Referral** as seen below.

This screenshot shows the 'MFP — DDA — New Referral' page. It has a 'Create Referral Form' header and a 'Referral Information' section. The 'Referral Date' field is highlighted in yellow and marked with an asterisk (*). The 'Referral Source' field is also highlighted in yellow and marked with an asterisk (*). The 'Source Name' field is white. At the top right, there is a 'New' button, a 'Cancel' link, and a 'Submit' button, which is circled with a red arrow.

2.12.2 View and Discard DDA Referral

The user can View the DDA—Referral in two ways. The first way was shown above as the user is taken to View-mode after submitting the Referral Form. The user can also navigate to DDA—Summary page and click the ***View link*** to ***View the DDA—Referral***.

MFP — DDA — Referral Summary

[Back to List](#) [Collapse All](#)

Referral

Specialist Assignment Information

Assigned To:	Not Assigned
--------------	--------------

Referral Information

Referral Date:	12/18/2012
Source:	Options Counseling
Entered By:	Boone, Angela
Status:	Pending

From View-mode the user can **Discard the DDA—Referral** by clicking the **Discard button** as seen in the figure below. The user is allowed to Discard a “Pending” DDA Referral.

MFP — DDA — Referral Details Status: Pending

[Back to Summary](#)

Referral Form

Referral Information

Referral Date:	12/18/2012
Referral Source:	Options Counseling
Source Name:	

2.12.3 Assign DDA Specialist to Client

In order to proceed on to adding a DDA Transition Process Form and Outcome for the client in the DDA module, you must **Assign a DDA Specialist** to the client. To assign a DDA Specialist log in as staff with the role of DDA Administrator that has access to the Jurisdiction of the client.

Long Term Services and Support

LTSS Maryland Login

User Name (Test Only)	FENicolas.quinones
On Behalf Of	Rick Mason [ddaspecialist, ddaadministrator]
Agency	DHMH
Location	DHMH - DDA

[Login](#)

Click the **Assignments** tab at the top of the page and navigate to *DDA* under the Assignment section in the left hand navigation to perform **Batch Assignment**. Choose **Unassigned** from the Status dropdown menu and click the **Filter button**. Locate the client you wish to assign a DDA Specialist to and **click the checkbox** next to them to select. Then **choose a DDA Specialist** from the drop down menu at the bottom of the page and click the **Assign button**. The client will now have that DDA Specialist assigned to them and a Transition Process Form and Outcome can now be performed by an authorized user for that client in the DDA module. Note that the DDA Specialist can be reassigned, in both Active and Inactive statuses.

The screenshot shows the 'MFP — DDA — Specialist Assignment' page. On the left, there's a sidebar titled 'Assignment Menu' with 'DDA' selected. The main area has a header 'MFP — DDA — Specialist Assignment'. Below it, a filter dropdown is set to 'Unassigned'. A table lists clients: Jonathan Smith (selected, indicated by a checked checkbox), CATONSVILLE COMMONS, Baltimore, 12/18/2012. At the bottom, a dropdown 'Assign to Specialist:' is set to 'Rick Mason', and an 'Assign' button is highlighted with a black arrow. A small 'View' link is also visible.

2.12.4 Add, Save and Edit DDA Transition Process Form

Navigate to the DDA—Referral List and click the **Summary link** for the referral you wish to create a DDA Transition Form for.

The screenshot shows the 'MFP — DDA — Referrals List' page. It displays a table with columns: Referral Date, Referral Source, Referral Name, Entered by, Status, and Actions. A row shows: 12/18/2012, Options Counseling, Boone, Angela, Pending. The 'Actions' column for this row contains a 'Summary' link, which is circled with a red oval and has a black arrow pointing to it.

From the DDA— Referral Summary page click the **Add link** in the Transition Process panel as seen in the figure below.

MFP — DDA — Referral Summary

[Back to List](#) [Collapse All](#)

▲ Referral

— Specialist Assignment Information

Assigned To:	Rick Mason
--------------	------------

— Referral Information

Referral Date:	12/18/2012	View
Source:	Options Counseling	
Entered By:	Boone, Angela	
Status:	Pending	

▲ Transition Process

— Transition Process Information

There are no Transition Process Form details to display.

[Add](#)

The **DDA Transition Process Form** will appear. Enter the **required information**, which will either be *highlighted yellow* or marked with an *asterisk*. After completing, or while in progress, the user can click the **Save button** to **Save the DDA Transition Process Form** as seen below.

MFP — DDA — Transition Process

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

Transition Process Form

▲ I. Client Information

— General Information

Assigned to:	Rick Mason
Date Assigned:	12/18/2012
Family Mentoring Requested?	<input type="radio"/> Yes <input type="radio"/> No
Waiver Application Initiated?	<input type="radio"/> Yes <input type="radio"/> No

▲ II. MFP Consent

— Signature Details

MFP Consent Signed?	Yes
MFP Consent Signature Date:	11/26/2012

▲ III. Discharge Date

— Discharge Details

Anticipated Discharge Date:	12/27/2012
Actual Discharge Date:	N/A
Reason for delay:	<input type="text"/>

▲ IV. Region Information

— Details

Institution Type: *	<input type="text"/>
---------------------	----------------------

After clicking the Save button the user is taken to View-mode. Click the **Edit button** to make changes to the DDA Transition Process Form as seen below. After making changes click the Save button again and the user will return to View-mode.

The screenshot shows the 'MFP — DDA — Transition Process' view mode. At the top right, there are 'View', 'Edit' (circled in red), 'Discard', and 'Collapse All' buttons. The 'Edit' button has a mouse cursor hovering over it. Below the buttons, the 'Transition Process Form' section is titled 'Transition Process Form'. Under 'I. Client Information', there is a 'General Information' section. It includes fields for 'Assigned to' (Rick Mason), 'Date Assigned' (12/18/2012), 'Family Mentoring Requested?' (radio buttons for Yes and No), and 'Waiver Application Initiated?' (radio buttons for Yes and No). A green success message box at the bottom right says 'Record has been saved successfully.' with a close button.

2.12.5 View and Discard DDA Transition Form

The user can **View the DDA Transition Form** in two ways. The first way was shown above where the user is taken to View-mode after saving the DDA Transition Form. The user can also View the DDA Transition Form by clicking the **View link** on the DDA—Referral Summary page as shown below.

The screenshot shows the 'Transition Process' section of the DDA—Referral Summary page. At the top right, there are 'Edit' and 'View' buttons (the 'View' button is circled in red and has a mouse cursor hovering over it). Below the buttons, the 'Transition Process Information' section is titled 'Transition Process Information'. It lists various fields: 'Assigned to' (Rick Mason), 'Date Assigned' (12/18/2012), 'MFP Consent Form Signed?' (Yes), 'Date signed' (11/26/2012), 'Anticipated Discharge Date' (12/27/2012), 'Actual Discharge Date' (N/A), 'Person Centered Plan Development' (N/A), and 'Quality of Life Survey?' (Yes).

From View-mode the user can **Discard the DDA Transition Process Form** by clicking the **Discard button** as seen in the figure below. An “In Progress” or “Submitted” DDA—Transition Form can be discarded as long as no DDA—Outcome is “In Progress” or “Submitted.”

MFP — DDA — Transition Process

Back to Summary

View Edit

Discard

Collapse All

Transition Process Form

I. Client Information

General Information

Assigned to:	Rick Mason
Date Assigned:	12/18/2012
Family Mentoring Requested?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Waiver Application Initiated?	<input type="radio"/> Yes <input checked="" type="radio"/> No

2.12.6 DDA Status Change to Active

After a *DDA Transition Process Form* is “*In Progress*,” DDA changes to an **Active status** on the **MFP Tasks List** page as seen below.

▲ DDA

Referral List

— History:

Pending Referral:	0
Active Referral:	1
Inactive Referral:	0

— Active DDA Referral Information:

Referral Date:	12/18/2012
Source:	Options Counseling
Entered By:	Boone, Angela
Status:	Active

2.12.7 Add, Save and Edit DDA Outcome

From the DDA—Summary page click the **Add Outcome link** as seen in the figure below.

▲ DDA Outcome

→ Add Outcome

— DDA Outcome Information

There are no DDA Outcome Process Form details to display.

The **DDA—Outcome** form will appear. Enter the **required information**, which will either be *highlighted yellow* or marked with an *asterisk*. After completing, or while in progress, click the **Save button** to **Save the DDA—Outcome** as seen below.

MFP — DDA — Outcome

[Cancel](#)

Outcome Form

— DDA Outcome Information —

Date MFP transition process ended: *

Did the individual successfully transition as an MFP participant? * Yes No

Participant lives with family members? Yes No

Did this individual receive a housing supplement during the reporting period? Yes No

New **Save**

After clicking the Save button the user is taken to View-mode. Click the **Edit button** to make changes to the DDA—Outcome as seen below. After making changes click the Save button again and the user will return to View-mode.

MFP — DDA — Outcome Details

[Back to Summary](#)

Outcome Form

— DDA Outcome Information —

Date MFP transition process ended: **

Did the individual successfully transition as an MFP participant? ** Yes No

View **Edit** **Submit** **Discard**

Record has been saved successfully.

2.12.8 View, Discard and Submit DDA Outcome

The user can **View the DDA—Outcome** in two ways. The first way was shown above where the user is taken to View-mode after saving the DDA—Outcome. The user can also View the DDA—Outcome by clicking the **View link** on the DDA—Summary page as seen below.

▲ Outcome

DDA Outcome

Date MFP transition process ended: 11/25/2012
Transitioned as MFP participant? Yes
Actual transition date: 12/12/2012
Participant lives with family members? No
Received housing supplement? No
Status: In Progress

Edit **View**

From View-mode the user can **Discard the DDA—Outcome** by clicking the **Discard button** as seen in the figure below. The user can discard an “In Progress” or “Submitted” DDA—Outcome.

MFP — DDA — Outcome Details

Back to Summary

View Edit

Submit Discard

Outcome Form

— DDA Outcome Information —

Date MFP transition process ended: ** 11/25/2012

Did the individual successfully transition as an MFP participant? ** Yes No

If the user does not wish to discard, click the **Submit button** to **Submit the DDA—Outcome** as seen in the figure below. Once submitted the DDA—Outcome can no longer be edited.

MFP — DDA — Outcome Details

Back to Summary

View Edit

Submit Discard

Outcome Form

— DDA Outcome Information —

Date MFP transition process ended: ** 11/25/2012

Did the individual successfully transition as an MFP participant? ** Yes No

2.12.9 DDA Status Change to Inactive

After a *DDA—Outcome* is “Submitted,” DDA changes to an **Inactive status** on the **MFP Tasks List** page as seen below.

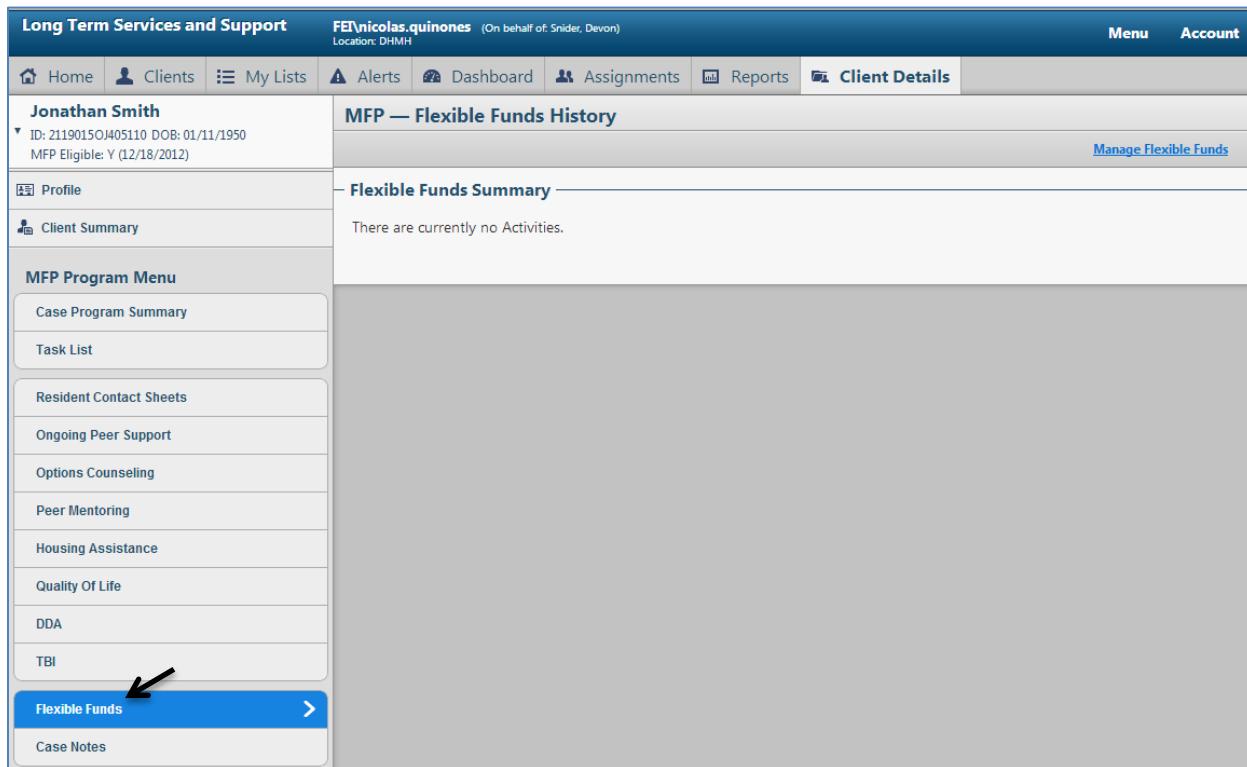
▲ DDA Referral List

— History: — Active DDA Referral Information: —

Pending Referral:	0	No active DDA Referral information to display.
Active Referral:	0	
Inactive Referral:	1	

2.13 Flexible Funds

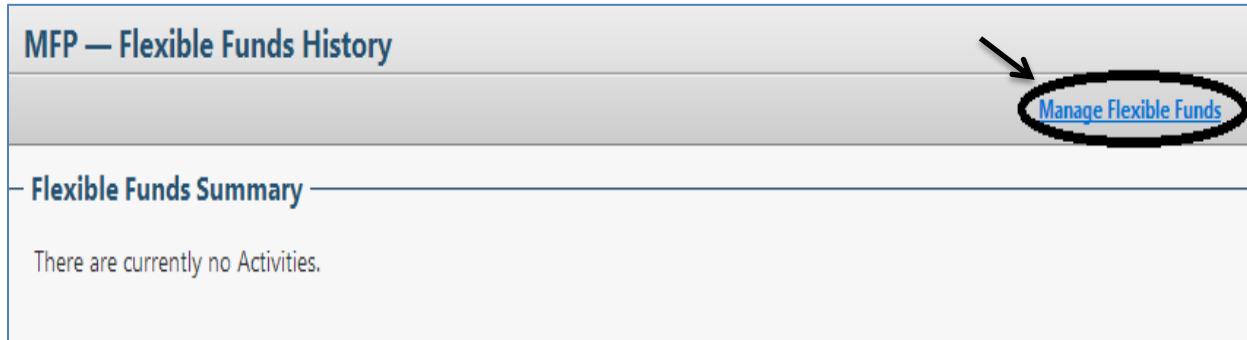
Navigate to the Flexible Funds module by clicking the **Flexible Funds tab** as shown in the figure below. This will take you to the **Flexible Funds—History List**.



The screenshot shows the LTSSMaryland system interface. At the top, there's a header bar with 'Long Term Services and Support' and 'FEI\nicolas.quinones (On behalf of: Snider, Devon) Location: DHMH'. On the right of the header are 'Menu' and 'Account' buttons. Below the header is a navigation bar with links: Home, Clients, My Lists, Alerts, Dashboard, Assignments, Reports, and Client Details. The main content area is titled 'MFP — Flexible Funds History'. It contains a sub-section titled 'Flexible Funds Summary' with the message 'There are currently no Activities.' To the left of the main content is a sidebar titled 'MFP Program Menu' containing links for Case Program Summary, Task List, Resident Contact Sheets, Ongoing Peer Support, Options Counseling, Peer Mentoring, Housing Assistance, Quality Of Life, DDA, TBI, and Flexible Funds. The 'Flexible Funds' link is highlighted with a blue background and a black arrow pointing to it from below.

2.13.1 Flexible Funds History and Manage Flexible Funds

The Flexible Funds—History page shows the user an overview of the Flexible Funds for that specific client. Click the **Manage Flexible Funds** link to go to the Manage Flexible Funds page as seen in the figure below.



The screenshot shows the 'MFP — Flexible Funds History' page. At the top right, there's a link labeled 'Manage Flexible Funds' which is circled with a blue oval and has a black arrow pointing to it from the bottom right. Below this, there's a section titled 'Flexible Funds Summary' with the message 'There are currently no Activities.'

2.13.2 Add, Edit and Discard Flexible Funds

From the **Manage Flexible Funds** page the user can enter the required information, which will either be *highlighted yellow* or marked with an *asterisk*. Click the **Add Funds button** to add the entry into the Flexible Funds History.

MFP — Manage Flexible Funds

[Back to List](#)

Flexible Funds Form

— Flexible Funds Summary —

Total: \$100.00

— Flexible Funds Details —

Category *

Note: Items within the Category list denoted with a dagger (+) indicate items covered if waiver transition funds have been exhausted.

Date of Expenditure *

Amount (\$) *

Description *

— MFP Flexible Funds —

Date of Expenditure	Amount	Category	Description	Status	Action
12/18/2012	\$100.00	Accessibility Equipment +	test	Submitted	Edit Discard

After clicking the Add Flexible Funds button the Manage Flexible Funds page is updated. Click the **Edit link** to make changes to a Flexible Fund entry as seen below.

— MFP Flexible Funds —

Date of Expenditure	Amount	Category	Description	Status	Action
12/18/2012	\$100.00	Accessibility Equipment +	test	Submitted	 Edit Discard

After making changes click the *Save & Close button* and the user will return to the Manage Flexible Funds page.

MFP — Manage Flexible Funds

[Back to List](#)

Flexible Funds Form

— Flexible Funds Summary —

Edit

*Items covered if waiver transition funds have been exhausted.

— Flexible Funds Summary —

Total: \$100.00

— Flexible Funds Details —

Category * Accessibility Equipment +
Note: Items within the Category list denoted with a dagger (†) indicate items covered if waiver transition funds have been exhausted.

Date of Expenditure * 12/18/2012

Amount (\$) * 100

Description * test

→ **Save & Close** **Cancel**

From the manage Flexible Funds page the user can **Discard a Flexible Funds entry** by clicking the ***Discard link*** as seen in the figure below. The user can discard a Flexible Fund entry at any time.

— MFP Flexible Funds —

Date of Expenditure	Amount	Category	Description	Status	Action
12/18/2012	\$100.00	Accessibility Equipment +	test	Submitted	→ Edit Discard

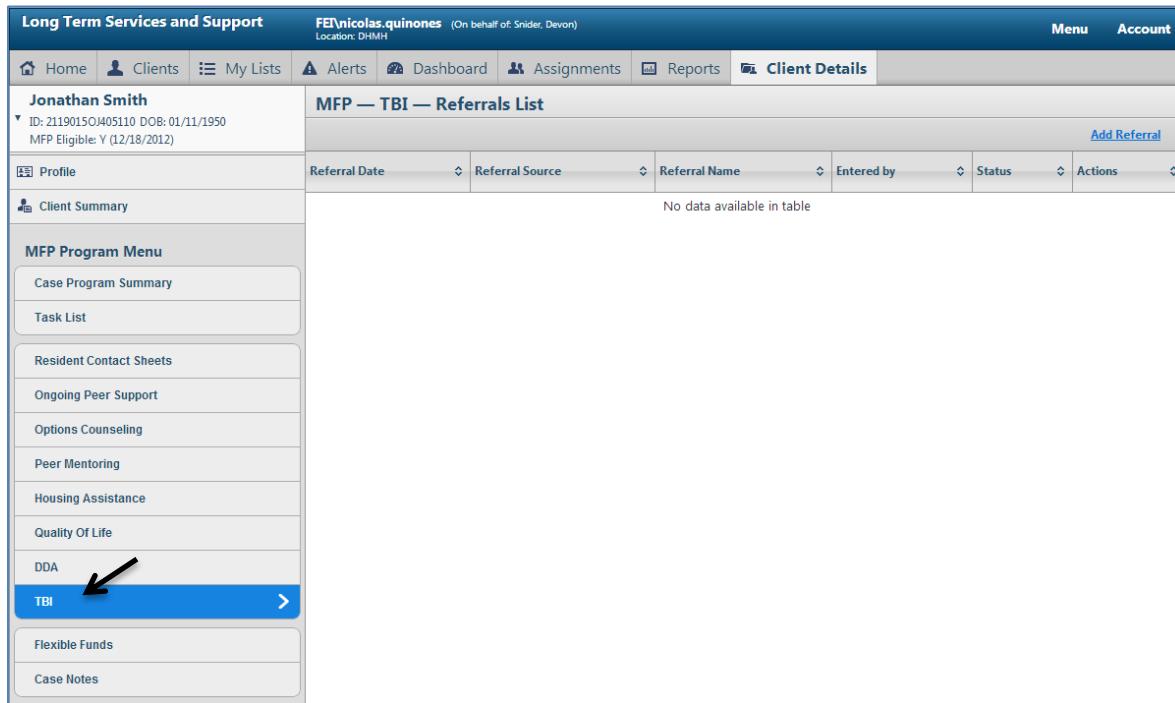
2.13.3 Updated Flexible Funds History

After adding Flexible Funds to the client under the Manage Flexible Funds page, navigate back to the Flexible Funds History page to see an updated overview of the Flexible Funds for that specific client as seen below.

MFP — Flexible Funds History					
Manage Flexible Funds					
Flexible Funds Summary					
Note: Items within the Category list denoted with a dagger (+) indicate items covered if waiver transition funds have been exhausted.					
Total:	\$100.00				
MFP Flexible Funds					
Date of Expenditure	Amount	Category	Description	Status	
12/18/2012	\$100.00	Accessibility Equipment +	test	Submitted	

2.14 TBI

Navigate to the TBI module by clicking the **TBI tab** as shown in the figure below. This will take you to the **TBI—Referral List**.



The screenshot shows the 'Long Term Services and Support' application interface. At the top, it displays the user information: FEI\nicolas.quinones (On behalf of: Snider, Devon) and Location: DHMH. On the right, there are 'Menu' and 'Account' links. The main navigation bar includes links for Home, Clients, My Lists, Alerts, Dashboard, Assignments, Reports, Client Details, Profile, and Client Summary. The 'Client Details' link is currently active, indicated by a blue background. On the left, a sidebar menu titled 'MFP Program Menu' lists various services: Case Program Summary, Task List, Resident Contact Sheets, Ongoing Peer Support, Options Counseling, Peer Mentoring, Housing Assistance, Quality Of Life, DDA, TBI (which has a blue arrow pointing to it), Flexible Funds, and Case Notes. The 'TBI' link is highlighted with a blue background. The main content area is titled 'MFP — TBI — Referrals List'. It features a header with columns: Referral Date, Referral Source, Referral Name, Entered by, Status, and Actions. Below the header, a message says 'No data available in table'. There is also a 'Add Referral' link at the top right of the list area.

2.14.1 Add, Submit and View TBI Referral

From the TBI—Referral List click the **Add Referral link** to **Add TBI—Referral** for the client as seen in the figure below.

MFP — TBI — Referrals List

Referral Date	Referral Source	Referral Name	Entered by	Status	Actions
No data available in table					

[Add Referral](#)

The **TBI—Referral** will appear. Enter the **required information**, which will either be *highlighted yellow* or marked with an *asterisk*. After completing the user can click the **Submit button** to **Submit the TBI—Referral** as seen below.

MFP — TBI — New Referral

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

Referral Form

— Referral Information —

Referral Source: *

Source Name:

[Submit](#)

The user can View the TBI—Referral in two ways. The first way was shown above as the user is taken to View-mode after submitting the Referral Form. The user can also navigate to TBI—Referral Summary page and click the **View link** to **View the TBI—Referral**.

MFP — TBI — Referral Summary

[Back to List](#) [Collapse All](#)

▲ Referral [View](#)

— Referral Information —

Referral Date:	12/18/2012
Source:	Self
Entered By:	Snider, Devon
Status:	Active

2.14.2 Add, Save and Edit TBI Outcome Process Form

From the TBI— Referral Summary page click the **Add link** as seen in the figure below. This will only be possible if the TBI Referral is in an *Active status*.

MFP — TBI — Referral Summary

[Back to List](#) [Collapse All](#)

Referral [View](#)

Referral Information

Referral Date:	12/18/2012
Source:	Self
Entered By:	Snider, Devon
Status:	Active

TBI Outcome [Add](#)

TBI Outcome Information

There are no TBI Outcome Process Form details to display.

The **TBI—Outcome Form** will appear. Enter the **required information**, which will either be *highlighted yellow* or marked with an *asterisk*. After completing, or while in progress, the user can click the **Save button** to **Save the TBI—Outcome Form** as seen below.

MFP — TBI — Outcome [New](#)

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

TBI Outcome Form

TBI Outcome Information

Date MFP transition process ended: *

Did the individual successfully transition as an MFP participant? * Yes No

Participant lives with family members? Yes No

Did this individual receive a housing supplement during the reporting period? Yes No

After clicking the **Save button** the user is taken to View-mode. Click the **Edit link** to make changes to the TBI—Outcome Form as seen below. After making changes click the **Save button** again and the user will return to View-mode.

MFP — TBI — Outcome Details [View](#)  [Edit](#)

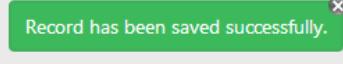
[Back to Summary](#) [Submit](#) [Discard](#)

TBI Outcome Form

TBI Outcome Information

Date MFP transition process ended: **

Did the individual successfully transition as an MFP participant? ** Yes No

 Record has been saved successfully.

2.14.3 View, Discard and Submit TBI Outcome Process Form

The user can **View the TBI—Outcome Form** in two ways. The first way was shown above where the user is taken to View-mode after saving the TBI—Outcome Form. The user can also View the TBI—Outcome Form by clicking the ***View link*** on the TBI—Referral Summary page as shown below.

A screenshot of a web-based form titled "TBI Outcome". At the top right are "Edit" and "View" buttons, with "View" circled in red and an arrow pointing to it. Below this is a section titled "TBI Outcome Information" containing the following data:

Date MFP transition process ended:	12/03/2012
Did the individual successfully transition as an MFP participant?	Yes
Actual transition date:	12/12/2012
Participant lives with family members?	No
Did this individual receive a housing supplement during the reporting period?	No
Status:	In Progress

From View-mode the user can **Discard the TBI—Outcome Form** by clicking the ***Discard button*** as seen in the figure below. The user can discard an “In Progress” or “Submitted” TBI—Outcome Form.

A screenshot of a web-based form titled "MFP — TBI — Outcome Details". At the top right are "View", "Edit", "Submit", and "Discard" buttons, with "Discard" circled in red and an arrow pointing to it. Below this is a section titled "TBI Outcome Form" containing the following data:

Date MFP transition process ended: **	12/03/2012
Did the individual successfully transition as an MFP participant? **	<input checked="" type="radio"/> Yes <input type="radio"/> No

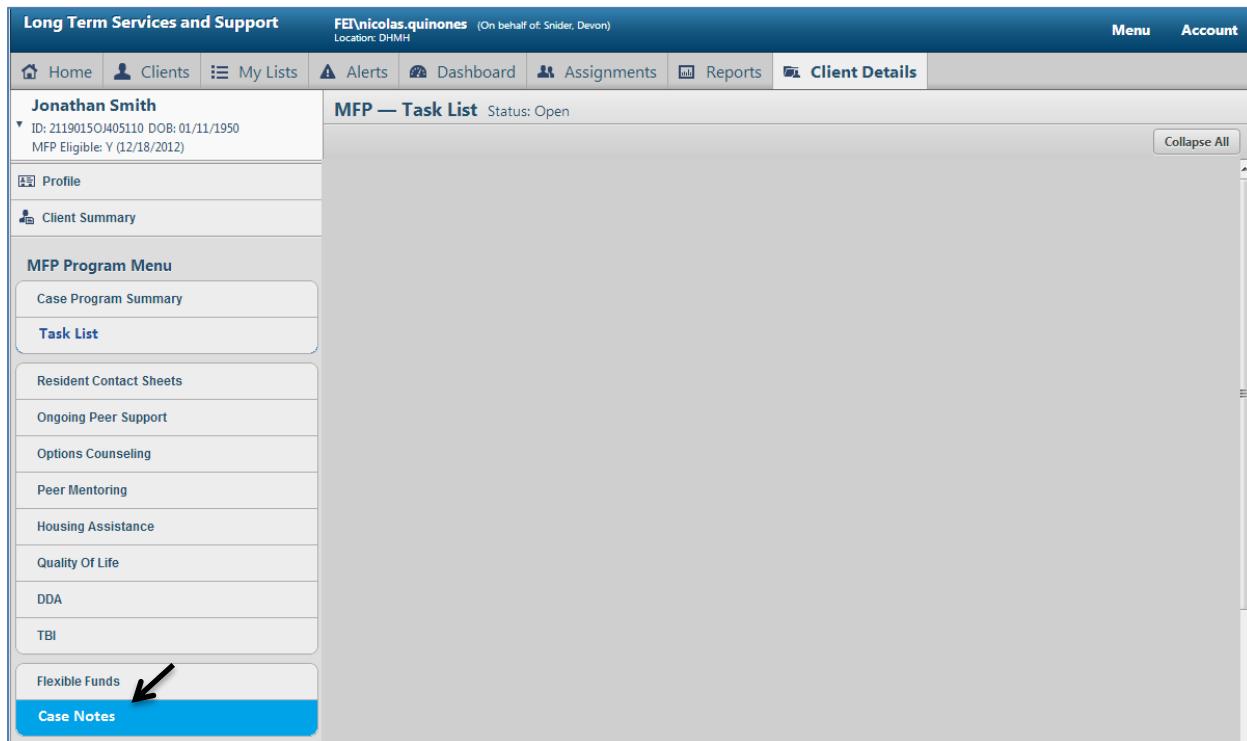
If the user does not wish to discard, click the ***Submit button*** to **Submit the TBI—Outcome Form** as seen in the figure below. Once submitted the TBI—Outcome Form can no longer be edited.

A screenshot of a web-based form titled "MFP — TBI — Outcome Details". At the top right are "View", "Edit", "Submit", and "Discard" buttons, with "Submit" circled in red and an arrow pointing to it. Below this is a section titled "TBI Outcome Form" containing the following data:

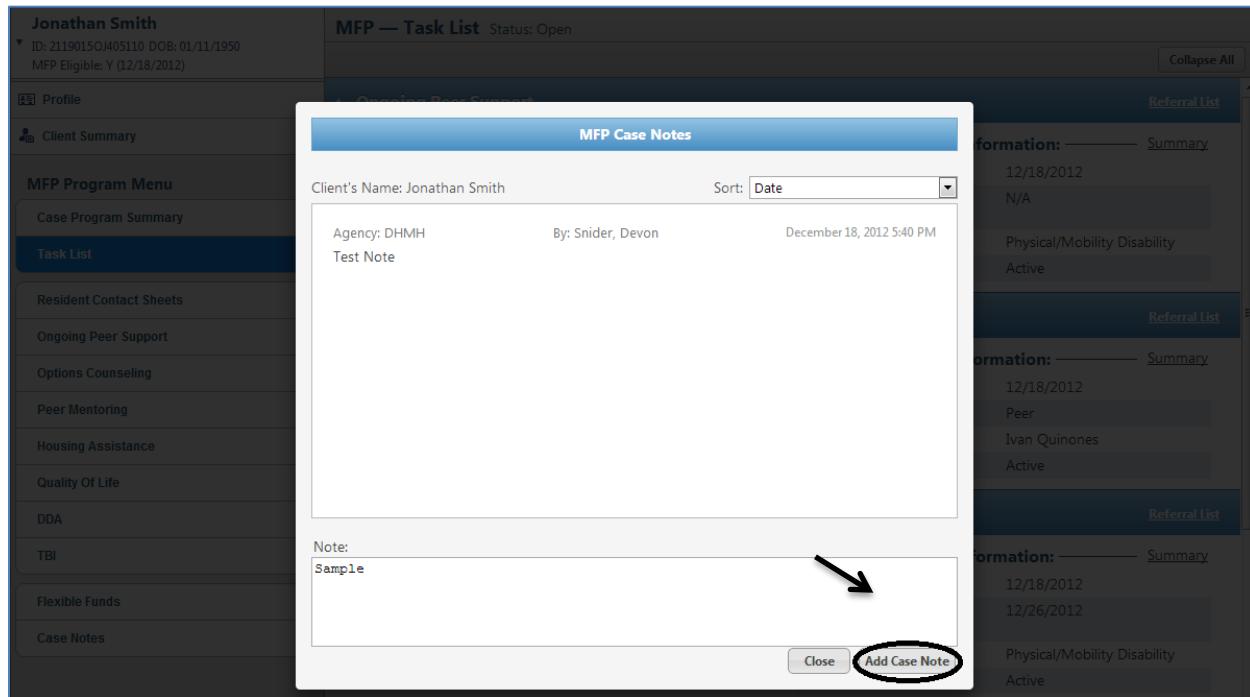
Date MFP transition process ended: **	12/03/2012
Did the individual successfully transition as an MFP participant? **	<input checked="" type="radio"/> Yes <input type="radio"/> No

2.15 Case Notes

Navigate to Case Notes by clicking the **Case Notes tab** as shown in the figure below. This will bring up the **MFP Case Notes** pop-up window.



From the MFP Case Notes pop-up window, enter a note and after completing click the **Add Case Note button**. The note will be stored in the list and the Agency, actor and date the Note was added will be stored in relation to that note.



2.16 MFP Program Summary

Navigate to the MFP Program Summary page by clicking the ***Case Program Summary tab*** in the left hand navigation as shown in the figure below. This will take you to the ***MFP—Case Program Summary*** page. The Program Summary page displays information specific to the case program.