
Waiver Programs 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

2.1 Add Program to the Client (ICS, LAH, WOA)

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 LAH 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.

Client ID	Last Name	First Name	Date Of Birth	Jurisdiction	Facility	SSN #	Current MA #	Primary Phone #	Actions
104985AP066121	Casarotto	Patricia	10/24/1968	Baltimore	ALICE MANOR	***-**-6589	56415641250		Client Summary

2.1.2 Add LAH, ICS, or WOA Program to Client

To add a program to a specific client, you must first be logged in as a permitted user. The following users have adequate permissions: DHMH Admin...

1. Log in as the permitted user
2. Search for client under *Clients* tab
3. Click **Client Summary** for client
4. Click Add Program

5. Complete the Create Case Program form, click **Save & Close**

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

2.2 Program Tasks List (ICS, LAH, WOA)

The LAH, ICS, or WOA Tasks List gives the user a snapshot of where the client is in the process of each sub-module in the Program. By default, when a client is added to the Program all of the listed modules will be in an 'Inactive' state. Modules include: *Initial Screening, Referral, Application, Assessment & Plan of Care, Level of Care, Plan of Service/Plan of Care, Assessment Packet, ATP, Financial and Overall Decision, Appeals & Dispositions, Redetermination Due Dates*. Each module displays in accordance to user permissions and rights. Refer to the figure below to see the default display of the LAH 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.

1. Log in as the permitted user
2. Search for client under *Clients* tab
3. Click **Client Summary** for client
4. Click **Go to Tasks** on the program panel

LAH — Task List Status: Open

Initial Screening

Initial Screening History

- In Progress: 0
- Active: 0
- Inactive: 0

Active Initial Screening

No active Initial Screening.

Referral

Referral History

- In Progress: 0
- Active: 0
- Inactive: 0

Active Referral

No active Referral information to display.

Application

Initial Meeting Information

Freedom of Choice History

- In Progress: 0
- Active: 0
- Inactive: 0

Active Freedom of Choice Form

No active Freedom of Choice information to display.

Narration History

- In Progress: 0
- Active: 0
- Inactive: 0

Active Narration Form

No active Narration information to display.

Documentation Reminder

There is no documentation reminder to display.

Application Packet Information

There is no Application Packet information to display.

2.3 Assign LAHWU Participant Specialist (ICS, LAH)

To assign an LAHWU Participant Specialist, the client must have an LAH/ICS program created (Refer to section “Adding Program to Client”).

1. Log in as permitted user
2. Click the *Assignments* tab
3. Click **LAHWU** menu button
4. Select client from list
5. Select Participant Specialist from dropdown list
6. Click **Assign**

Assignment Menu

- LAH
- LAHWU**
- ICS
- LAMIU

LAH — LAHWU — Participant Specialist Assignment

Filter by Status: **Unassigned**

First Name	Last Name	Facility	County	Age	Assigned To	Actions
Patricia	Casarotto	ALICE MANOR	Baltimore	44		View

Assign to Participant Specialist: **Patricia Casarotto** **Assign**

2.4 Assign AAA Case Manager Participant Specialist (WOA)

To assign an AAA Case Manager, the client must have a WOA program created (Refer to section “Adding Program to Client”).

1. Log in as permitted user

2. Click the *Assignments* tab
3. Click **AAA** menu button
4. Select client from list
5. Select AAA Case Manager from dropdown
6. Click **Assign**

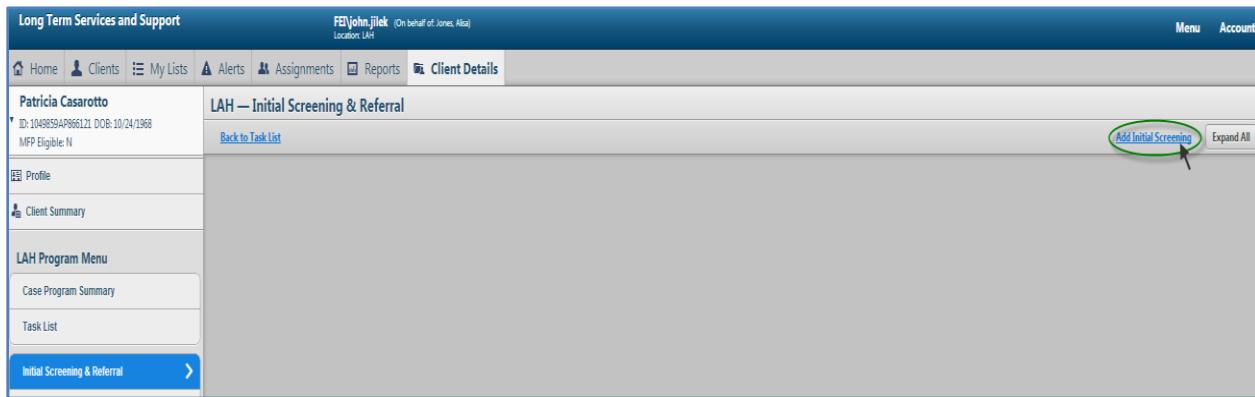
The screenshot shows the LTSS software interface. The top navigation bar includes links for Home, Clients, My Lists, Alerts, Dashboard, Assignments, and Reports. The user is logged in as FENjohn.jilek (On behalf of Boone, Angels). The main content area is titled 'WOA — AAA — Case Manager Assignment'. A sidebar on the left lists 'Assignment Menu' items: MFP, Options Counseling, WOA, and AAA (which is selected). The main table has columns for First Name, Last Name, Facility, County, Age, Assigned To, and Actions. One row is visible: Patricia Casarotto, ALICE MANOR, Baltimore, 44, assigned to AAA. At the bottom, there is a 'Filter by Status' dropdown set to 'Unassigned' and a circled 'Assign' button.

2.5 Initial Screening (ICS, LAH, WOA)

2.5.1 Add Initial Screening

To add an Initial Screening to the selected client, you must log in as the permitted user. NOTE: This form is optional for WOA.

1. Log in as the permitted user
2. Search for client under *Clients* tab
3. Click **Client Summary** for client
4. Click **Go to Task** link for select program
5. Click **Initial Screening and Referral** left menu button OR click **Summary** from Task List
6. Click Add Initial Screening



2.5.2 “Save” Initial Screening

Click **Save** after completing the form. This will save all selections and entries on the form and direct the user to view mode.

The screenshot shows the 'Initial Screening Form' dialog box. The 'Screening' section contains fields for 'Initial Contact Date' (12/19/2012) and 'Type of Applicant' (Nursing Facility). The 'Applicant Information' section includes questions about current residence in a NF, NF residency for 30 days, LTC MA for 30 days, and LTC MA confirmation date (12/19/2012). The 'Housing Information' section shows 'Housing Needed?' with 'No' selected. The 'Save' button is highlighted with a green oval in the top right corner of the dialog.

2.5.3 “Submit” Initial Screening

Click **Submit** to complete the form process. This will save all previous selections and entries and direct the user to view mode. Prior to submitting, the user is permitted to toggle between “View” and “Edit”

to commit and save changes.

The screenshot shows the 'Initial Screening & Referral' section of the LTSSMaryland application. The 'Initial Screening Form' is open, containing sections for 'Screening', 'Applicant Information', and 'Housing Information'. The 'Submit' button at the top right of the form is circled in green.

2.5.4 “Discard” Initial Screening

The user is permitted to discard a form that is ‘In Progress’.

The screenshot shows the 'Initial Screening & Referral' section of the LTSSMaryland application. The 'Initial Screening Form' is open, containing sections for 'Screening', 'Applicant Information', and 'Housing Information'. The 'Discard' button at the top right of the form is circled in green.

2.5.5 Initial Screening List View

The user can view a list of Initial Screenings and the status of each ('Submitted', 'In Progress', or 'Discarded')

The screenshot shows the 'Initial Screening & Referral' section of the LTSSMaryland application. The 'Initial Screenings' list is displayed, showing three entries: one submitted (status: Submitted), one discarded (status: Discarded (made a mistake)), and one in progress (status: In Progress). The 'View' and 'Edit' buttons are visible next to each entry.

2.6 Referral (ICS, LAH)

2.6.1 Add Referral

To add a referral, you must have an Initial Screening with a ‘Submitted’ status. NOTE: Referral is for LAH/ICS only.

1. From the Initial Screening List, click **Summary** link
2. Expand the ‘Submitted’ Initial Screening panel
3. Click Add Referral

The screenshot shows the 'Initial Screening & Referral' section of the LTSSMaryland application. On the left, there's a sidebar with various menu items like Home, Clients, Profile, Client Summary, LAH Program Menu, Case Program Summary, Task List, and Initial Screening & Referral (which is currently selected). The main area displays a list of 'Initial Screenings'. One entry is expanded, showing details such as 'Initial Contact Date: 12/19/2012', 'Type of Applicant: Nursing Facility', and 'Created By: Jones, Alisa'. In the top right corner of this expanded panel, there is a green highlighted button labeled 'Add Referral'.

2.6.2 Save Referral

Click **Save** after completing the form. This will save all selections and entries on the form and direct the user to view mode.

The screenshot shows the 'New Referral Form' dialog box. It contains two sections: 'Referral Information' and 'Alternate contact information'. Under 'Referral Information', there are fields for 'Date Referral Submitted' (set to 12/19/2012), 'Referred By' (set to 'Family'), and 'Referral Comments'. Under 'Alternate contact information', there are fields for 'Contact Name' (set to 'John Johnson'), 'Street Address 1' (set to '123 Main St'), 'City' (set to 'Owings Mills'), 'State' (set to 'Maryland'), 'Zip Code' (set to '21117'), and 'Phone Number' (set to '3026706124'). In the top right corner of the dialog box, there is a green highlighted button labeled 'Save'.

2.6.3 Submit Referral

Click **Submit** to complete the form process. This will save all previous selections and entries and direct the user to view mode. Prior to submitting, the user is permitted to toggle between “View” and “Edit” to commit and save changes.

The screenshot shows the 'Referral Form' page within the LTSSMaryland application. The left sidebar contains navigation links for Profile, Client Summary, LAH Program Menu, Initial Screening & Referral (with 'Referral Form Details' selected), Application, Assessment & POC, Level of Care, Plan of Service/Plan of Care, Assessment Packet, ATP, Financial & Overall Decision, Appeals & Dispositions, and Transition Funds. The main content area displays the 'LAH — Initial Screening & Referral — Referral Status: In Progress' form. The 'Referral Form' section includes fields for Date Referral Submitted (12/19/2012), Referred By (Family), Referral Comments (Complete the referral process), and Referral Entered By (Patterson, Kevin). Below this is the 'Alternate contact information' section with fields for Contact Name (John Johnson), Street Address 1 (123 Main St), Street Address 2, City (Owings Mills), State (Maryland), Zip Code (21117), and Phone Number (3028706124). At the top right of the form are 'View', 'Edit', 'Back to List', 'Submit' (circled in green), and 'Discard' buttons.

2.6.4 Discard Referral

The user is permitted to discard a form that is ‘In Progress’ or ‘Submitted’.

This screenshot is identical to the one above, showing the 'Referral Form' page. The only difference is that the 'Discard' button at the top right of the form is highlighted with a green circle, indicating it is the focus of this step in the process.

2.6.5 Referral List View

The user can view a list of Referrals and the status of each ('Submitted', 'In Progress', or 'Discarded')

Created Date	Created By	Last Modified	Referred By	Date Referral Submitted	Status	Actions
12/19/2012	Patterson Kevin	12/19/2012	Legal Aid	12/19/2012	In Progress	View
12/19/2012	Patterson Kevin	12/19/2012	Family	12/19/2012	Submitted	View
12/19/2012	Patterson Kevin	12/19/2012	Family	12/19/2012	Discarded (made a mistake)	View

2.6.6 Acknowledge Referral

To Acknowledge a referral, you must be logged in as the assigned case manager. Refer to section "Assign Case Manager"

1. Log in as the permitted user
2. Search for client under *Clients* tab
3. Click **Client Summary** for client
4. Click **Go to Tasks** link for select program
5. Click **Referral** menu button OR click **Summary** from Task List
6. Click **View** link for Active Referral
7. Click Acknowledge

2.7 Assign TCC Case Manager (ICS, LAH)

To assign a TCC Case Manager, the client must have a ‘Submitted’ Referral (Refer to section “Referral”).

1. Log in as permitted user
2. Click the *Assignments* tab
3. Click **TCC** menu button
4. Select client from list
5. Select TCC Case Manager from dropdown list
6. Click Assign

The screenshot shows the 'LAH — TCC — Case Manager Assignment' screen. On the left, there's an 'Assignment Menu' with 'LAH' selected and 'TCC' highlighted. The main area displays a table with one row for a client named Patricia Casarotto, aged 44, assigned to ALICE MANOR in Baltimore. At the bottom of the table row, there's a button labeled 'Assign' with a green circle around it.

2.8 Application Packet (ICS, LAH, WOA)

2.8.1 “Add” Initial Meeting Date

To add an Initial Meeting Date for Application, you must log in as the permitted user.

1. Log in as the permitted user
2. Search for client under *Clients* tab
3. Click **Client Summary** for client
4. Click **Go to Tasks** link for select program
5. Click **Application** menu button OR click **Summary** from Task List
6. Click **Add** (from Application menu) OR **Details** (from Task List)

The screenshot shows the LTSSMaryland system's Client Details page for a client named Patricia Casarotto. The 'Application' menu is currently selected. In the 'Initial Meeting' section, there is a message stating 'There is no Initial Meeting information to display.' Below it, the 'Freedom of Choice Forms' section is visible, featuring a table header with columns for 'Created Date', 'Due Date', 'Status', 'Signature Status', and 'Actions'. An 'Add' button is located at the top right of this section, circled in green.

2.8.2 “Submit” Initial Meeting Date

Click **Submit** to complete the form process. This will save all previous selections and entries and direct the user to view mode.

The screenshot shows a modal dialog titled 'LAH — Application — Initial Meeting' with a 'Cancel' button. Inside, a sub-dialog titled 'Initial Meeting Form' contains a section for 'Initial Meeting Date' with a red asterisk. A date input field shows '12/19/2012'. At the bottom right of this sub-dialog is a green 'Submit' button, which is circled in green.

2.8.3 “Add” Freedom of Choice

To add a Freedom of Choice Form for Application, an Initial Meeting Date must be complete and you must log in as the permitted user.

1. Log in as the permitted user
2. Search for client under *Clients* tab
3. Click **Client Summary** for client
4. Click **Go to Tasks** link for select program
5. Click **Application** menu button OR click **Summary** from Task List
6. Click **Add** (from Application menu)

The screenshot shows the 'LAH — Application' page. On the left, there's a sidebar with various menu items like 'Profile', 'Client Summary', 'LAH Program Menu', and 'Application'. Under 'Application', 'New Freedom of Choice' is selected. The main content area shows a table for 'Freedom of Choice Forms' with columns for 'Created Date', 'Due Date', 'Status', 'Signature Status', and 'Actions'. A green circle highlights the 'Add' button at the top right of this table. Below this, there are sections for 'Narration Forms' and 'Documentation Reminder', both of which show 'No data available in table'.

2.8.4 “Save” Freedom of Choice Form

Click **Save** after completing the form. This will save all selections and entries on the form and direct the user to view mode.

This screenshot shows the 'LAH — Application — Freedom of Choice' form. It includes sections for 'Service Options' (with a note about institutional services) and 'Signature' (with fields for First Name, Last Name, Middle Name, SSN, Authorized Representative, Date, and Signature Status). At the bottom right, there is a 'Save' button, which is circled in green.

2.8.5 “Submit” Freedom of Choice Form

Click **Submit** to complete the form process. This will save all previous selections and entries and direct the user to view mode.

The screenshot shows the 'Freedom of Choice' application page. On the right, there's a large form area titled 'Freedom of Choice Form'. It contains sections for 'Service Options' (with three radio button options), 'Signature' (with fields for First Name, Last Name, Middle Name, SSN, Authorized Representative, Date, and Signature Status), and a 'Comments' section. At the top right of the form area, there are 'View', 'Edit', 'Submit', and 'Discard' buttons, with 'Submit' being highlighted with a green circle. On the left, a sidebar menu lists various application sections like 'Assessment & POC', 'Level of Care', etc., with 'Freedom of Choice' currently selected. The top navigation bar includes 'Home', 'Clients', 'My Lists', 'Alerts', 'Dashboard', 'Reports', 'Client Details', and 'Menu/Account'.

2.8.6 “Print” Freedom of Choice Form

The user is able to view the AERS POC in print view (PDF format displayed in a separate window/tab).

1. Log in as the permitted user
2. Search for client under *Clients* tab
3. Click **Client Summary** for client
4. Click **Application** menu button
5. Click **Print**

The screenshot shows the 'Print' button for the 'Freedom of Choice Form' in the 'Application' section. The 'Print' button is circled in green. The page displays various application forms and documentation details such as 'Initial Meeting', 'Freedom of Choice Forms', 'Narration Forms', 'Documentation Reminder', and 'Application Packet'.

2.8.7 “Discard” Freedom of Choice Form

The user is permitted to discard a form that is ‘In Progress’ or ‘Submitted’.

This screenshot shows the 'Freedom of Choice' form within the 'LAH — Application — Freedom of Choice' section of the LTSSMaryland system. The left sidebar includes links for Home, Clients, My Lists, Alerts, Dashboard, Reports, Client Details, Profile, Client Summary, LAH Program Menu, Case Program Summary, Task List, Initial Screening & Referral, Application, and Freedom of Choice (which is currently selected). The main content area displays the 'Freedom of Choice Form' with sections for Service Options and Signature. At the top right of the content area, there are 'View' and 'Discard' buttons, with 'Discard' being circled in green. The signature section includes fields for First Name (Patricia), Last Name (Casarotto), Middle Name (Ann), SSN (215456589), Authorized Representative (JJ Jilek), Date (12/19/2012), and Signature Status (Signed and paper copy on file).

2.8.8 Add Narration Form

To add a Narration Form for Application, you must log in as the permitted user. NOTE: This form is optional.

1. Log in as the permitted user
2. Search for client under *Clients* tab
3. Click **Client Summary** for client
4. Click **Go to Tasks** link for select program
5. Click **Application** menu button OR click **Summary** from Task List
6. Click **Add** (from Application menu)

This screenshot shows the 'Application' menu within the 'LAH — Application' section of the LTSSMaryland system. The left sidebar includes links for Home, Clients, My Lists, Alerts, Dashboard, Reports, Client Details, Profile, Client Summary, LAH Program Menu, Case Program Summary, Task List, Referrals, Application (which is currently selected), Assessment & POC, Level of Care, Plan of Service/Plan of Care, Assessment Packet, ATP, Financial & Overall Decision, Appeals & Dispositions, Transition Funds, Case Notes, and Additional Forms. The main content area displays sections for Initial Meeting, Freedom of Choice Forms, Narration Forms, Documentation Reminder, and Application Packet. The 'Add' button for the 'Narration Forms' section is circled in green.

2.8.9 “Save” Narration Form

Click **Save** after completing the form. This will save all selections and entries on the form and direct the user to view mode.

The screenshot shows the 'LAH — Application — Narration' form. The 'Narration Form' section contains fields for Case Manager (Erin Bricker), Agency (TCC), Title (Service Coordinator), Telephone Number ((410) 987-1048 ext 189), Interview Date (12/19/2012), and Narration (empty text area). The 'Applicant/Client Information' section lists Patricia Casarotto's details: First Name (Patricia), Last Name (Casarotto), Middle Name (Ann), Date of Birth (10/24/1968), SSN # (215456589), Medicaid Identifier (56415641250 (Community)), and Authorized Representative (JJ Jilek). The left sidebar shows the navigation menu under the 'LAH Program Menu' section, with 'New Narration' selected. The top right corner shows the user information 'FEN John Jilek (On behalf of Bricker, Inc)' and 'Location: The Coordinating Center'.

2.8.10 “Submit” Narration Form

Click **Submit** to complete the form process. This will save all previous selections and entries and direct the user to view mode.

The screenshot shows the 'LAH — Application — Narration' form. The 'Narration Form' section contains fields for Case Manager (Erin Bricker), Agency (TCC), Title (Service Coordinator), Telephone Number ((410) 987-1048 ext 189), Interview Date (12/19/2012), and Narration (empty text area). The 'Applicant/Client Information' section lists Patricia Casarotto's details: First Name (Patricia), Last Name (Casarotto), Middle Name (Ann), Date of Birth (10/24/1968), SSN # (215456589), Medicaid Identifier (56415641250), and Authorized Representative (JJ Jilek). The left sidebar shows the navigation menu under the 'LAH Program Menu' section, with 'Narration' selected. The top right corner shows the user information 'FEN John Jilek (On behalf of Bricker, Inc)' and 'Location: The Coordinating Center'. The top right of the form has buttons for 'View', 'Edit', 'Submit' (highlighted with a green circle), and 'Discard'.

2.8.11 “Print” Narration Form

The user is able to view the AERS POC in print view (PDF format displayed in a separate window/tab).

1. Log in as the permitted user
2. Search for client under *Clients* tab
3. Click **Client Summary** for client
4. Click **Application** menu button
5. Click **Print**

Long Term Services and Support FED:john.jilek (On behalf of Bricker, Inc) Location: The Coordinating Center

Home Clients My Lists Alerts Dashboard Reports My Profile Client Details

Patricia Casarotto
ID: 104989AAP866121 DOB: 10/24/1968
MFP Eligible: N

Profile Client Summary

LAH Program Menu

- Case Program Summary
- Task List
- Referrals
- Application** >
- Assessment & AERS POC
- Level of Care
- Plan of Service/Plan of Care
- Assessment Packet
- ATP
- Financial & Overall Decision
- Appeals & Dispositions
- Transition Funds
- Case Notes
- Additional Forms

LAH — Application

Back to Task List

Initial Meeting

Initial Meeting Information

Initial Meeting Date: 12/19/2012

Freedom of Choice Forms

Created Date	Due Date	Status	Signature Status	Actions
12/19/2012	01/05/2013	Submitted	Signed and paper copy on file	Details Print

Narration Forms

Case Manager	Agency	Interview Date	Status	Actions
Erin Bricker	TCC	12/19/2012	Acknowledged	Details Print

Documentation Reminder

Documentation Reminder Details

Documentation Reminder Date: 12/19/2012

Application Packet

Application Packet Details

Application Date	Submitted	Acknowledged
12/19/2012	12/19/2012	12/19/2012

2.8.12 “Discard” Narration Form

The user is permitted to discard a form that is ‘In Progress’ or ‘Submitted’.

Long Term Services and Support FED:john.jilek (On behalf of Bricker, Inc) Location: The Coordinating Center

Home Clients My Lists Alerts Dashboard Reports Client Details

Patricia Casarotto
ID: 104989AAP866121 DOB: 10/24/1968
MFP Eligible: N

Profile Client Summary

LAH Program Menu

- Case Program Summary
- Task List
- Referrals
- Application
- Narration** >
- Assessment & POC
- Level of Care
- Plan of Service/Plan of Care
- Assessment Packet
- ATP
- Financial & Overall Decision
- Appeals & Dispositions
- Transition Funds
- Case Notes
- Additional Forms
- Notice of Case Activity
- Fiscal Intermediary
- Activities

LAH — Application — Narration

Back to list

Narration Form

Narration Information

Case Manager: ** Erin Bricker
Agency: TCC
Title: Service Coordinator
Telephone Number: (410) 987-1048 (ext) 189
Interview Date: ** 12/19/2012
Narration: **
Narration text can be entered here.

Applicant/Client Information

First Name:	Patricia
Last Name:	Casarotto
Middle Name:	Ann
Date of Birth:	10/24/1968
SSN #:	215456589
Medicaid Identifier:	56415641250
Authorized Representative:	jj jilek

2.8.13 “Acknowledge” Narration Form (ICS, LAH)

To Acknowledge a Freedom of Choice Form, you must be logged in as the LAHWU Participant Specialist.

1. Log in as the permitted user
2. Search for client under *Clients* tab
3. Click **Client Summary** for client
4. Click **Go to Tasks** link for select program
5. Click **Application** menu button OR click **Summary** from Task List
6. Click **Details** link for Narration Form
7. Click Acknowledge

The screenshot shows the software's main navigation bar at the top with links for Home, Clients, My Lists, Alerts, Assignments, Reports, Client Details, Menu, and Account. A user profile for 'JJ Jilek (On behalf of Jones, Albie)' is displayed. On the left, a vertical sidebar lists various menu items under 'LAH Program Menu' such as Case Program Summary, Task List, Initial Screening & Referral, Application, and Narration (which is currently selected). The main content area is titled 'LAH — Application — Narration'. It contains two sections: 'Narration Form' and 'Applicant/Client Information'. The 'Narration Form' section includes fields for Case Manager (Erin Bricker), Agency (TCC), Title (Service Coordinator), Telephone Number ((410) 987-1048 ext 189), Interview Date (12/19/2012), and Narration (with a note: 'Narration text can be entered here'). The 'Applicant/Client Information' section displays details for Patricia Casarotto, including First Name (Patricia), Last Name (Casarotto), Middle Name (Ann), Date of Birth (10/24/1968), SSN (# 215456589), Medicaid Identifier (56415641250), and Authorized Representative (JJ Jilek). At the top right of the narration form section, there are 'View', 'Acknowledge' (which is circled in green), and 'Discard' buttons.

2.8.14 Add Documentation Reminder

To add a Documentation Reminder for Application, you must log in as the permitted user. NOTE: This form is optional.

1. Log in as the permitted user
2. Search for client under *Clients* tab
3. Click **Client Summary** for client
4. Click **Go to Tasks** link for select program
5. Click **Application** menu button OR click **Summary** from Task List
6. Click **Add** (from Application menu)

This screenshot shows the 'LAH — Application' page in the LTSSMaryland system. The left sidebar is titled 'Long Term Services and Support' and includes sections for Home, Clients, My Lists, Alerts, Dashboard, Reports, Client Details, Profile, Client Summary, LAH Program Menu, Case Program Summary, Task List, Referrals, Application, Assessment & POC, Level of Care, Plan of Service/Plan of Care, Assessment Packet, ATP, Financial & Overall Decision, Appeals & Dispositions, Transition Funds, Case Notes, and Additional Forms. The 'Application' section is currently selected. The main content area shows 'Initial Meeting' information with an initial meeting date of 12/19/2012. Below it is a 'Freedom of Choice Forms' table with one row: 'Case Manager' (TCC) with an interview date of 12/19/2012, status 'Submitted', and signature status 'Signed and paper copy on file'. There is a 'Details' and 'Print' link next to the row. A 'Narration Forms' section follows, also showing one row for the same Case Manager with the same details. The 'Documentation Reminder' section is expanded, showing a message that there is no documentation reminder to display. The 'Application Packet' section is also expanded, showing a message that there is no application packet information to display. A green circle highlights the 'Add' button at the bottom right of the 'Documentation Reminder' section.

2.8.15 “Save” Documentation Reminder

Click **Save** after completing the form. This will save all selections and entries on the form and direct the user to view mode.

This screenshot shows the 'Documentation Reminder Form' dialog box. It has two sections: 'Application Information' (Date: 12/19/2012) and 'Documentation Reminders'. The 'Documentation Reminders' section contains a large list of checkboxes for various documents, with several checked. A green circle highlights the 'Save' button in the top right corner of the dialog box.

2.8.16 Add Application Packet

To add an Application Packet for Application, you must have a ‘Submitted’ Freedom of Choice Form and log in as the permitted user.

1. Log in as the permitted user
2. Search for client under *Clients* tab
3. Click **Client Summary** for client

4. Click **Go to Tasks** link for select program
5. Click **Application** menu button OR click **Summary** from Task List
6. Click **Details** (from Application menu)

The screenshot shows the Long Term Services and Support application interface. The top navigation bar includes 'Home', 'Clients', 'My Lists', 'Alerts', 'Dashboard', 'Reports', and 'Client Details'. The 'Client Details' tab is active. The main content area displays details for client Patricia Casarotto, including her ID, DOB, and MPP Eligible status. The 'LAH — Application' section is expanded, showing 'Initial Meeting' information (Initial Meeting Date: 12/19/2012) and 'Freedom of Choice Forms' (a table with columns: Created Date, Due Date, Status, Signature Status, Actions). Below this is a 'Narration Forms' section (a table with columns: Case Manager, Agency, Interview Date, Status, Actions). The 'Documentation Reminder' section follows, and finally, the 'Application Packet' section, which contains a note: 'There is no Application Packet information to display.' A circled 'Details' button is located at the bottom right of the 'Application Packet' section.

2.8.17 “Submit” Application Packet

Click **Submit** to complete the form process. This will save all previous selections and entries and direct the user to view mode.

The screenshot shows the 'LAH — Application — Application Packet' dialog box. It contains a 'Cancel' button and a 'New' button. The main area is titled 'Application Packet Form' and includes a sub-section 'Application Packet Information' with a field for 'Application Date' containing the value '12/19/2012'. A circled 'Submit' button is located at the bottom right of the dialog box.

2.8.18 “Acknowledge” Application Packet (ICS, LAH)

To Acknowledge a Freedom of Choice Form, you must be logged in as the LAHWU Participant Specialist.

1. Log in as the permitted user
2. Search for client under *Clients* tab
3. Click **Client Summary** for client
4. Click **Go to Tasks** link for select program
5. Click **Application** menu button OR click **Summary** from Task List
6. Click **Details** link for Application Packet
7. Click Acknowledge

2.9 Cost Neutrality (ICS)

2.9.1 “Add” Cost Neutrality

To add Cost Neutrality, you must log in as the permitted user.

1. Log in as the permitted user
2. Search for client under *Clients* tab
3. Click **Client Summary**
4. Click **Go to Tasks** link for ICS program
5. Click **Cost Neutrality** menu button
6. Click **Add**

2.9.2 “Save” Cost Neutrality

Click **Save** after completing the form. This will save all selections and entries on the form and direct the user to view mode.

The screenshot shows the 'Cost Neutrality' form within the 'Long Term Services and Supports' application. The form includes fields for ICS Cost Neutrality (\$1500.00), Effective Start Date (01/17/2013), Effective End Date (01/17/2014), and Approved By (lahwsupervisor1 LAHWU). A green circle highlights the 'Save' button in the top right corner of the form window.

2.9.3 “Edit” Cost Neutrality

The user is permitted to edit an existing ICS Cost Neutrality entry from the Cost Neutrality list.

1. Log in as the permitted user
2. Search for client under *Clients* tab
3. Click **Client Summary**
4. Click **Go to Tasks** link for ICS program
5. Click **Cost Neutrality** menu button
6. From the ICS Cost Neutrality list view, click **Edit** for an existing entry

The screenshot shows the 'Cost Neutrality List' table within the 'Long Term Services and Supports' application. The table has columns for ICS Cost Neutrality (\$1,500.00), Effective Start Date (01/17/2013), Effective End Date (01/17/2014), Approved By (lahwsupervisor1 LAHWU), and Actions. A green circle highlights the 'Edit' button in the Actions column for the first row.

7. Modify the form, click **Save**

2.9.4 “Delete” Cost Neutrality

The user is permitted to delete an existing ICS Cost Neutrality entry from the Cost Neutrality list.

1. Log in as the permitted user
2. Search for client under *Clients* tab
3. Click **Client Summary**
4. Click **Go to Tasks** link for ICS program
5. Click **Cost Neutrality** menu button
6. From the ICS Cost Neutrality list view, click **Delete** for an existing entry

ICS — Cost Neutrality List

ICS Cost Neutrality	Effective Start Date	Effective End Date	Approved By	Actions
\$1,500.00	01/17/2013	01/17/2014	lahwusupervisor1.LAHWU	Edit Delete

2.10 Assessment & POC (ICS, LAH, WOA)

2.10.1 Create Assessment & POC Request

To create a new Assessment & POC Request, you must have a ‘Submitted’ Application Packet and log in as the permitted user.

1. Log in as the permitted user
2. Search for client under *Clients* tab
3. Click **Client Summary** for client
4. Click **Go to Tasks** link for select program
5. Click **Assessment & POC** menu button OR click **Summary** from Task List
6. Click **Create New Request**

LAH — Assessment & POC

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

Assessment & POC Request

Evaluation Information

No request was submitted.

interRAI HC MD

Reference Date	Status	LOC	RUG	Submitted Date	Actions
No data available in table					

AERS Plan of Care

Created Date	Start Date	End Date	Last Modified Date	AERS Staff	POC Type	Status	Active	Actions
No data available in table								

2.10.2 “Submit” AERS Assessment & POC Request

Click **Submit** to complete the form process. This will save all previous selections and entries and direct the user to view mode.

The screenshot shows the software's main navigation bar at the top with links for Home, Clients, My Lists, Alerts, Assignments, Reports, and Client Details. The 'Client Details' section is active, displaying a client named Patricia Casarotto with ID 1048959AP866121 and DOB 10/24/1968. On the left, there's a sidebar with various program menus like LAH Program Menu, Case Program Summary, Task List, Initial Screening & Referral, Application, and Assessment & POC. A 'New Request' button is highlighted with a blue arrow. The main content area shows a modal window titled 'interRAI HC MD Health Evaluation & POC Request Form' with a dropdown menu for 'Request Evaluation Type' set to 'Initial'. The 'Submit' button in the top right corner of the modal is circled in green.

2.11 Plan of Service/Plan of Care (ICS, LAH)

2.11.1 Add POS/POC

To add a POS/POC, you must log in as the permitted user.

1. Log in as the permitted user
2. Search for client under *Clients* tab
3. Click **Client Summary** for client
4. Click **Go to Tasks** link for select program
5. Click **Plan of Service/Plan of Care** menu button OR click **Summary** from Task List
6. Click Add POS/POC

The screenshot shows the software's main navigation bar at the top with links for Home, Clients, My Lists, Alerts, Dashboard, Reports, and Client Details. The 'Client Details' section is active, displaying the same client information as the previous screenshot. The left sidebar includes the 'LAH Program Menu' with 'Plan of Service/Plan of Care' selected. The main content area shows a table header for 'LAH — Plan of Service/Plan of Care' with columns for Created Date, Type, POS Cost Neutrality, Cost Neutrality Limit, Start Date, End Date, Status, Active/Inactive, and Actions. A 'Back to Task List' link is visible above the table. The 'Actions' column contains a green 'Add POS/POC' button, which is circled in green.

2.11.2 "Save" POS/POC

Click **Save** after completing the form. This will save all selections and entries on the form and direct the user to view mode. This Save will trigger the POS/POC process, taking the user to the POS/POC Summary page.

The screenshot shows the 'LAH — Plan of Service/Plan of Care — I. Client Information' form. The 'Save' button is located in the top right corner of the modal window. The form contains fields for Client Information, Address to Receive Services, and Representative (Relative/Guardian) Information. The 'Client Information' section includes fields for Last Name, First Name, Middle Initial, Suffix, MA#, SSN#, DOB, Case Manager, and Case Manager Phone. The 'Address to Receive Services' section includes fields for Street Address, City, State, Zip Code, and Phone. The 'Representative' section includes fields for Name, Address, and Address 2. The 'Save' button is circled in green.

2.11.3 Plan of Service/ Plan of Care Summary Page

This summary page will be utilized as the landing page for each POS/POC.

The screenshot shows the 'LAH — Plan of Service/Plan of Care' summary page. It lists several sections with edit buttons: I. Client Information, II. Overview, III. Services, IV. Cost Neutrality, V. Diagnosis, VI. Signatures, and VII. Advanced Directives. The 'Edit' buttons for these sections are circled in green.

2.11.4 "Save" POS/POC: II. Overview

Click **Save** after completing the form. This will save all selections and entries on the form and direct the user to view mode. “Active” AERS POC required for “Initial” POS/POC.

1. Navigate to the POS/POC Summary page (reference above section)
2. Under II. Overview section, click **Edit**

The screenshot shows the 'LAH — Plan of Service/Plan of Care' page. On the left, there's a sidebar with various menu items like 'Client Details', 'LAH Program Menu', and 'Assessment & POC'. The main area shows a list of sections: 'I. Client Information', 'II. Overview', 'III. Services', 'IV. Cost Neutrality', 'V. Diagnosis', 'VI. Signatures', and 'VII. Advanced Directives'. The 'II. Overview' section has an 'Edit' button next to it, which is circled in green.

3. Click **Save**

The screenshot shows the 'LAH — Plan of Service/Plan of Care — II. Overview' page. It includes fields for 'POS/POC Details' (Create Date, Start Date, End Date, Type, Reason), a text area for 'Explain Reason for New POS/POC' (containing the text 'The client needs a new form'), and a 'Back-up Plan' section. Below these are sections for 'Overview Questionnaire' and 'LAHWU must approve this POS.' It contains several radio button groups for questions like 'Was the POS jointly developed?' and 'Does the POS meet the participant's health and safety needs?'. The 'Save' button at the top right is circled in green.

2.11.5 "Save" POS/POC: III. Services

Click **Save** after completing the form. This will save all selections and entries on the form and direct the user to view mode.

1. Navigate to the POS/POC Summary page (reference above section)
2. Under III. Services section, click **Add**

The screenshot shows the 'LAH — Plan of Service/Plan of Care' page. On the left, there's a sidebar with various menu items like 'Profile', 'Client Summary', 'LAH Program Menu', and 'Plan of Service/Plan of Care'. The main area displays a navigation tree with sections: 'I. Client Information', 'II. Overview', 'III. Services' (which is expanded and highlighted with a green circle around the 'Add' button), 'IV. Cost Neutrality', 'V. Diagnosis', 'VI. Signatures', and 'VII. Advanced Directives'. At the top right, there are buttons for 'Submit', 'Discard', and 'Expand All'.

3. Click **Save**

The screenshot shows the 'LAH — Plan of Service/Plan of Care — III. Add Services' form. It has a sidebar with 'LAH Program Menu' items like 'Assessment Packet', 'ATP', 'Financial & Overall Decision', etc. The main form is titled 'III. Services' and contains several input fields: 'POS/POC Service' (dropdown menu showing 'Dentist Visit'), 'Type' (dropdown menu showing 'State Plan Service'), 'Frequency Type' (radio buttons for Daily, Weekly, Monthly, Annual, Hourly, with 'Hourly' selected), 'Frequency' (text input field showing '0'), 'Rate' (text input field showing '0.00'), 'Units' (text input field showing '1'), 'Provider' (text input field with a 'Search' button), 'Provider Number' (text input field), 'Provider Start Date' (date input field showing '12/20/2012'), 'Provider End Date' (date input field showing '12/27/2013'). Below these are checkboxes for 'MCO Waiver to pay for 2 months of services.' and 'Medicare/Medicaid Waiver will pay 20% Medicare/Medicaid to pay 80%.' There are also 'Monthly Cost' (\$0.00), 'Annual Cost' (\$0.00), and a 'Comments' text area. At the top right of the form, there are 'Save' and 'Save and Create New' buttons, with 'Save' being circled in green.

2.11.6 View IV. Cost Neutrality

User is permitted to view Cost Neutrality.

1. Navigate to the POS/POC Summary page (reference above section)
2. Click the IV. Cost Neutrality section panel to expand OR click **Expand All**

The screenshot shows the 'LAH — Plan of Service/Plan of Care' page. On the left is a navigation sidebar with various links like 'Profile', 'Client Summary', 'LAH Program Menu', etc. The main content area has a tree-like structure with sections: I. Client Information, II. Overview, III. Services, IV. Cost Neutrality (which is expanded), V. Diagnosis, VI. Signatures, and VII. Advanced Directives. Under IV. Cost Neutrality, there's a table with service totals and a note about Total POS/POC Cost Neutrality. At the top right of the content area, there are 'Submit', 'Discard', and 'Expand All' buttons, with 'Expand All' being highlighted by a green oval.

2.11.7 "Save" POS/POC: V. DIAGNOSIS

Click **Save** after completing the form. This will save all selections and entries on the form and direct the user to view mode.

1. Navigate to the POS/POC Summary page (reference above section)
2. Under V. Diagnosis section, click **Edit**

This screenshot is similar to the previous one but focuses on the 'V. Diagnosis' section. The 'Edit' button for the 'V. Diagnosis' section is highlighted with a green oval. The rest of the interface is identical to the previous screenshot, showing the navigation sidebar and the expanded 'IV. Cost Neutrality' section.

3. Click **Save**

This screenshot shows the 'LAH — Plan of Service/Plan of Care — V. Diagnosis' form. The left sidebar contains a navigation menu with sections like 'LAH Program Menu', 'Additional Forms', and 'Activities'. The main form area has two sections: 'Primary Diagnosis' and 'Secondary Diagnosis'. Each section includes an ICD-9 code input field, a description text area, and a comments text area. At the bottom of the form, there is a 'DiagnosisAll' section containing the names 'Cholera' and 'Typhoid fever'. The top right corner of the form window has a 'Save' button, which is circled in green.

2.11.8 “Save” POS/POC: VI. Signatures

Click **Save** after completing the form. This will save all selections and entries on the form and direct the user to view mode.

1. Navigate to the POS/POC Summary page (reference above section)
2. Under VI. Signatures section, click **Add**

This screenshot shows the 'LAH — Plan of Service/Plan of Care' summary page. The left sidebar contains a navigation menu with sections like 'LAH Program Menu', 'Additional Forms', and 'Activities'. The main summary area lists several sections with edit and add buttons: 'I. Client Information', 'II. Overview', 'III. Services', 'IV. Cost Neutrality', 'V. Diagnosis', 'VI. Signatures', and 'VII. Advanced Directives'. The 'VI. Signatures' section is circled in green.

3. Click **Save**

The screenshot shows the 'VI. Signature' section of the 'LAH — POS/POC Signature — VI. Signature' page. The 'Signature Details' panel contains fields for Signature Type (Adult Medical Day Care Provider), Signature Name (John Smith), Date (12/20/2012), and Signature Status (Electronic). A 'Save' button is located in the top right corner of the form area.

2.11.9 “Save” POS/POC: Advance Directives

Click **Save** after completing the form. This will save all selections and entries on the form and direct the user to view mode. The Advance Directives are pre-populated from the client profile

1. Navigate to the POS/POC Summary page (reference above section)
2. Under VII. Advanced Directives section, click **Edit**

The screenshot shows the 'VII. Advanced Directives' section of the 'LAH — Plan of Service/Plan of Care' page. The section includes dropdown menus for I. Client Information, II. Overview, III. Services, IV. Cost Neutrality, V. Diagnosis, VI. Signatures, and VII. Advanced Directives. The 'Edit' button for the VII. Advanced Directives section is highlighted with a green oval.

3. Click **Save**

The screenshot shows the 'VII. Advanced Directives' form. It contains sections for DNRI, Living Will, Medical POA, Medical POA Durable, General POA, General POA Durable, Guardian of Person, and Guardian of Property. Each section has three radio button options: Yes, No, and Unknown. A 'Save' button is located in the top right corner of the form area.

2.11.10 "Submit" POS/POC

Click **Submit** to complete the form process. This will save all previous selections and entries and direct the user to view mode. When the (Assign) CM submits the POS/POC, the status will update to “Pending Lead Decision”, by which the TCC Supervisor will Review/Submit POS/POC

1. Navigate to the POS/POC Summary page (reference above section)
2. Click **Submit**

2.11.11 "Submit" POS/POC Lead Review

Click **Submit** to complete the form process. This will save all previous selections and entries and direct the user to view mode. When the TCC Supervisor submits the POS/POC review, the status will update to “Pending LAHWU Decision.”

1. Log in as the permitted user
2. Search for client under *Clients* tab
3. Click **Client Summary** for client
4. Click **Go to Tasks** link for select program
5. Click **Plan of Service/Plan of Care** menu button OR click **Summary** from Task List
6. Select existing POS/POC, click **View**

7. Review/Modify each section, click **Submit**

The screenshot shows the 'LAH — Plan of Service/Plan of Care' page. At the top, there's a navigation bar with links like Home, Clients, My Lists, Alerts, Dashboard, Assignments, Reports, and Client Details. On the left, there's a sidebar with sections for Profile, Client Summary, LAH Program Menu (Case Program Summary, Task List, Referrals, Application, Assessment & POC, Level of Care, Plan of Service/Plan of Care), and POS/POC Details. The main content area displays a table of sections: I. Client Information, II. Overview, III. Services, IV. Cost Neutrality, V. Diagnosis, VI. Signatures, and VII. Advanced Directives. Each section has an 'Edit' or 'Add' button next to it. In the top right of the main area, there are buttons for Copy, Submit (highlighted with a red circle), Discard, and Expand All.

2.11.12 Apply POS/POC Lead Decision

To submit a lead decision, you must be logged in as the permitted user. The following user is permitted to submit lead decision: LAHWU Participant Specialist, TCC Supervisor... Clicking “Approve” will trigger a new status based on decision applied (i.e. ‘Approved’, ‘Denied’, ‘In Progress’).

1. Log in as the permitted user
2. Search for client under *Clients* tab
3. Click **Client Summary** for client
4. Click **Go to Tasks** link for select program
5. Click **Plan of Service/Plan of Care** menu button OR click **Summary** from Task List
6. Select existing POS/POC, click **View**

The screenshot shows the same 'LAH — Plan of Service/Plan of Care' page as the previous one, but with a specific task selected. The task card includes fields for Created Date (12/20/2012), Type (Provisional), POS Cost Neutrality (\$143.58), Cost Neutrality Limit, Start Date (12/20/2012), End Date (12/27/2013), Status (Pending LAHWU Decision), Active/Inactive (Inactive), and Actions. Below the table, there are buttons for Copy, View PDF, and another 'View' button (highlighted with a red circle).

7. Provide comment in section IX. POS/POC Decision (optional)
8. Click Approve, Deny, or Clarification Request

The screenshot shows the 'LAH — Plan of Service/Plan of Care' page. The client details for Patricia Casarotto are displayed on the left. The main content area shows a navigation menu with sections: I. Client Information, II. Overview, III. Services, IV. Cost Neutrality, V. Diagnosis, VI. Signatures, VII. Advanced Directives, and IX. POS/POC Decision. The status of the form is 'Pending LAHWU Decision'. At the top right, there are buttons for Copy, Approve (highlighted with a green circle and a red arrow), Deny, Clarification Request, Discard, and Expand All.

2.11.13 “Discard” POS/POC

The user is permitted to discard a form that is ‘In Progress’, ‘Pending Lead Decision’, or ‘Pending LAHWU Decision.’

The screenshot shows the 'LAH — Plan of Service/Plan of Care' page. The client details for Patricia Casarotto are displayed on the left. The main content area shows a navigation menu with sections: I. Client Information, II. Overview, III. Services, IV. Cost Neutrality, V. Diagnosis, VI. Signatures, VII. Advanced Directives, and IX. POS/POC Decision. The status of the form is 'In Progress'. At the top right, there are buttons for Submit, Discard (highlighted with a green circle and a red arrow), and Expand All.

2.12 Plan of Service/Plan of Care (WOA)

2.12.1 Add POS/POC

To add a POS/POC, you must log in as the permitted user. The following users are permitted to complete Appeals Form: (Assign) AAA Case Manager...

1. Log in as the permitted user
2. Search for client under *Clients* tab
3. Click **Client Summary** for client
4. Click **Go to Tasks** link for select program
5. Click **Plan of Service/Plan of Care** menu button OR click **Summary** from Task List
6. Click **Add POS/POC**

The screenshot shows the LTSS system's 'Plan of Service/Plan of Care' (WOA) page. The left sidebar includes links for Profile, Client Summary, WOA Program Menu (Case Program Summary, Task List, Initial Screening, Application, Assessment & AERS POC, Level of Care), and Plan of Service/Plan of Care. The main content area has a heading 'WOA — Plan of Service/Plan of Care' and a sub-heading 'Back to Task List'. Below these are search filters for 'Created Date', 'Type', 'POS Cost Neutrality', 'Cost Neutrality Limit', 'Start Date', 'End Date', 'Status', 'Active/Inactive', and 'Actions'. A message 'No data available in table' is displayed. In the top right corner of the table header, there is a green oval highlighting the 'Add POS/POC' button.

2.12.2 "Save" POS/POC

Click **Save** after completing the form. This will save all selections and entries on the form and direct the user to view mode. This Save will trigger the POS/POC process, taking the user to the POS/POC

Summary page.

I. Add Client Information Form

Client Information

Last Name:	Casarotto
First Name:	Patricia
Middle Initial:	Ann
Suffix:	
MA#:	56415641250 (Community)
SSN#:	215456589
DOB:	10/24/1968
Case Manager:	Amy Weaver
Case Manager Phone:	4108875421

Address to Receive Services:

Address Type:	Nursing Facility
Street Address:	EL SHADDAI HEALTH CARE
Address Description:	ALICE MANOR
Street Address 2:	7000 SECURITY BLVD #302
City:	BALTIMORE
County:	Baltimore
State:	Maryland
Zip Code:	21244
Phone:	4102989800

Representative (Relative/Guardian) Information:

Name:	JJ Jilek
Address:	123 Main St
Address 2:	

2.12.3 Plan of Service/ Plan of Care Summary Page

This summary page will be utilized as the landing page for each POS/POC.

WOA — Plan of Service/Plan of Care Status: In Progress

I. Client Information **Edit**

II. Overview **Edit**

III. Services **Edit** **Manage Services**

IV. Cost Neutrality **Edit**

V. Diagnosis **Edit**

VI. Signatures **Add**

VII. Advanced Directives **Edit**

2.12.4 "Save" POS/POC: II. Overview

Click **Save** after completing the form. This will save all selections and entries on the form and direct the user to view mode. “Active” AERS POC required for “Initial” POS/POC.

1. Navigate to the POS/POC Summary page (reference above section)
2. Under II. Overview section, click **Edit**

The screenshot shows the 'WOA -- Plan of Service/Plan of Care' page. On the left is a sidebar with various menu items like Profile, Client Summary, WOA Program Menu, etc. The main area has a navigation tree on the left with sections: I. Client Information, II. Overview, III. Services, IV. Cost Neutrality, V. Diagnosis, VI. Signatures, VII. Advanced Directives. The 'Edit' button for the 'II. Overview' section is highlighted with a red circle.

3. Click **Save**

The screenshot shows the 'WOA -- Plan of Service/Plan of Care -- II. Overview' edit page. It contains fields for POS/POC Details (Create Date, Start Date, End Date, Type, Reason), Overview Questionnaire (Enrolled in Subsidy Program, Goals/Interest), and POS/POC Comments. The 'Save' button in the top right corner is highlighted with a green circle.

2.12.5 "Save" POS/POC: III. Services

Click **Save** after completing the form. This will save all selections and entries on the form and direct the user to view mode.

1. Navigate to the POS/POC Summary page (reference above section)
2. Under III. Services section, click **Manage Services**

The screenshot shows the 'WOA — Plan of Service/Plan of Care' page. The left sidebar includes 'Profile' and 'WOA Program Menu' sections. The main content area displays sections I through VII. A mouse cursor is positioned over the 'Manage Services' link under section IV.

3. Click Save

The screenshot shows the 'WOA — Plan of Service/Plan of Care — III. Add Services' page. The left sidebar has 'Services' selected. The main content area shows service details for 'Adult Medical Day Care' and features a 'Save Service' button at the bottom.

2.12.6 View IV. Cost Neutrality

User is permitted to view Cost Neutrality.

1. Navigate to the POS/POC Summary page (reference above section)
2. Click the IV. Cost Neutrality section panel to expand OR click **Expand All**

This screenshot shows the 'LAH — Plan of Service/Plan of Care' page. The navigation bar at the top includes 'Home', 'Clients', 'My Lists', 'Alerts', 'Dashboard', 'Reports', and 'Client Details'. The left sidebar contains links for 'Profile', 'Client Summary', 'LAH Program Menu', 'Case Program Summary', 'Task List', 'Referrals', 'Application', 'Assessment & POC', 'Level of Care', 'Plan of Service/Plan of Care', and 'POSPOC Details'. The main content area displays sections: 'I. Client Information', 'II. Overview', 'III. Services', 'IV. Cost Neutrality' (which is highlighted with a green border), 'V. Diagnosis', 'VI. Signatures', and 'VII. Advanced Directives'. A table titled 'Services Totals' provides financial details. At the bottom right of the main area are 'Submit', 'Discard', and 'Expand All' buttons.

2.12.7 "Save" POS/POC: V. DIAGNOSIS

Click **Save** after completing the form. This will save all selections and entries on the form and direct the user to view mode.

1. Navigate to the POS/POC Summary page (reference above section)
2. Under V. Diagnosis section, click **Edit**

This screenshot shows the 'WOA — Plan of Service/Plan of Care' page. The navigation bar and sidebar are identical to the LAH version. The main content area displays sections: 'I. Client Information', 'II. Overview', 'III. Services', 'IV. Cost Neutrality', 'V. Diagnosis' (which is highlighted with a green border), 'VI. Signatures', and 'VII. Advanced Directives'. A 'Manage Services' button is visible next to the 'Services' section. At the bottom right of the main area are 'Submit', 'Discard', and 'Expand All' buttons.

3. Click **Save**

Long Term Services and Support

FED\john.jilek (On behalf of Waiver_Amp)
Location: Baltimore County Dept. of Aging

Home Clients My Lists Alerts Dashboard Reports My Profile Client Details

Patricia Casarotto
ID: 1049859A9A866121 DOB: 10/24/1968
MF Eligible: N

Profile Client Summary

WOA Program Menu

Case Program Summary
Task List
Initial Screening
Application
Assessment & AERS POC
Level of Care
Plan of Service/ Plan of Care

V. Diagnosis >

ATP
Financial and Overall Decision
Appeals & Dispositions
Transition Funds
Case Notes

Additional Forms
Notice of Case Activity

Activities
Activities

WOA — Plan of Service/Plan of Care — V. Diagnosis

Back to View

V. Diagnosis

— Diagnosis Code

— Primary Diagnosis
Primary Diagnosis * ICD-9 Code: 001.0 Select
Description: Due to Vibrio cholerae

Comments:

— Secondary Diagnosis
Secondary Diagnosis * ICD-9 Code: 001.0 Select
Description: Due to Vibrio cholerae

Comments:

Diagnosis(All):
Due to Vibrio cholerae
Due to Vibrio cholerae

Save

2.12.8 “Save” POS/POC: VI. Signatures

Click **Save** after completing the form. This will save all selections and entries on the form and direct the user to view mode.

1. Navigate to the POS/POC Summary page (reference above section)
2. Under VI. Signatures section, click **Add**

Long Term Services and Support

FED\john.jilek (On behalf of Waiver_Amp)
Location: Baltimore County Dept. of Aging

Home Clients My Lists Alerts Dashboard Reports My Profile Client Details

Patricia Casarotto
ID: 1049859A9A866121 DOB: 10/24/1968
MF Eligible: N

Profile Client Summary

WOA Program Menu

Case Program Summary
Task List
Initial Screening
Application
Assessment & AERS POC
Level of Care
Plan of Service/ Plan of Care

POS/POC Details >

WOA — Plan of Service/Plan of Care Status: In Progress

Back to List

I. Client Information Edit
II. Overview Edit
III. Services Manage Services
IV. Cost Neutrality Edit
V. Diagnosis Edit
VI. Signatures Add
VII. Advanced Directives Edit

Submit Discard Expand All

3. Click **Save**

Long Term Services and Support

FBNjohn.jilk (On behalf of Weaver, Amy)
Location: Baltimore County Dept. of Aging

Home Clients My Lists Alerts Dashboard Reports My Profile Client Details

Patricia Casarotto
ID: 1049859A9A866121 DOB: 10/24/1968
MFP Eligible N

Profile Client Summary

WOA Program Menu

Case Program Summary
Task List
Initial Screening
Application
Assessment & AERS POC
Level of Care
Plan of Service/ Plan of Care
VI. Signature >

WOA — POS/POC Signature — VI. Signature

Back to View

VI. Signature

Signature Details

Signature Type: Ast. Living Provider - Level 2
Signature Name: John Smith
Date: 12/20/2012
Signature Status: Electronic

Save

2.12.9 "Save" POS/POC: Advance Directives

Click **Save** after completing the form. This will save all selections and entries on the form and direct the user to view mode. The Advance Directives are pre-populated from the client profile.

1. Navigate to the POS/POC Summary page (reference above section)
2. Under VII. Advanced Directives section, click **Edit**

Long Term Services and Support

FBNjohn.jilk (On behalf of Weaver, Amy)
Location: Baltimore County Dept. of Aging

Home Clients My Lists Alerts Dashboard Reports My Profile Client Details

Patricia Casarotto
ID: 1049859A9A866121 DOB: 10/24/1968
MFP Eligible N

Profile Client Summary

WOA Program Menu

Case Program Summary
Task List
Initial Screening
Application
Assessment & AERS POC
Level of Care
Plan of Service/ Plan of Care
POS/POC Details >

WOA — Plan of Service/Plan of Care Status: In Progress

Back to List

VII. Advanced Directives

I. Client Information Edit
II. Overview Edit
III. Services Manage Services
IV. Cost Neutrality
V. Diagnosis Edit
VI. Signatures Add
VII. Advanced Directives Edit

3. Click **Save**

Long Term Services and Support

FBNjohn.jilk (On behalf of Weaver, Amy)
Location: Baltimore County Dept. of Aging

Home Clients My Lists Alerts Dashboard Reports My Profile Client Details

Patricia Casarotto
ID: 1049859A9A866121 DOB: 10/24/1968
MFP Eligible N

Profile Client Summary

WOA Program Menu

Case Program Summary
Task List
Initial Screening
Application
Assessment & AERS POC
Level of Care
Plan of Service/ Plan of Care
VII. Advanced Directives >

WOA — Plan of Service/Plan of Care — VII. Advanced Directives

Back to View

VII. Advanced Directives

Advanced Directives

DNR:	<input type="radio"/> Yes	<input type="radio"/> No	<input checked="" type="radio"/> Unknown
Living Will:	<input type="radio"/> Yes	<input type="radio"/> No	<input checked="" type="radio"/> Unknown
Medical POA:	<input type="radio"/> Yes	<input type="radio"/> No	<input checked="" type="radio"/> Unknown
Medical POA Durable:	<input type="radio"/> Yes	<input type="radio"/> No	<input checked="" type="radio"/> Unknown
General POA:	<input type="radio"/> Yes	<input type="radio"/> No	<input checked="" type="radio"/> Unknown
General POA Durable:	<input type="radio"/> Yes	<input type="radio"/> No	<input checked="" type="radio"/> Unknown
Guardian of Person:	<input checked="" type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Unknown
Guardian of Property:	<input checked="" type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Unknown

Save

2.12.10 “Submit” POS/POC

Click **Submit** to complete the form process. This will save all previous selections and entries and direct the user to view mode. When the (Assign) CM submits the POS/POC, the status will update to “Pending Supervisor/Coordinator Decision”, by which the AAA Supervisor will Review/Submit POS/POC

1. Navigate to the POS/POC Summary page (reference above section)
2. Click **Submit**

The screenshot shows the 'WOA — Plan of Service/Plan of Care' page with a status of 'In Progress'. On the right, there's a sidebar with sections like 'I. Client Information', 'II. Overview', 'III. Services', etc., each with an 'Edit' or 'Add' link. At the bottom right of the main content area, there's a 'Submit' button with a green circle around it, and other options like 'Discard' and 'Expand All'.

2.12.11 “Submit” POS/POC Lead Review

Click **Submit** to complete the form process. This will save all previous selections and entries and direct the user to view mode. If “Need MDOA approval” is ‘Yes’ in section VIII, when the AAA Supervisor submits the POS/POC review, the status will update to “Pending MDOA Decision.”

1. Log in as the permitted user
2. Search for client under *Clients* tab
3. Click **Client Summary** for client
4. Click **Go to Tasks** link for select program
5. Click **Plan of Service/Plan of Care** menu button OR click **Summary** from Task List
6. Select existing POS/POC, click **View**

The screenshot shows the 'WOA — Plan of Service/Plan of Care' page for a client named Patricia Casarotto. The table includes columns for Created Date, Type, POS Cost Neutrality, Cost Neutrality Limit, Start Date, End Date, Status, Active/Inactive, and Actions. The 'Actions' column contains links for View, Log, and View PDF. A green circle highlights the 'View' link in the Actions column.

7. Complete section VIII. Team Lead/Coordinator Review, click **Save**

The screenshot shows the 'VIII. Team Lead/Coordinator Review' section of the application. It contains several groups of questions with radio button options. At the bottom right of the form area, there is a large 'Save' button with a green oval highlighting it.

8. Review/Modify each section, click **Submit**

The screenshot shows the 'LAH — Plan of Service/Plan of Care' section. On the right side, there is a vertical list of sections with 'Edit' and 'Add' buttons: I. Client Information, II. Overview, III. Services, IV. Cost Neutrality, V. Diagnosis, VI. Signatures, and VII. Advanced Directives. At the top right of the page, there is a 'Submit' button with a green oval highlighting it.

2.12.12 Apply POS/POC Lead Decision

To submit a lead decision, you must be logged in as the permitted user. The following user is permitted to submit lead decision: MDOA Admin, (Assigned) MDOA Case Manager, AAA Supervisor. Clicking “Approve” will trigger a new status based on decision applied (i.e. ‘Approved’, ‘Denied’, ‘In Progress’). NOTE: MDOA users will only apply the decision if the Lead specified ‘Needs MDOA approval’ in section VIII. Team Lead/Coordinator Review.

1. Log in as the permitted user
2. Search for client under *Clients* tab
3. Click **Client Summary** for client
4. Click **Go to Tasks** link for select program
5. Click **Plan of Service/Plan of Care** menu button OR click **Summary** from Task List
6. Select existing POS/POC, click **View**

Long Term Services and Support

FBN/john.jilek (On behalf of Rosenthal, Jerry)
Location: Maryland Department of Aging

Home Clients My Lists Alerts Dashboard Assignments Reports My Profile Client Details

Patricia Casarotto
ID: 1049859A9A866121 DOB: 10/24/1968
MPF Eligible: N

WOA — Plan of Service/Plan of Care

Back to Task List Add POS/POC

Created Date	Type	POS Cost Neutrality	Cost Neutrality Limit	Start Date	End Date	Status	Active/Inactive	Actions
12/21/2012	Provisional	\$143.58		12/21/2012	12/21/2012	Pending MDOA Decision	Inactive	

Profile
Client Summary
WOA Program Menu
Case Program Summary
Task List
Initial Screening
Application
Assessment & AERS POC
Level of Care
Plan of Service/ Plan of Care >

7. Provide comment in section IX. POS/POC Decision (optional)

8. Click **Approve, Deny, or Clarification Request**

Long Term Services and Support

FBN/john.jilek (On behalf of Rosenthal, Jerry)
Location: Maryland Department of Aging

Home Clients My Lists Alerts Dashboard Assignments Reports My Profile Client Details

Patricia Casarotto
ID: 1049859A9A866121 DOB: 10/24/1968
MPF Eligible: N

WOA — Plan of Service/Plan of Care Status: Pending MDOA Decision

Back to List Copy Approve Deny Clarification Request Discard Expand All

I. Client Information
II. Overview
III. Services
IV. Cost Neutrality
V. Diagnosis
VI. Signatures
VII. Advanced Directives
VIII. Team Lead/Coordinator Review
IX. POS/POC Decision Status: Pending MDOA Decision Edit

2.12.13 “Discard” POS/POC

The user is permitted to discard a form that is ‘In Progress’, “Pending Supervisor/Coordinator Decision”, or “Pending MDOA Decision.”

Long Term Services and Support

FBN/john.jilek (On behalf of Weaver, Amy)
Location: Baltimore County Dept. of Aging

Home Clients My Lists Alerts Dashboard Reports My Profile Client Details

Patricia Casarotto
ID: 1049859A9A866121 DOB: 10/24/1968
MPF Eligible: N

WOA — Plan of Service/Plan of Care Status: In Progress

Back to List Submit Discard Expand All

I. Client Information
II. Overview
III. Services
IV. Cost Neutrality
V. Diagnosis
VI. Signatures
VII. Advanced Directives

2.13 Assessment Packet (ICS, LAH)

The Assessment Packet is comprised of four program processes including: Maryland Standardized Assessment, AERS Plan of Care, Level of Care, and Plan of Service Plan of Care. All of these LAH/ICS program processes must be complete prior to an Assessment Packet being complete.

2.13.1 Add Assessment Packet Documentation Reminder

To add an Assessment Packet Documentation Reminder, you must log in as the permitted user.

1. Log in as the permitted user
2. Search for client under *Clients* tab
3. Click **Client Summary** for client
4. Click **Go to Tasks** link for select program
5. Click **Assessment Packet** menu button OR click **Summary** from Task List
6. Under Documentation Reminder, click **View**

The screenshot shows the LTSS system's "Client Details" page for a client named Patricia Casarotto. The left sidebar has a "LAH Program Menu" with "Assessment Packet" selected. The main content area shows the "LAH — Assessment Packet" section with a status of "N/A". Under "Documentation Reminder", there is a "Date Details" section indicating "There is no Documentation Reminder entry." A "View" button is highlighted with a green circle and arrow. Other sections like "AP Management" and "Acknowledgement" also show "No submitted assessment packets".

2.13.2 “Save” Assessment Packet Documentation Reminder

Click **Save** after completing the form. This will save all selections and entries on the form and direct the user to view mode. The user is able to *View* and *Edit* the Documentation Reminder Form after saving through the respective links displaying in view mode.

The screenshot shows the LTSSMaryland application interface. On the left is a sidebar with various menu items like Home, Clients, My Lists, Alerts, Dashboard, Reports, and Client Details. Under 'LAH Program Menu', 'Assessment Packet' is selected. The main content area displays a 'LAH — Assessment Packet — Documentation Reminder' form. This form includes a 'Documentation Reminder Form' section with checkboxes for 'Narration Detailed to LAHWU', 'Signed Assessment', 'Signed AERS POC', 'Current LOC', and 'Signed POS/POC'. At the bottom right of this section, there is a 'Create Date' field showing '12/20/2012'. In the top right corner of the entire modal window, there is a 'Save' button, which is circled in green.

2.13.3 “Print” entire documentation reminder

After saving the Documentation Reminder, The user is permitted to view and print the entire document reminder.

This screenshot shows the same application interface as the previous one, but the 'Documentation Reminder Form' is now displayed in a larger, centered modal window. The 'Print the entire document reminder' link is highlighted with a green circle. The rest of the interface, including the sidebar and other buttons, is visible around the modal.

2.13.4 Review & Submit Assessment Packet

To review the Assessment Packet, you must log in as the permitted user. The following are permitted to review the Assessment Packet: (Assigned) TCC Case Manager. Click **Submit** to complete the review process.

1. Log in as the permitted user
2. Search for client under *Clients* tab
3. Click **Client Summary** for client
4. Click **Go to Tasks** link for select program
5. Click **Assessment Packet** menu button OR click **Summary** from Task List
6. Under AP Management section, click **View**

The screenshot shows the 'Client Details' page for a client named Patricia Casarotto. The 'AP Management' section is highlighted with a blue background. The 'View' button in this section is circled with a green circle.

7. Review the Assessment Packet, click **Submit**

The screenshot shows the 'Assessment Packet Management' page. The 'Submit' button is circled with a green circle.

Form Type	Create Date	Start Date	End Date	Type	Status	Active	Actions
Maryland Standardized Assessment	12/18/2012	11/01/2012	12/20/2012	5 - Discharge assessment, covers last 3 days of service	Submitted	Yes	View
AERS Plan of Care	12/20/2012	11/01/2012	11/01/2013	Redetermination	Submitted	Yes	View
Level of Care	12/20/2012	12/20/2012	12/20/2013		Approved By DHMH Physician	Yes	View
Plan of Service/Plan of Care	12/20/2012	12/20/2012	12/27/2013	Initial	Approved	Yes	View

2.13.5 “Acknowledge” Assessment Packet

To Acknowledge the Assessment Packet, the Assessment Packet must be ‘Submitted’ and you must be logged in with the permitted user. The following are permitted to acknowledge the Assessment Packet: LAHWU Participant Specialist.

1. Log in as the permitted user
2. Search for client under *Clients* tab
3. Click **Client Summary** for client
4. Click **Go to Tasks** link for select program
5. Click **Assessment Packet** menu button OR click **Summary** from Task List
6. Under Acknowledgement section, click **View**
7. Click Acknowledge



The screenshot shows the software's navigation bar with 'Long Term Services and Support' and 'FED:John.Jilek (On behalf of: Jones, Alie)' at the top. The main content area displays a 'Client Details' section for 'Patricia Casarotto' with ID 104989AP866121, DOB 10/24/1968, and MFP Eligible: N. Below this is the 'LAH — Assessment Packet — Acknowledgement' section with a 'Back to List' link. A 'AP Acknowledgement Information' panel shows 'Assessment Packet Due Date: 02/02/2013'. The 'Assessment Packet' section contains a table with four rows of data:

Form Type	Create Date	Start Date	End Date	Status	Active	Submitted in Assessment Packet	Actions
Maryland Standardized Assessment	12/19/2012	11/01/2012	12/20/2012	Submitted	Yes	Yes	View
AERS Plan of Care	12/20/2012	11/01/2012	11/01/2013	Submitted	Yes	Yes	View
Level of Care	12/20/2012	12/20/2012	12/20/2013	Approved By DHMH Physician	Yes	Yes	View
Plan of Service/Plan of Care	12/20/2012	12/20/2012	12/27/2013	Approved	Yes	Yes	View

2.14 Pre-ATP (ICS, LAH)

2.14.1 “Add” Pre-ATP Questionnaire

To add a Pre-ATP Questionnaire Form, the Assessment Packet must be “Acknowledged” and you must log in as the permitted user. NOTE: This form is optional.

1. Log in as the permitted user
2. Search for client under *Clients* tab
3. Click **Client Summary** for client
4. Click **Go to Tasks** link for select program
5. Click **ATP** menu button OR click **Summary** from Task List
6. Under Pre-ATP Questionnaires, click **Add**

The screenshot shows the 'Long Term Services and Support' application interface. The top navigation bar includes 'Home', 'Clients', 'My Lists', 'Alerts', 'Assignments', 'Reports', 'Client Details', 'Menu', and 'Account'. The user is logged in as 'FBI\john.jilk' (On behalf of Jones, Alisa) at location 'LAH'. On the left, there's a sidebar with 'LAH Program Menu' containing links like 'Case Program Summary', 'Task List', 'Initial Screening & Referral', 'Application', 'Assessment & POC', 'Level of Care', 'Plan of Service/Plan of Care', 'Assessment Packet', and 'ATP'. The main content area is titled 'LAH — ATP' and shows two tables: 'Pre-ATP Questionnaires' and 'ATP Questionnaires'. The 'Pre-ATP Questionnaires' table has columns for 'Creation Date', 'Status', and 'Actions'. The 'ATP Questionnaires' table has columns for 'ATP Type', 'Creation Date', 'Date DEWS Alerted', 'Date DEWS Acknowledged', 'Status', and 'Actions'. Both tables show 'No data available in table'. In the top right corner of the 'Pre-ATP Questionnaires' table, there is a blue 'Add' button with a green circle around it.

2.14.2 “Save” Pre-ATP Questionnaire

Click **Save** after completing the form. This will save all selections and entries on the form and direct the user to view mode.

The screenshot shows the 'Pre-ATP Questionnaire Form' page. At the top right, there is a 'Save' button with a green circle around it. The form contains several questions with radio button options. The status bar at the bottom indicates 'Status: In Progress'.

2.14.3 “Submit” Pre-ATP Questionnaire

Click **Submit** to complete the form process. This will save all previous selections and entries and direct the user to view mode.

The screenshot shows the 'Pre-ATP Questionnaire Form' page. At the top right, there is a 'Submit' button with a green circle around it. The status bar at the bottom indicates 'Status: In Progress'.

2.14.4 “Discard” Pre-ATP Questionnaire

The user is permitted to discard a form that is ‘In Progress’ or ‘Submitted’.

The screenshot shows the 'Pre-ATP Questionnaire' form. At the top right of the form area, there is a 'Discard' button with a green circle around it. The form contains several questions with radio button options and a note about pending status.

2.15 Certification of Technical and Medical Eligibility (WOA)

2.15.1 “Add” Certification of Technical and Medical Eligibility

To add a Certification of Technical and Medical Eligibility, you must log in as the permitted user.

1. Log in as the permitted user
2. Search for client under **Clients** tab
3. Click **Client Summary** for client
4. Click **Go to Tasks** link for select program
5. Click **ATP** menu button OR click **Summary** from Task List
6. Under Certification of Technical and Medical Eligibility, click **Add**

The screenshot shows the 'Certificate of Technical and Medical Eligibility' section. At the top right of the table header, there is an 'Add' button with a green circle around it. Below the table, another 'Add' button is also highlighted with a green circle.

2.15.2 “Save” Certification of Technical and Medical Eligibility

Click **Save** after completing the form. This will save all selections and entries on the form and direct the user to view mode.

The screenshot shows the 'WOA — ATP — Certification of Tech/Med Eligibility for Waiver Services' form. The 'Client Details' section at the top right shows 'FBNjohn.jilek (On behalf of: Waiver, Amy) Location: Baltimore County Dept. of Aging'. The main form area contains 'Client Information' and 'A. Waiver Technical Eligibility Must Meet All Of the Following' sections. The 'Save' button is located in the top right corner of the form window.

2.15.3 “Submit” Certification of Technical and Medical Eligibility

Click **Submit** to complete the form process. This will save all previous selections and entries and direct the user to view mode.

The screenshot shows the same 'WOA — ATP — Certification of Tech/Med Eligibility for Waiver Services' form, but the status at the top right now says 'Status: In Progress'. The 'Submit' button is highlighted with a green oval in the top right corner of the form window.

2.15.4 “Print” Certification of Technical and Medical Eligibility

The user is able to view the AERS POC in print view (PDF format displayed in a separate window/tab).

1. Log in as the permitted user
2. Search for client under *Clients* tab
3. Click **Client Summary** for client
4. Click **Go to Tasks** link for select program
5. Click **ATP** menu button OR click **Summary** from Task List
6. Click **Print**

This screenshot shows the 'WOA — ATP' section of the application. On the left, there's a sidebar with various links like Home, Clients, My Lists, Alerts, Dashboard, Reports, My Profile, Client Details, Profile, Client Summary, WOA Program Menu, Case Program Summary, Task List, Initial Screening, Application, Assessment & AERS POC, Level of Care, Plan of Service/Plan of Care, and ATP. The main area shows a table for 'ATP Questionnaires'. The 'Print' button in the top right corner of this table is circled in green.

2.16 ATP Questionnaire (ICS, LAH, WOA)

2.16.1 “Add” ATP Questionnaire

To add an ATP Questionnaire Form, you must log in as the permitted user.

1. Log in as the permitted user
2. Search for client under *Clients* tab
3. Click **Client Summary** for client
4. Click **Go to Tasks** link for select program
5. Click **ATP** menu button OR click **Summary** from Task List
6. Under ATP Questionnaires, click **Add**

This screenshot shows the 'LAH — ATP' section of the application. The sidebar and table structure are similar to the previous screenshot, but the 'Add' button in the top right corner of the 'ATP Questionnaires' table is circled in green.

2.16.2 “Save” ATP Questionnaire

Click **Save** after completing the form. This will save all selections and entries on the form and direct the user to view mode.

The screenshot shows the 'ATP — ATP — Questionnaire' form. The 'Save' button in the top right corner is circled in green. The form contains sections for 'ATP Type' (Advisory Authorization), 'Jurisdiction' (Baltimore), 'Client Information' (Individual's Full Name: Patricia Casarotto, SSN: 215456589, Date of Birth: 10/24/1968, MAR: 56415641250 (Community), Address: EL SHADDAI HEALTH CARE, 7000 SECURITY BLVD #302, BALTIMORE, MD 21244), and 'Client Now Is In' (Nursing Facility, Anticipated Date of Deinstitutionalization: 12/20/2012). The 'Street Address' section shows 'EL SHADDAI HEALTH CARE' as the address.

2.16.3 “Submit” ATP Questionnaire

Click **Submit** to complete the form process. This will save all previous selections and entries and direct the user to view mode.

The screenshot shows the 'ATP — ATP — Questionnaire' form with the status 'Status: In Progress'. The 'Submit' button in the top right corner is circled in green. The form includes sections for 'ATP Type' (Advisory Authorization), 'Jurisdiction' (Baltimore), 'Client Information' (Individual's Full Name: Patricia Casarotto, SSN: 215456589, Date of Birth: 10/24/1968, MAR: 56415641250 (Community), Address: EL SHADDAI HEALTH CARE, 7000 SECURITY BLVD #302, BALTIMORE, MD 21244), 'Client Now Is In' (Nursing Facility, Anticipated Date of Deinstitutionalization: 12/20/2012), and 'Full Address' (EL SHADDAI HEALTH CARE, 7000 SECURITY BLVD #302, BALTIMORE MD. 21244). A 'Sign Off' section at the bottom contains fields for Signature, Date, Title, and Telephone Number.

2.16.4 “Print” ATP Questionnaire

The user is able to view the AERS POC in print view (PDF format displayed in a separate window/tab).

1. Log in as the permitted user
2. Search for client under *Clients* tab
3. Click **Client Summary** for client
4. Click **Go to Tasks** link for select program
5. Click **ATP** menu button OR click **Summary** from Task List
6. Click Print

ATP Type	Creation Date	Date DEWS Alerted	Date DEWS Acknowledged	Status	Actions
Advisory Authorization	12/20/2012	N/A	N/A	In Progress	View Print
Advisory Authorization	12/20/2012	12/20/2012	N/A	Submitted	View Print

2.16.5 “Discard” ATP Questionnaire

The user is permitted to discard a form that is ‘In Progress’ or ‘Submitted’.

Signature: **	Jones, Alisa
Date: **	12/20/2012
Title: **	Provider Relations Manager
Telephone Number: **	4107675095

2.16.6 ATP Questionnaire List View

The user can view a list of Pre-ATP and ATP Questionnaires and the status of each ('Submitted', 'In Progress', or 'Discarded').

Pre-ATP Questionnaires					
Creation Date	Status	Active	Actions		
12/20/2012	Submitted	No	View	Print	Edit
12/20/2012	Discarded (mistake)	No	View	Print	Edit

ATP Questionnaires						
ATP Type	Creation Date	Date DEWS Alerted	Date DEWS Acknowledged	Status	Actions	
Advisory Authorization	12/20/2012	N/A	N/A	In Progress	Edit	View Print
Advisory Authorization	12/20/2012	12/20/2012	N/A	Submitted	View	Print

2.17 Transition Funds (ICS, LAH, WOA)

2.17.1 Add Transition Funds

Transition Fund can be maintained for each client.

1. Log in as the permitted user
2. Search for client under *Clients* tab
3. Click **Client Summary** for client
4. Click **Go to Tasks** link for select program
5. Click **Transition Funds** menu button
6. Click Manage Transition Funds

7. Complete form, click **Add Funds**

Long Term Services and Support

FETjohn.jlek (On behalf of Becker, Inc)
Location: The Coordinating Center

Home Clients My Lists Alerts Dashboard Reports Client Details

Patricia Casarotto
ID: 1049859AP866121 DOB: 10/24/1968
MF Eligible: N

Profile Client Summary

LAH Program Menu

- Case Program Summary
- Task List
- Referrals
- Application
- Assessment & AERS POC
- Level of Care
- Plan of Service/Plan of Care
- Assessment Packet
- ATP
- Financial & Overall Decision
- Appeals & Dispositions
- Transition Funds
- Manage Transition Funds >
- Case Notes

LAH — Manage Transition Funds

Back to list

Transition Funds Form

— Transition Funds Summary

There are currently no Activities.

— Add LAH Transition Fund

Items covered if waiver transition funds have been exhausted.

Date of Transition:	12/20/2012
Category:	Funds to secure essential utilities
Date of Expenditure:	12/20/2012
Amount:	\$ 150.00
Description:	Electric

Add Funds

2.17.2 “Discard” Transition Funds

The user is permitted to discard funds that have been ‘Submitted’.

Long Term Services and Support

FETjohn.jlek (On behalf of Becker, Inc)
Location: The Coordinating Center

Home Clients My Lists Alerts Dashboard Reports Client Details

Patricia Casarotto
ID: 1049859AP866121 DOB: 10/24/1968
MF Eligible: N

Profile Client Summary

LAH Program Menu

- Case Program Summary
- Task List
- Referrals
- Application
- Assessment & AERS POC
- Level of Care
- Plan of Service/Plan of Care
- Assessment Packet
- ATP
- Financial & Overall Decision
- Appeals & Dispositions
- Transition Funds
- Manage Transition Funds >
- Case Notes

LAH — Manage Transition Funds

Back to list

Transition Funds Form

— Transition Funds Summary

LAH Total: \$150.00

Total: \$150.00

— Add LAH Transition Fund

Items covered if waiver transition funds have been exhausted.

Date of Transition:	
Category:	
Date of Expenditure:	12/20/2012
Amount:	\$ 0.00
Description:	

LAH Transition Funds

Date of Expenditure	Amount	Category	Description	Status	Action
12/20/2012	\$ 150.00	Funds to secure essential utilities	Electric	Submitted	Discard

(Discarded funds are not included in the Total)

Total: \$150.00

2.17.3 View Transition Funds History

The user is permitted to view a history of transition funds.

Date of Expenditure	Amount	Category	Description	Status
12/20/2012	\$150.00	Funds to secure essential utilities	Electric	Submitted
12/20/2012	\$846.26	Funds to secure essential utilities	water	Submitted

2.18 Case Notes (ICS, LAH, WOA)

2.18.1 Add Case Notes

The user is permitted to add case notes throughout the enrollment of the client.

1. Log in as the permitted user
2. Search for client under *Clients* tab
3. Click **Client Summary** for client
4. Click **Go to Tasks** link for select program
5. Click **Case Notes** menu button
6. Enter a note, click **Add Case Note**

2.19 Notice of Case Activity (ICS, LAH, WOA)

2.19.1 “Add” Notice of Case Activity

The user is permitted to add a NOC form.

1. Log in as the permitted user
2. Search for client under *Clients* tab
3. Click **Client Summary** for client
4. Click **Go to Tasks** link for select program
5. Click Notice of Case Activity menu button
6. Click **Add**

The screenshot shows the LTSSMaryland system interface. At the top, there's a navigation bar with links for Home, Clients, My Lists, Alerts, Dashboard, Reports, and Client Details. The Client Details section shows a client profile for Patricia Casarotto. On the left, there's a sidebar titled 'LAH Program Menu' with various options like Case Program Summary, Task List, Referrals, Application, Assessment & AERS POC, Level of Care, Plan of Service/Plan of Care, Assessment Packet, ATP, Financial & Overall Decision, Appeals & Depositions, Transition Funds, Case Notes, and Additional Forms. Under 'Additional Forms', 'Notice of Case Activity' is selected and highlighted with a blue border. The main content area is titled 'LAH — Notices of Case Activity' and contains a table header for 'Notices of Case Activity' with columns for Date, Case Manager, Status, and Actions. Below the header, it says 'No data available in table'. In the top right corner of the main content area, there's a small 'Add' button, which is circled in green.

2.19.2 "Save" Notice of Case Activity

Click **Save** after completing the form. This will save all selections and entries on the form and direct the user to view mode.

The screenshot shows the 'Notice of Case Activity' form in the LTSSMaryland system. The form includes fields for Client Information (MA Number, First Name, Middle Name, Last Name, Address Description, Street Address 1, Street Address 2, City, State, Zip Code, County, Address Type), Case Activity (Case Manager, Client Participation options like deceased or moved), and a Signature section. The 'Save' button in the top right corner is highlighted with a green circle.

2.19.3 "Submit" Notice of Case Activity

Click **Submit** to complete the form process. This will save all previous selections and entries and direct the user to view mode.

The screenshot shows the 'Notice of Case Activity' form in the LTSSMaryland system. The form includes fields for Client Information, Case Activity, and a Signature section. The 'Submit' button in the top right corner is highlighted with a green circle. The 'Effective' date is listed as 12/20/2012, and the reason is noted as 'The nursing home level of care was not met.'

2.19.4 “Discard” Notice of Case Activity

The user is permitted to discard a form that is ‘In Progress’ or ‘Submitted’.

This screenshot shows the 'Notice of Case Activity' form within the LTSSMaryland application. The left sidebar contains a navigation menu with various program modules like LAH Program Menu, Assessment & AERS POC, and Financial & Overall Decision. Under 'Additional Forms', 'Notice of Case Activity' is selected, indicated by a blue background. The main content area displays the 'Notice of Case Activity Form' with fields for Client Information (MA Number: 56415641290, First Name: Patricia, Middle Name: Ann, Last Name: Casarotto, Address: ALICE MANOR, Street Address 1: EL SHADDAI HEALTH CARE, Street Address 2: 7000 SECURITY BLVD #302, City: BALTIMORE, State: Maryland, Zip Code: 21244, County: Baltimore) and Case Activity (Case Manager: Erin Bricker). Below these sections is a 'Client Participation' section with a note about recipient authorization. At the bottom right of the form, there is a 'Discard' button, which is highlighted with a green circle.

2.19.5 “Print” Notice of Case Activity

The user is permitted to view form in print view (PDF format displayed in a separate window/tab).

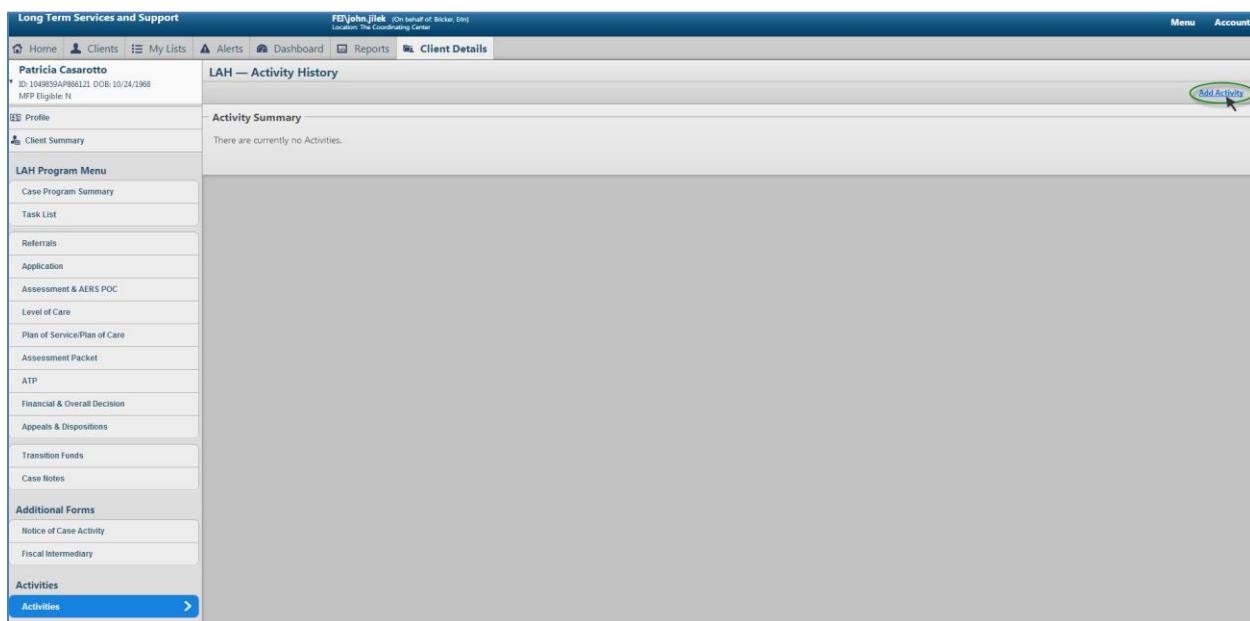
This screenshot shows the 'Notices of Case Activity' list within the LTSSMaryland application. The left sidebar includes the same navigation menu as the previous screenshot. The main content area displays a table titled 'Notices of Case Activity' with columns for Date, Case Manager, Status, and Actions. A single row is shown for 12/20/2012, Erin Bricker, Submitted, and 'Details Print'. The 'Print' button in the Actions column is highlighted with a green circle.

2.20 Activities (ICS, LAH, WOA)

2.20.1 Add Activity

The user is permitted to add an activity for a select client.

1. Log in as the permitted user
2. Search for client under *Clients* tab
3. Click **Client Summary** for client
4. Click **Go to Tasks** link for select program
5. Click **Activities** menu button
6. Click **Add Activity**



2.20.2 "Save" Activity

Click **Save** after completing the form. This will save all selections and entries on the form and direct the user to view mode.

The screenshot shows the 'LAH — Activity Sheet' page. At the top, it displays client details: ID: 10488594P8686121, DOB: 10/24/1968, MFP Eligible: N. On the right, there are 'Update' and 'Save' buttons, with 'Save' being circled in green. The left sidebar contains a navigation menu with sections like Profile, Client Summary, LAH Program Menu, Case Program Summary, Task List, Referrals, Application, Assessment & AERS POC, Level of Care, Plan of Service/Plan of Care, Assessment Packet, ATP, Financial & Overall Decisions, Appeals & Dispositions, Transition Funds, Case Notes, Additional Forms, Notice of Case Activity, Fiscal Intermediary, Activities, and Activities. The main content area has tabs for Activity Sheet, Activity Summary, Activity Information, and Activity List. Under Activity List, there is a table with columns for Type (Clerical), Activity (Administer MFP Flexible Fund), Category (Administrative), Duration (2 hrs. 25 min.), and Description (Administrative activities complete). A note at the bottom says '(To view more content, re-size the text area by dragging the bottom-right corner.)'.

2.20.3 “Edit” Activity

The user is permitted to edit an existing activity from the Activity History page.

1. Log in as the permitted user
2. Search for client under *Clients* tab
3. Click **Client Summary** for client
4. Click **Go to Tasks** link for select program
5. Click **Activities** menu button
6. Click **Edit**

Long Term Services and Support

FEDjohn.jlck (On behalf of Bricker, Inc)
Location: The Coordinating Center

Home Clients My Lists Alerts Dashboard Reports Client Details

Patricia Casarotto
ID: 1049859A9866L2I DOB: 10/24/1968
MFP Eligible: N

Profile Client Summary LAH Program Menu Case Program Summary Task List Referrals Application Assessment & AERS POC Level of Care Plan of Service/Plan of Care Assessment Packet ATP Financial & Overall Decision Appeals & Dispositions Transition Funds Case Notes Additional Forms Notice of Case Activity Fiscal Intermediary Activities Activities

LAH — Activity History

Add Activity Expand All

Activity Summary

Administrative Total:	10 Units
Comprehensive Total:	0 Units
Ongoing Total:	0 Units

Grand Total: 10 Units

12/20/2012 Staff: Erin Bricker

Edit Discard

7. Modify the existing Activity, click Save

Long Term Services and Support

FEDjohn.jlck (On behalf of Bricker, Inc)
Location: The Coordinating Center

Home Clients My Lists Alerts Dashboard Reports Client Details

Patricia Casarotto
ID: 1049859A9866L2I DOB: 10/24/1968
MFP Eligible: N

Profile Client Summary LAH Program Menu Case Program Summary Task List Referrals Application Assessment & AERS POC Level of Care Plan of Service/Plan of Care Assessment Packet ATP Financial & Overall Decision Appeals & Dispositions Transition Funds Case Notes Additional Forms Notice of Case Activity Fiscal Intermediary Activities Activities

LAH — Activity Sheet

Back to Activity History

Activity Sheet

Activity Summary

Total Administrative:	145 Min. / 10 Units
Total Comprehensive:	0 Min. / 0 Units
Total Ongoing:	0 Min. / 0 Units

Activity Information

Date of Activity: * 12/20/2012
Staff: * Erin Bricker

Activity List *

Activities Description

Type: * Clerical
Activity: * Administer MFP Flexible Fund:
Category: * Administrative
Duration: * 2 hrs. 25 min.
Description: * Administrative activities complete

Save

2.20.4 “Discard” Activity

The user is permitted to discard a form that is ‘In Progress’ or ‘Submitted’.

The screenshot shows the LTSSMaryland system interface. On the left is a vertical sidebar with various menu items like Profile, Client Summary, LAH Program Menu, Case Program Summary, Task List, Referrals, Application, Assessment & AERS POC, Level of Care, Plan of Service/Plan of Care, Assessment Packet, ATP, Financial & Overall Decision, Appeals & Dispositions, Transition Funds, Case Notes, Additional Forms, Notice of Case Activity, Fiscal Intermediary, Activities, and Activities (selected). The main content area is titled 'LAH — Activity History'. It shows an 'Activity Summary' table with three rows: Administrative Total (10 Units), Comprehensive Total (0 Units), and Ongoing Total (0 Units). Below this is a 'Grand Total' row showing 10 Units. A specific activity entry for '12/20/2012' is selected, showing 'Staff: Erin Bricker'. At the bottom right of this entry is a blue 'Discard' button, which is circled in green in the screenshot.

2.21 Fiscal Intermediary (ICS, LAH)

2.21.1 “Add” Fiscal Intermediary Request

The user is permitted to add an FI Request form. There should be an ‘Approved’ and ‘Active’ POS/POC with independent provider selected.

1. Log in as the permitted user
2. Search for client under *Clients* tab
3. Click **Client Summary** for client
4. Click **Go to Tasks** link for select program
5. Click **Fiscal Intermediary** menu button
6. Click **Add**

This screenshot shows the 'Fiscal Intermediary' section of the LTSSMaryland system. On the left, there's a vertical navigation menu with various tabs like Home, Clients, Alerts, Dashboard, Reports, and Client Details. Under 'Fiscal Intermediary', there are two tables: 'Fiscal Intermediary Authorization Requests' and 'Fiscal Intermediary Attendants'. Both tables have columns for Created Date, Created By, Last Modified, Status, and Actions. The 'Actions' column in both tables contains a link labeled 'Add'. A green circle highlights this 'Add' link in the second table.

2.21.2 “Save” Fiscal Intermediary

Click **Save** after completing the form. This will save all selections and entries on the form and direct the user to view mode.

This screenshot shows the 'Authorization Request Form' for 'Fiscal Intermediary - Authorization Request'. The form includes sections for 'General Information' (Client Name: Roula Adams, Medicaid Number: 32165498766, Case Management Agency: TCC), 'Accessing Services' (Name of Enrolled Nurse Supervisor or Agency: Abass Amoke, Provider Number: 669996100), and 'Attendants' (Approved POS/POC Providers: Akinseye Ama, Attendant list: Akinseye Ama (Akinseye Ama) with details: Name: Akinseye Ama, Provider Number: 646801200, Emergency Type: Yes, Pay Rate: 71.79, Start Date: 01/17/2013, End Date: 01/18/2014). A green circle highlights the 'Save' button at the top right of the form.

2.21.3 “Submit” Fiscal Intermediary

Click **Submit** to complete the form process. This will save all previous selections and entries and direct the user to view mode.

This screenshot shows the 'Fiscal Intermediary - Authorization Request' form for client Roula Adams. The form is titled 'Fiscal Intermediary - Authorization Request Authorization Request Form'. It includes sections for 'General Information', 'Accessing Services', and 'Attendants'. The 'Attendants' section lists one attendant, Akimseye Ama, with details like provider number 646801200 and service hours 71.79. The 'Discard' button in the top right corner is highlighted with a green oval.

2.21.4 “Discard” Fiscal Intermediary

The user is permitted to discard a form that is ‘In Progress’.

This screenshot shows the same 'Fiscal Intermediary - Authorization Request' form for client Roula Adams. The 'Discard' button in the top right corner is highlighted with a green oval. The form fields are identical to the previous screenshot, including the list of attendants and their details.

2.22 MFP Questionnaire (ICS, LAH, WOA)

2.22.1 Create MFP Questionnaire

The MFP Questionnaire can be completed at any time. There are no limitations on the number of questionnaires that can be created.

1. Log in as the permitted user
2. Search for client under *Clients* tab
3. Click **Client Summary** for client
4. From the Client Summary, click **MFP Questionnaire List**

This screenshot shows the 'Client Summary' page for a client named 'John Jacobjingle'. The left sidebar includes links for Profile, Client Summary, Assessment, POC & LOC, and Additional Forms. The 'Additional Forms' section contains a link to 'MFP Questionnaire List', which is circled in green with a cursor pointing at it. The main content area displays three sections: LAH, WOA, and ICS, each with a 'Case Program Start Date' and 'Case Program End Date' field, both currently set to 'N/A'. At the bottom, there is an 'Alerts' section with date filters and a table showing 'No data available in table'.

5. Click **Create New Questionnaire**

This screenshot shows the 'MFP Questionnaire List' page. The left sidebar is identical to the previous screenshot. The main content area has a header 'MFP Questionnaire List' and a table with columns for 'Last Submission Date', 'Eligible (Y/N)', 'Anticipated Discharge Date', 'Status', and 'Actions'. A single row is present with the message 'No data available in table'. In the top right corner of the main area, there is a button labeled 'Create New Questionnaire' with a green oval and a cursor arrow pointing at it.

2.22.2 "Save" MFP Questionnaire

Click **Save** after completing the form. This will save all selections and entries on the form and direct the user to view mode.

The screenshot shows the 'Long Term Services and Supports' application interface. On the left, there's a sidebar with navigation links like 'Home', 'Clients', 'My Lists', 'Alerts', 'Dashboard', 'Reports', and 'Client Details'. Under 'Additional Forms', 'MFP Questionnaire List' is selected. The main content area is titled 'MFP Questionnaire' and displays the 'Money Follows the Person Questionnaire Form'. At the top right of this form, there are 'New', 'Save', and 'Cancel' buttons, with 'Save' being the one highlighted with a green oval. Other visible fields include 'Anticipated Discharge Date' set to '01/17/2013' and 'Consent Form Signed' and 'Consent Form Date' both set to '01/17/2013'.

2.22.3 "Submit" MFP Questionnaire

Click **Submit** to complete the form process. This will save all previous selections and entries and direct the user to view mode.

This screenshot is similar to the previous one but shows the 'Status: In Progress' message at the top of the 'MFP Questionnaire' section. The 'Submit' button at the top right of the form is highlighted with a green oval. The rest of the form and sidebar are identical to the previous screenshot.

2.22.4 “Discard” MFP Questionnaire

The user is permitted to discard a form that is ‘In Progress’.

The screenshot shows the 'MFP Questionnaire' page for client 'John Jacobjingle'. The 'Status' is listed as 'In Progress'. In the top right corner, there are four buttons: 'View', 'Edit', 'Submit', and 'Discard'. The 'Discard' button is circled in green. On the left side, there is a sidebar with various menu items like 'Profile', 'Client Summary', 'Assessment, POC & LOC', 'Assessment & AERS POC', 'Level of Care', 'Additional Forms', and 'MFP Questionnaire List'. The main content area contains sections for 'Money Follows the Person Questionnaire Form' and 'Questionnaire'.

2.23 Case Program Summary (ICS, LAH, WOA)

The user is permitted to view a snapshot of the case program. The Case Program Summary provides information including: Opening Information, Closing Information, Reopening Information, Progress, Status, and Redetermination Dates

1. Log in as the permitted user
2. Search for client under *Clients* tab
3. Click **Client Summary** for client
4. Click **Go to Tasks** link for select program
5. Click **Case Program Summary** menu button

The screenshot shows the 'LAH — Case Program Summary' page for client 'Patricia Casarotto'. The 'Status' is listed as 'Open'. The 'Case Program Summary' section is expanded, showing details under 'Opening Information', 'Closing Information', 'Reopening Information', and 'Additional Information'. The 'Case Program Summary' menu item in the sidebar is circled in green. The sidebar also includes 'Profile', 'Client Summary', 'LAH Program Menu', 'Case Program Summary' (which is highlighted), 'Task List', 'Referrals', 'Application', 'Assessment & AERS POC', 'Level of Care', 'Plan of Service/Plan of Care', 'Assessment Packet', 'ATP', 'Financial & Overall Decision', 'Appeals & Dispositions', 'Transition Funds', 'Case Notes', 'Additional Forms', 'Notice of Case Activity', 'Fiscal Intermediary', and 'Activities'.