Waiver Programs User Manual

A step by step navigational process

January 2013

Prepared by: FEi Systems

Contents

1 Introduction

1.1 Background

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

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

1.2 Guide to navigate through user manuals

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

1.2.1 User Manuals Descriptions

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

plans of service/care, etc. Information regarding adding/closing/reopening these case programs will be provided in this manual.

- **Administration** – This manual will provide information about various administration functions in the LTSS system, a major focus being agency and staff management. Note: This is mainly related to the LTSS system administration and not the actual day-to-day administration functions. Agency management module contains information about the agency, multiple locations (if any), programs that the agency works with, type of agency (contractor/government agency, etc.). Staff Management module contains information about each agencies' staff, how to create/edit staff profiles when a new staff member joins your agency, staff contact information, etc. This is critical because the roles and permissions given to a user will determine functionality they will see within LTSS.
- **Money Follows the Person** – This manual will provide information about how to complete various steps involved in the MFP process such as the Resident Contact Sheet, Ongoing Peer Support, Options Counseling, Peer Mentoring, Housing Assistance, Quality of Life, etc. The manual will give details about the necessary steps to complete each module, as well as information about the interaction between MFP and the waiver programs in LTSS. The manual is catered to all agencies associated with the MFP process.
- **Waiver Programs** – This manual will take you through the entire application process from the time a person chooses to apply for LAH/WOA/ICS, through the various eligibility determinations, until the enrollment eligibility determination. Instructions on how to add/edit/discard program-related forms will be provided here. The manual is catered to case management agencies and state oversight agencies.
- **Standardized Assessment and Level of Care** – This manual will provide information about how to complete an assessment, recommended plan of care, level of care determination in LTSS. The manual is catered to staff from Adult Evaluation and Review Services (AERS) and Utilization Control Agent (UCA).
- **Financial and Overall Eligibility Determination** – This manual will provide information about various forms and letters involved in determining financial and overall eligibility for programs such as LAH/WOA/ICS. The manual is catered to Division of Eligibility for Waiver Services (DEWS) staff members.
- **Appeals –** This manual will provide information regarding the appeals process in case a client chooses to appeal. The manual is catered to the appeals staff at DHMH and other users that may have permissions/role to view appeals
- **Quality Care Review**– This manual will walk the user through the steps necessary for completing a Quality Care Review (QCR) Worksheet for a client. The QCR Worksheet is used to perform a review of services given to a client through a specific waiver program the client was enrolled in. The manual is broken down into sections, including: adding QCR Review Periods, selecting potential clients to review, assignments and the three levels of review performed by QCR staff. The manual is catered to DHMH staff members.

1.2.2 Recommended approach

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

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

2 Getting Started

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

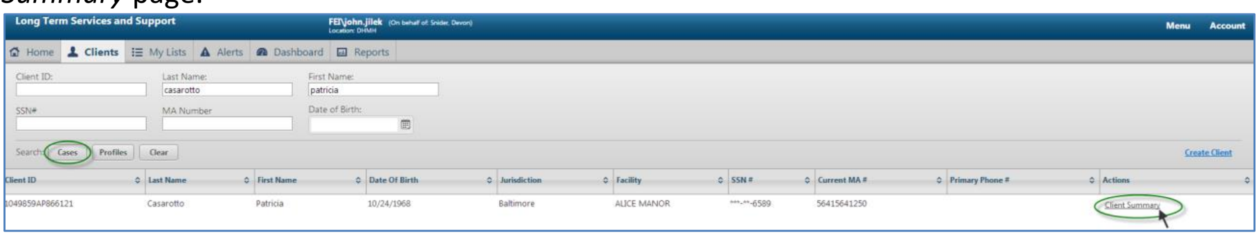
2.1.1 Client Search

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.

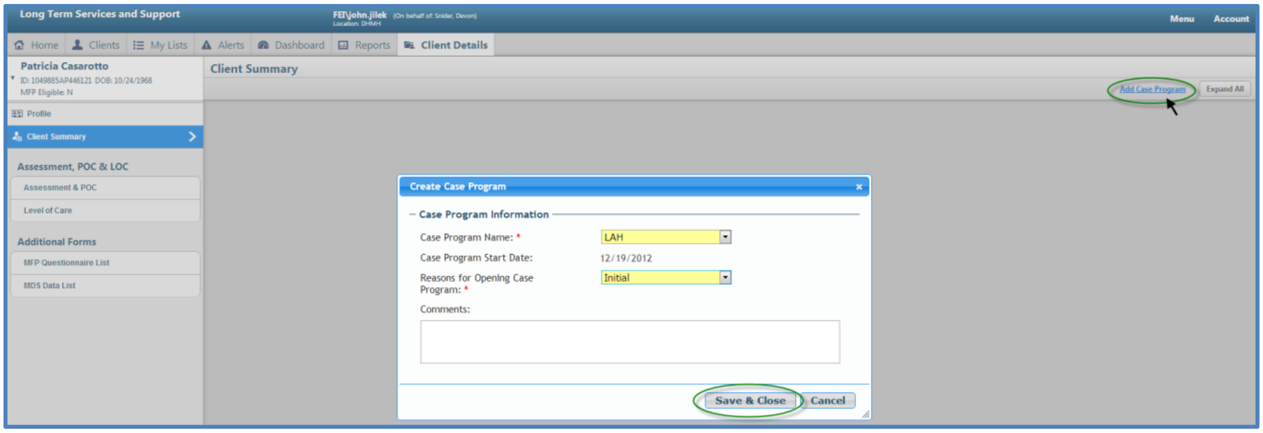


2.1.2 Add LAH, ICS, or WOA Program to Client

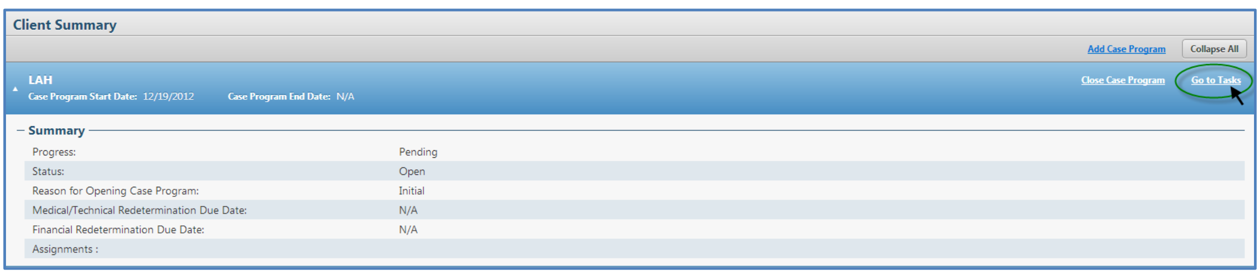
To add a program to a specific client, you must first be logged in as a permitted user. The following users have adequate permissions: DHMH Admin…

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**



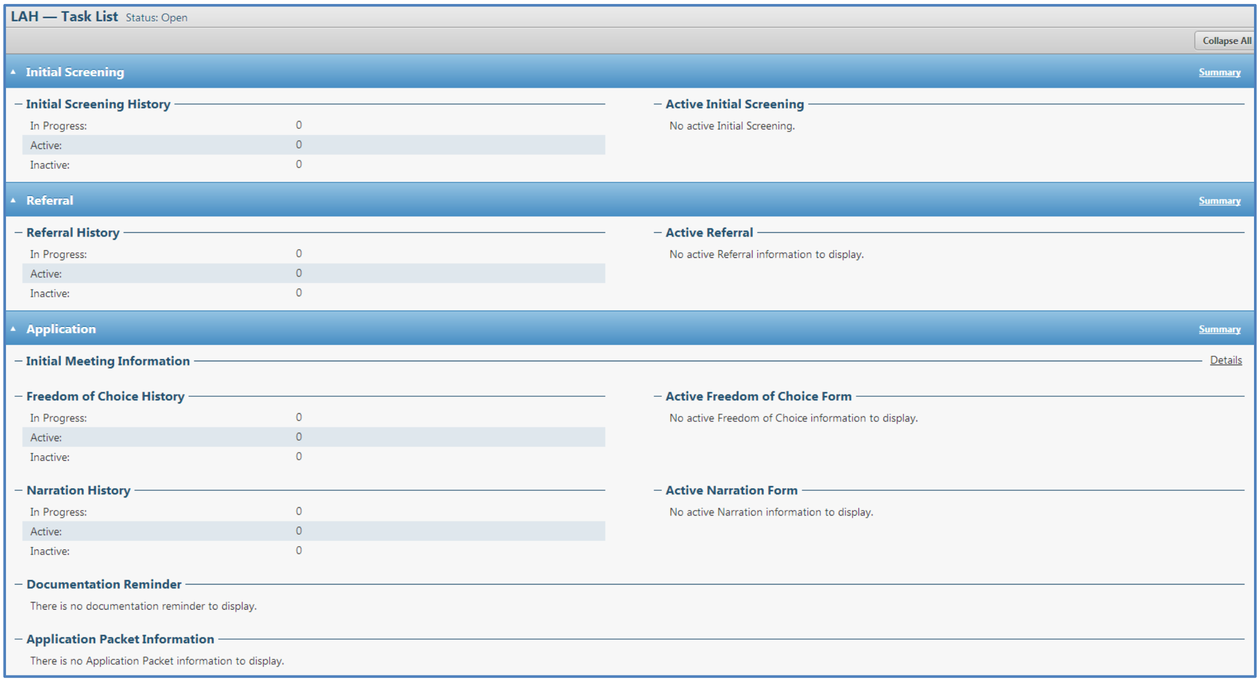
6. Click the ***Go to Tasks*** link to see client details for the select Program, starting with the Tasks List.



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



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”).

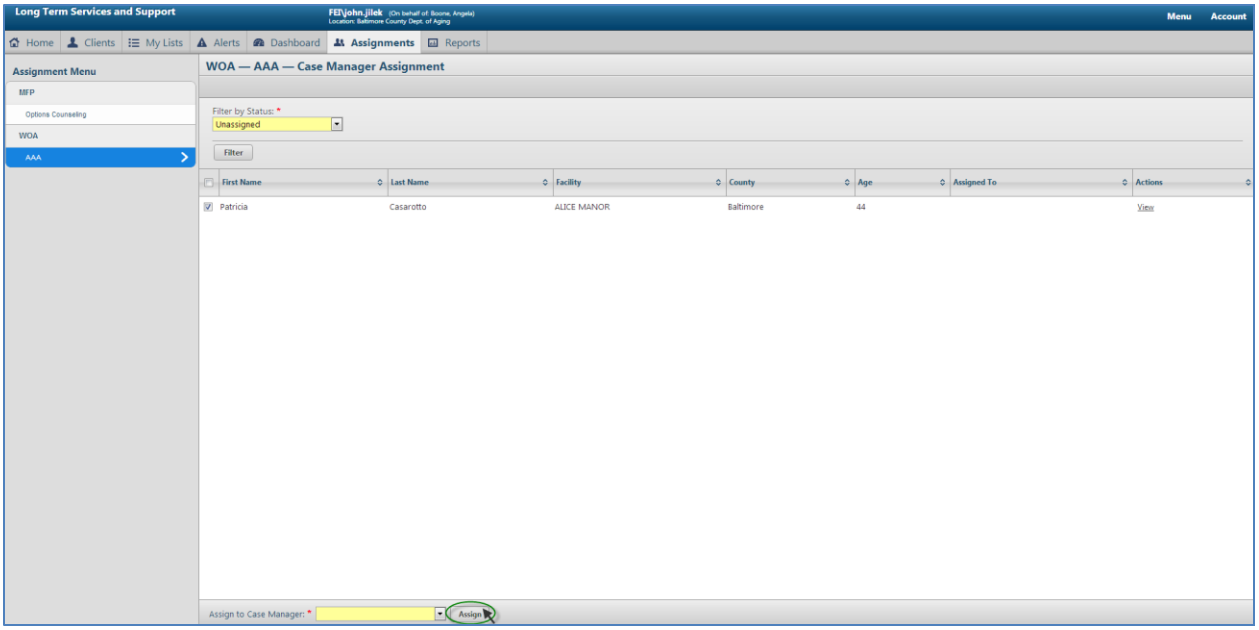
1. Log in as permitted user
2. Click the *Assignments* tab
3. Click **LAHWU** menu button
4. Select client from list
5. Select Participant Specialist from dropdown list
6. Click **Assign**

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**

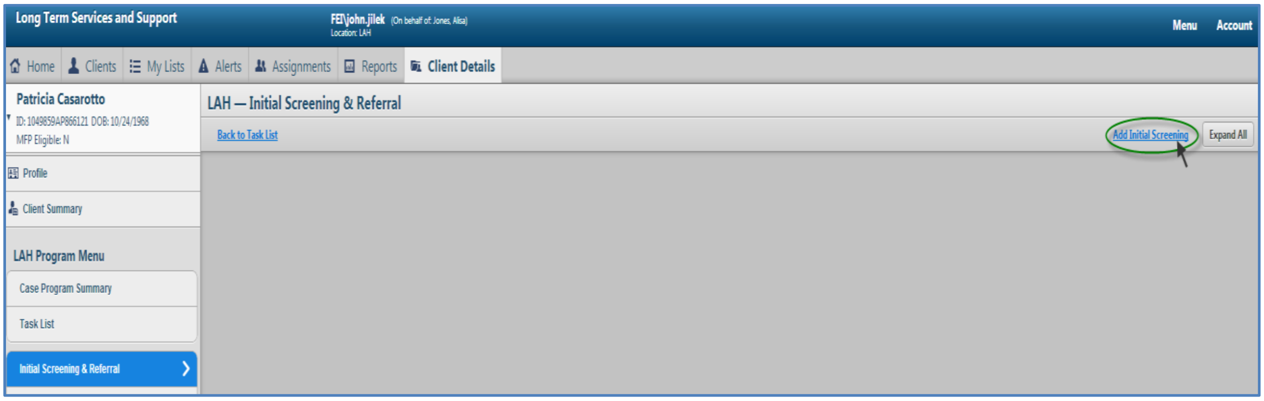


2.5 Initial Screening (ICS, LAH, WOA)

2.5.1 Add Initial Screening

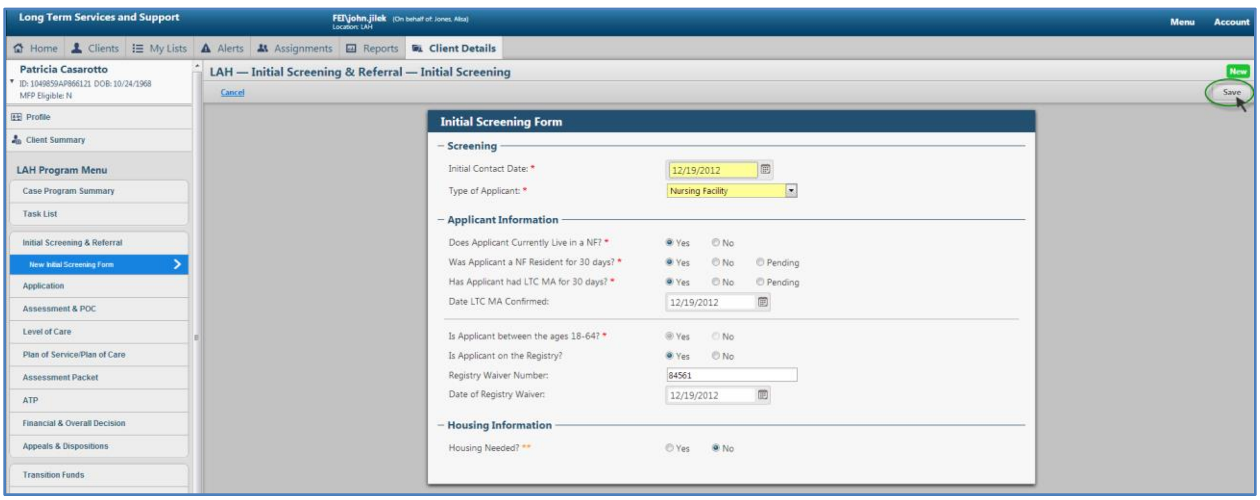
To add an Initial Screening to the selected client, you must log in as the permitted user. NOTE: This form is optional for WOA.

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



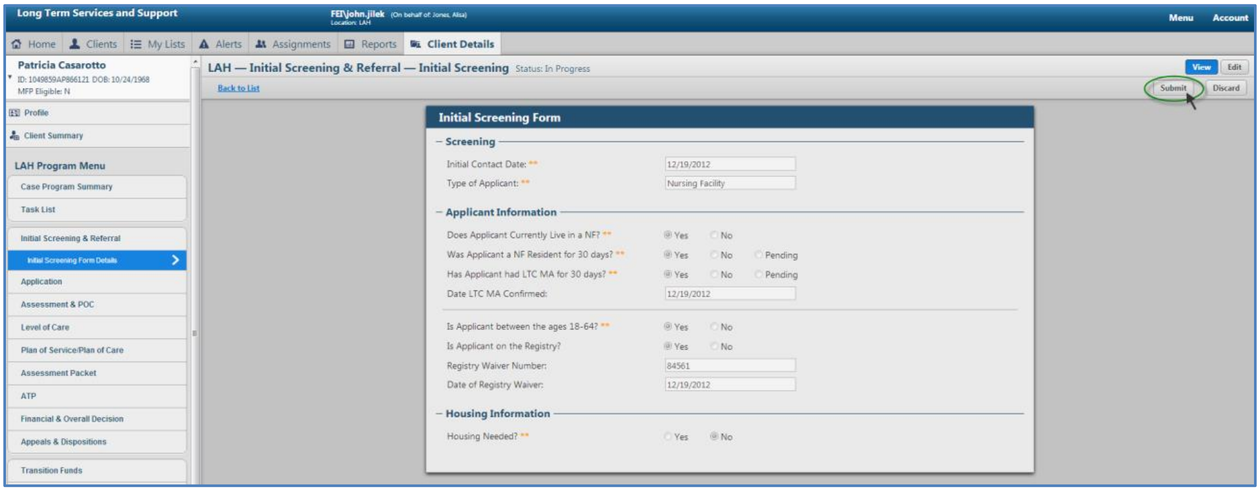
2.5.2 "Save" Initial Screening

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



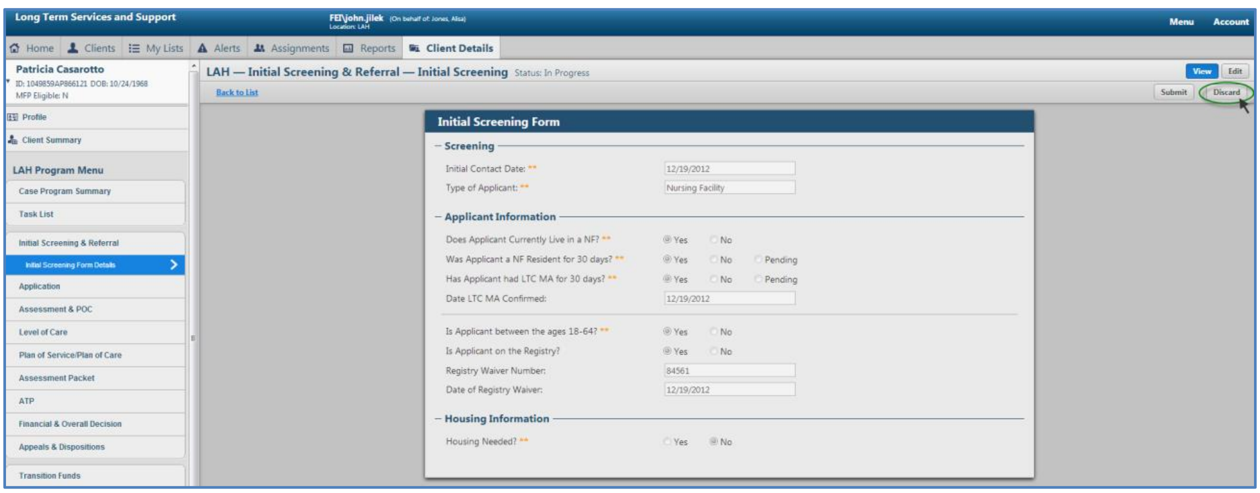
2.5.3 "Submit" Initial Screening

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.



2.5.4 "Discard" Initial Screening

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



2.5.5 Initial Screening List View

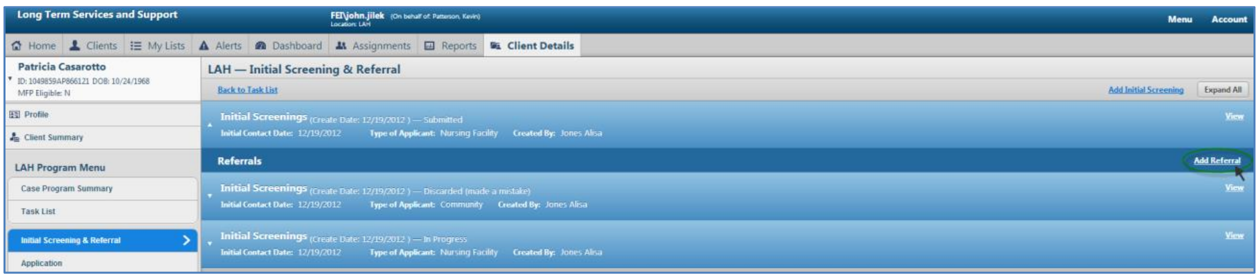
The user can view a list of Initial Screenings and the status of each ('Submitted', 'In Progress', or 'Discarded')

2.6 Referral (ICS, LAH)

2.6.1 Add Referral

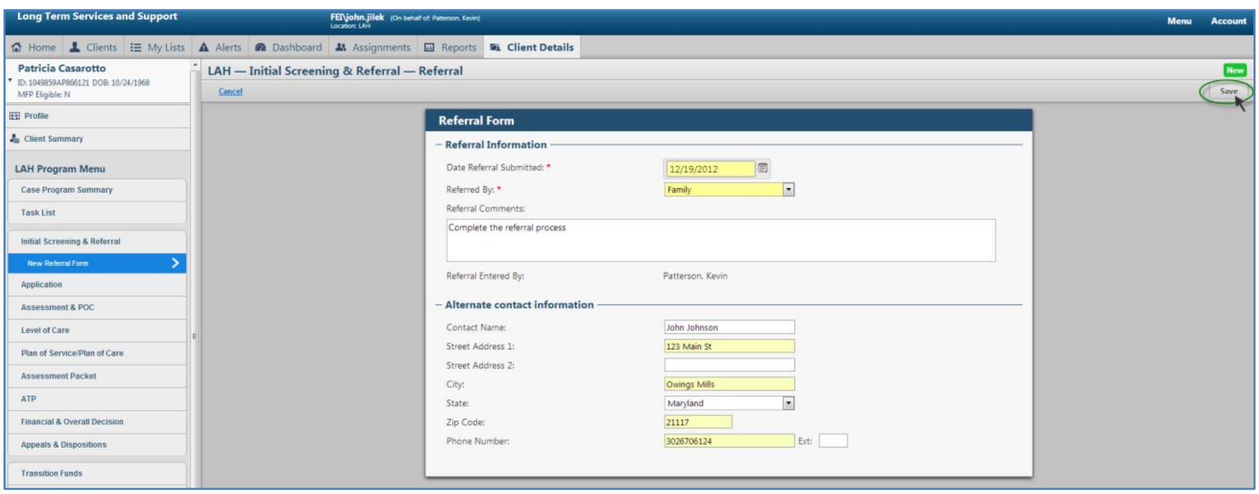
To add a referral, you must have an Initial Screening with a 'Submitted' status. NOTE: Referral is for LAH/ICS only.

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



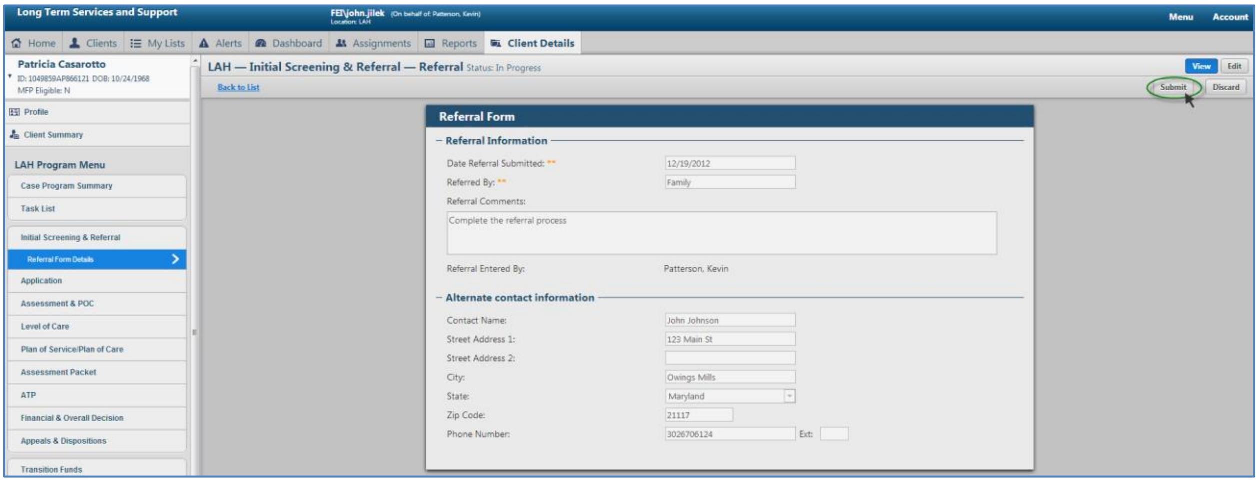
2.6.2 Save Referral

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



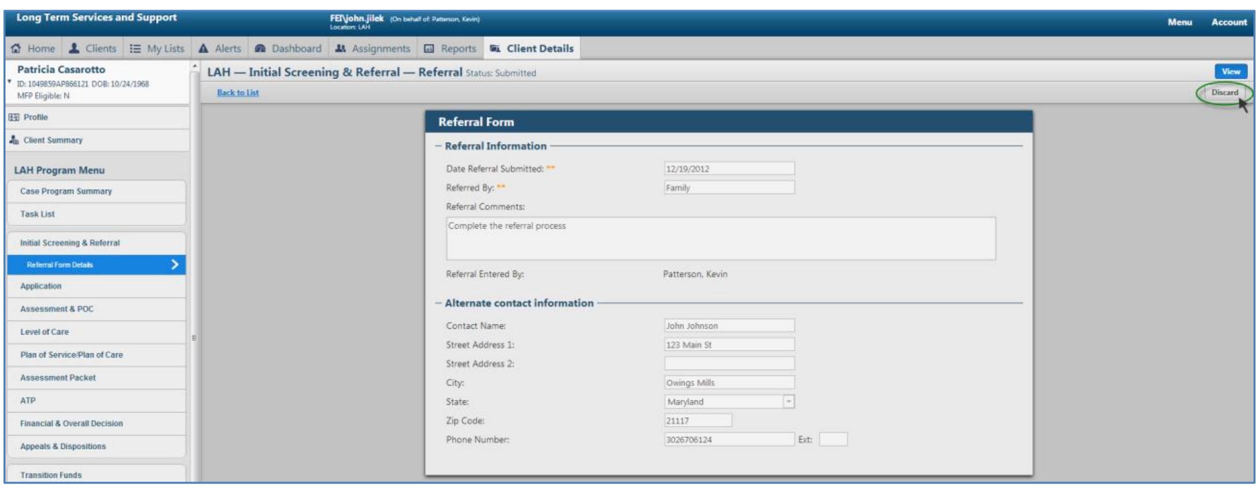
2.6.3 Submit Referral

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.



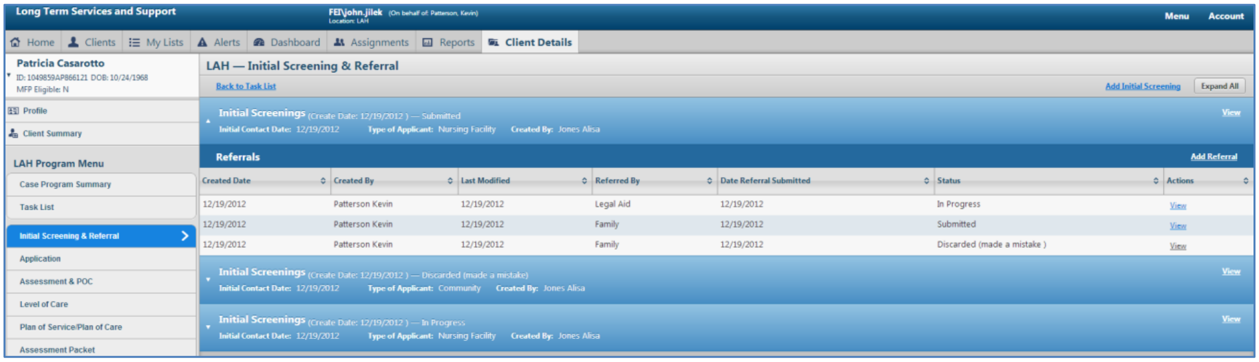
2.6.4 Discard Referral

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



2.6.5 Referral List View

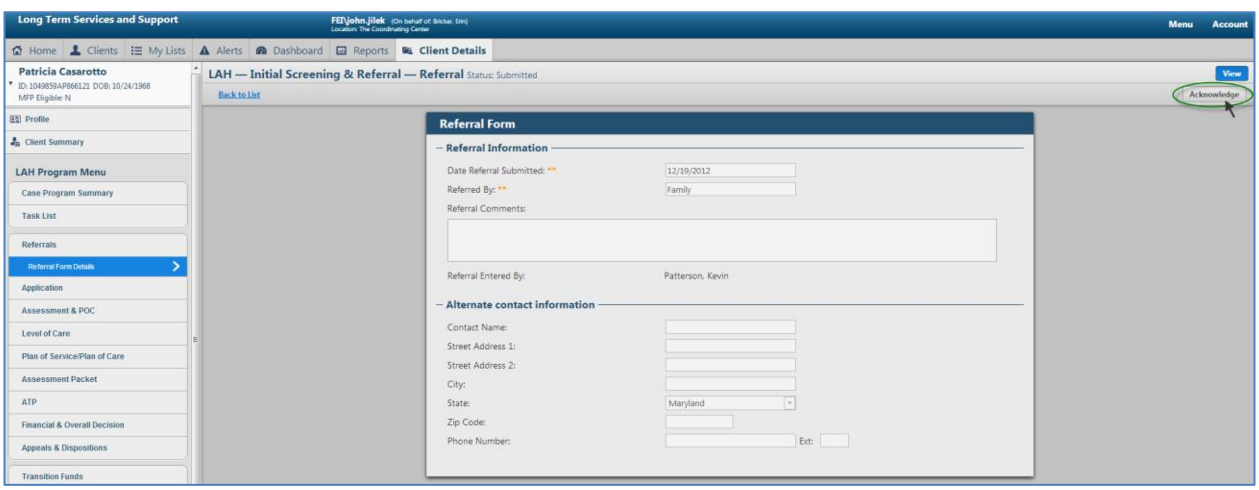
The user can view a list of Referrals and the status of each (‘Submitted’, ‘In Progress’, or ‘Discarded’)



2.6.6 Acknowledge Referral

To Acknowledge a referral, you must be logged in as the assigned case manager. Refer to seciton “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”).

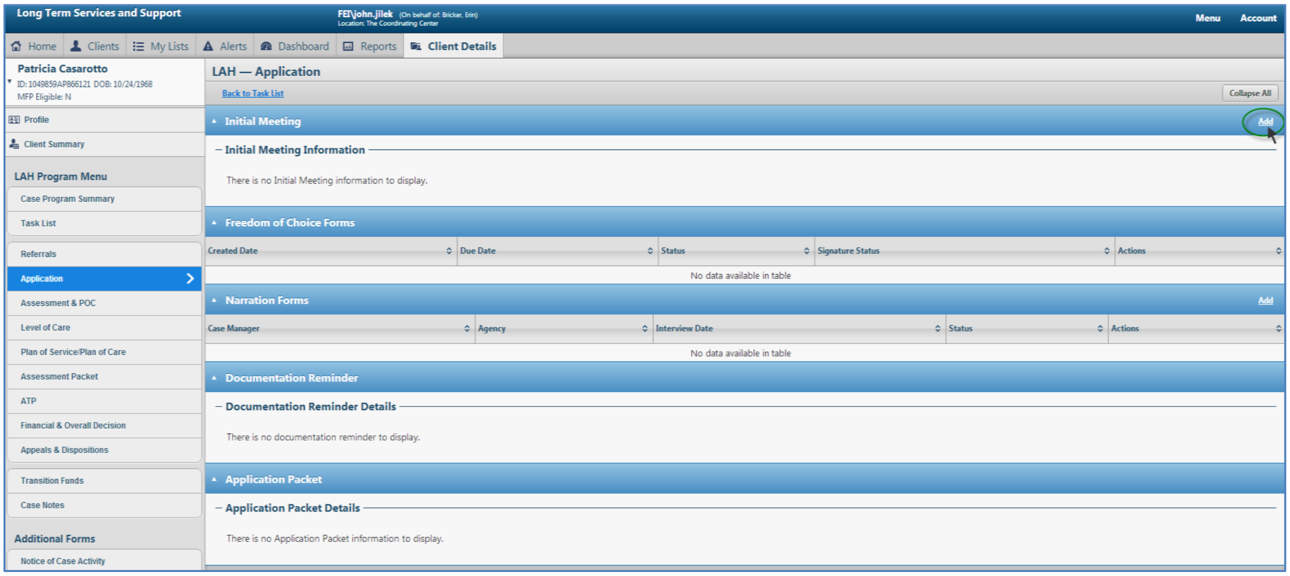
1. Log in as permitted user
2. Click the *Assignments* tab
3. Click **TCC** menu button
4. Select client from list
5. Select TCC Case Manager from dropdown list
6. Click Assign

2.8 Application Packet (ICS, LAH, WOA)

2.8.1 “Add” Initial Meeting Date

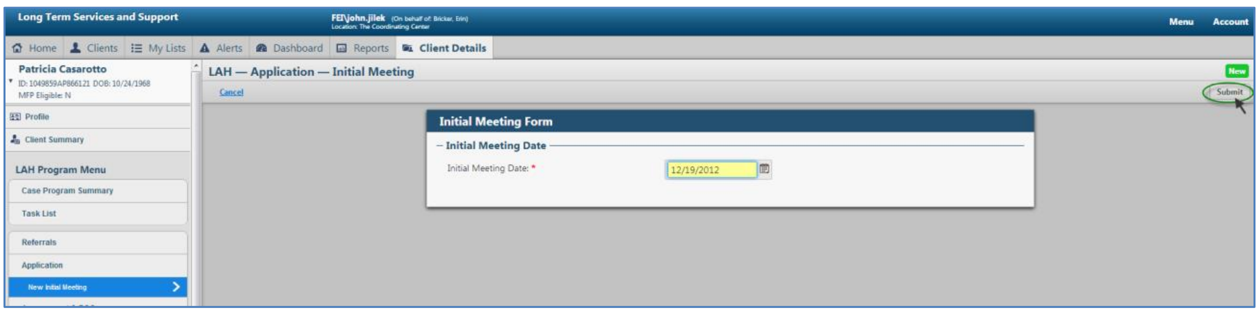
To add an Initial Meeting Date for Application, you must log in as the permitted user.

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)



2.8.2 "Submit" Initial Meeting Date

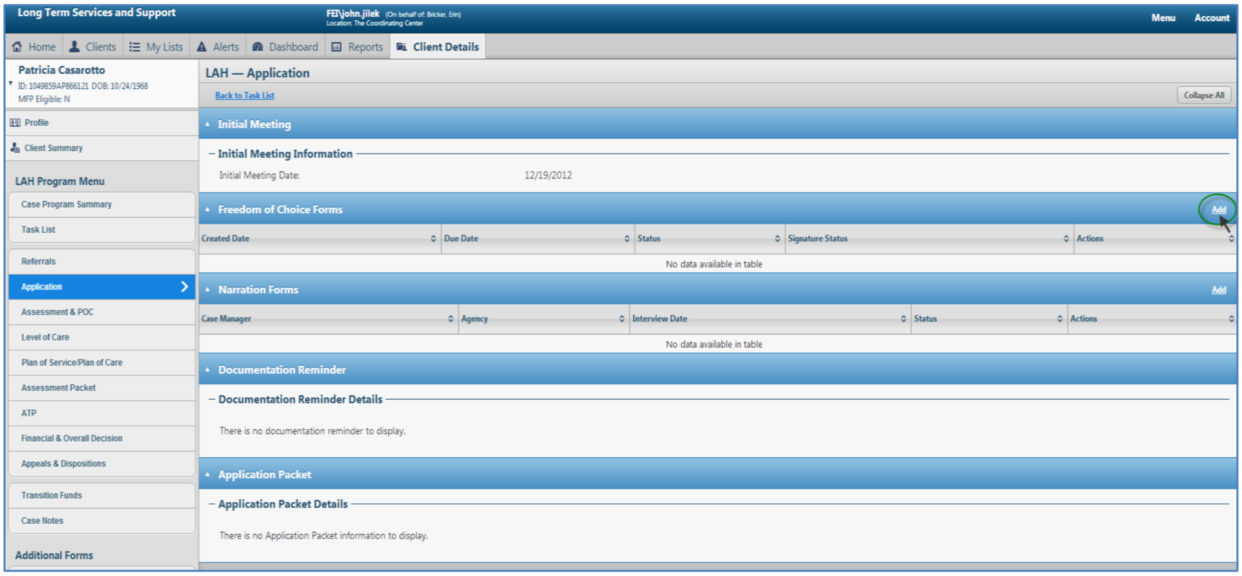
Click **Submit** to complete the form process. This will save all previous selections and entries and direct the user to view mode.



2.8.3 "Add" Freedom of Choice

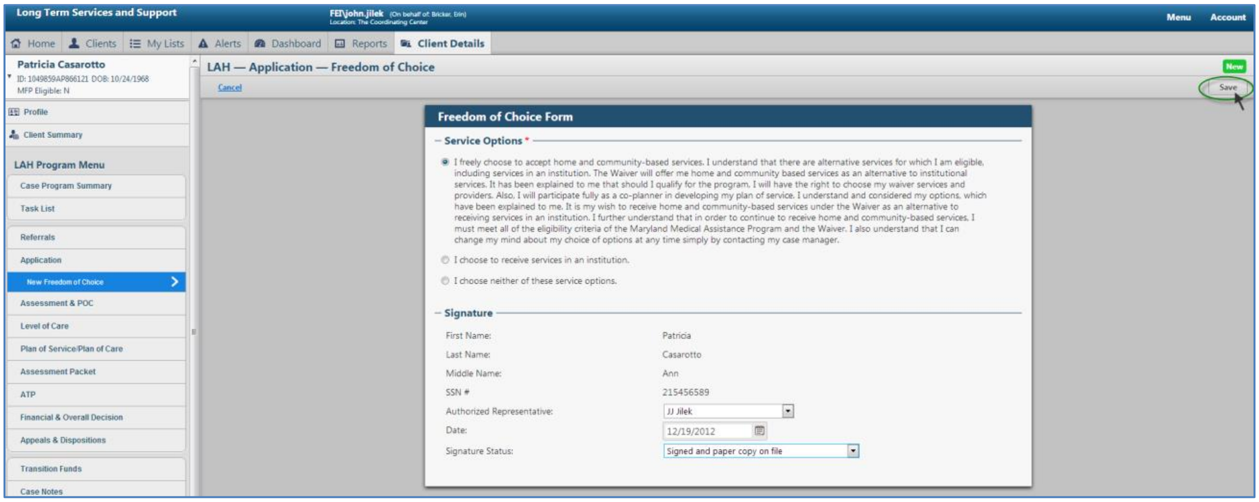
To add a Freedom of Choice Form for Application, an Initial Meeting Date must be complete and you must log in as the permitted user.

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)



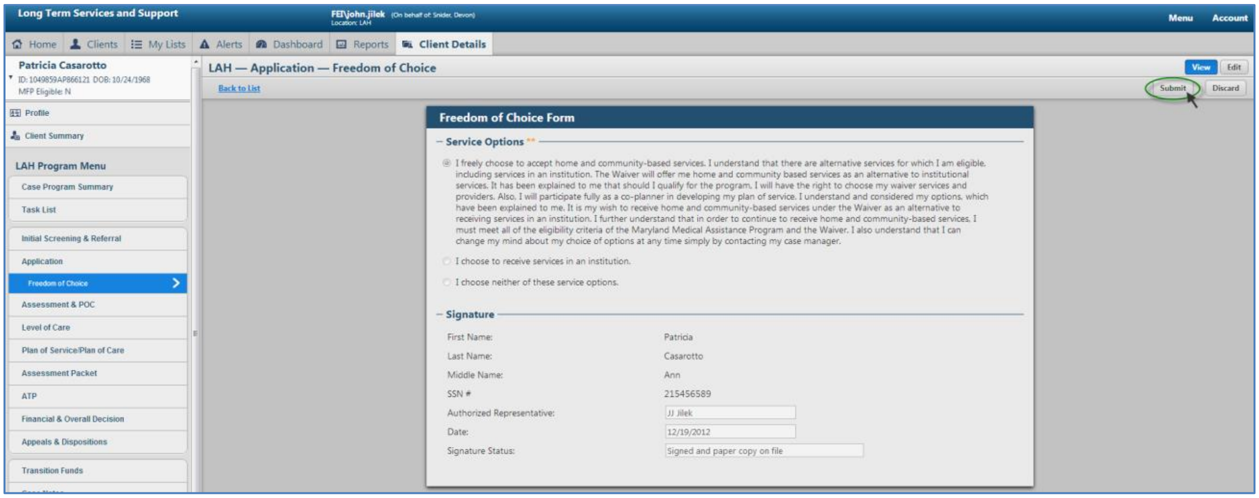
2.8.4 "Save" Freedom of Choice Form

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



2.8.5 "Submit" Freedom of Choice Form

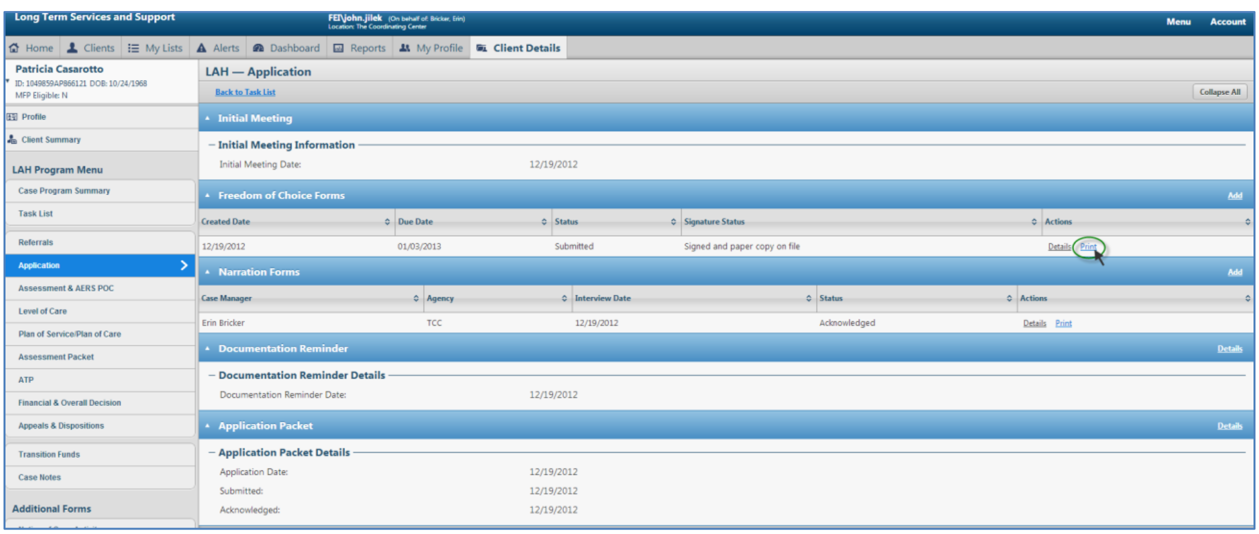
Click **Submit** to complete the form process. This will save all previous selections and entries and direct the user to view mode.



2.8.6 "Print" Freedom of Choice Form

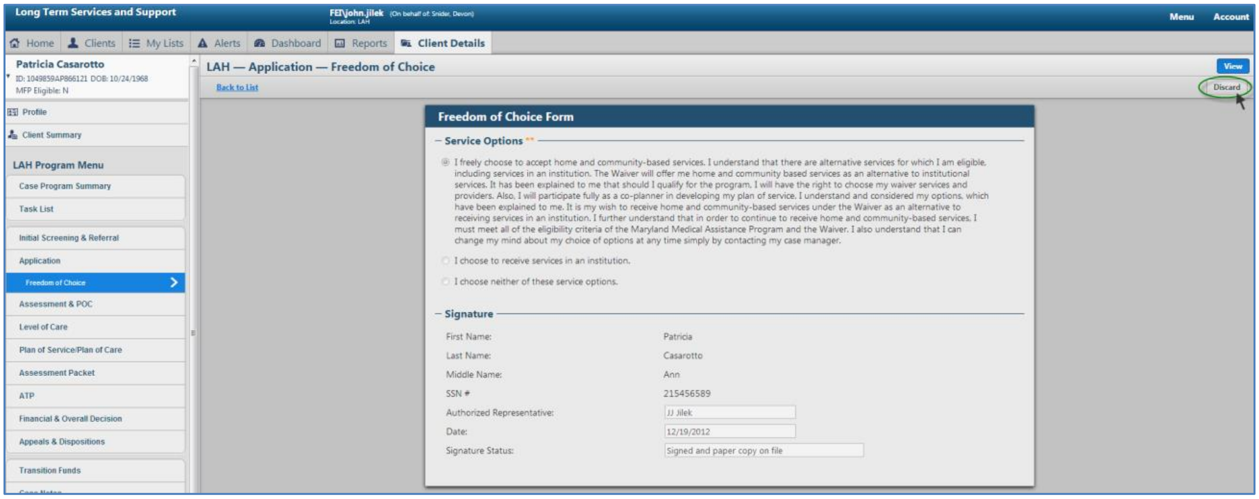
The user is able to view the AERS POC in print view (PDF format displayed in a separate window/tab).

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**



2.8.7 "Discard" Freedom of Choice Form

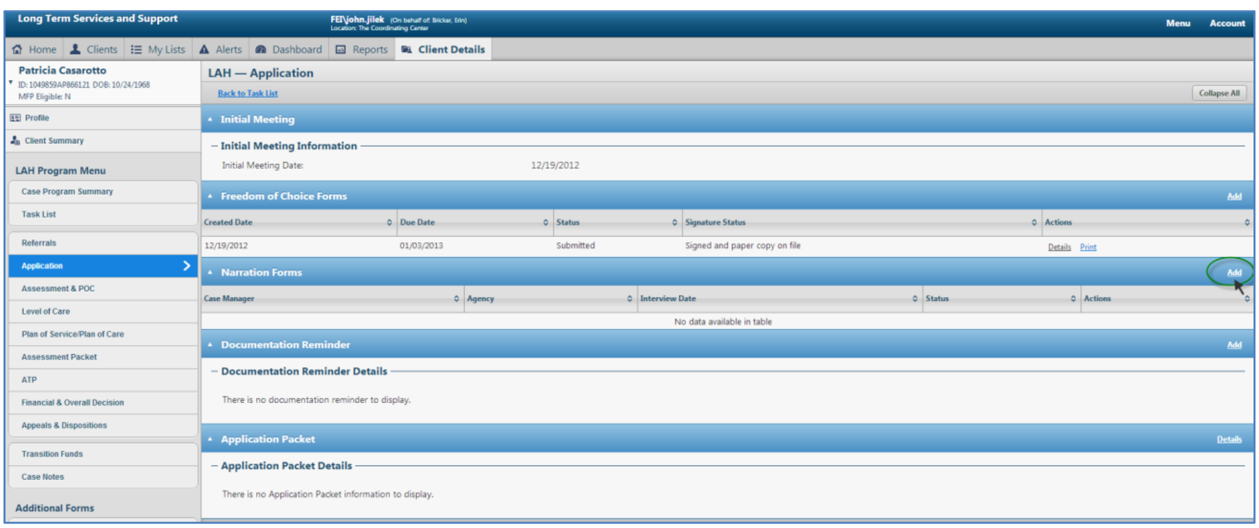
The user is permitted to discard a form that is 'In Progress' or 'Submitted'.



2.8.8 Add Narration Form

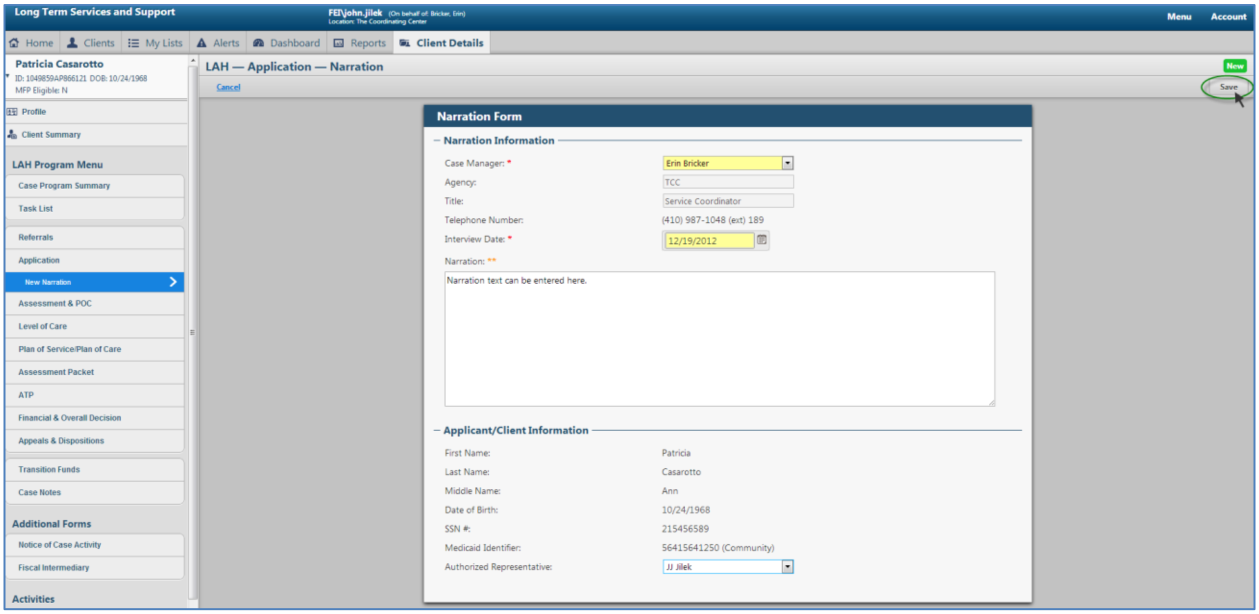
To add a Narration Form for Application, you must log in as the permitted user. NOTE: This form is optional.

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)



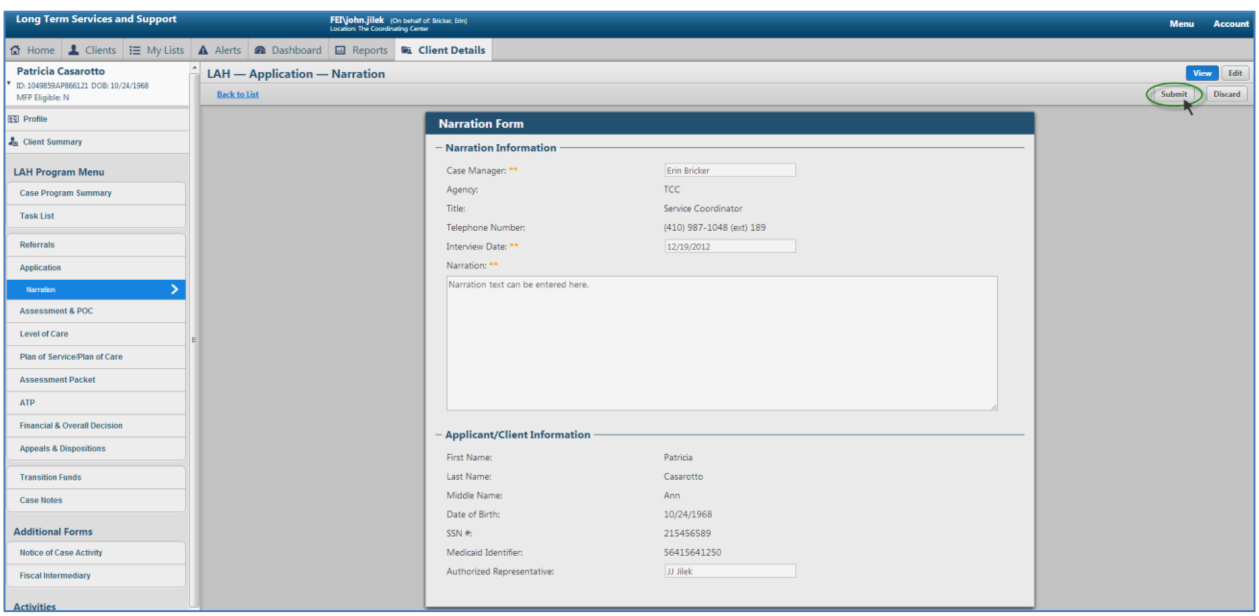
2.8.9 "Save" Narration Form

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



2.8.10 "Submit" Narration Form

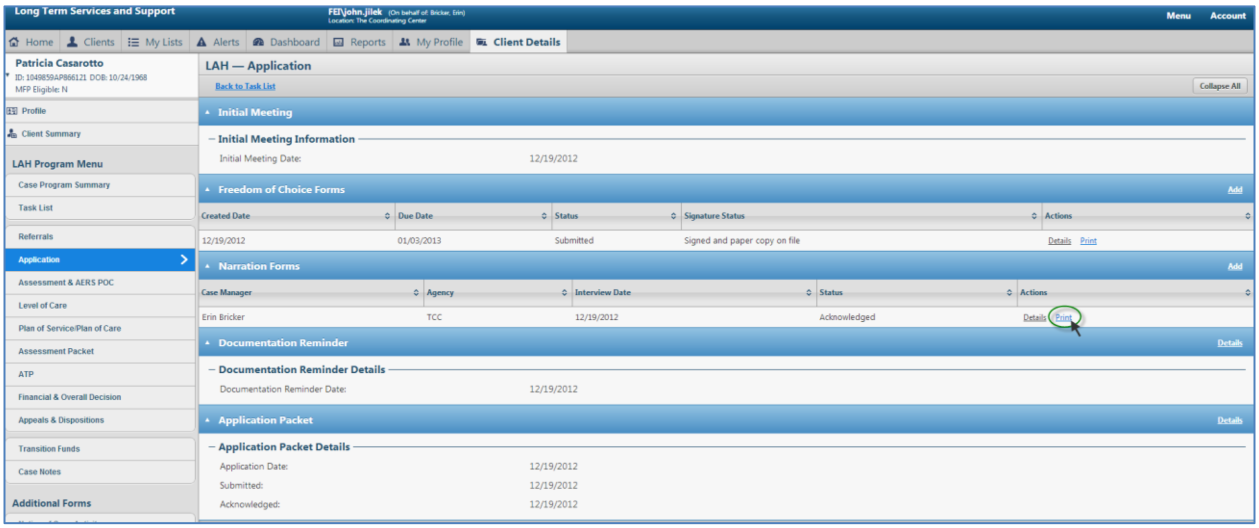
Click **Submit** to complete the form process. This will save all previous selections and entries and direct the user to view mode.



2.8.11 "Print" Narration Form

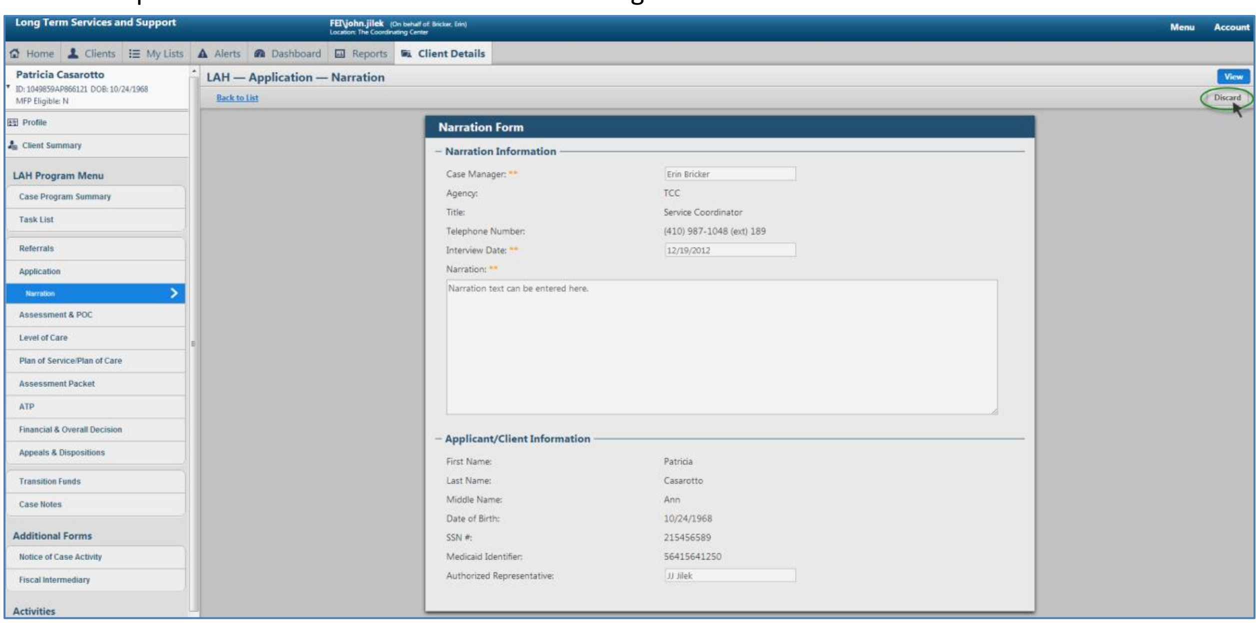
The user is able to view the AERS POC in print view (PDF format displayed in a separate window/tab).

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**



2.8.12 "Discard" Narration Form

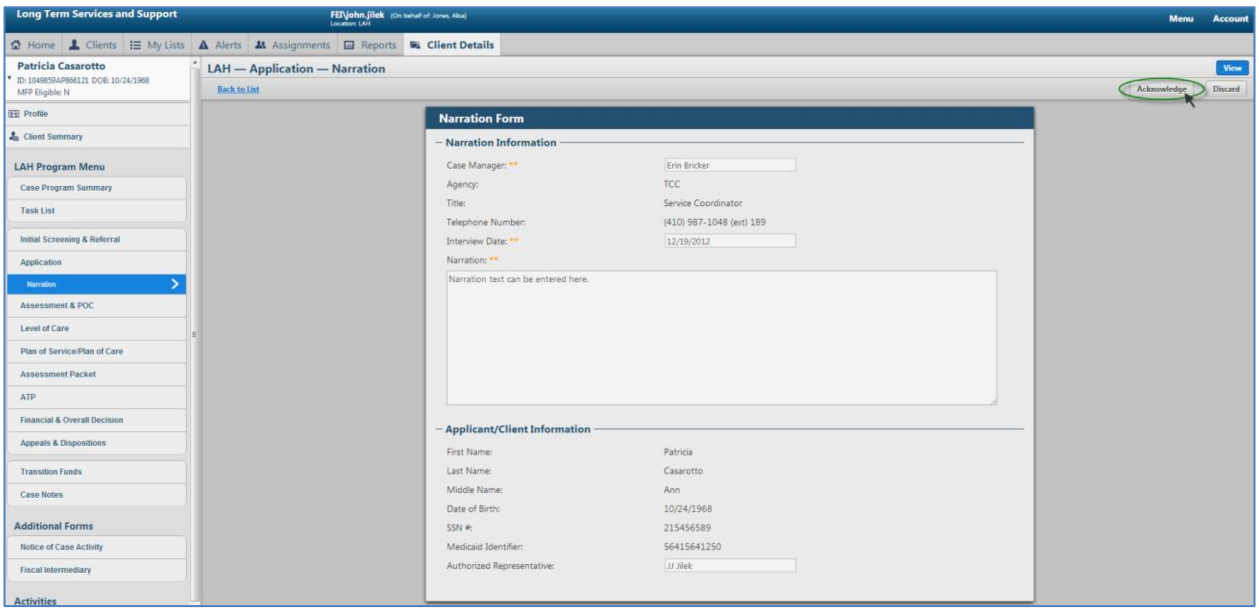
The user is permitted to discard a form that is 'In Progress' or 'Submitted'.



2.8.13 "Acknowledge" Narration Form (ICS, LAH)

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

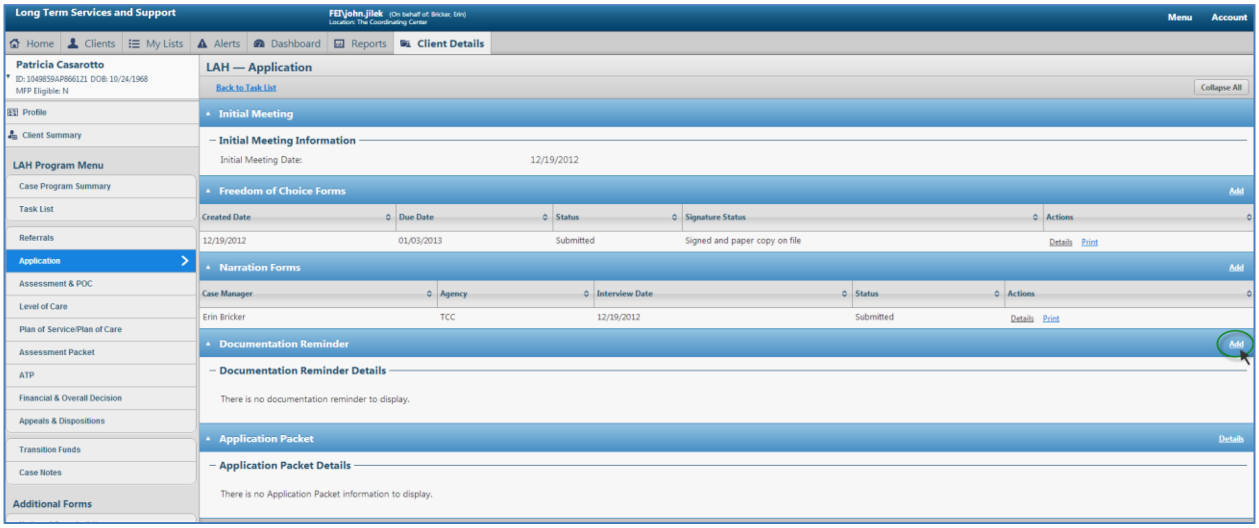
1. Log in as the permitted user
2. Search for client under *Clients* tab
3. Click **Client Summary** for client
4. Click **Go to Tasks** link for select program
5. Click **Application** menu button OR click **Summary** from Task List
6. Click **Details** link for Narration Form
7. Click Acknowledge



2.8.14 Add Documentation Reminder

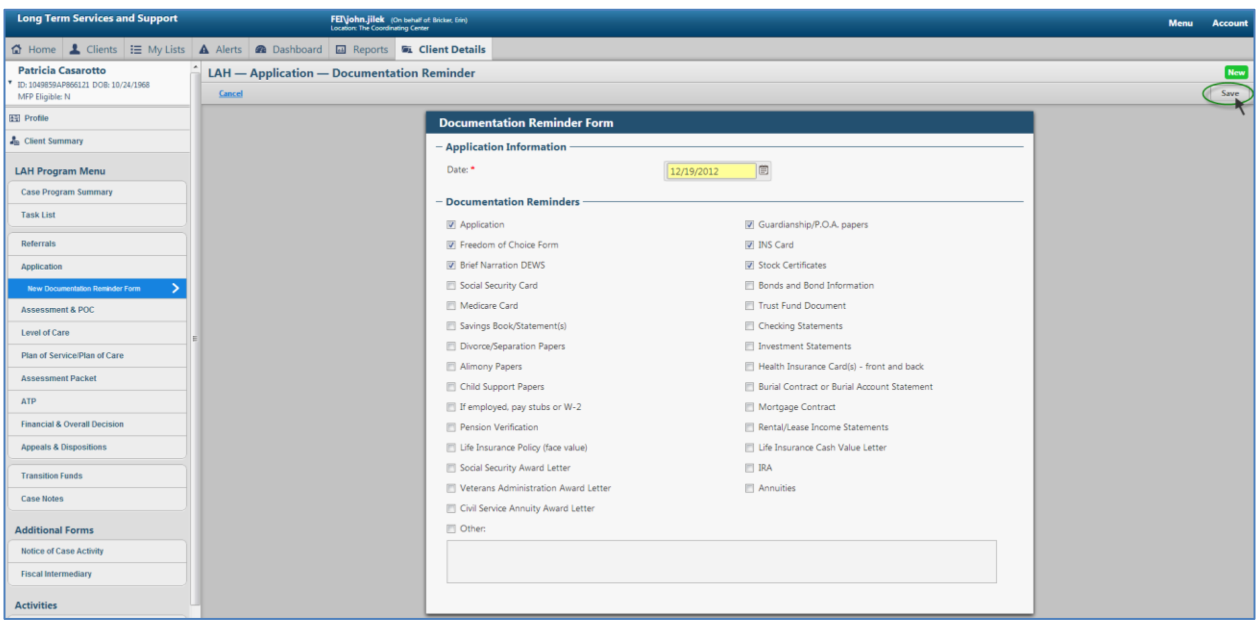
To add a Documentation Reminder for Application, you must log in as the permitted user. NOTE: This form is optional.

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)



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.

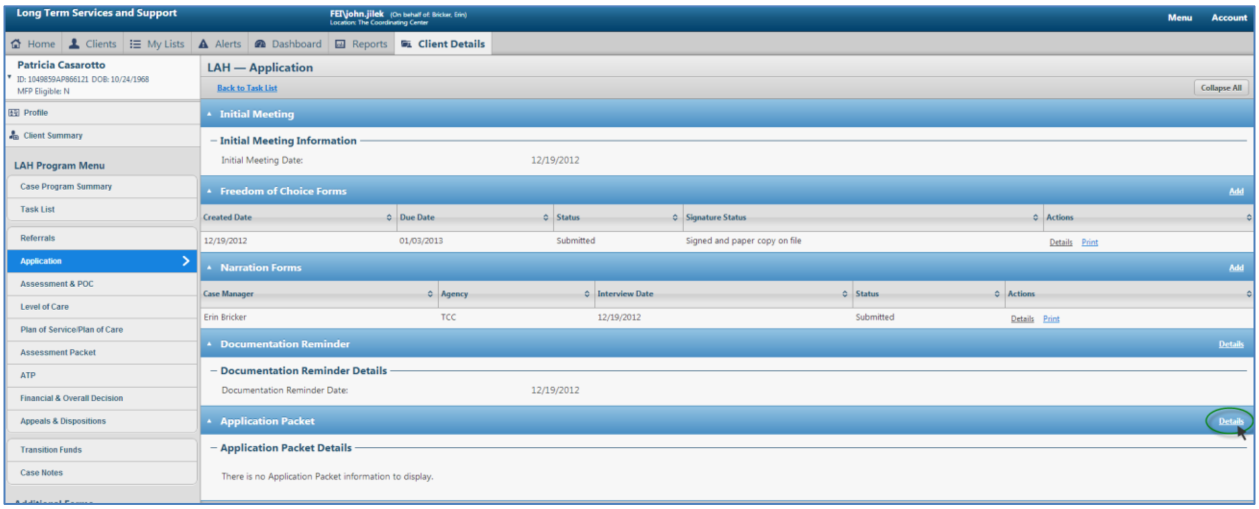


2.8.16 Add Application Packet

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

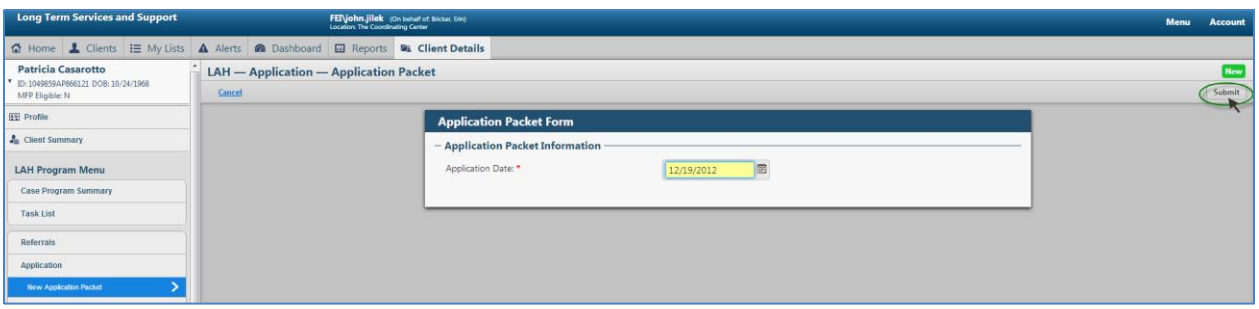
1. Log in as the permitted user
2. Search for client under *Clients* tab
3. Click **Client Summary** for client

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)



2.8.17 "Submit" Application Packet

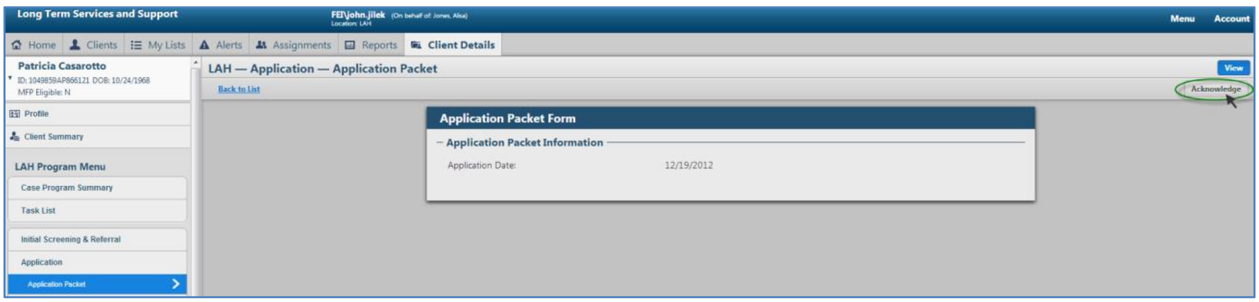
Click **Submit** to complete the form process. This will save all previous selections and entries and direct the user to view mode.



2.8.18 "Acknowledge" Application Packet (ICS, LAH)

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

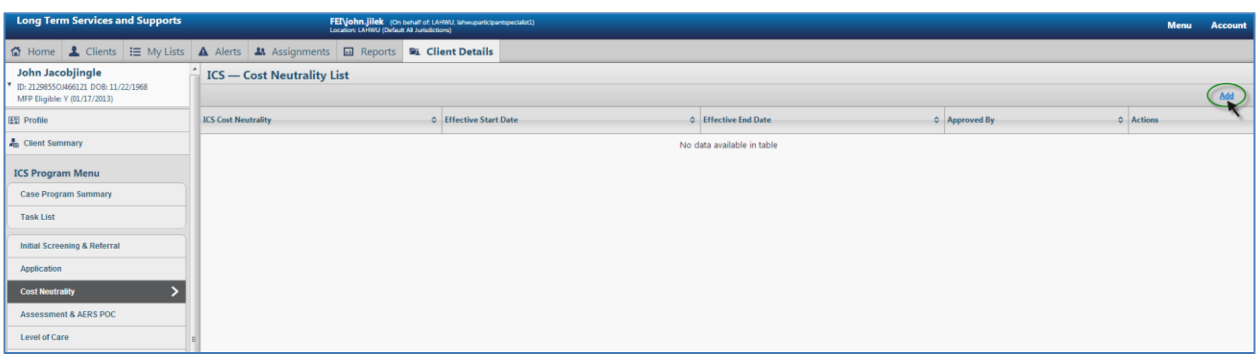


2.9 Cost Neutrality (ICS)

2.9.1 "Add" Cost Neutrality

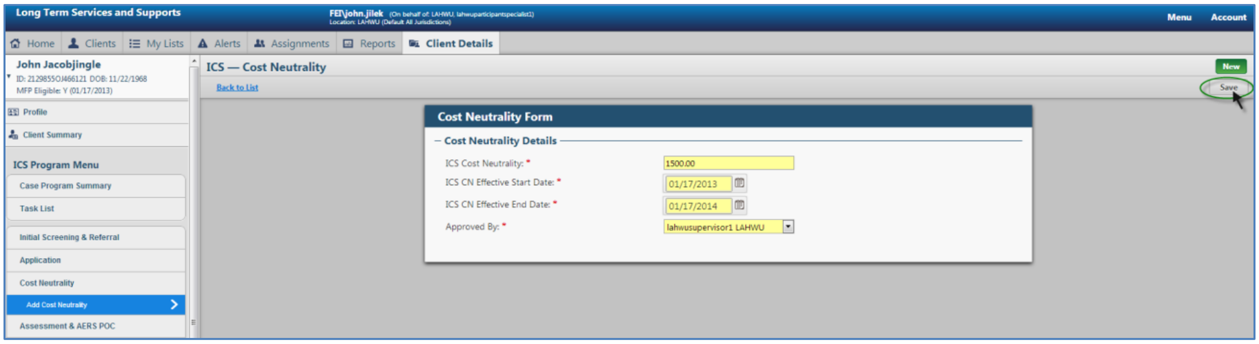
To add Cost Neutrality, you must log in as the permitted user.

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

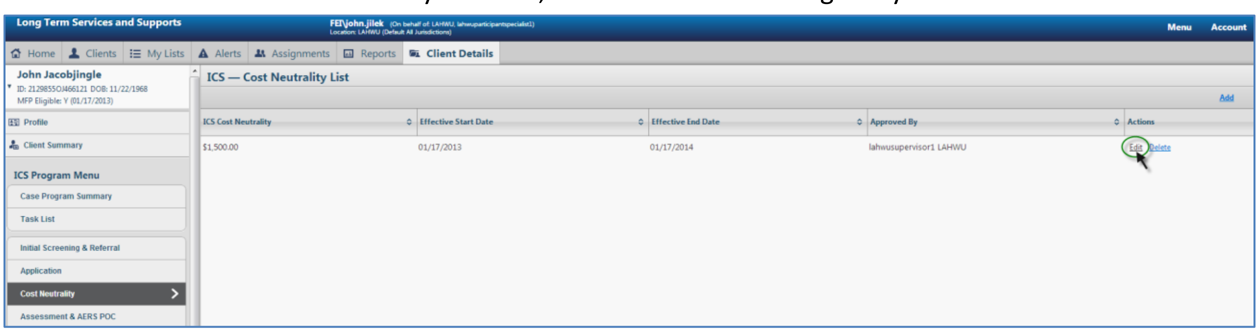
Click **Save** after completing the form. This will save all selections and entries on the form and direct the user to view mode.



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

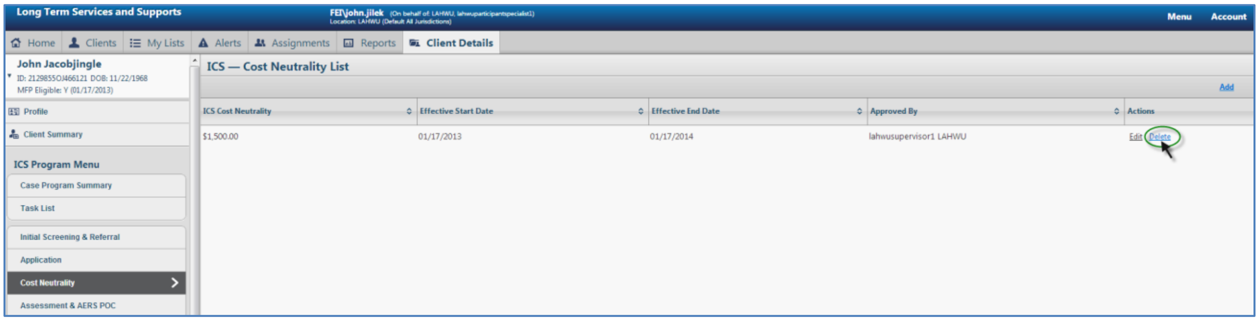


7. Modify the form, click **Save**

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

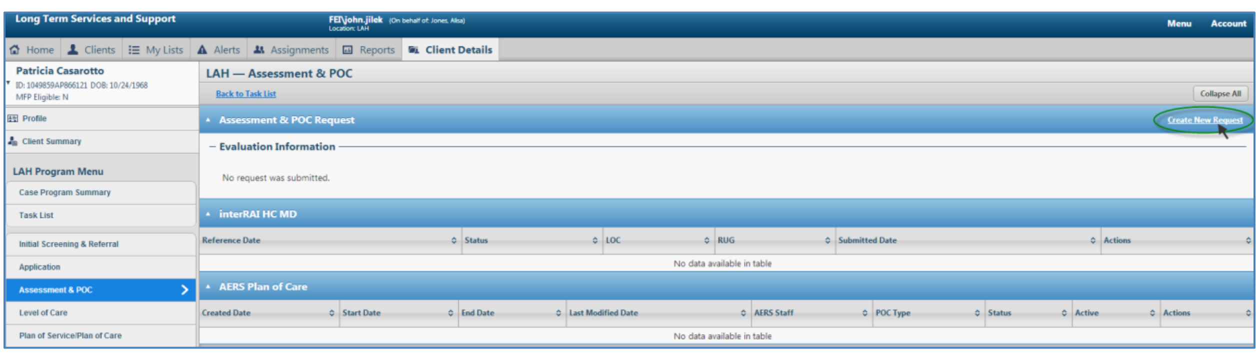


2.10 Assessment & POC (ICS, LAH, WOA)

2.10.1 Create Assessment & POC Request

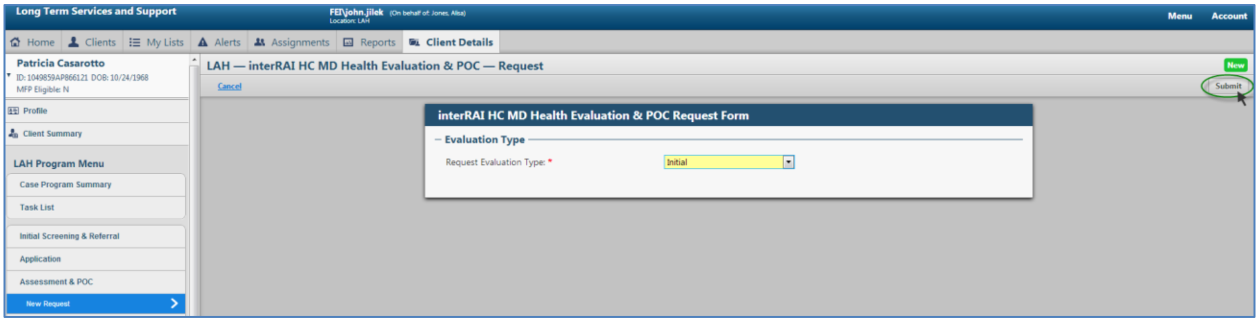
To create a new Assessment & POC Request, you must have a 'Submitted' Application Packet and log in as the permitted user.

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**



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.

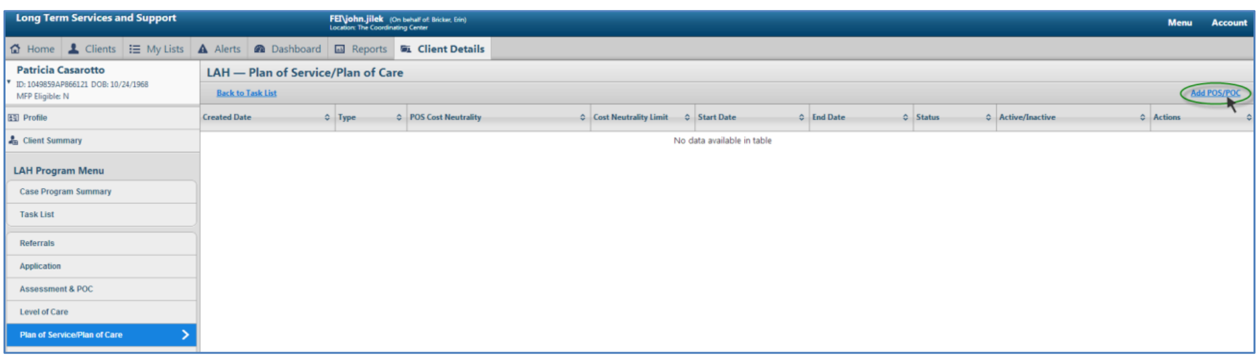


2.11 Plan of Service/Plan of Care (ICS, LAH)

2.11.1 Add POS/POC

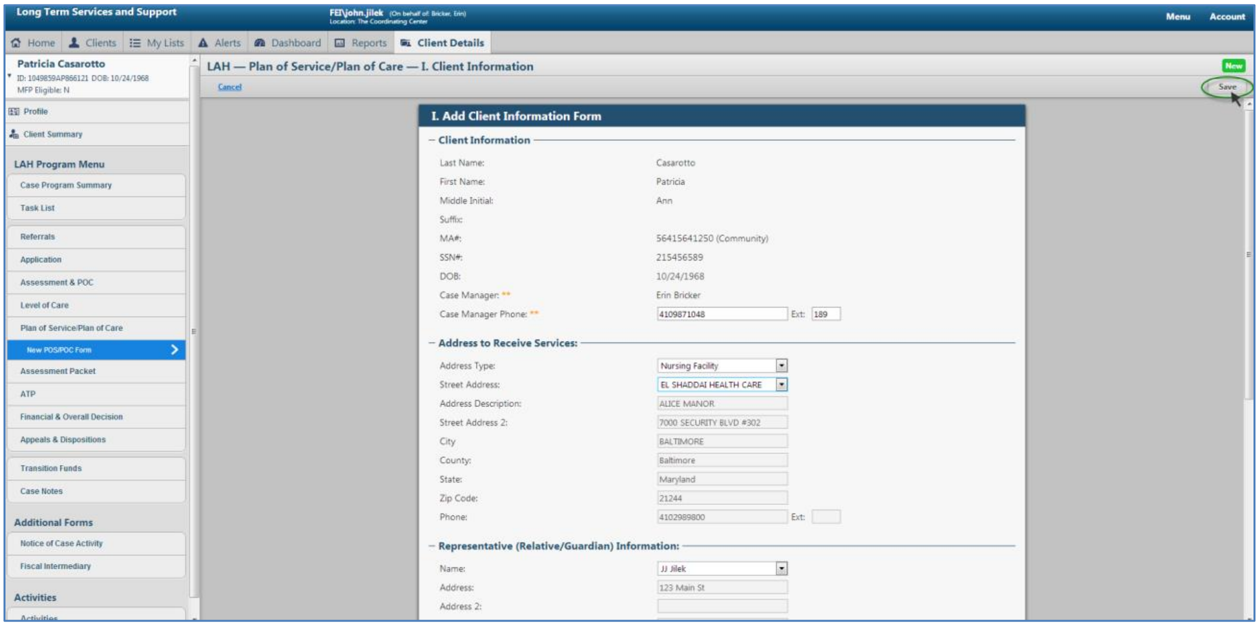
To add a POS/POC, you must log in as the permitted user.

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



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.



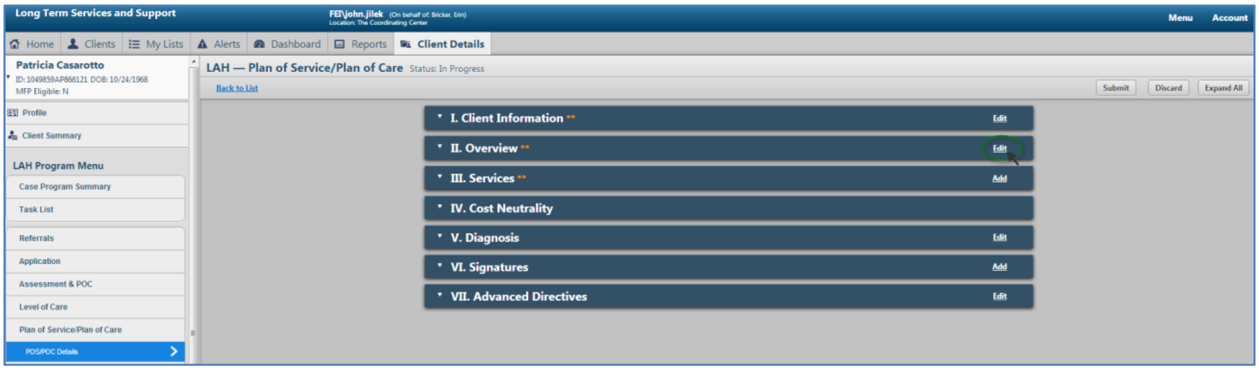
2.11.3 Plan of Service/ Plan of Care Summary Page

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

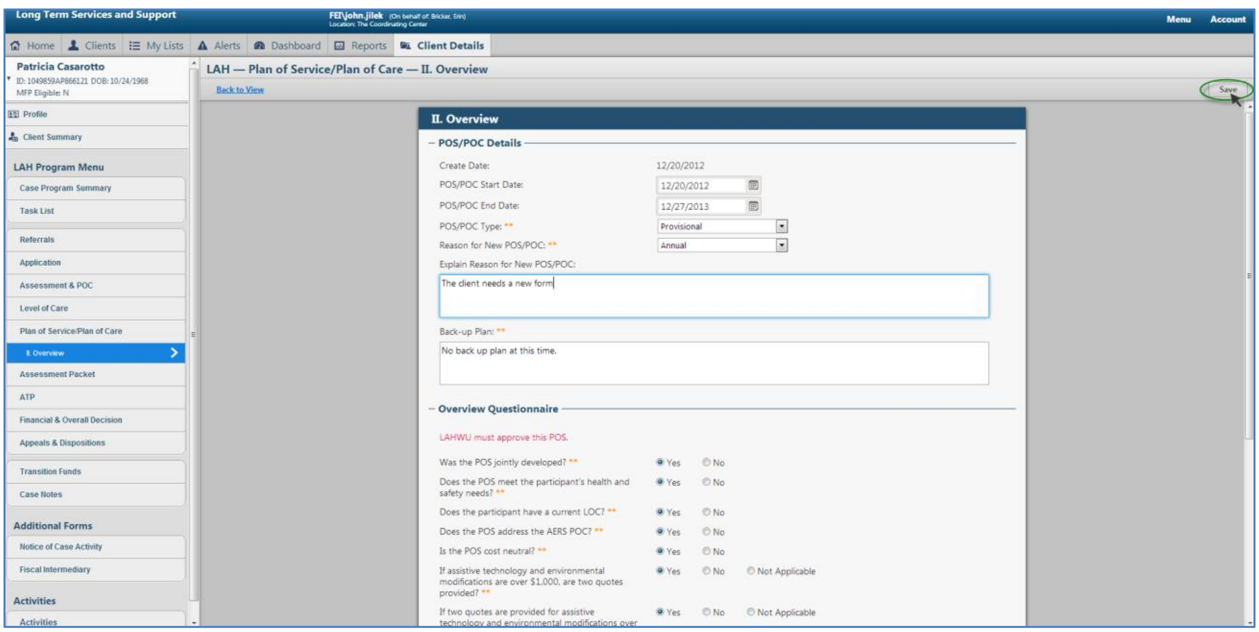
2.11.4 "Save" POS/POC: II. Overview

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 <u>II. Overview</u> section, click **Edit**



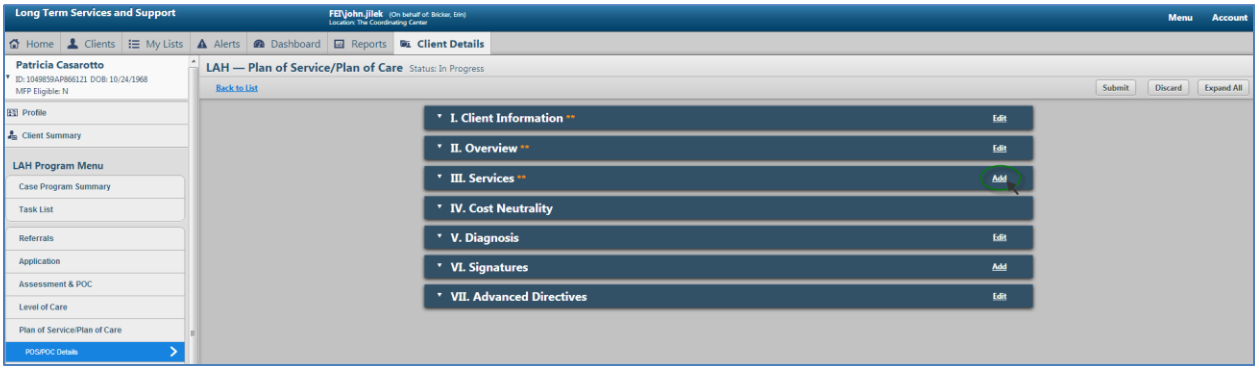
3. Click **Save**



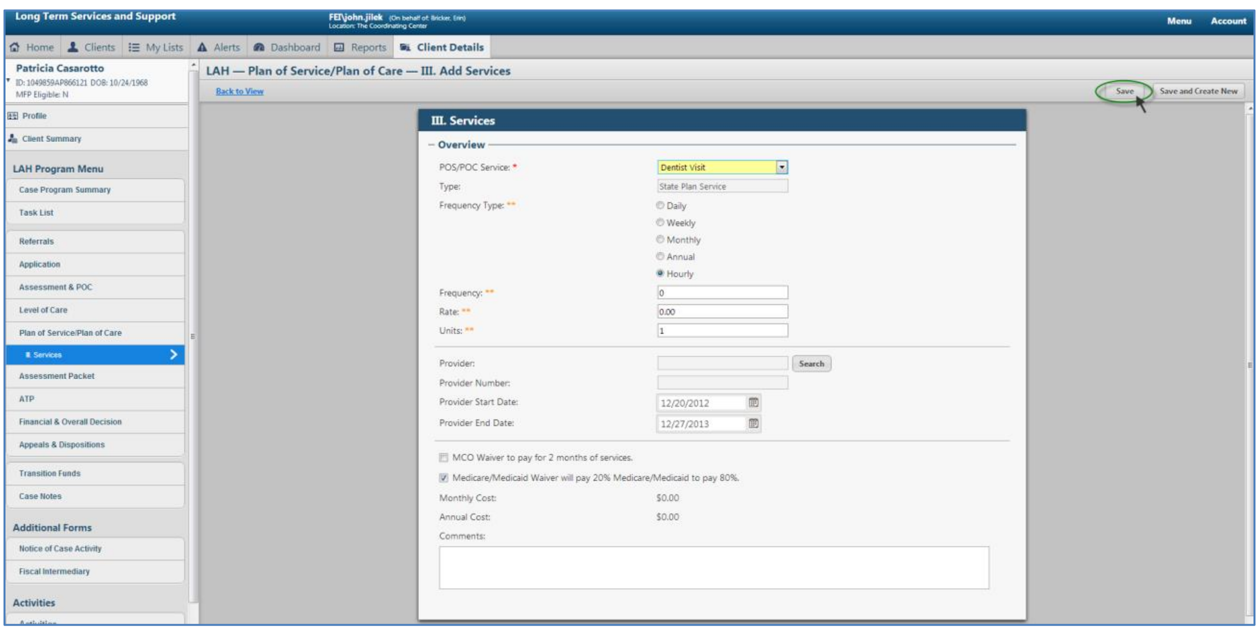
2.11.5 "Save" POS/POC: III. Services

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**



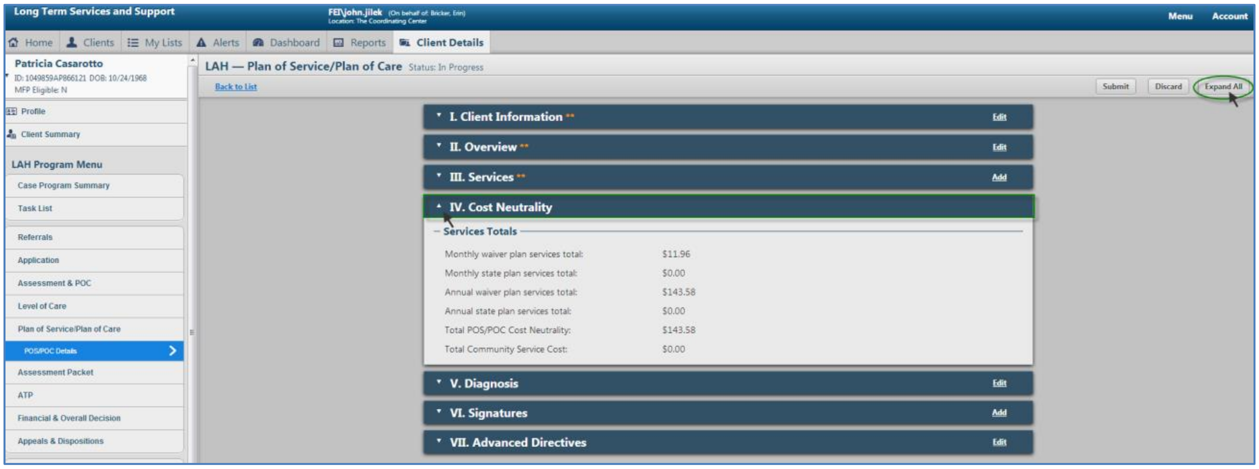
3. Click **Save**



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**

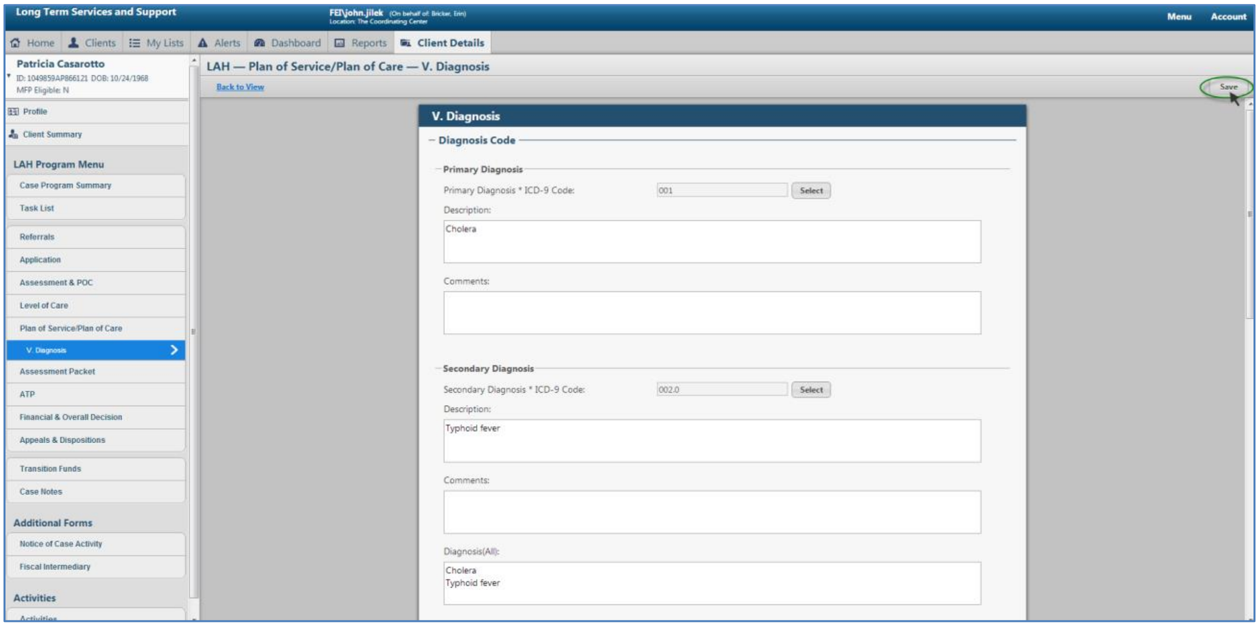


2.11.7 "Save" POS/POC: V. DIAGNOSIS

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**

3. Click **Save**

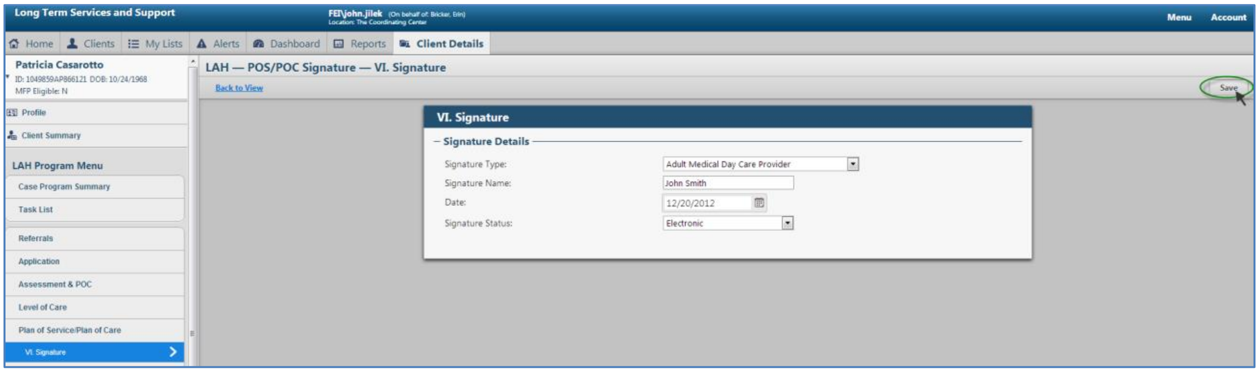


2.11.8 "Save" POS/POC: VI. Signatures

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**

3. Click **Save**

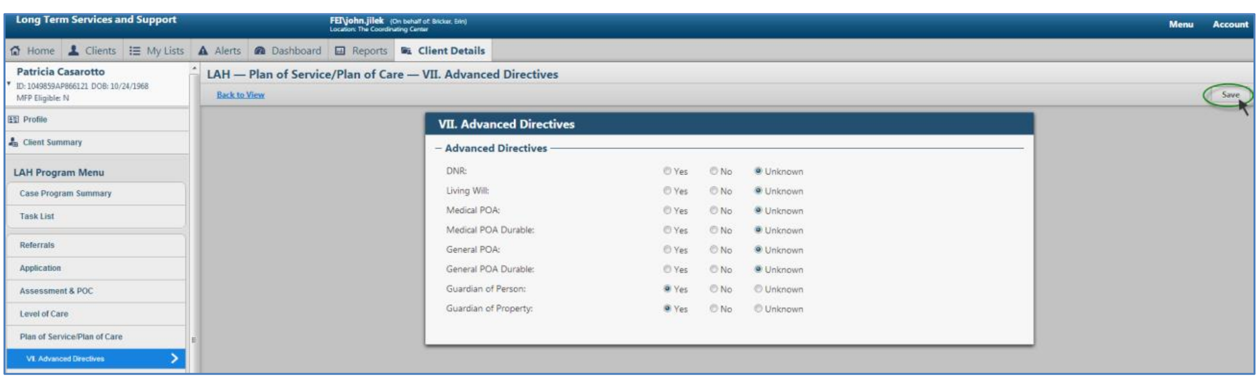


2.11.9 "Save" POS/POC: Advance Directives

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**

3. Click **Save**



2.11.10 "Submit" POS/POC

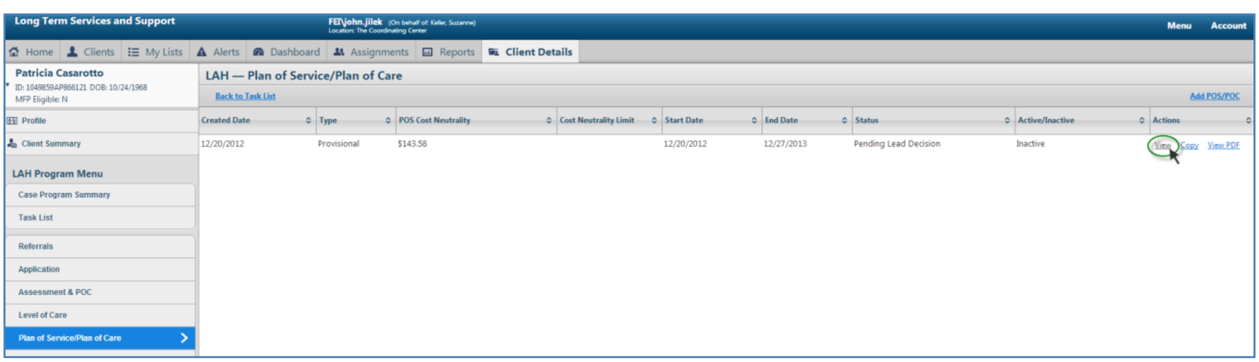
Click **Submit** to complete the form process. This will save all previous selections and entries and direct the user to view mode. When the (Assign) CM submits the POS/POC, the status will update to "Pending Lead Decision", by which the TCC Supervisor will Review/Submit POS/POC

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**

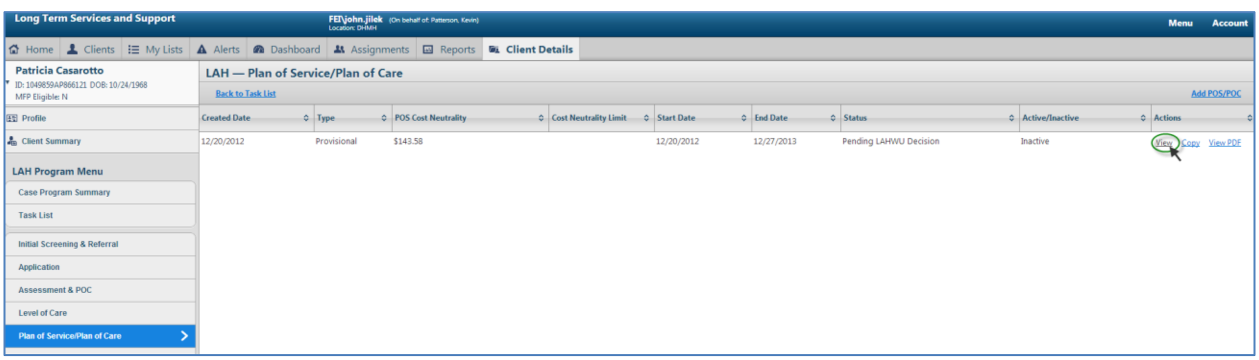


7. Review/Modify each section, click **Submit**

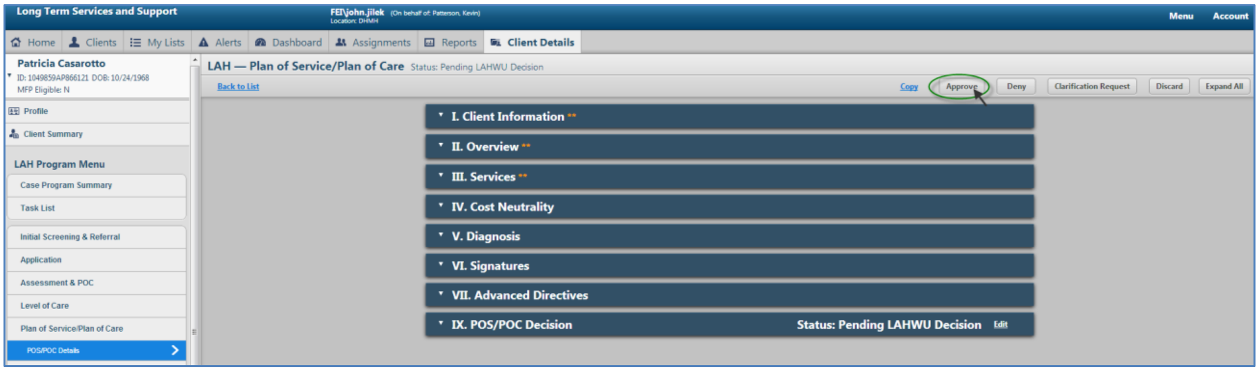
2.11.12 Apply POS/POC Lead Decision

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**



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



2.11.13 "Discard" POS/POC

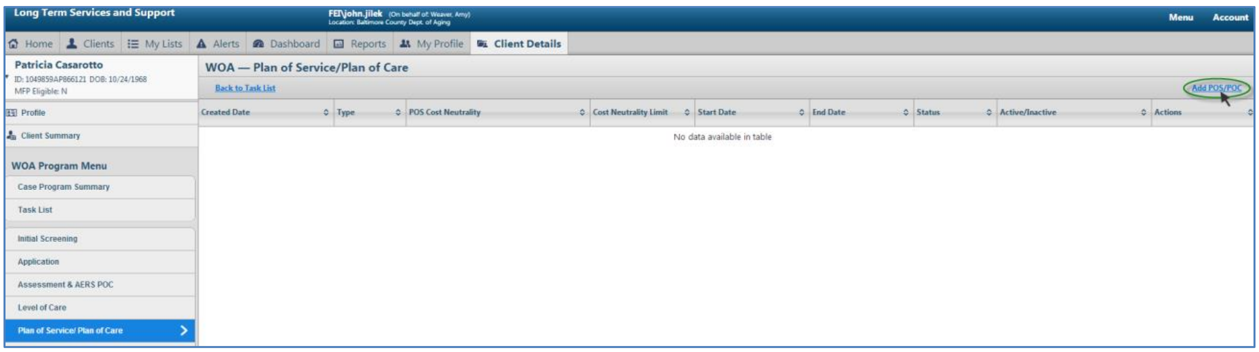
The user is permitted to discard a form that is 'In Progress', "Pending Lead Decision", or "Pending LAHWU Decision."

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…

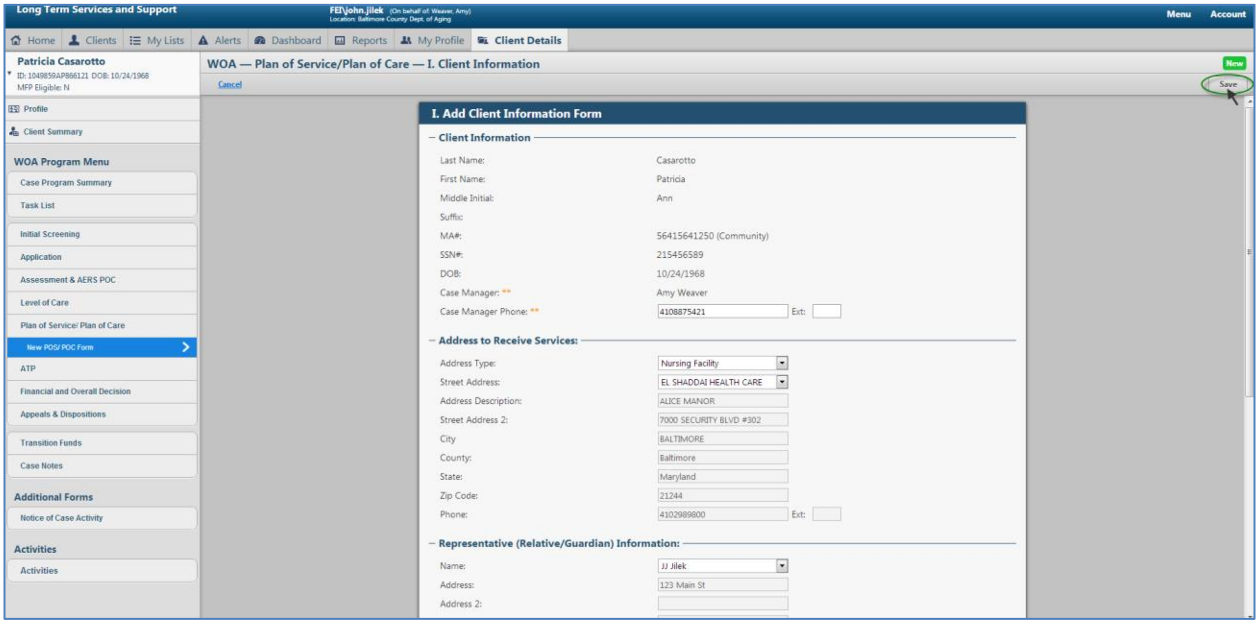
1. Log in as the permitted user
2. Search for client under *Clients* tab
3. Click **Client Summary** for client
4. Click **Go to Tasks** link for select program
5. Click **Plan of Service/Plan of Care** menu button OR click **Summary** from Task List
6. Click **Add POS/POC**



2.12.2 "Save" POS/POC

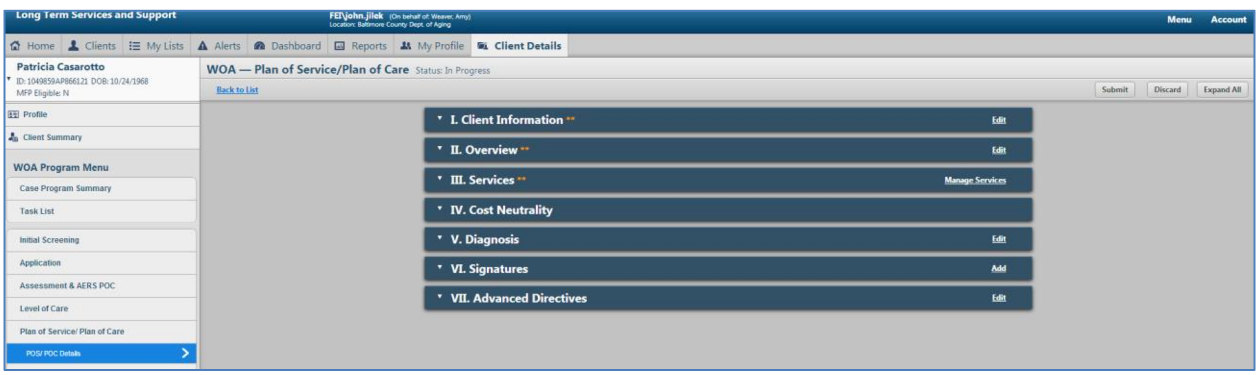
Click **Save** after completing the form. This will save all selections and entries on the form and direct the user to view mode. This Save will trigger the POS/POC process, taking the user to the POS/POC

Summary page.



2.12.3 Plan of Service/ Plan of Care Summary Page

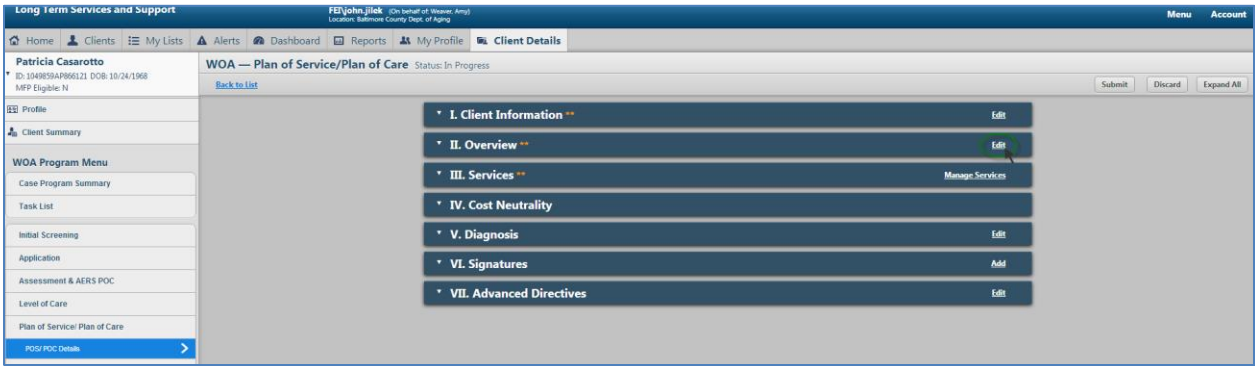
This summary page will be utilized as the landing page for each POS/POC.



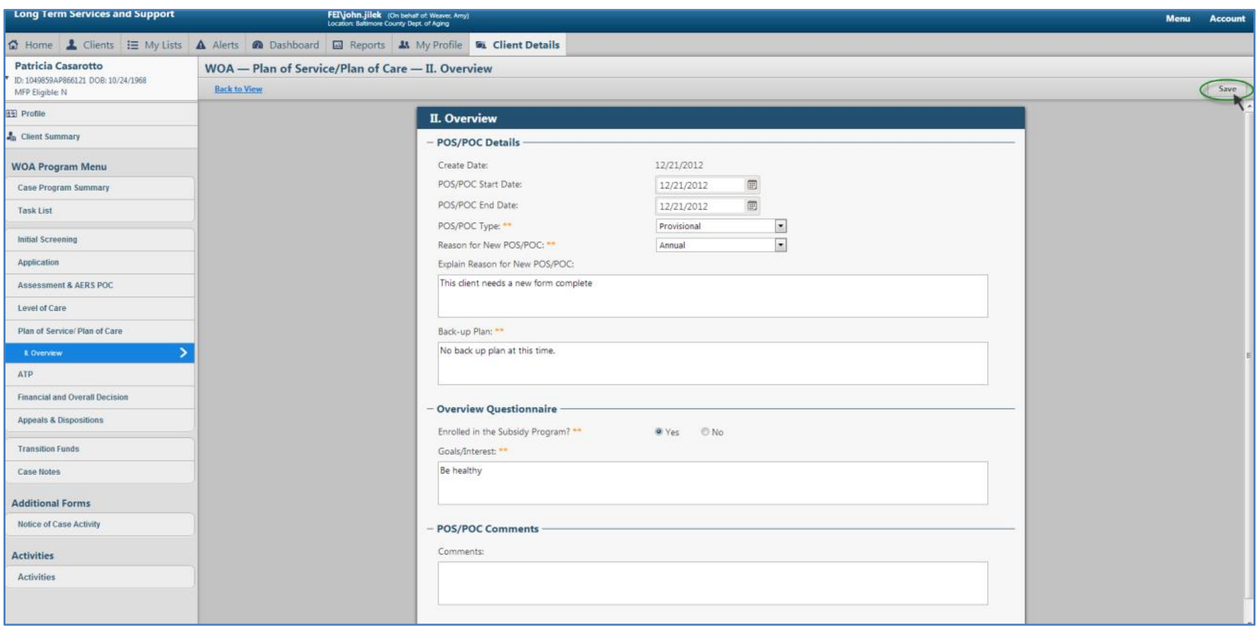
2.12.4 "Save" POS/POC: II. Overview

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**



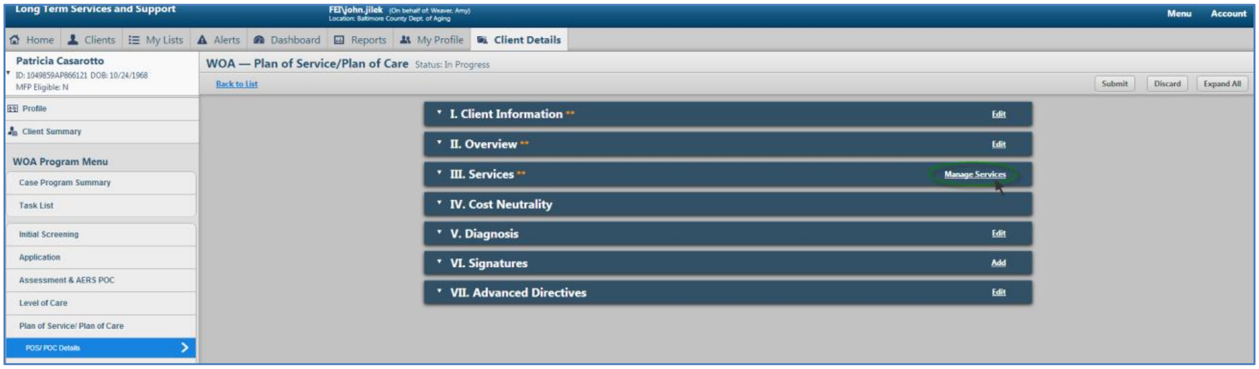
3. Click **Save**



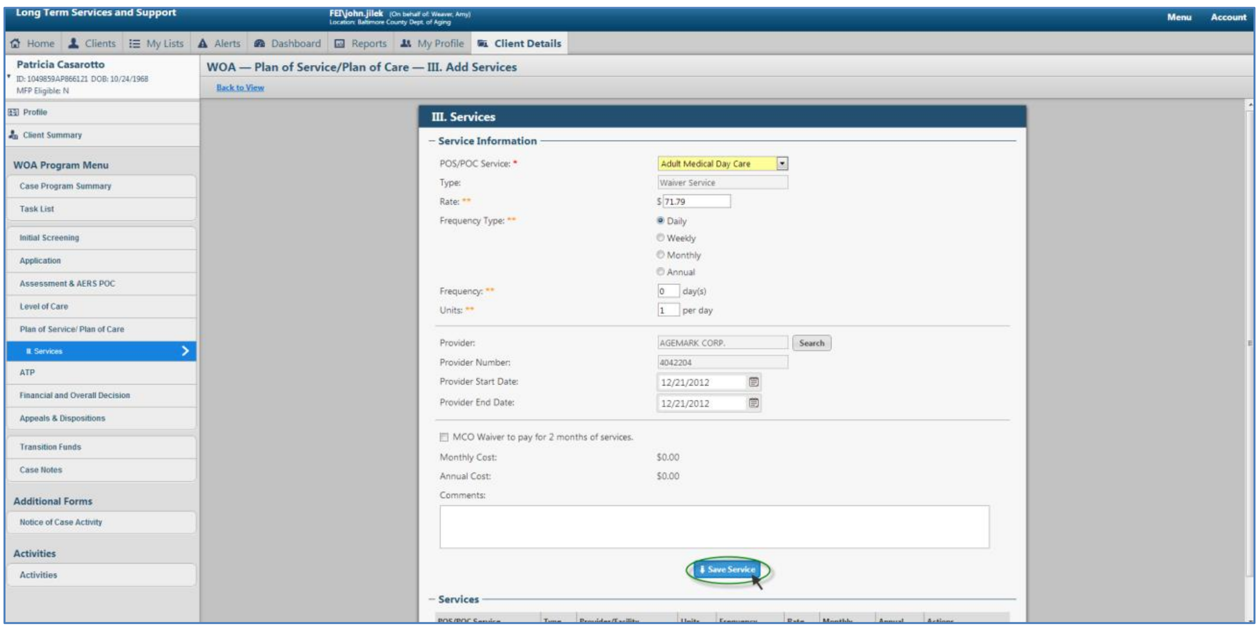
2.12.5 "Save" POS/POC: III. Services

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**



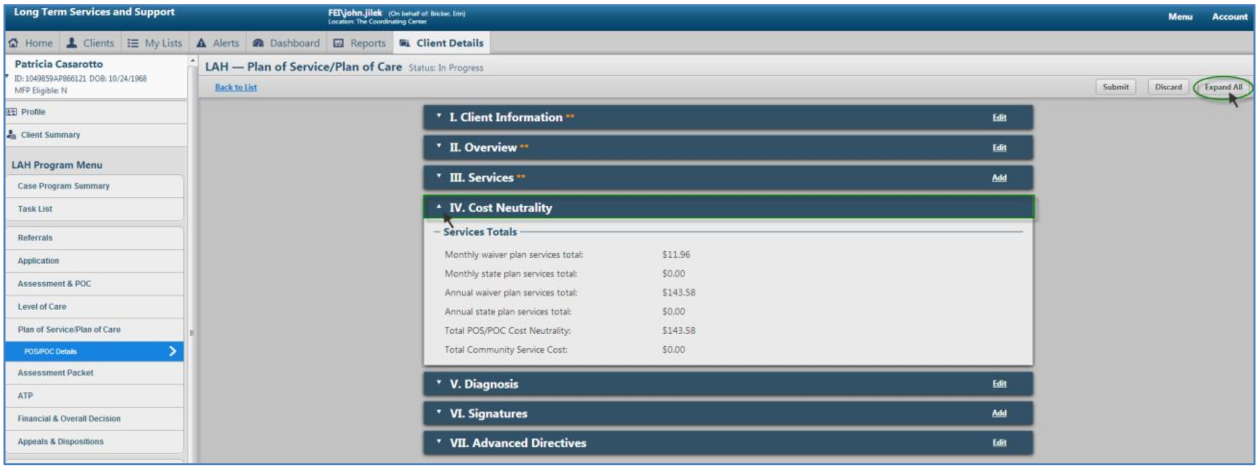
3. Click **Save**



2.12.6 View IV. Cost Neutrality

User is permitted to view Cost Neutrality.

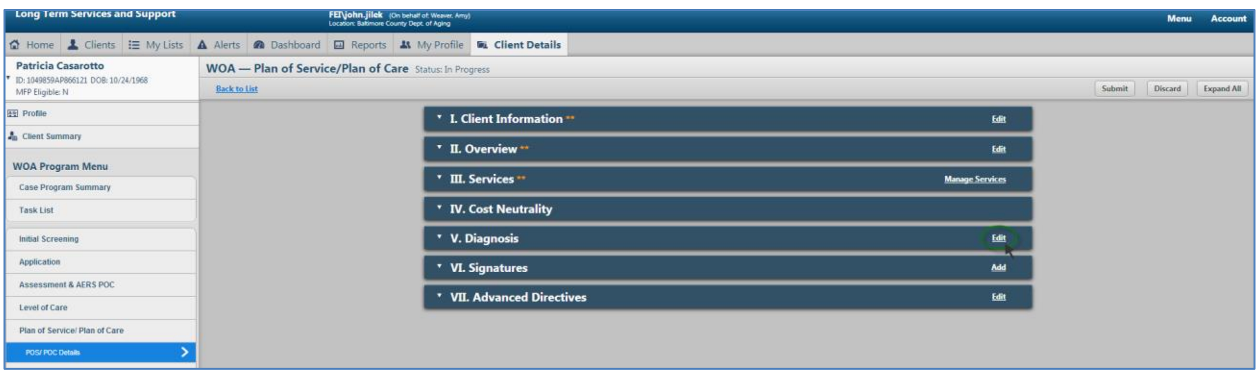
1. Navigate to the POS/POC Summary page (reference above section)
2. Click the IV. Cost Neutrality section panel to expand OR click **Expand All**



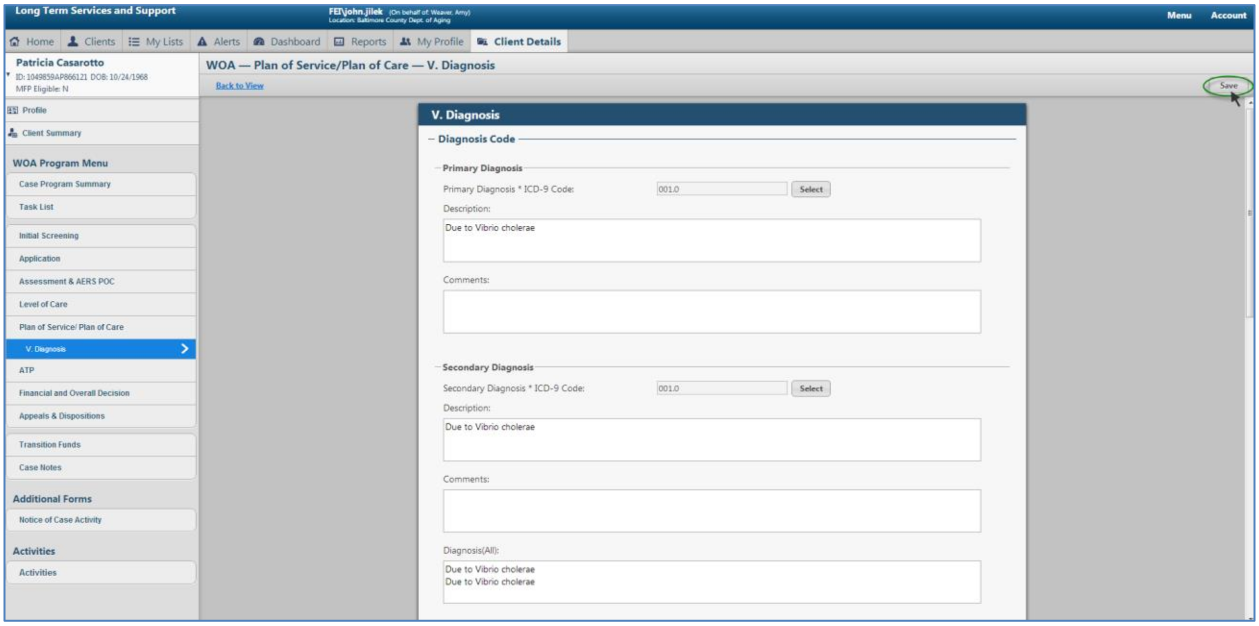
2.12.7 "Save" POS/POC: V. DIAGNOSIS

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**



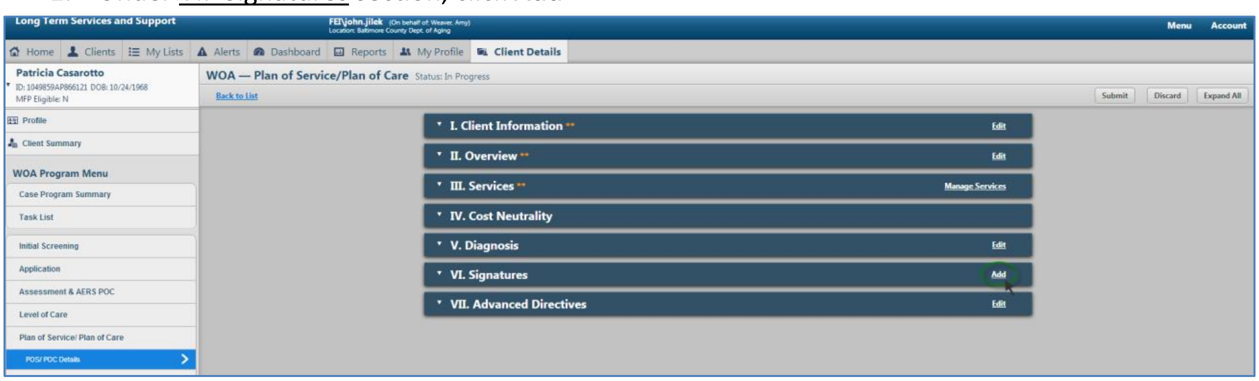
3. Click **Save**



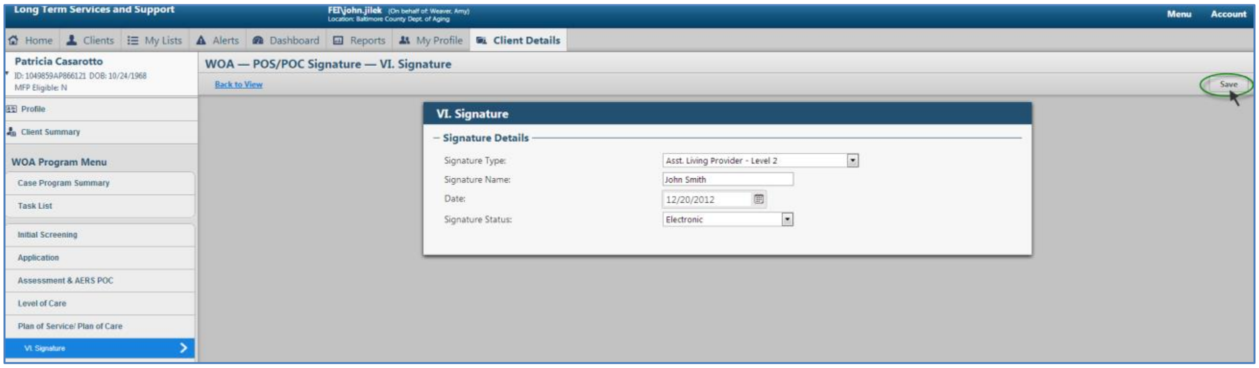
2.12.8 "Save" POS/POC: VI. Signatures

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**



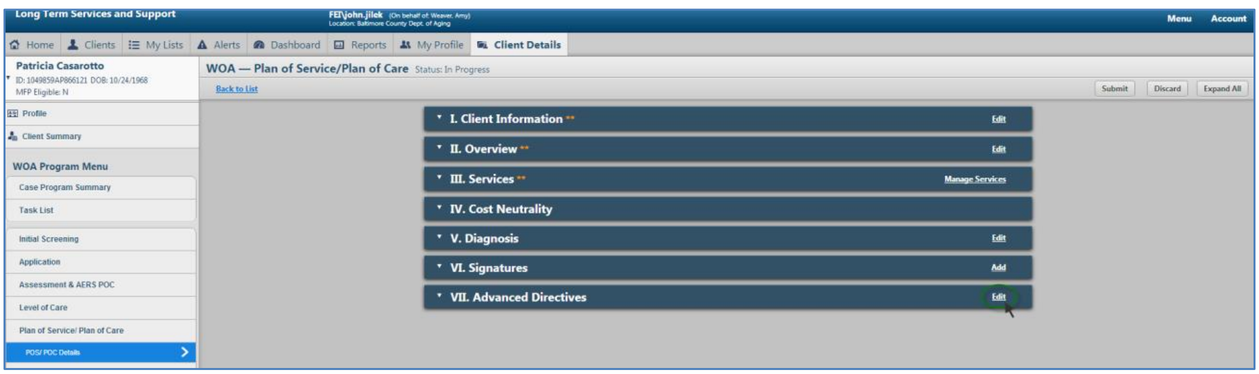
3. Click **Save**



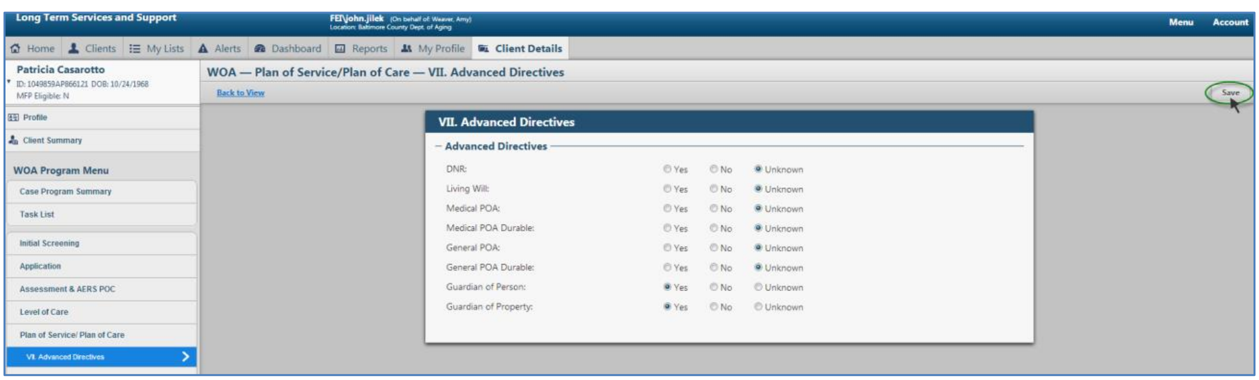
2.12.9 "Save" POS/POC: Advance Directives

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**



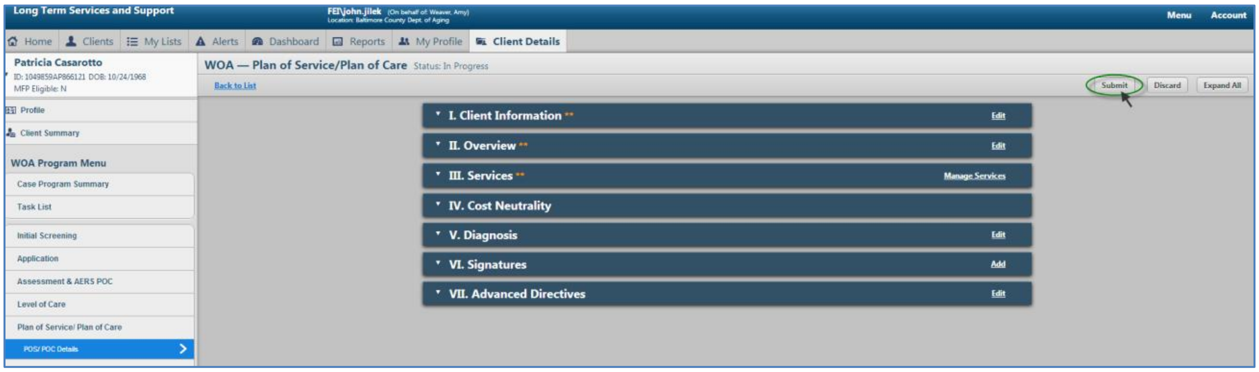
3. Click **Save**



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

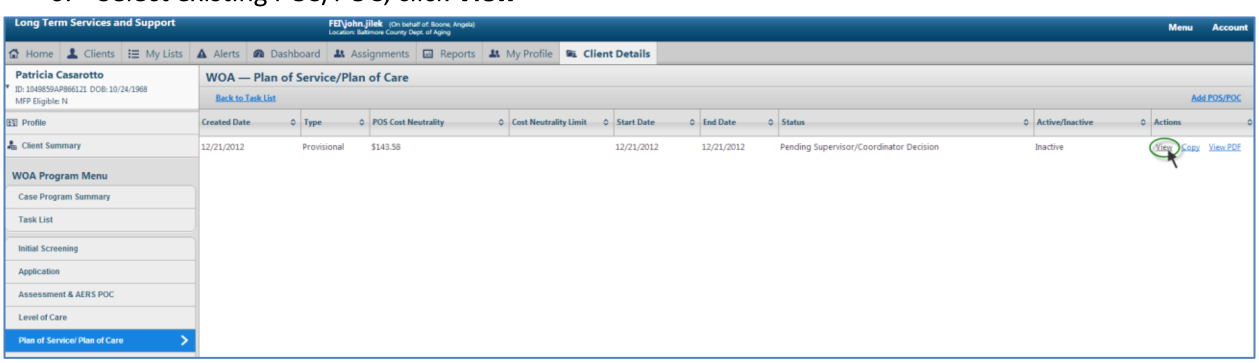
1. Navigate to the POS/POC Summary page (reference above section)
2. Click **Submit**



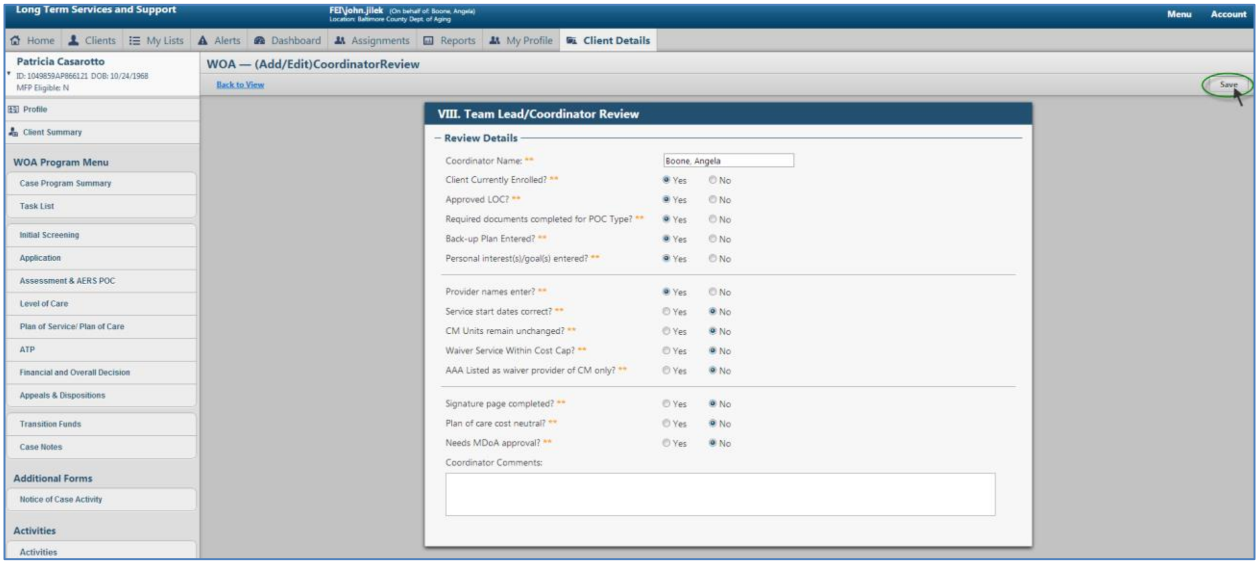
2.12.11 "Submit" POS/POC Lead Review

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**



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

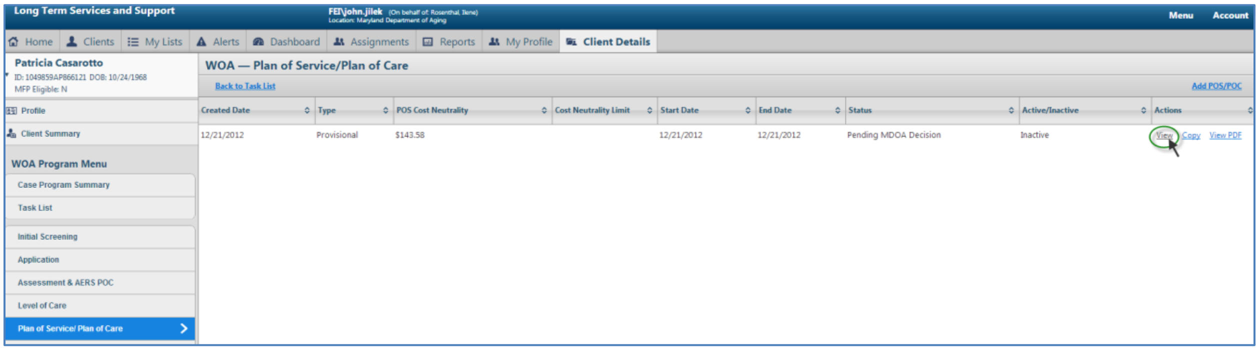


8. Review/Modify each section, click **Submit**

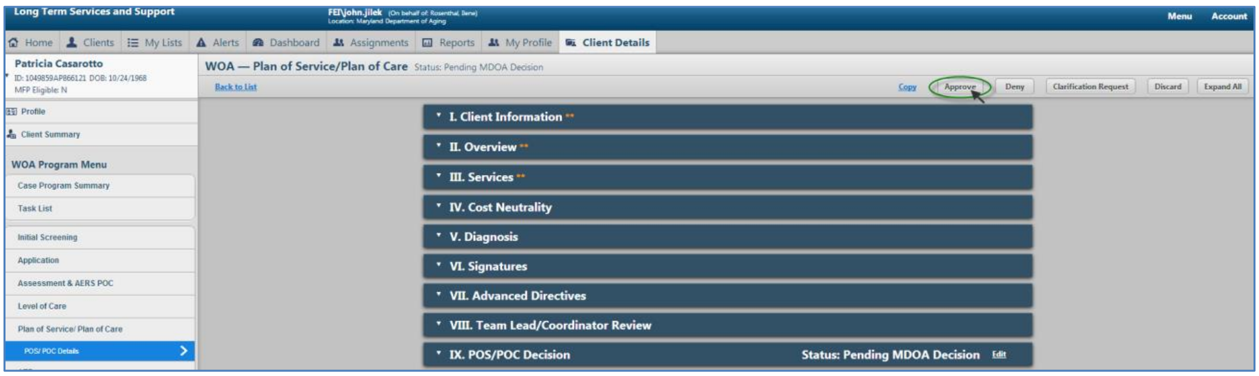
2.12.12 Apply POS/POC Lead Decision

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**

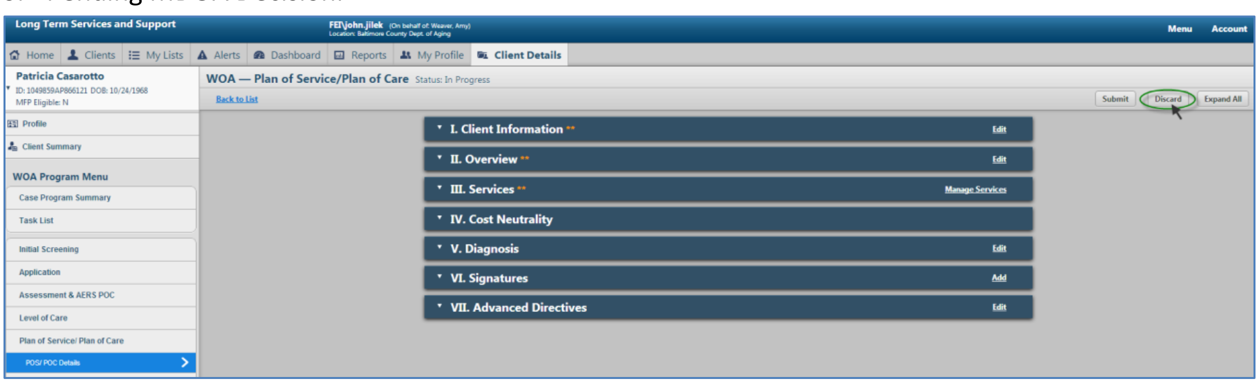


7. Provide comment in section IX. POS/POC Decision (optional)
8. Click **Approve, Deny,** or **Clarification Request**



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."



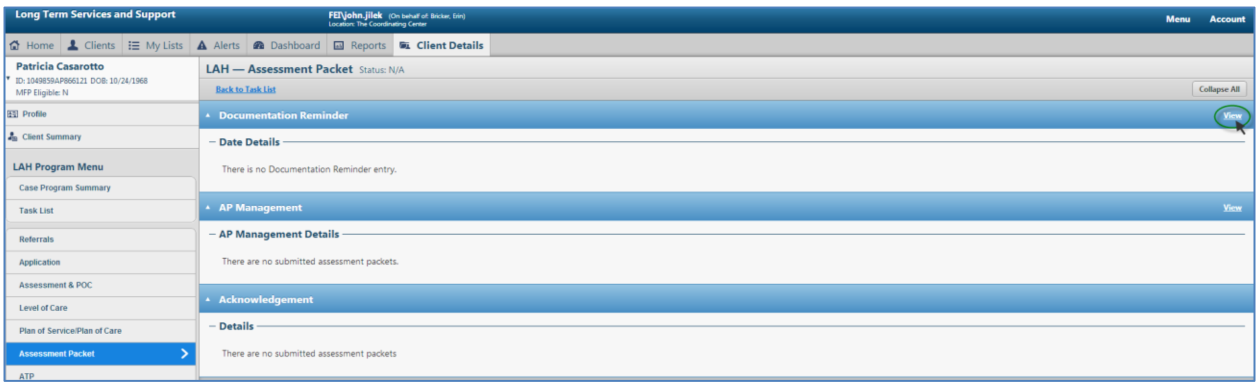
2.13 Assessment Packet (ICS, LAH)

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

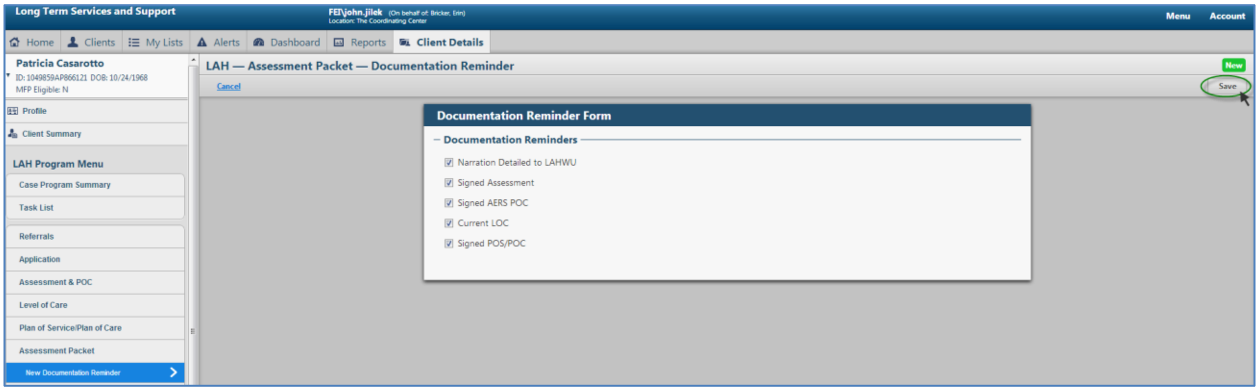
To add an Assessment Packet Documentation Reminder, you must log in as the permitted user.

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**



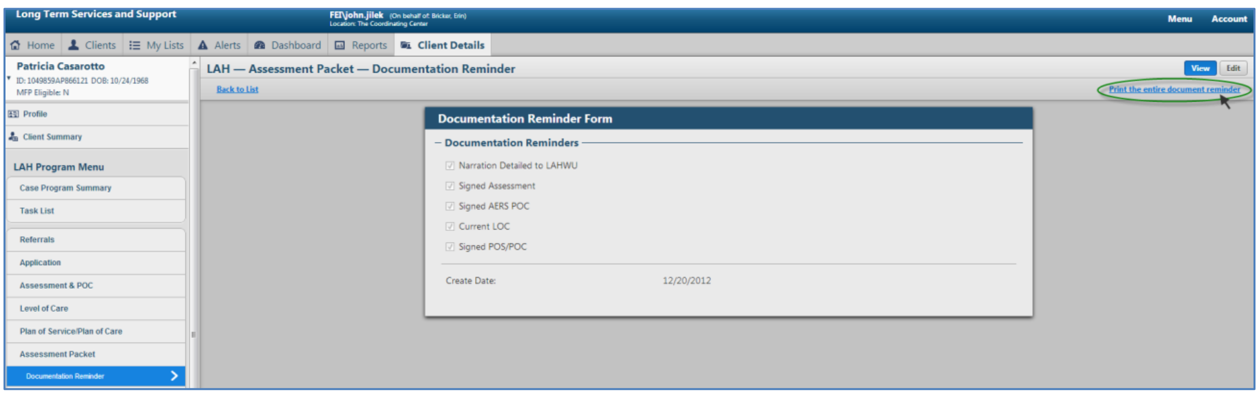
2.13.2 "Save" Assessment Packet Documentation Reminder

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.



2.13.3 "Print" entire documentation reminder

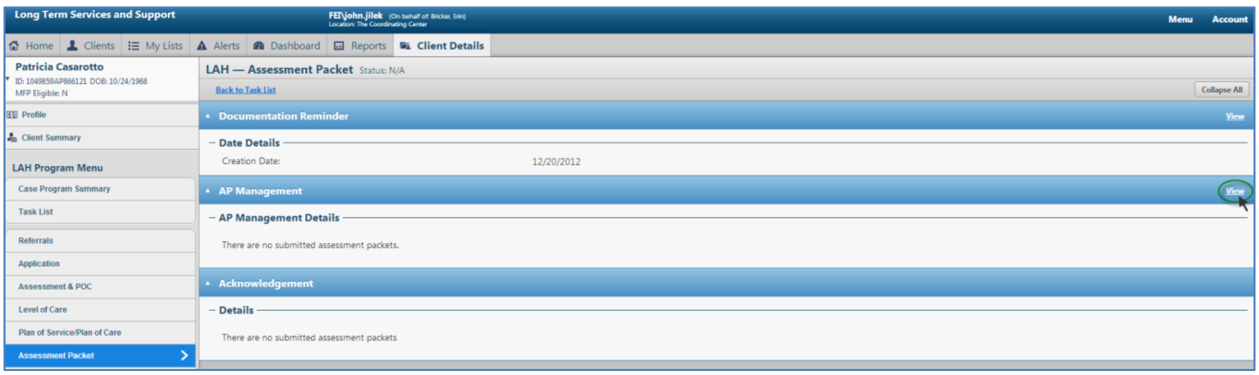
After saving the Documentation Reminder, The user is permitted to view and print the entire document reminder.



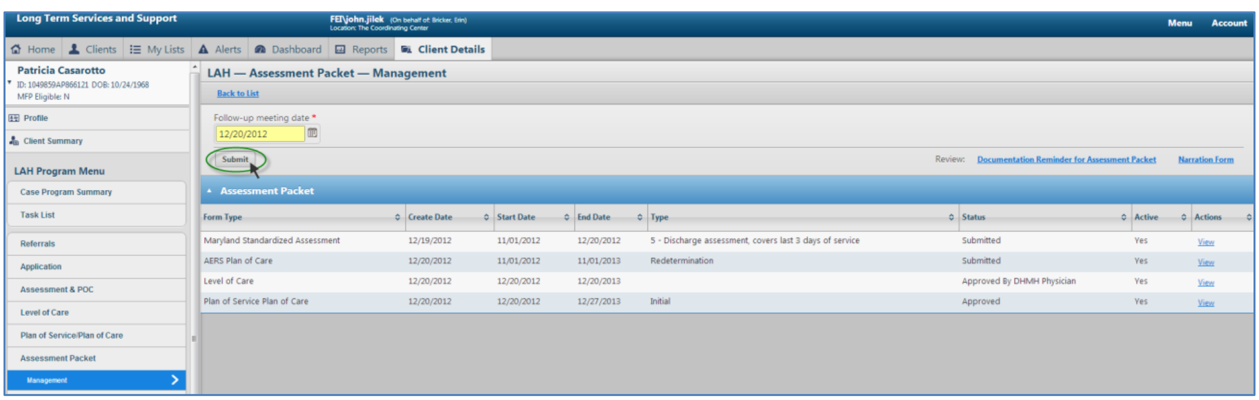
2.13.4 Review & Submit Assessment Packet

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 <u>AP Management</u> section, click **View**



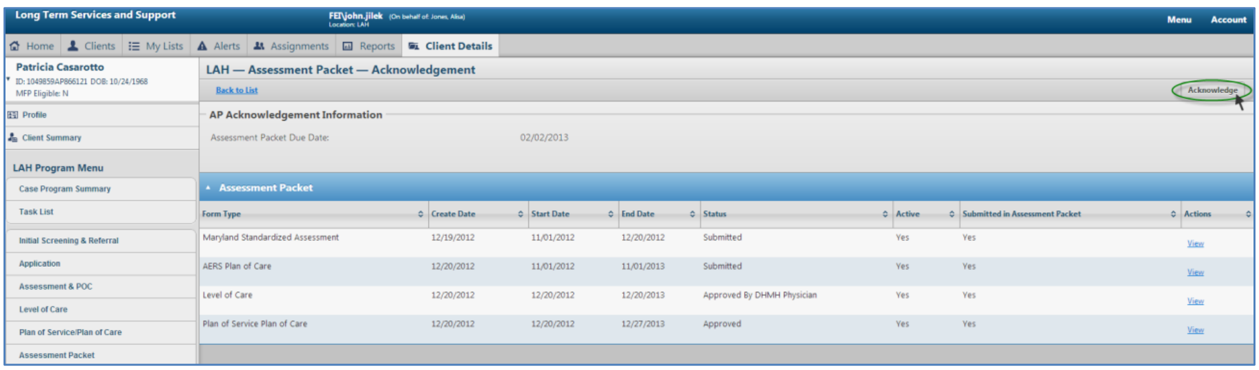
7. Review the Assessment Packet, click **Submit**



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 <u>Acknowledgement</u> section, click **View**
7. Click Acknowledge

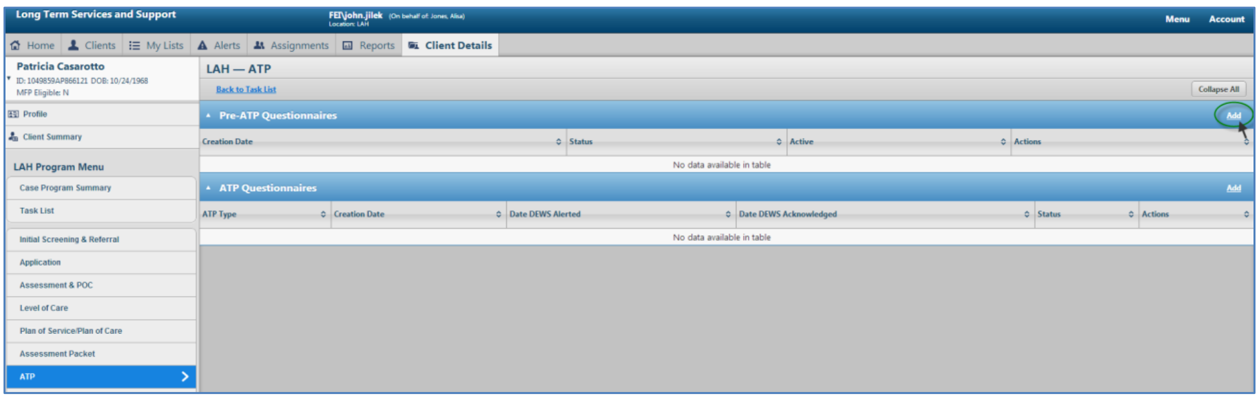


2.14 Pre-ATP (ICS, LAH)

2.14.1 "Add" Pre-ATP Questionnaire

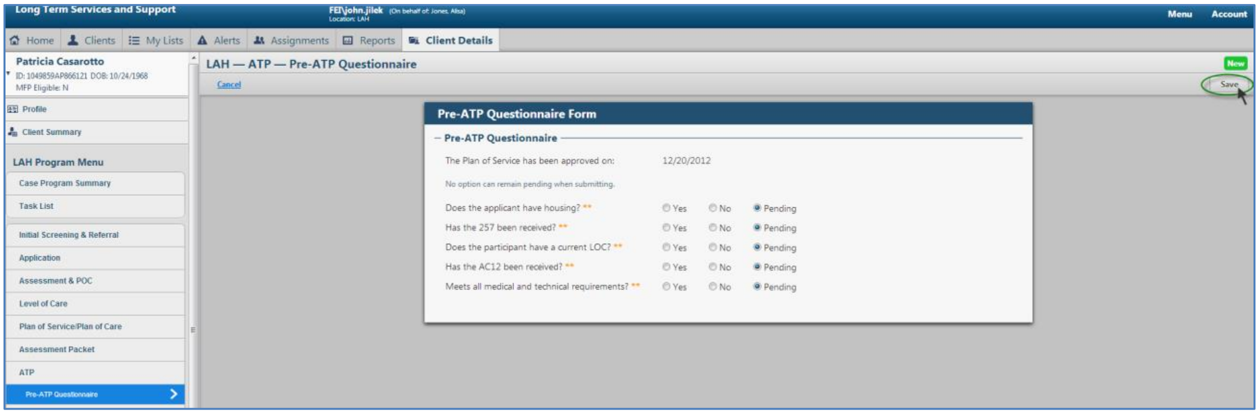
To add a Pre-ATP Questionnaire Form, the Assessment Packet must be "Acknowledged" and you must log in as the permitted user. NOTE: This form is optional.

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**



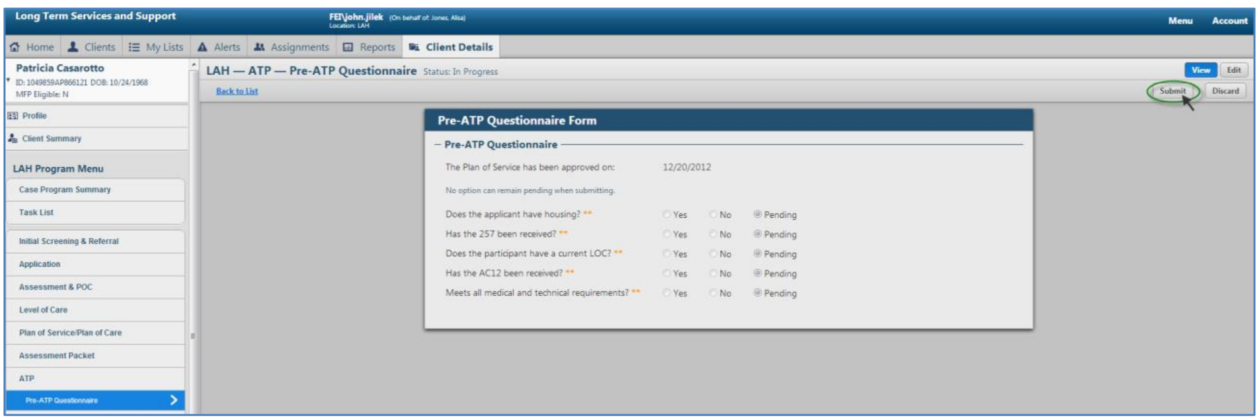
2.14.2 "Save" Pre-ATP Questionnaire

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



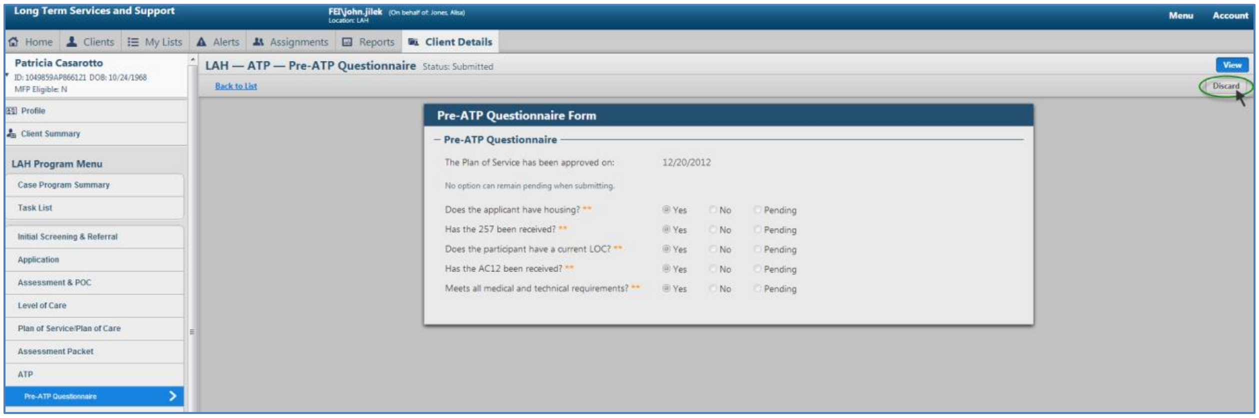
2.14.3 "Submit" Pre-ATP Questionnaire

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



2.14.4 “Discard” Pre-ATP Questionnaire

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

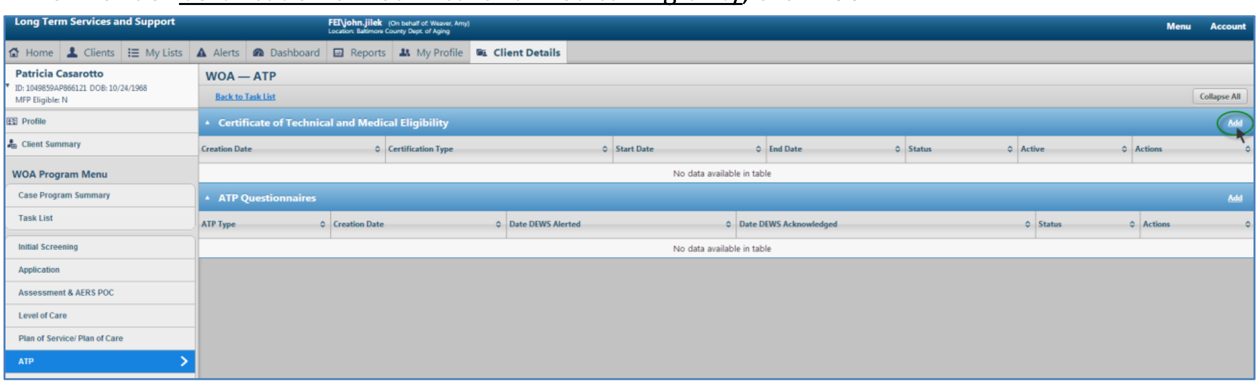


2.15 Certification of Technical and Medical Eligibility (WOA)

2.15.1 “Add” Certification of Technical and Medical Eligibility

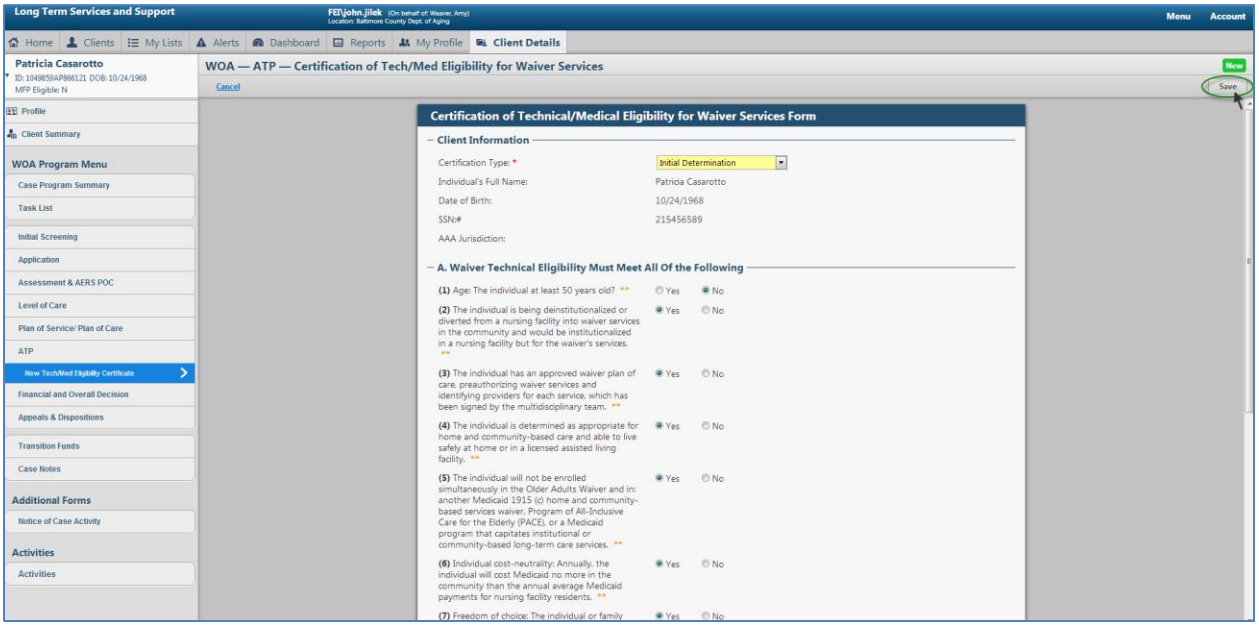
To add a Certification of Technical and Medical Eligibility, you must log in as the permitted user.

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**



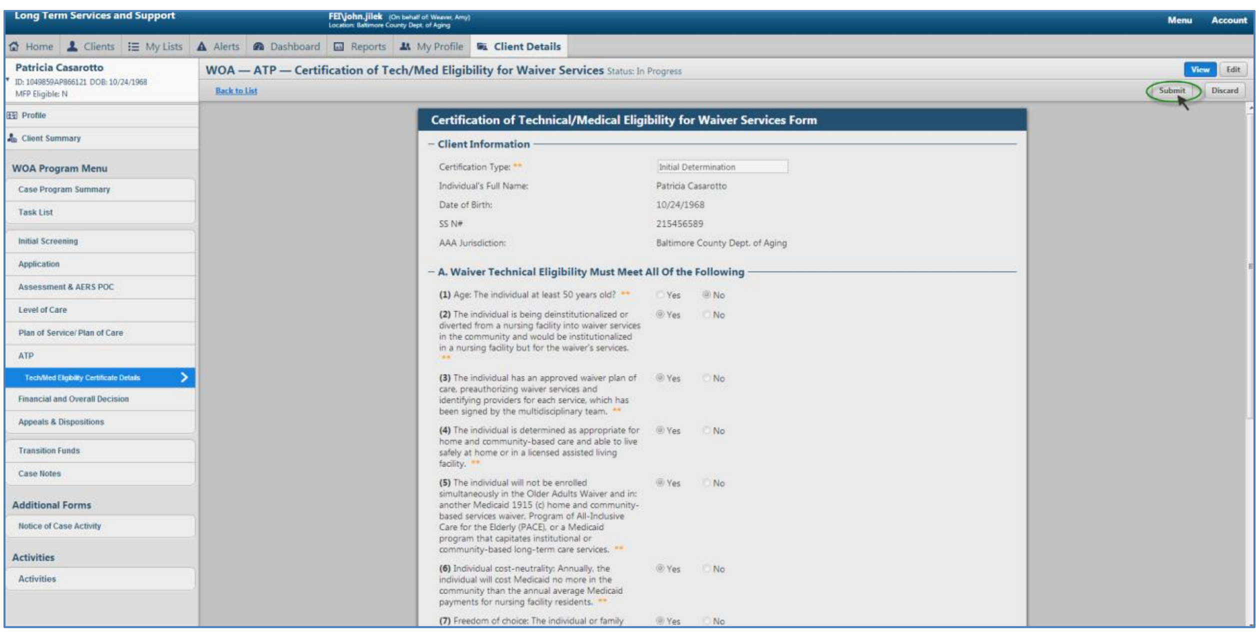
2.15.2 "Save" Certification of Technical and Medical Eligibility

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



2.15.3 "Submit" Certification of Technical and Medical Eligibility

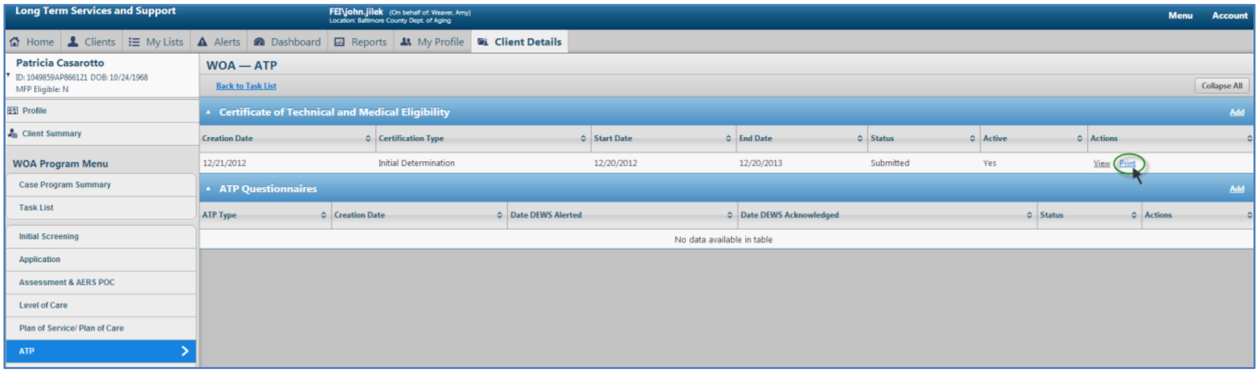
Click **Submit** to complete the form process. This will save all previous selections and entries and direct the user to view mode.



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**

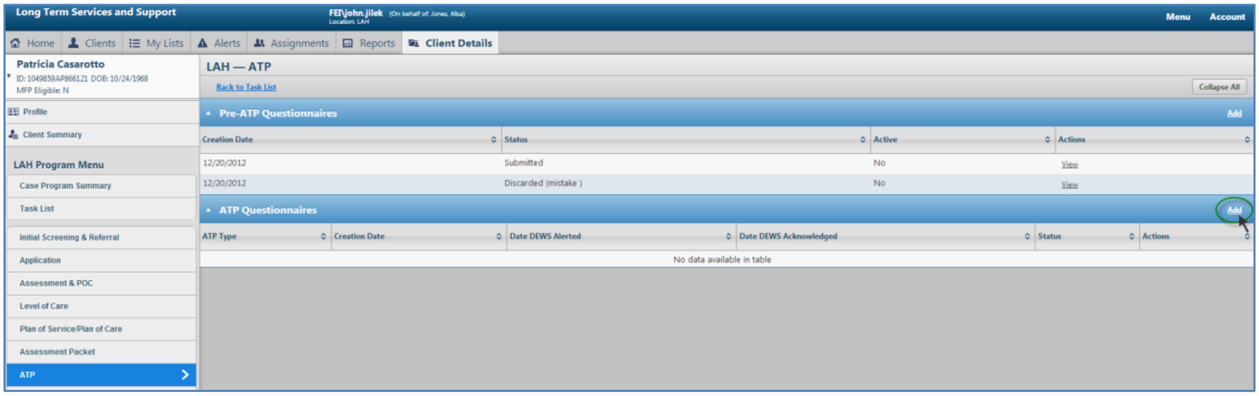


2.16 ATP Questionnaire (ICS, LAH, WOA)

2.16.1 "Add" ATP Questionnaire

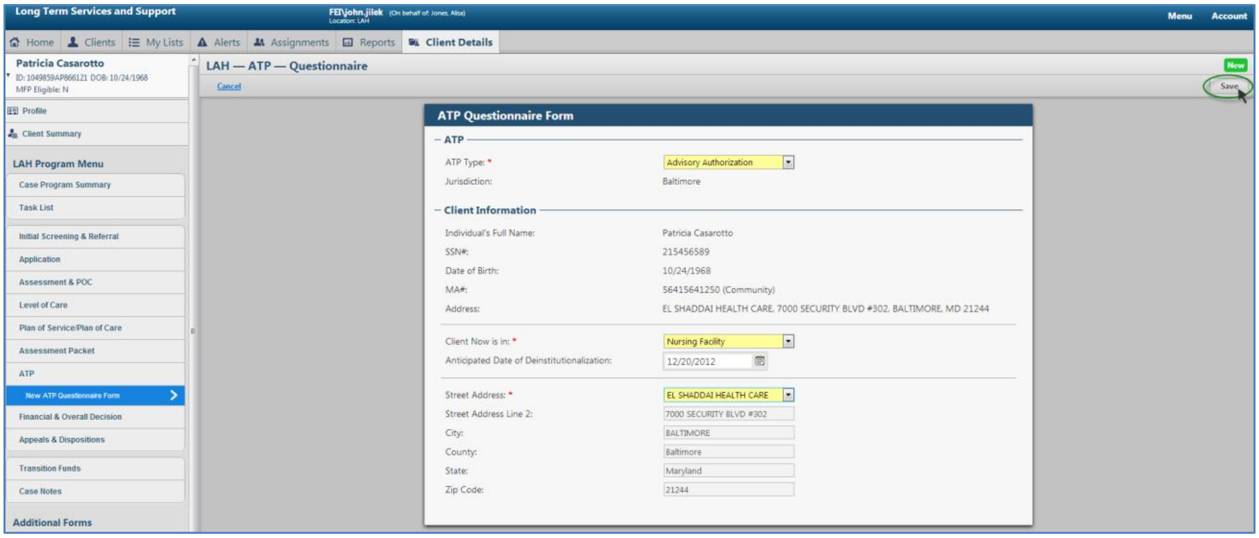
To add an ATP Questionnaire Form, you must log in as the permitted user.

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 <u>ATP Questionnaires</u>, click **Add**



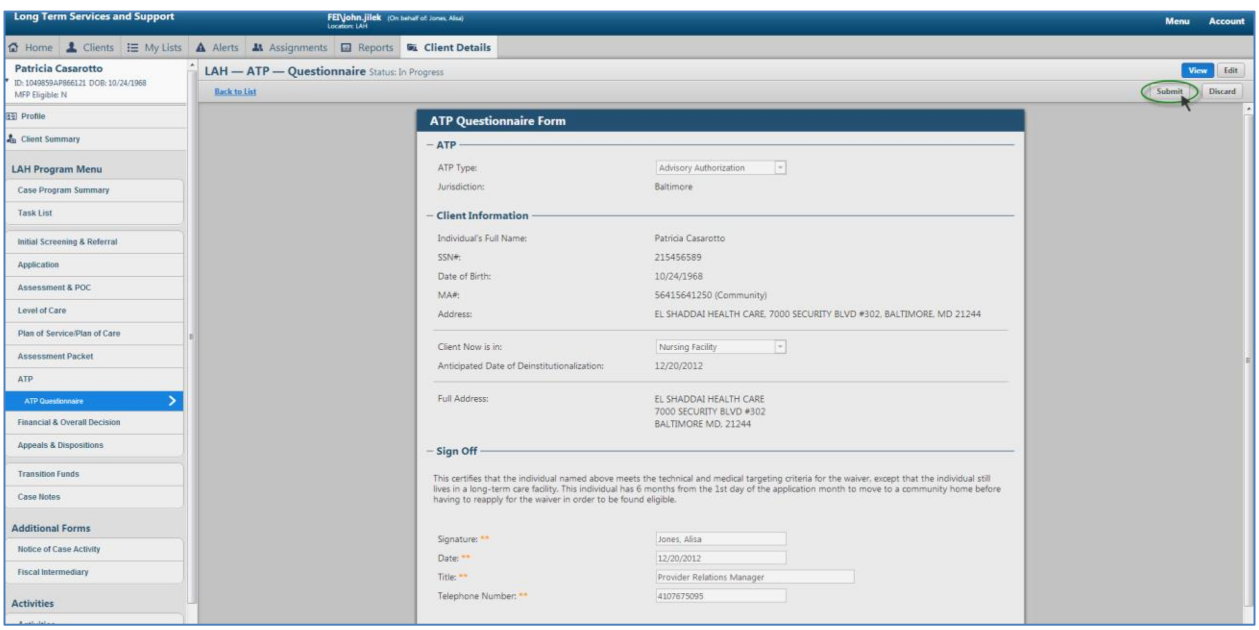
2.16.2 “Save” ATP Questionnaire

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



2.16.3 “Submit” ATP Questionnaire

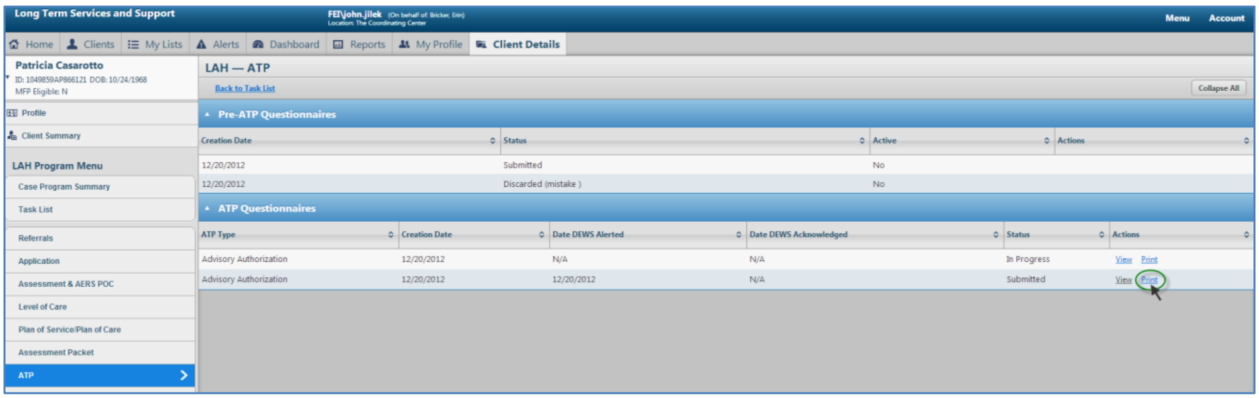
Click **Submit** to complete the form process. This will save all previous selections and entries and direct the user to view mode.



2.16.4 "Print" ATP Questionnaire

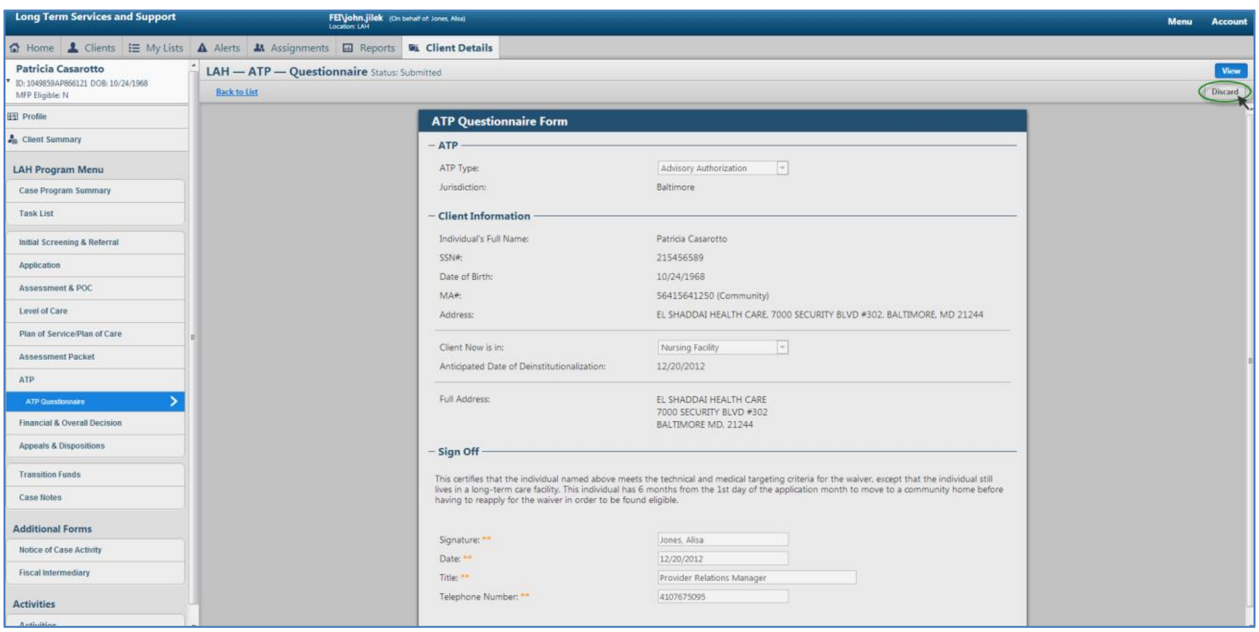
The user is able to view the AERS POC in print view (PDF format displayed in a separate window/tab).

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



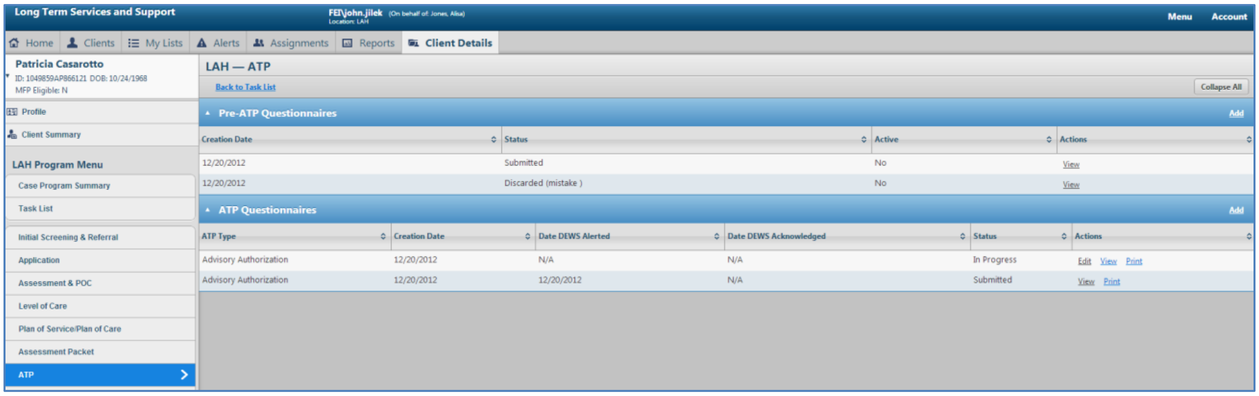
2.16.5 "Discard" ATP Questionnaire

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



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').

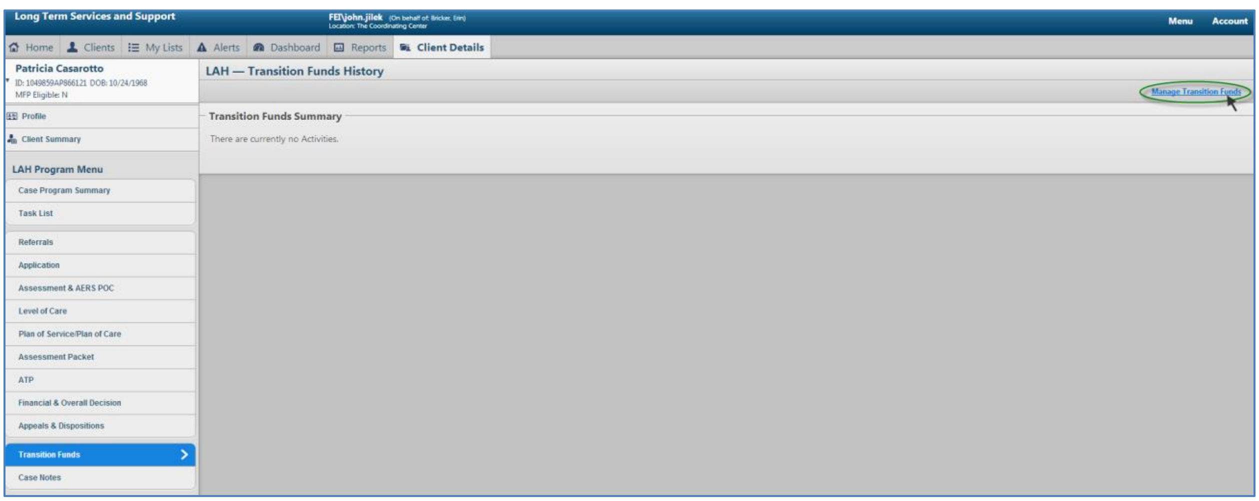


2.17 Transition Funds (ICS, LAH, WOA)

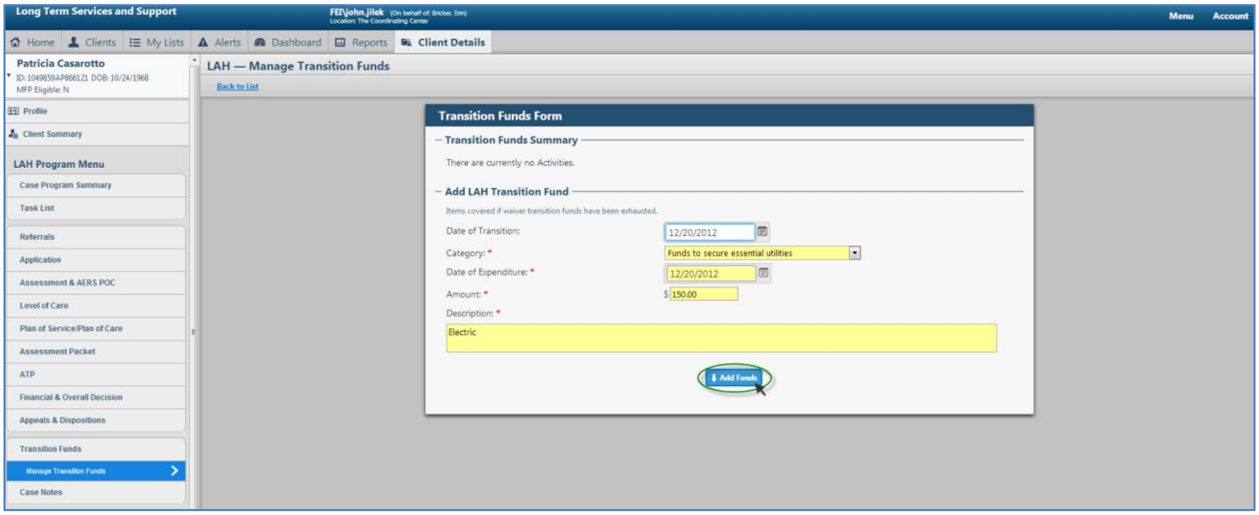
2.17.1 Add Transition Funds

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

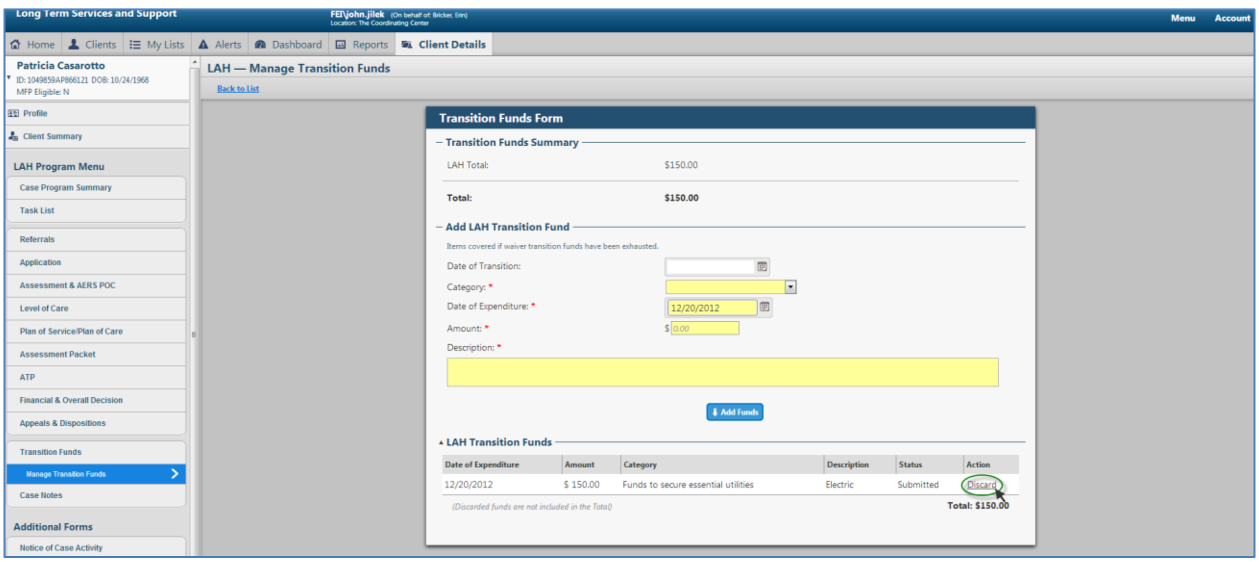


7. Complete form, click **Add Funds**



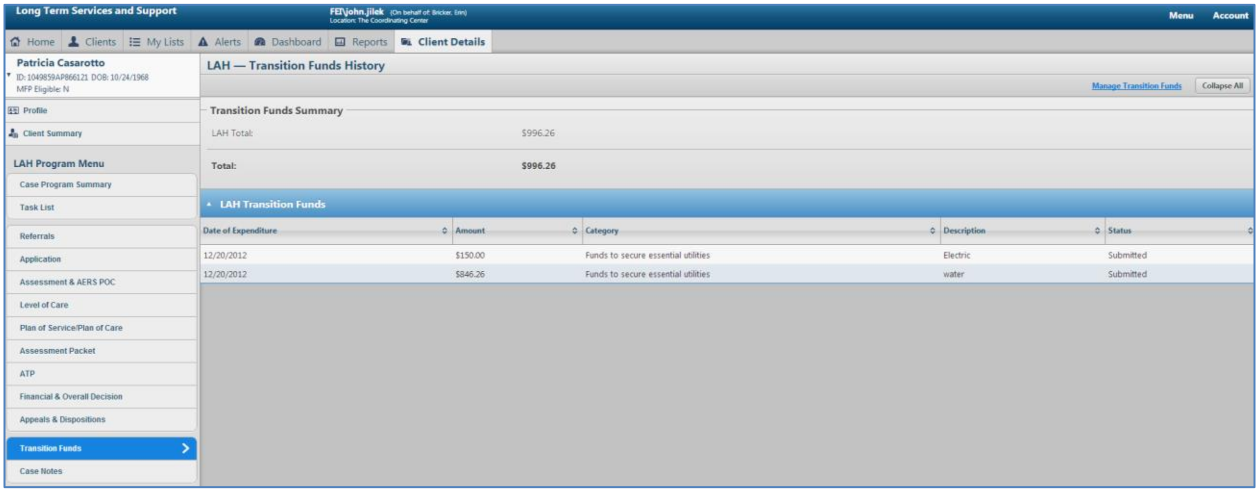
2.17.2 "Discard" Transition Funds

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



2.17.3 View Transition Funds History

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

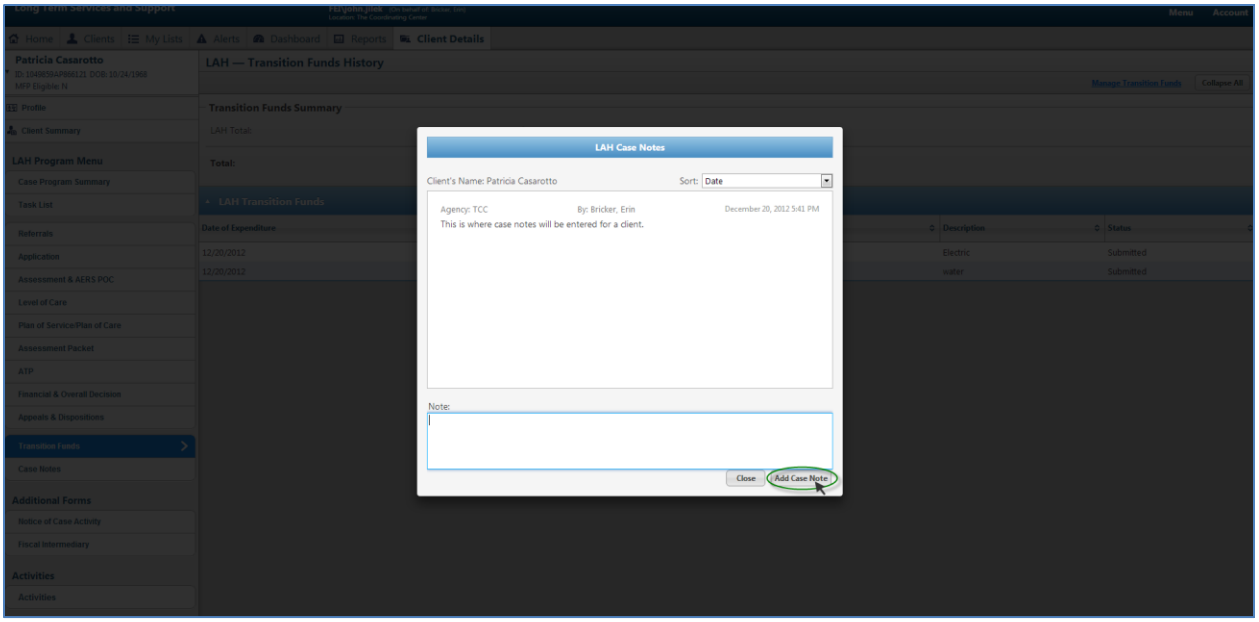


2.18 Case Notes (ICS, LAH, WOA)

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**

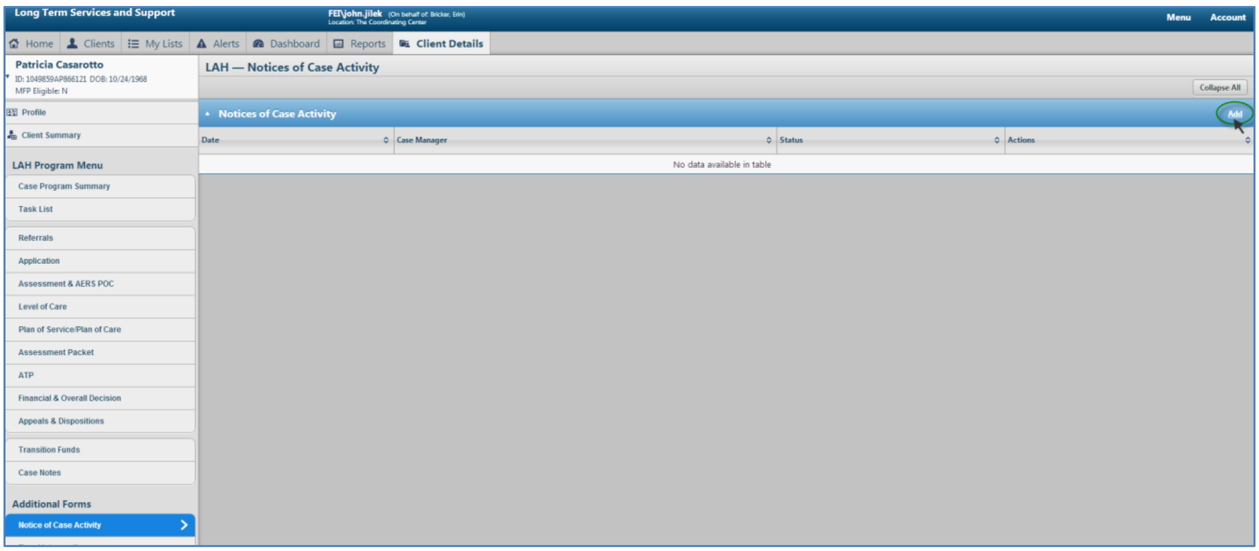


2.19 Notice of Case Activity (ICS, LAH, WOA)

2.19.1 "Add" Notice of Case Activity

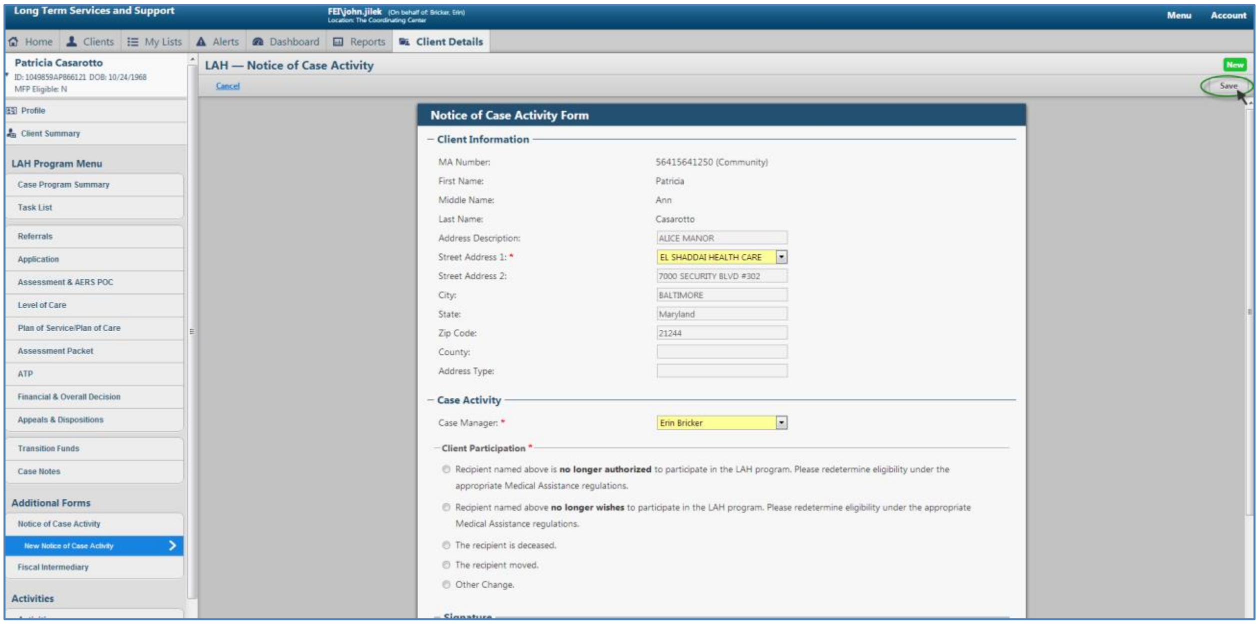
The user is permitted to add a NOC form.

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**



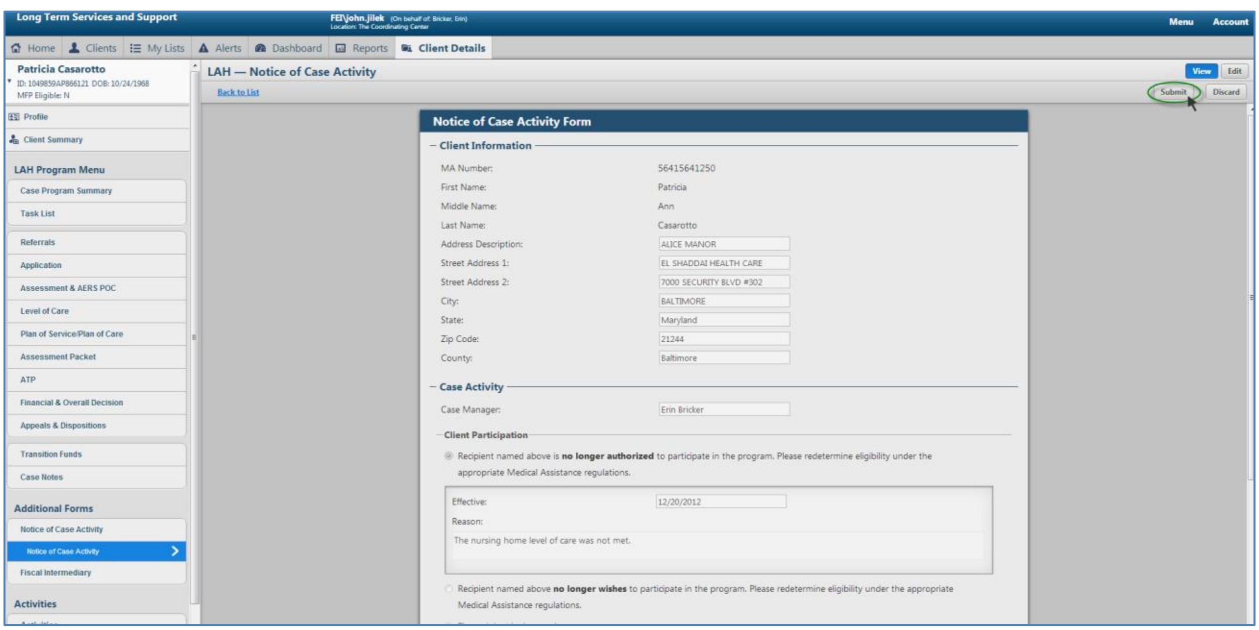
2.19.2 "Save" Notice of Case Activity

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



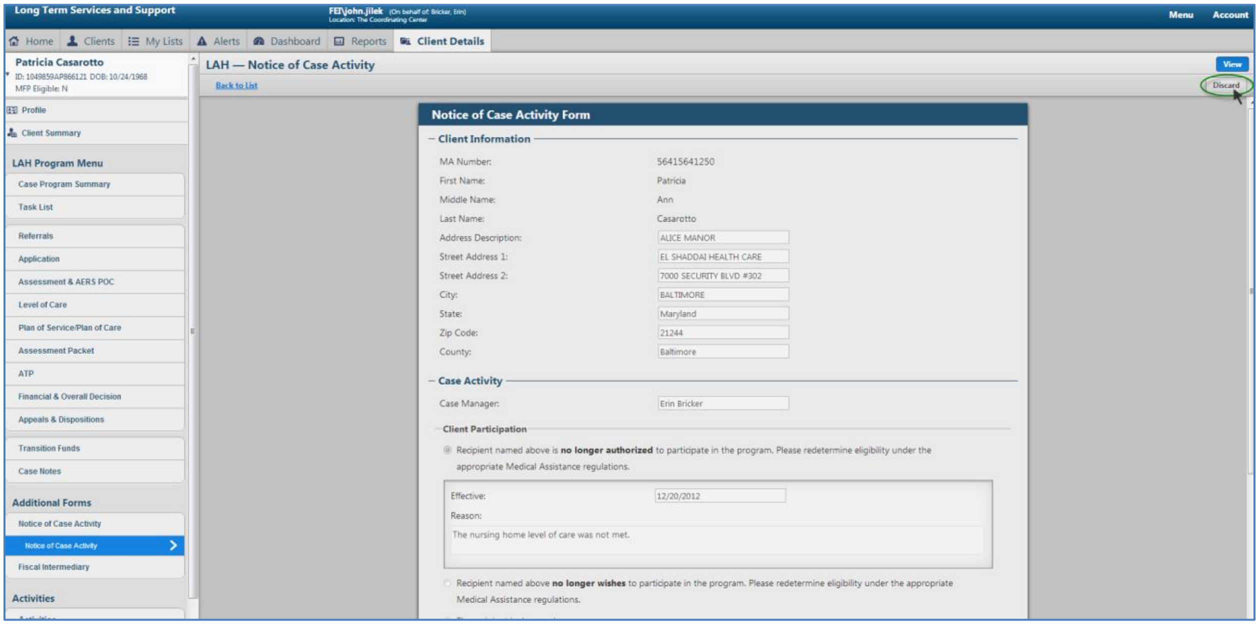
2.19.3 "Submit" Notice of Case Activity

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



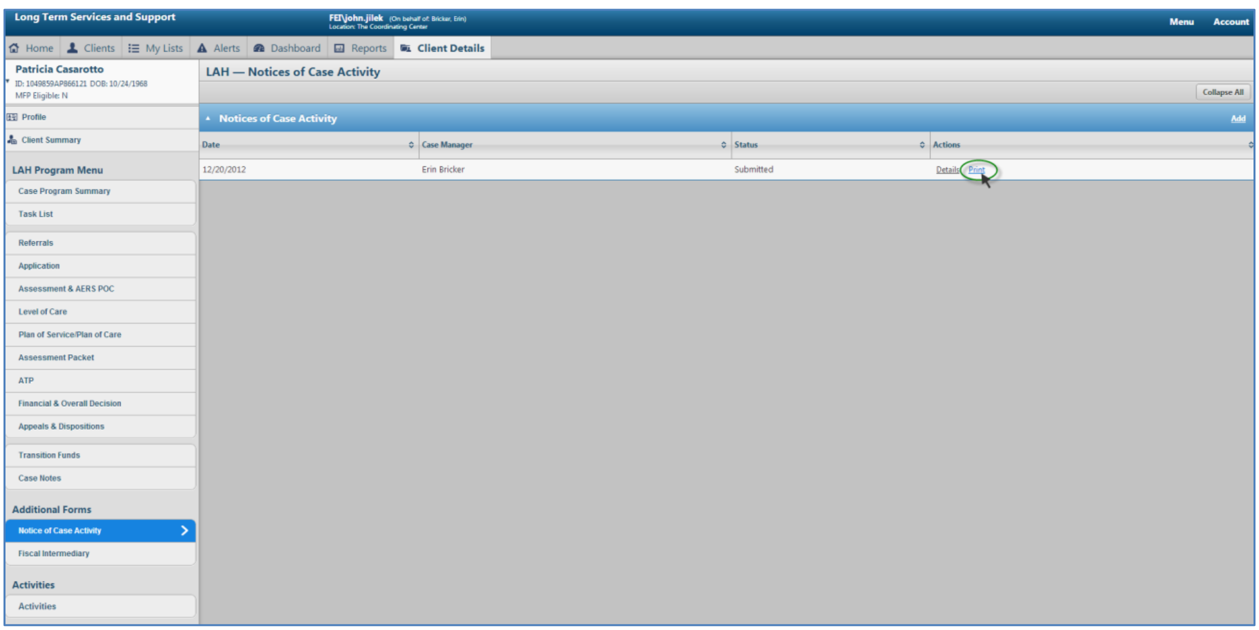
2.19.4 "Discard" Notice of Case Activity

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



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).

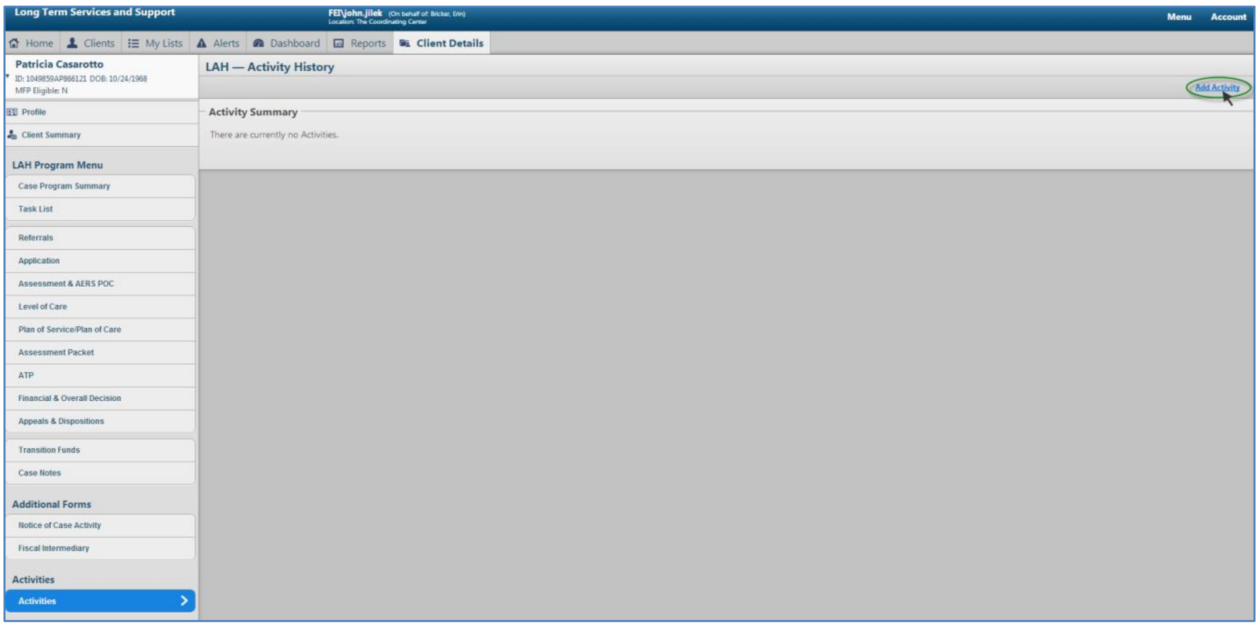


2.20 Activities (ICS, LAH, WOA)

2.20.1 Add Activity

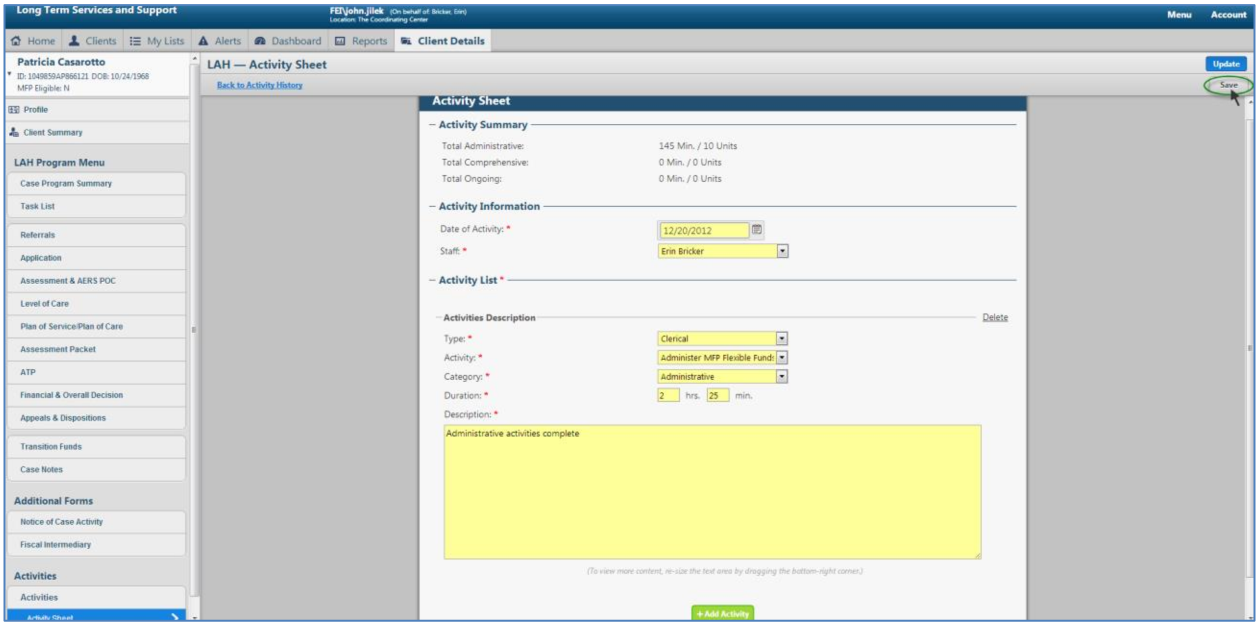
The user is permitted to add an activity for a select client.

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

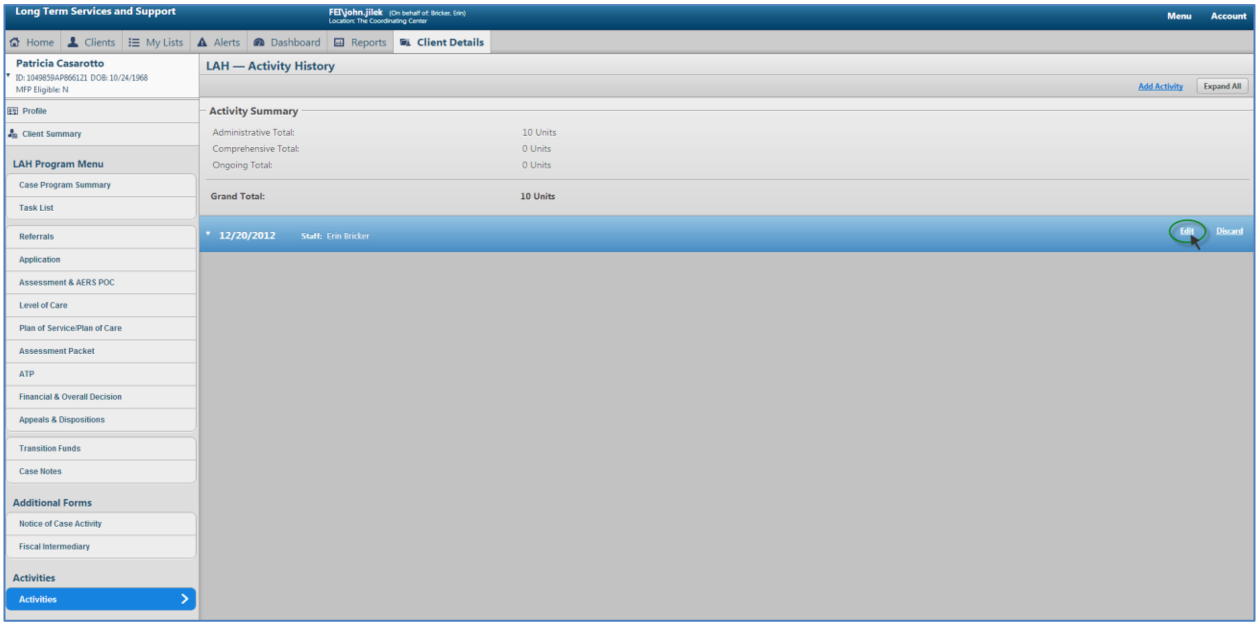
Click **Save** after completing the form. This will save all selections and entries on the form and direct the user to view mode.



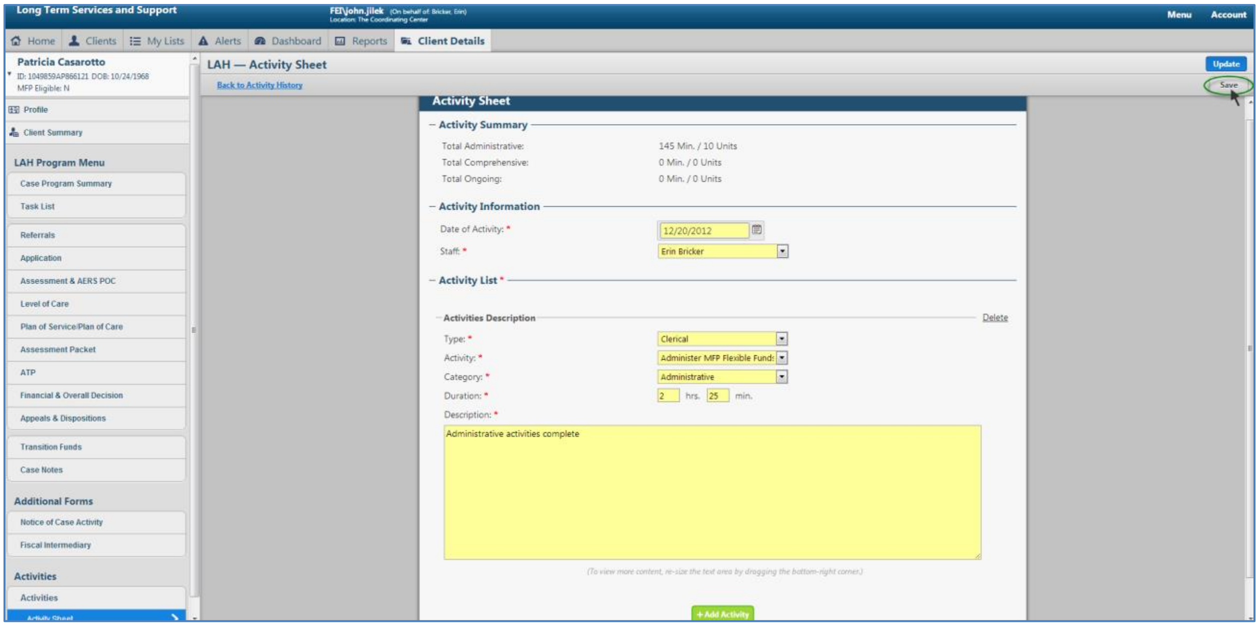
2.20.3 "Edit" Activity

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**

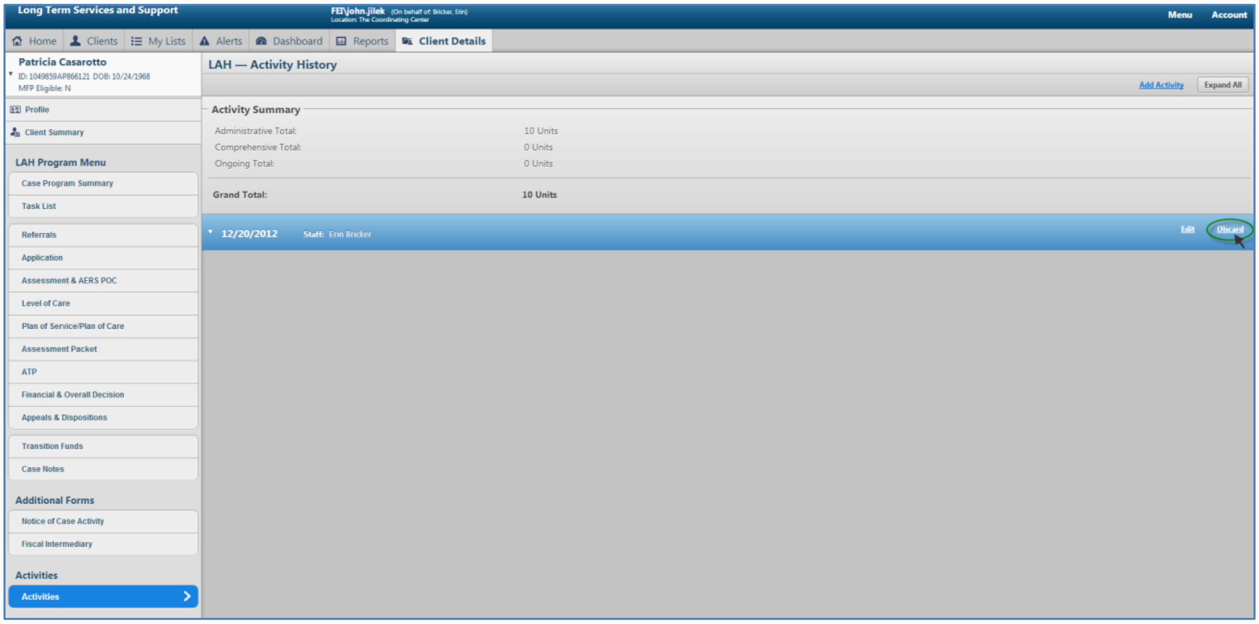


7. Modify the existing Activity, click **Save**



2.20.4 "Discard" Activity

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

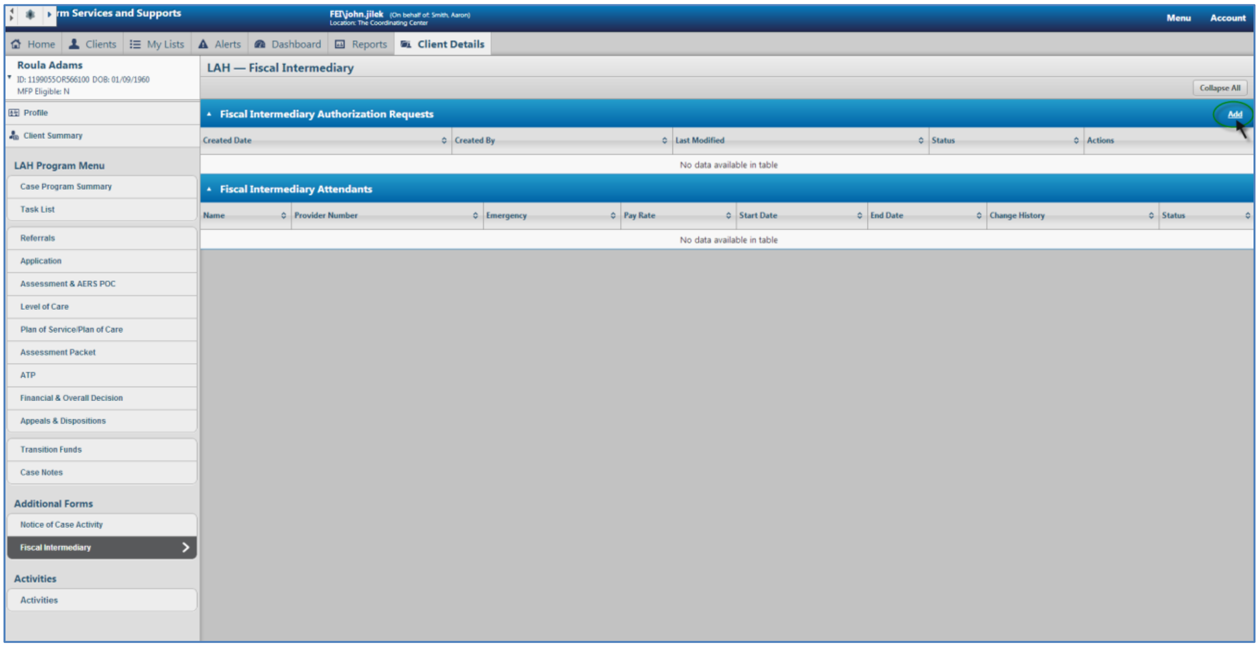


2.21 Fiscal Intermediary (ICS, LAH)

2.21.1 "Add" Fiscal Intermediary Request

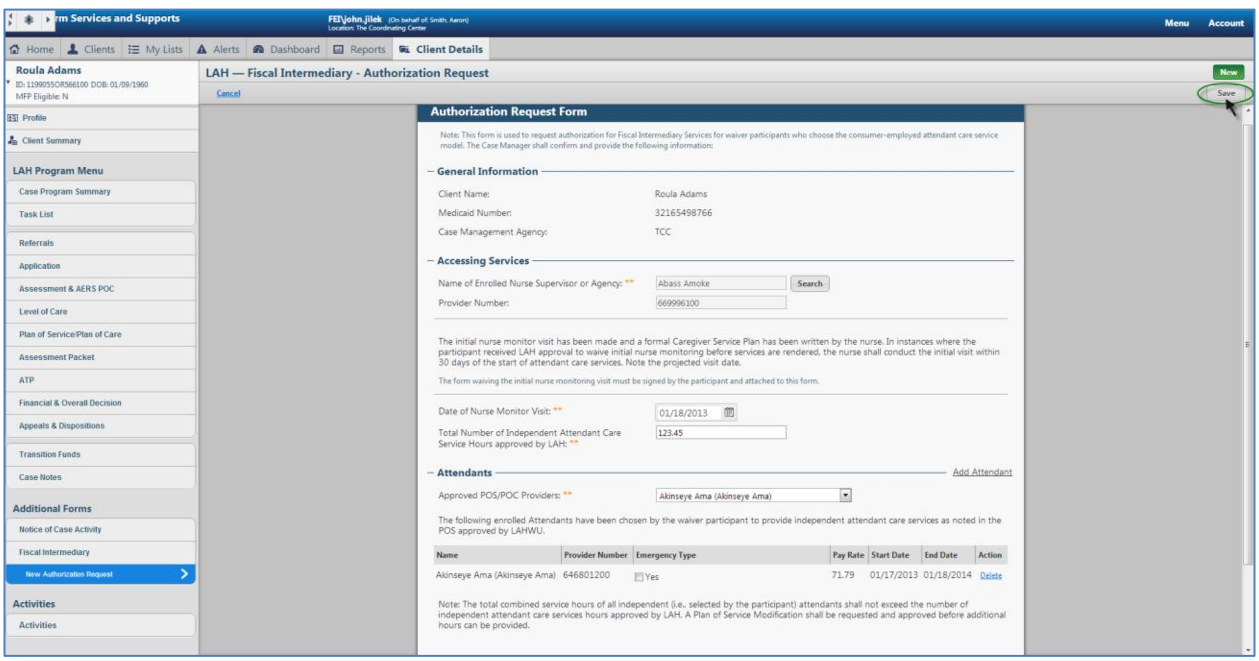
The user is permitted to add an FI Request form. There should be an 'Approved' and 'Active' POS/POC with independent provider selected.

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**



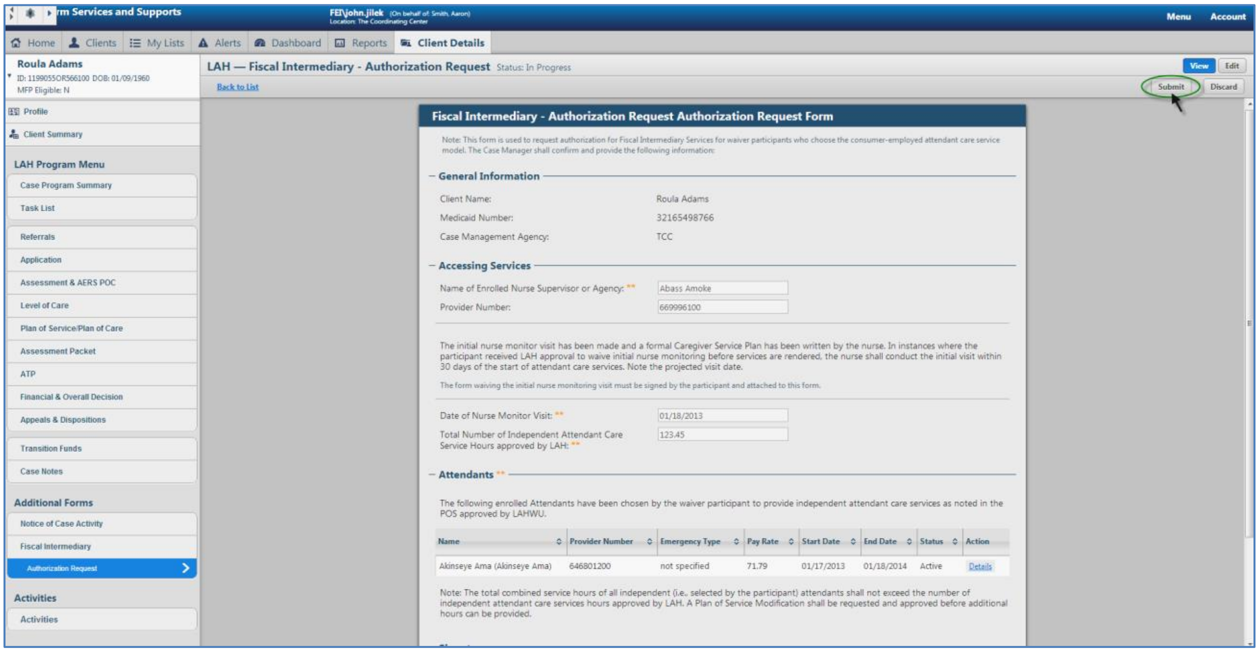
2.21.2 "Save" Fiscal Intermediary

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



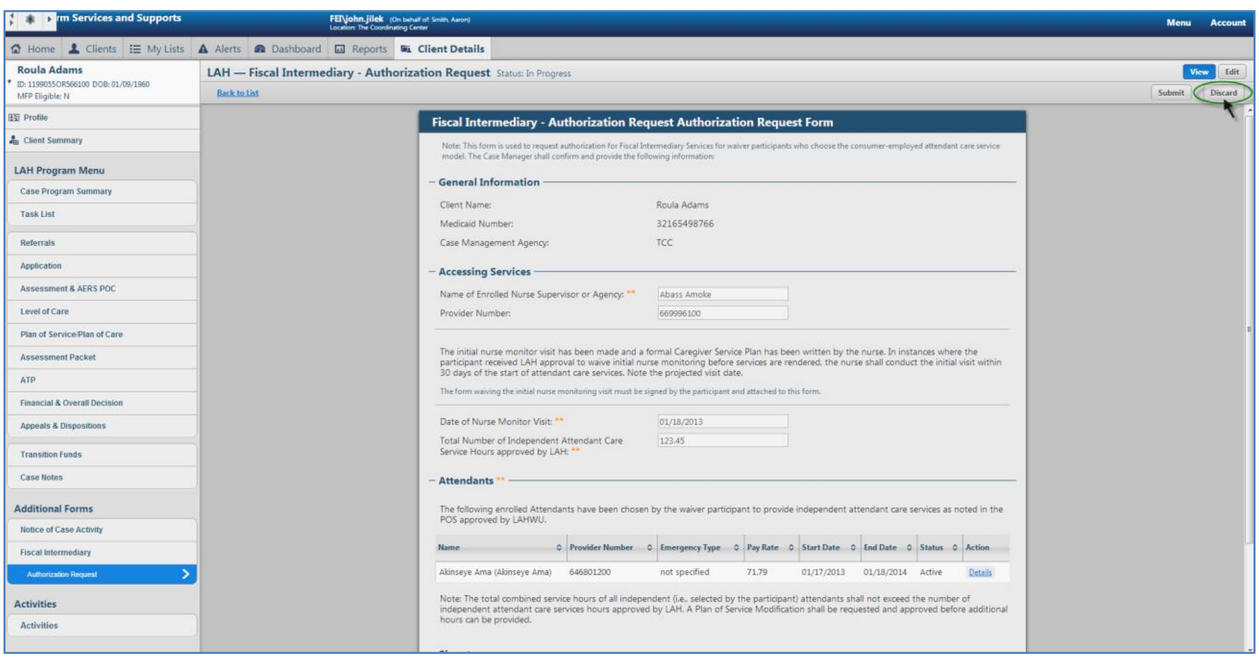
2.21.3 "Submit" Fiscal Intermediary

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



2.21.4 "Discard" Fiscal Intermediary

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

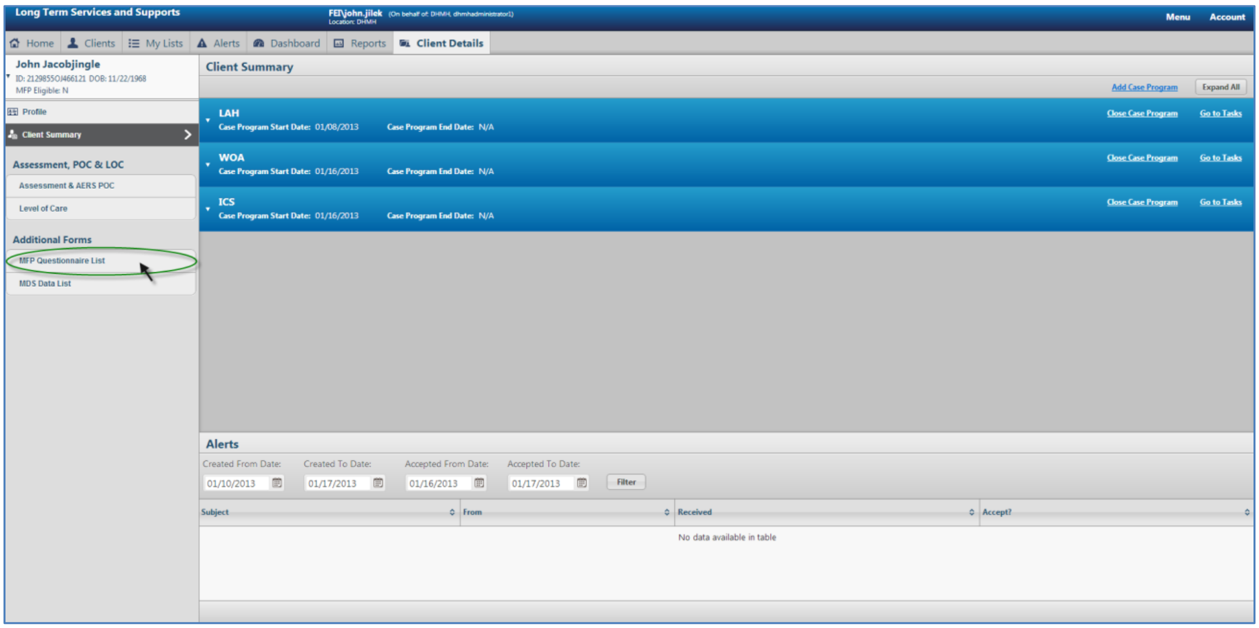


2.22 MFP Questionnaire (ICS, LAH, WOA)

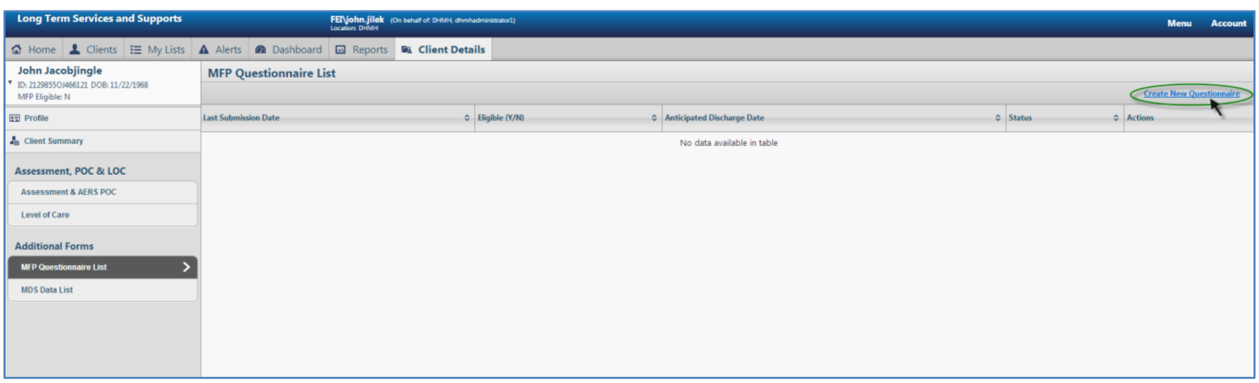
2.22.1 Create MFP Questionnaire

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**

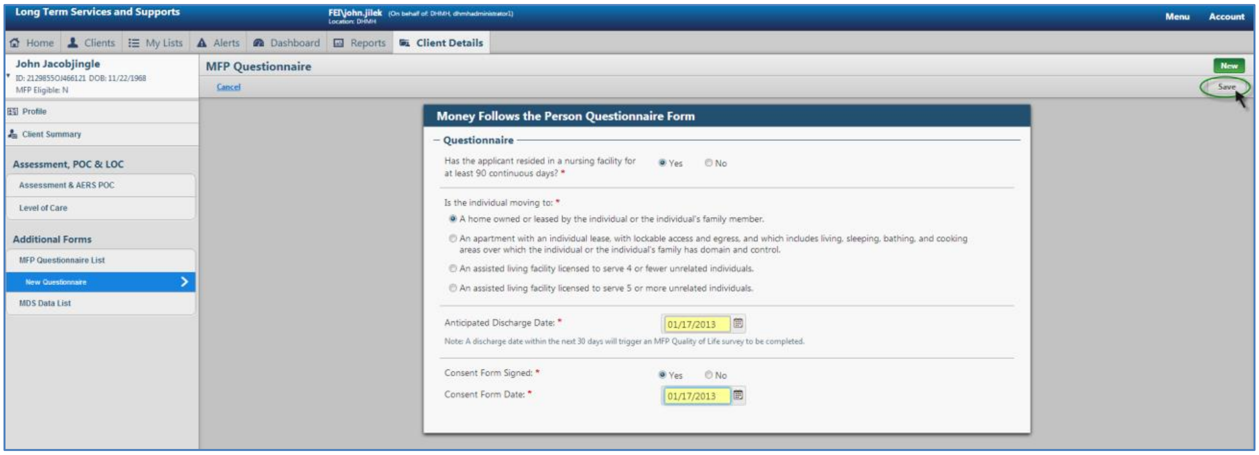


5. Click **Create New Questionnaire**



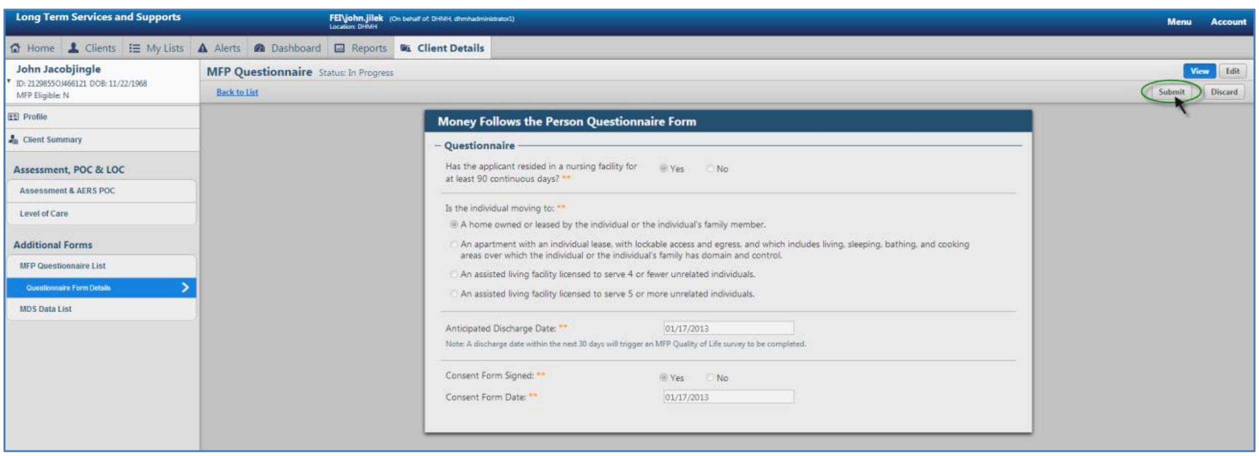
2.22.2 "Save" MFP Questionnaire

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



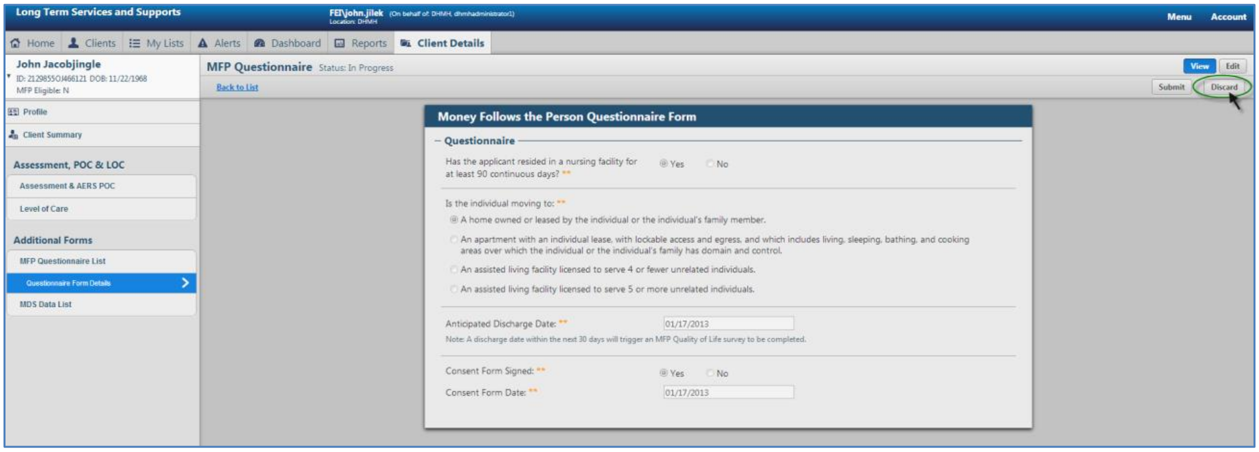
2.22.3 "Submit" MFP Questionnaire

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



2.22.4 "Discard" MFP Questionnaire

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



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