Money Follows the Person User Manual

A step by step navigational process

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Table of 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

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

2.1 Add MFP to the Client

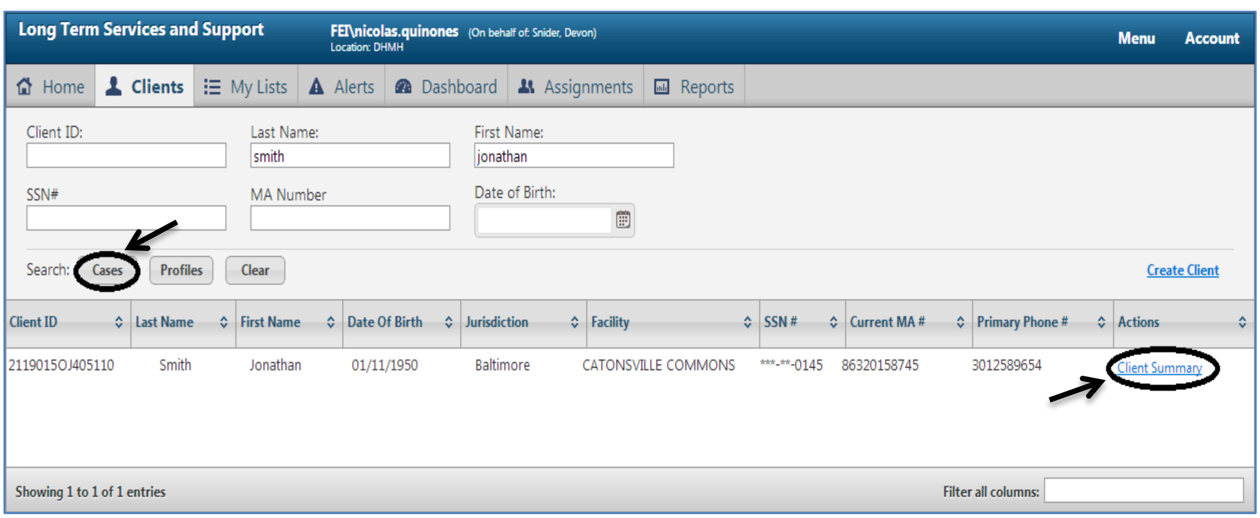
2.1.1 Client Search

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

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

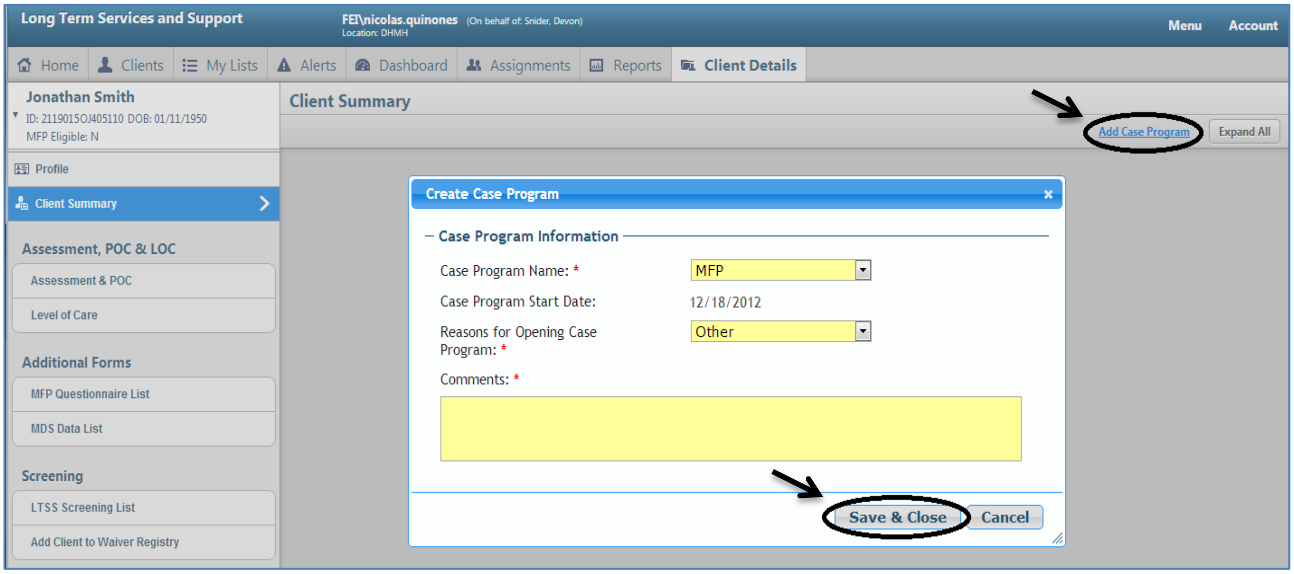
- Enter Smith in the Last Name text box.
- Enter Jonathan in the First Name text box.
- Click the **Cases** button to perform a client search.

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

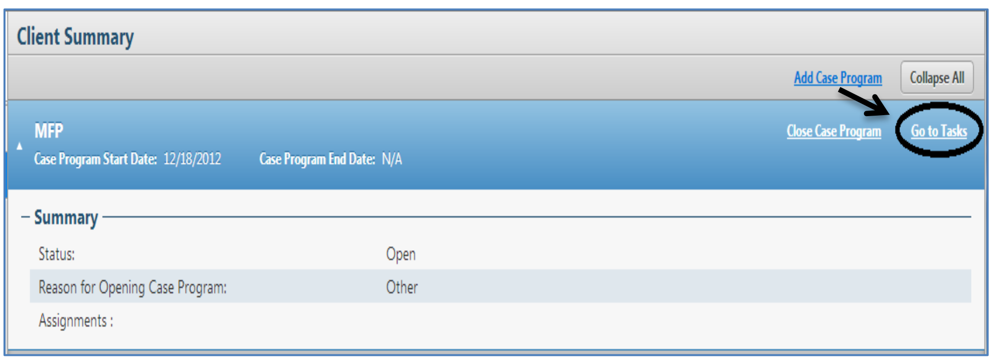


2.1.2 Add Program

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

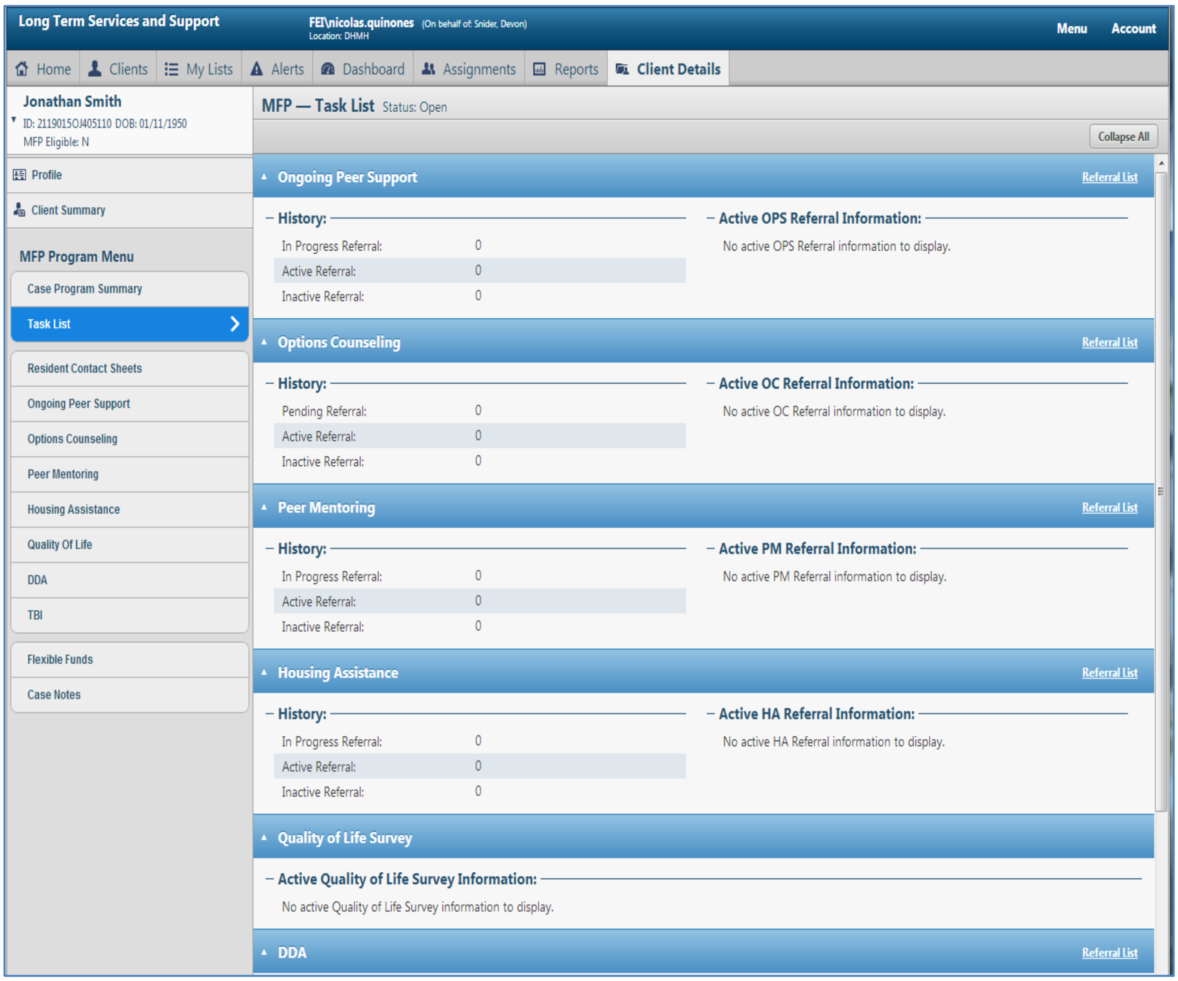


Click the ***Go to Tasks link*** to see client details for the MFP Program, starting with the MFP Tasks List.



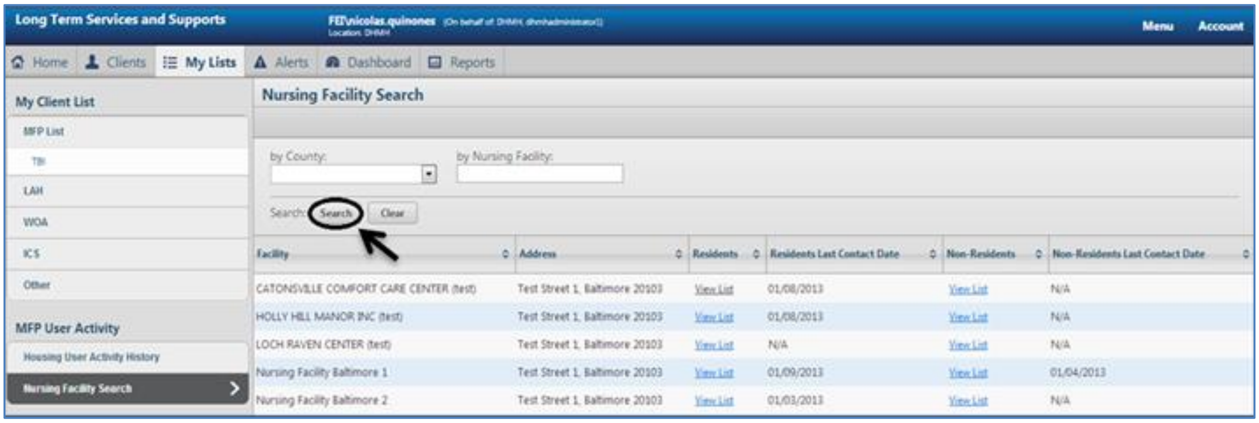
2.2 MFP Tasks List

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

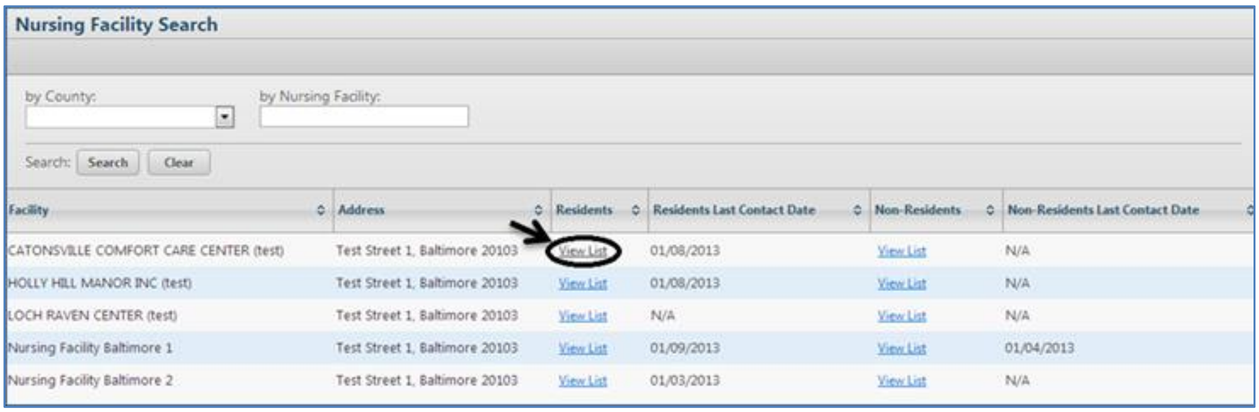


2.3 Nursing Facility Search

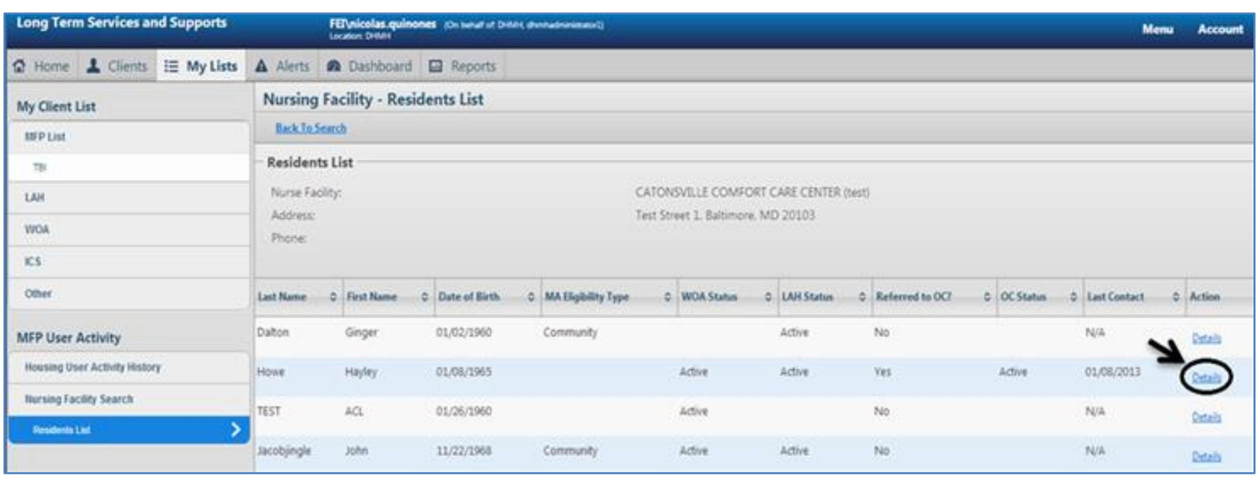
The Nursing Facility Search page can be accessed through My List. Under the My List tab at the top of LTSS, authorized users will have access to the MFP User Activity section located in the left hand navigation. To access the Nursing Facility Search page click on **Nursing Facility Search** from the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



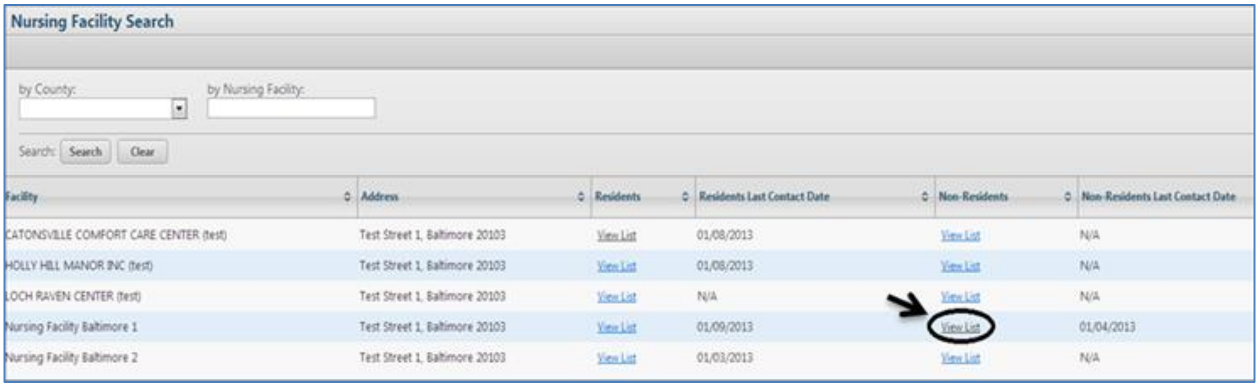
To view a list of Residents for a particular Nursing Facility, click the **View List link** under the Residents column for the specific Nursing Facility.



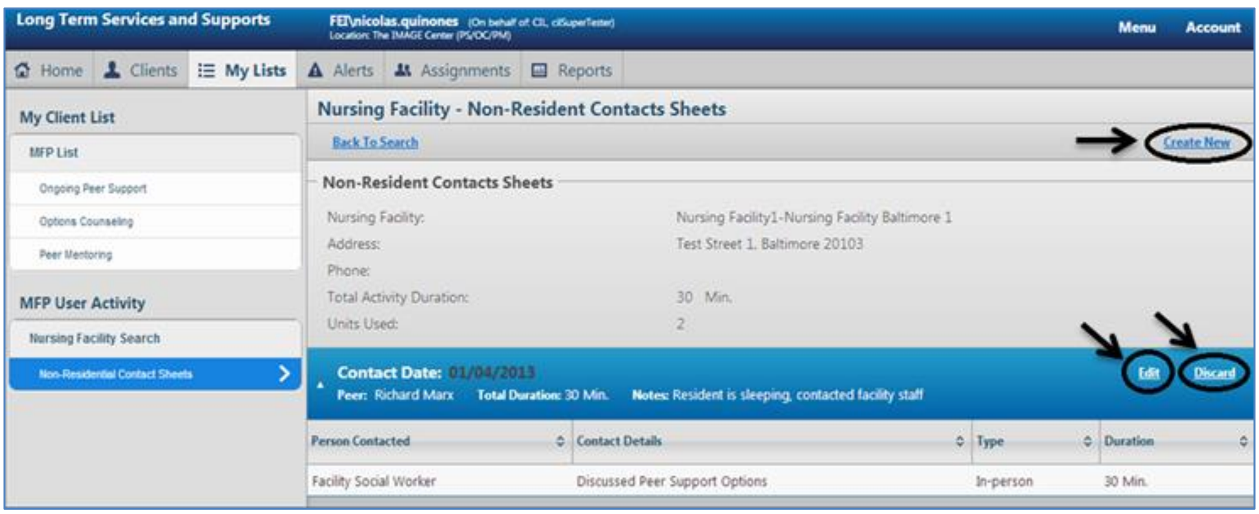
From the Nursing Facility – Resident List the actor will see details on the specific Nursing Facility they are viewing as well as a full list of all clients in LTSS associated with that Nursing Facility. From the output list the actor can navigate to any particular client's Resident Contact Sheet by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



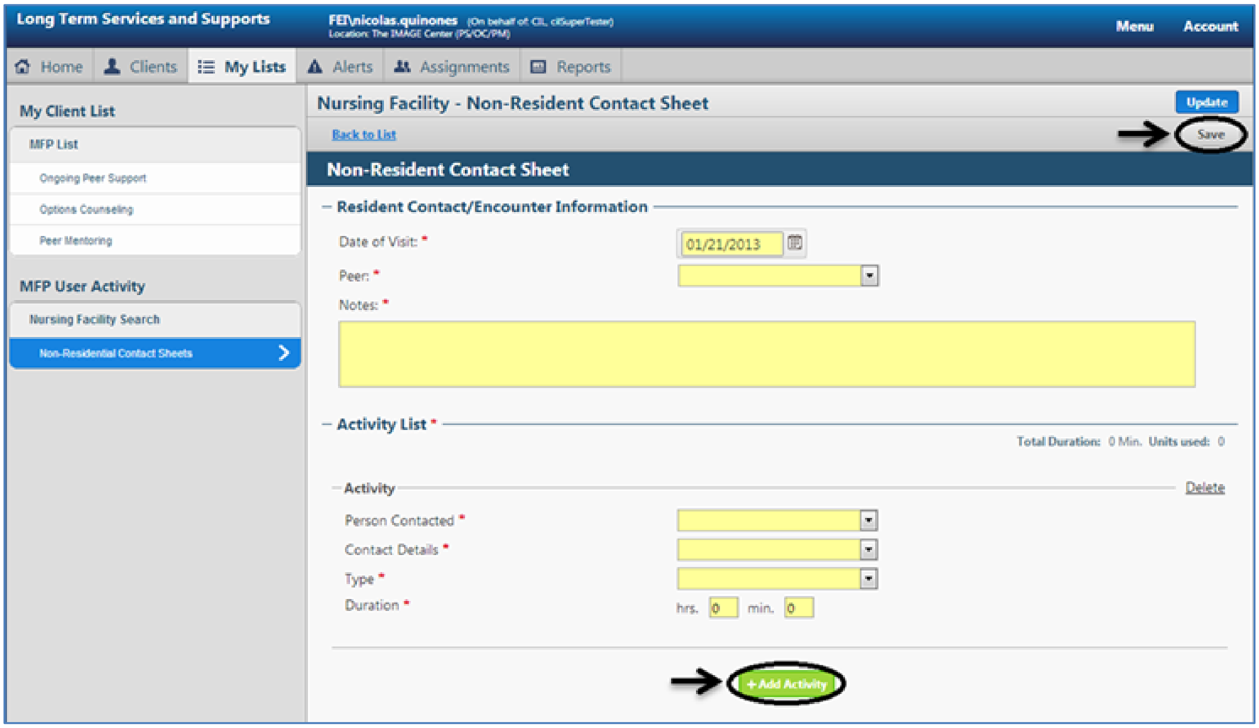
To view a list of Non-Resident Contact Sheets for a particular Nursing Facility, click the **View List link** under the Non-Residents column for the specific Nursing Facility as seen in the figure below.



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

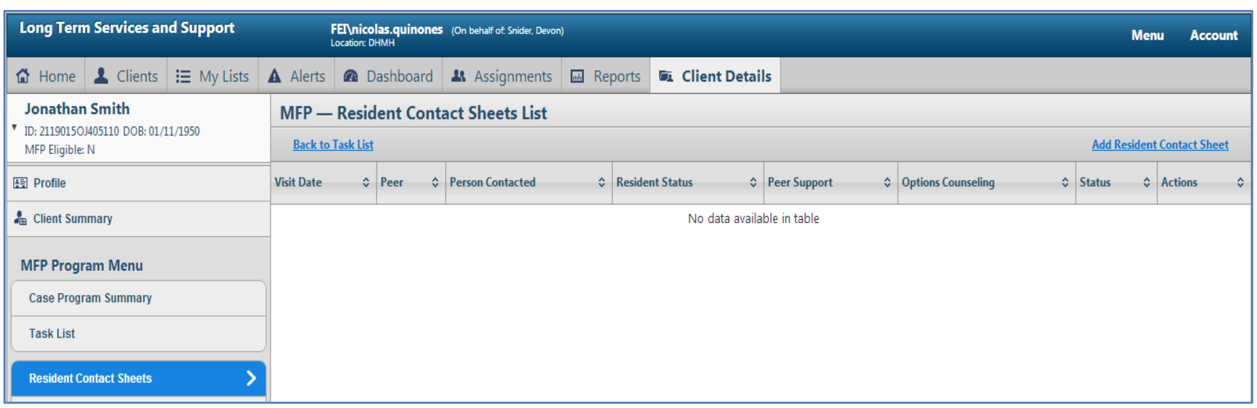


When the actor clicks the Create New link as seen in the figure above the Nursing Facility – Non-Resident Contact Sheet form will appear. The actor will fill in all required information, which will be highlighted yellow or marked with an asterisk as seen in the figure below. The actor will have the option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



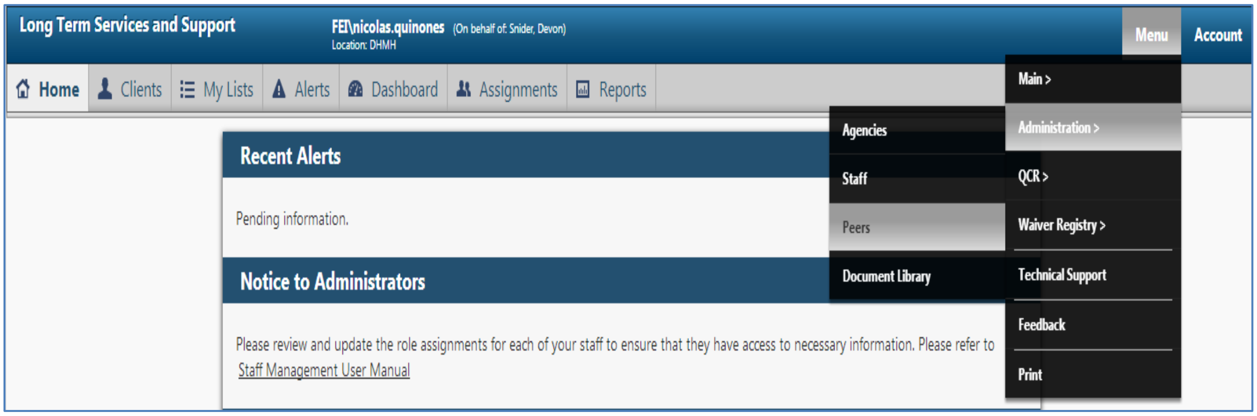
2.4 Resident Contact Sheets

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

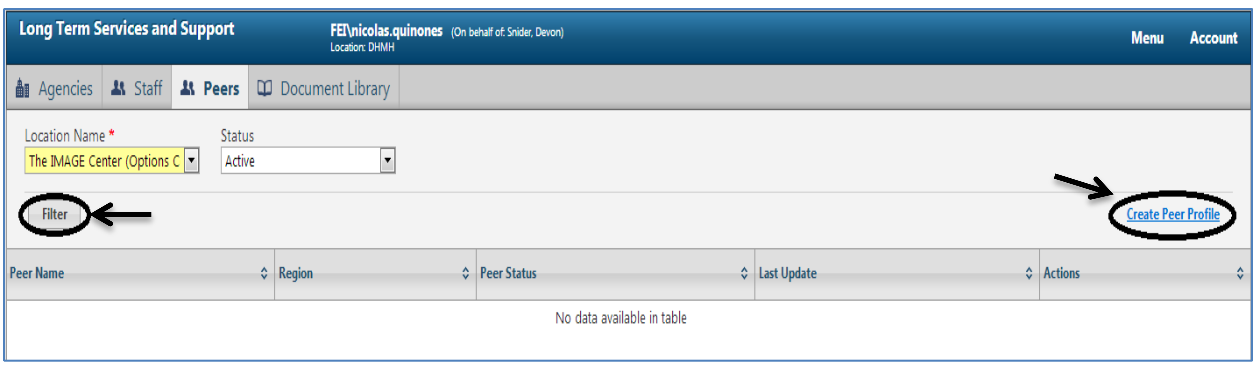


2.4.1 Create Peer Profile

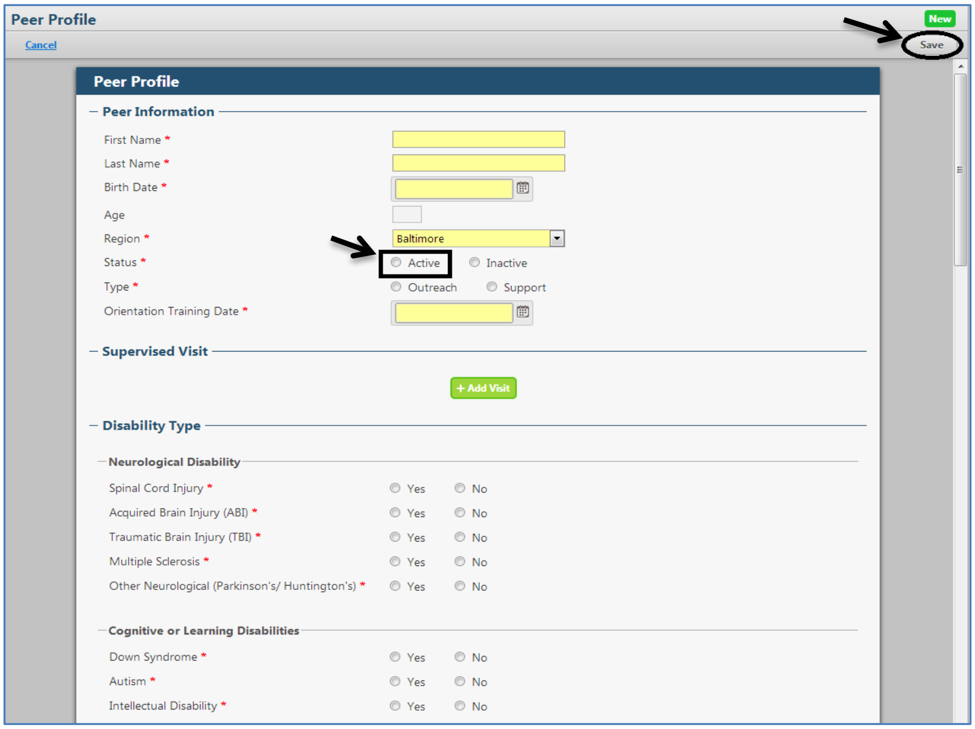
A precondition to being able to Save/Submit a Resident Contact Sheet is having at least 1 Peer Profile created within the Jurisdiction of the client you are trying to add the form for. To add a Peer Profile go through the ***Menu tab*** and navigate to ***Administration and Peers*** as seen in the figure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



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

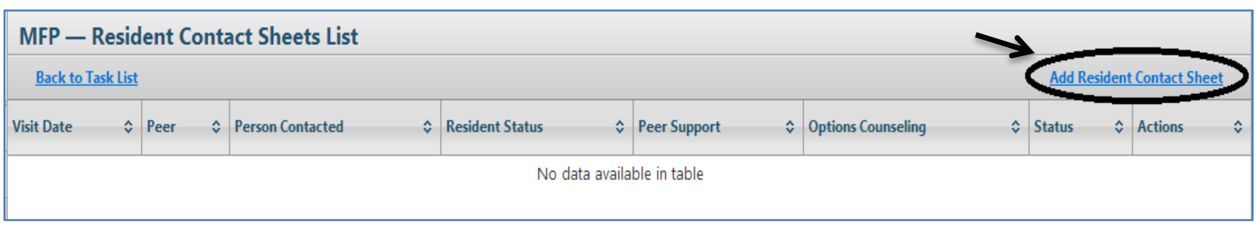


To create a *Peer Profile,* enter the required information which will be highlighted yellow or marked with an asterisk, as well as any optional information. In order for the Peer to show up in the Peer dropdown on the Resident Contact Sheet they must be set to ***"Active"*** as seen in the figure below.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

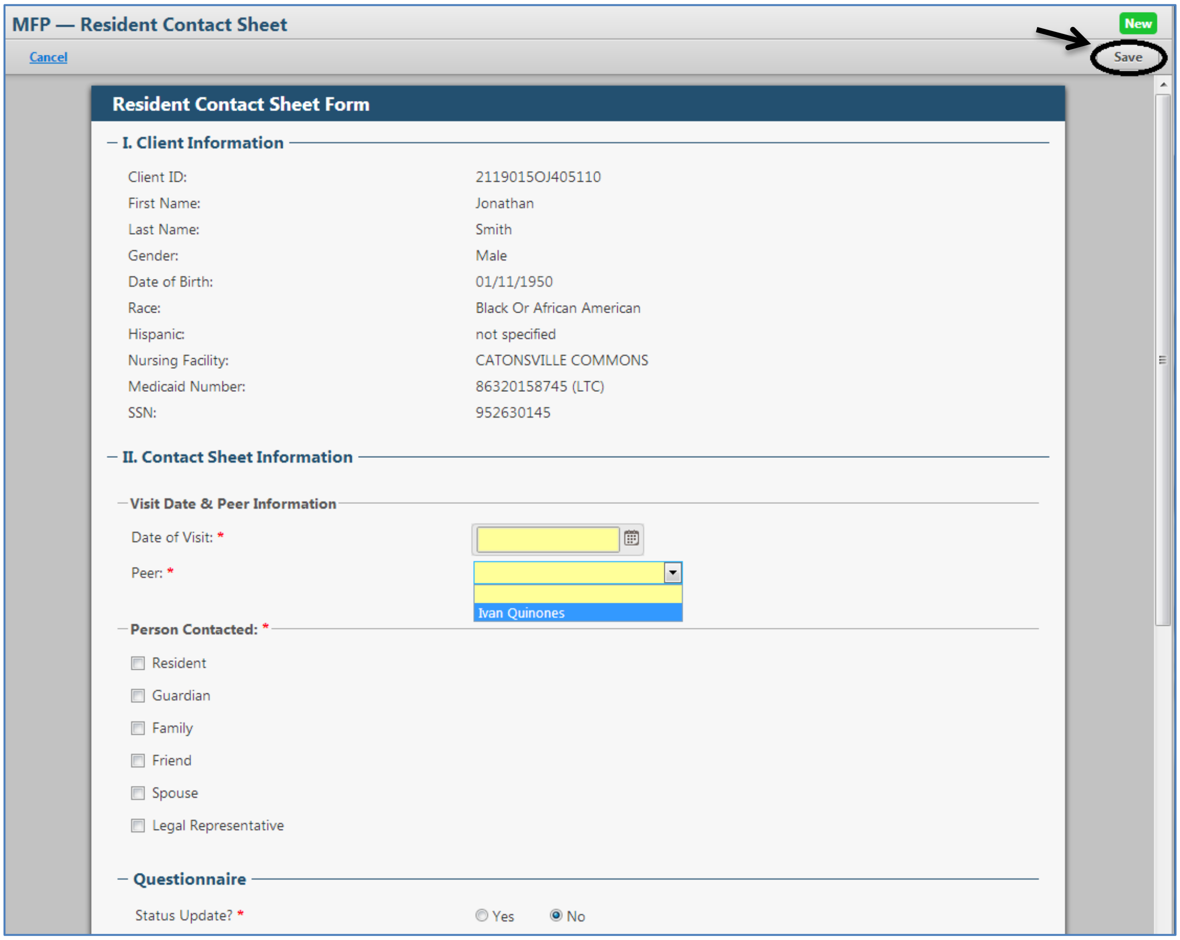


2.4.2 Add, Save and Edit Resident Contact Sheet

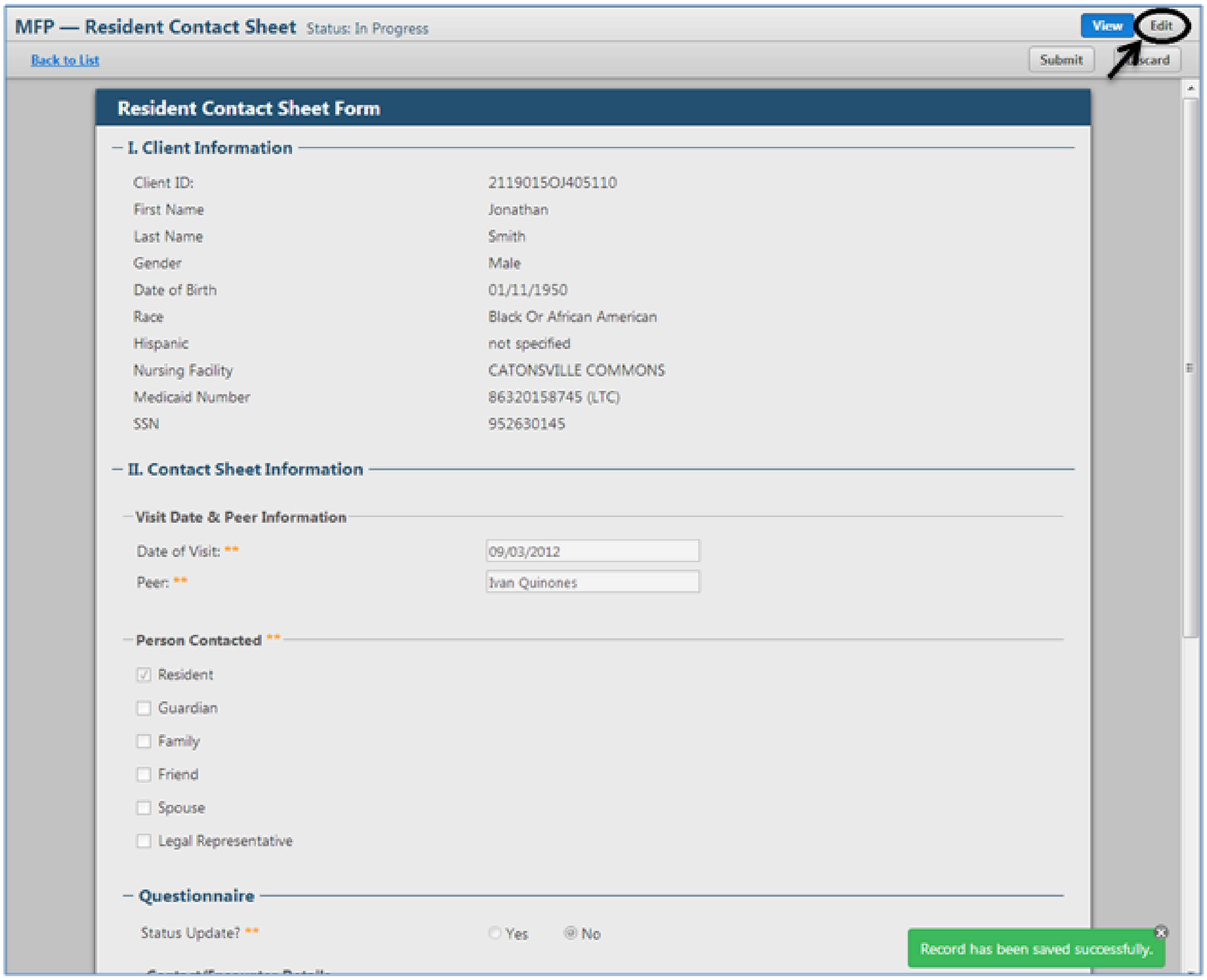
From the Resident Contact Sheet List click the **Add Resident Contact Sheet link**.



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

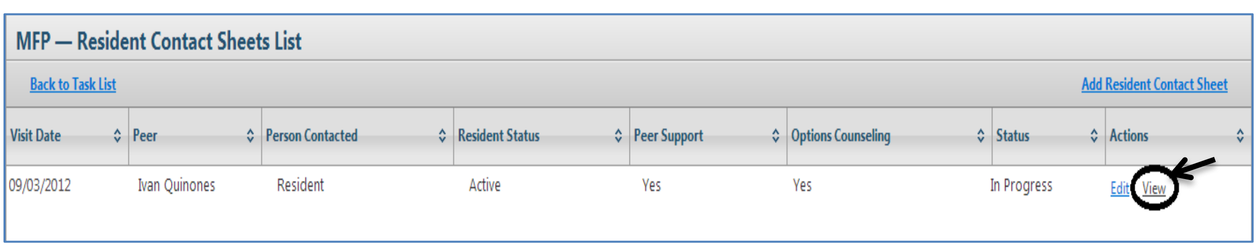


After clicking the Save button the user is taken to View-mode and will see the message indicating that the "Record has been saved successfully." Click the **Edit button** to make changes to the Resident Contact Sheet as seen below. After making changes click the Save button again and the user will return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

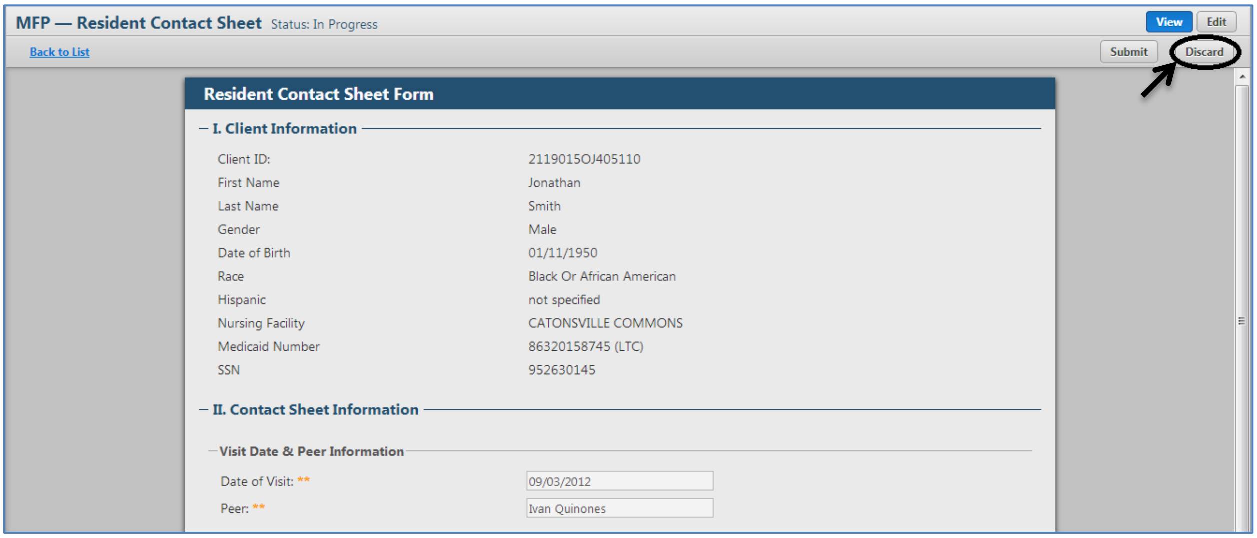


2.4.3 View, Discard and Submit Resident Contact Sheet

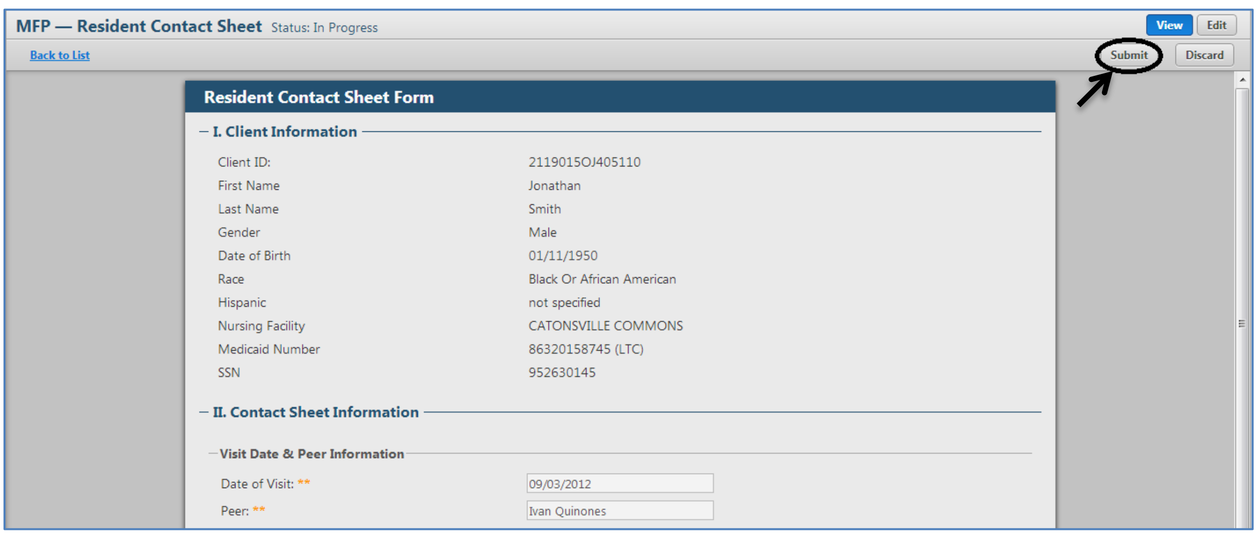
The user can **View the Resident Contact Sheet** in two ways. The first way was shown above where the user is taken to View-mode after saving the Resident Contact Sheet. The user can also View the Resident Contact Sheet by clicking the ***View link*** on the *Resident Contact Sheet List* as shown below.



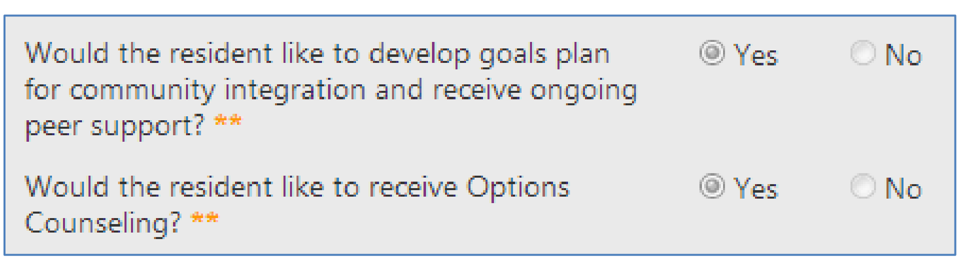
From View-mode the user can **Discard the Resident Contact Sheet** by clicking the ***Discard button*** as seen in the figure below. Once the Resident Contact Sheet is Submitted the user will no longer have the option to Discard.



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

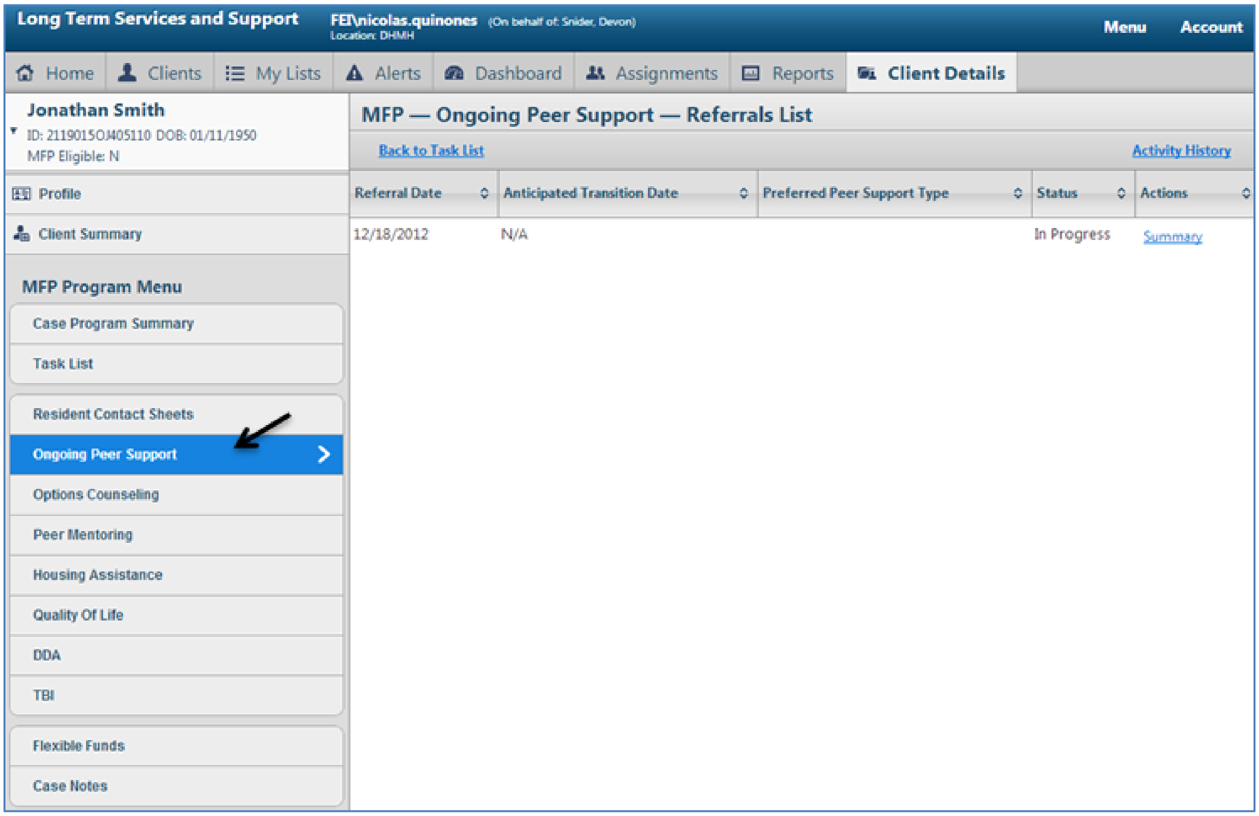


Upon Submit, if the actor chose Yes to either of the questions referring to Ongoing Peer Support or Options Counseling, a Referral will be created in the respective module for the clients in MFP program.



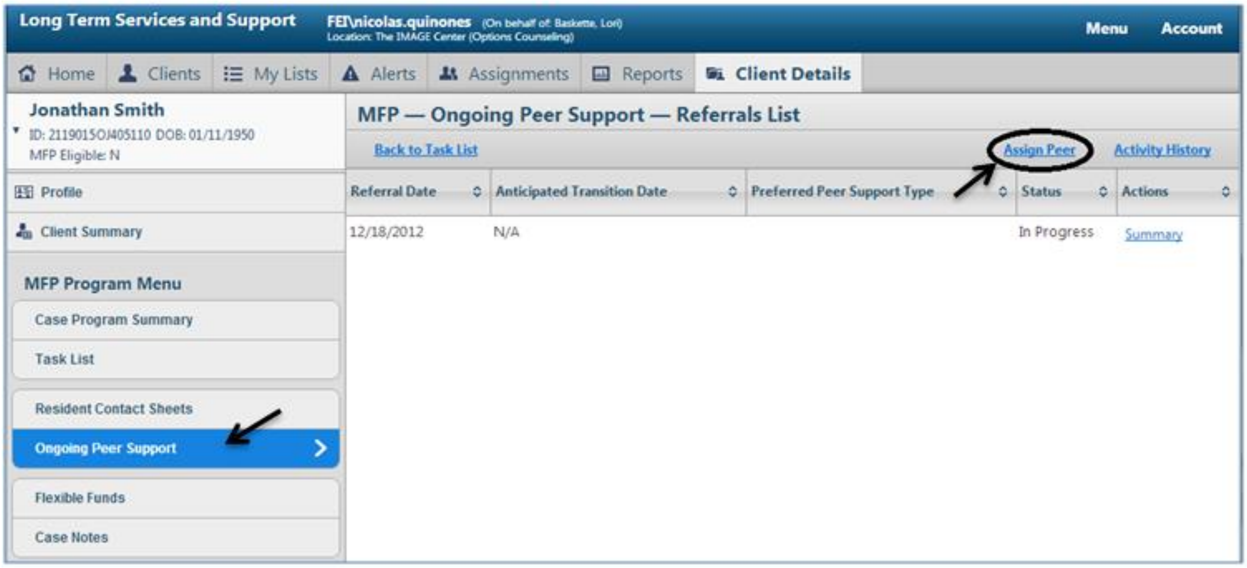
2.5 Ongoing Peer Support

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

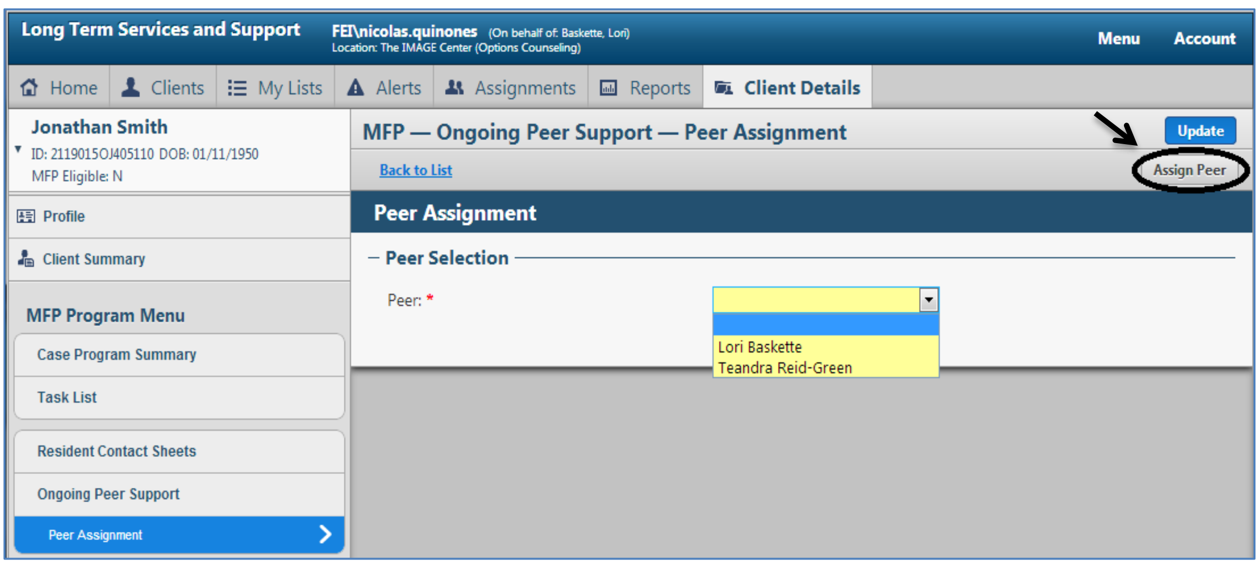


2.5.1 Assign CIL Peer to Client

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

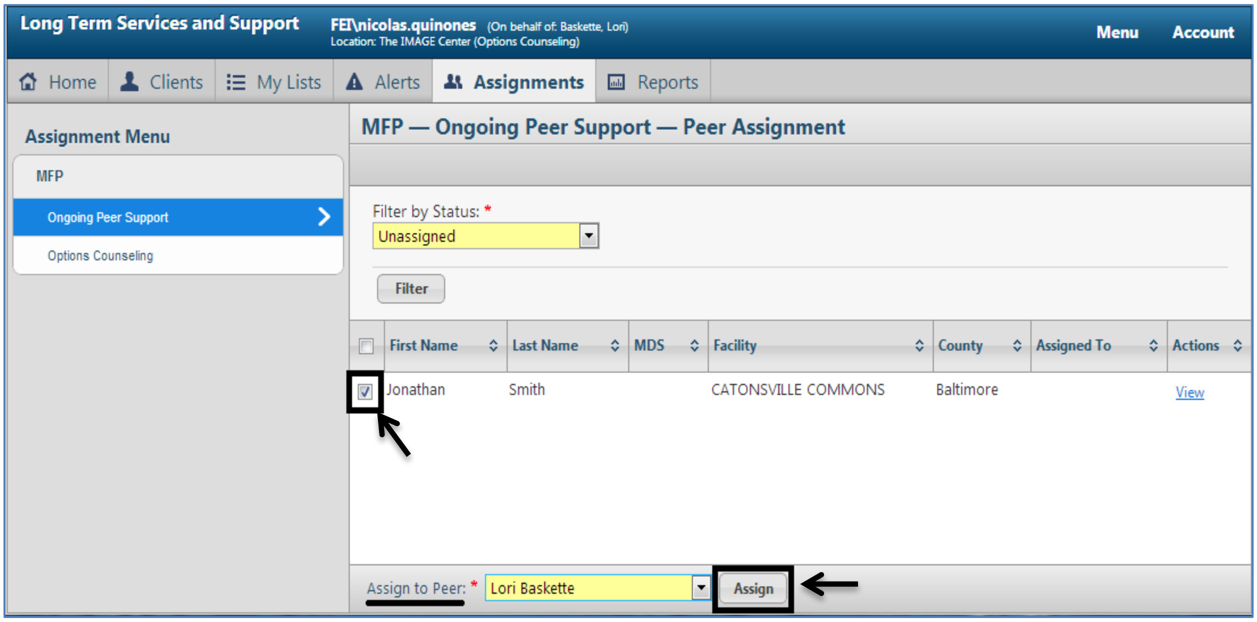


The actor will be taken to the *Ongoing Peer Support- Peer Assignment* page where they can assign and reassign a CIL Peer to the client by selecting a Peer from the dropdown menu and clicking the ***Assign Peer button*** as seen in the figure below.



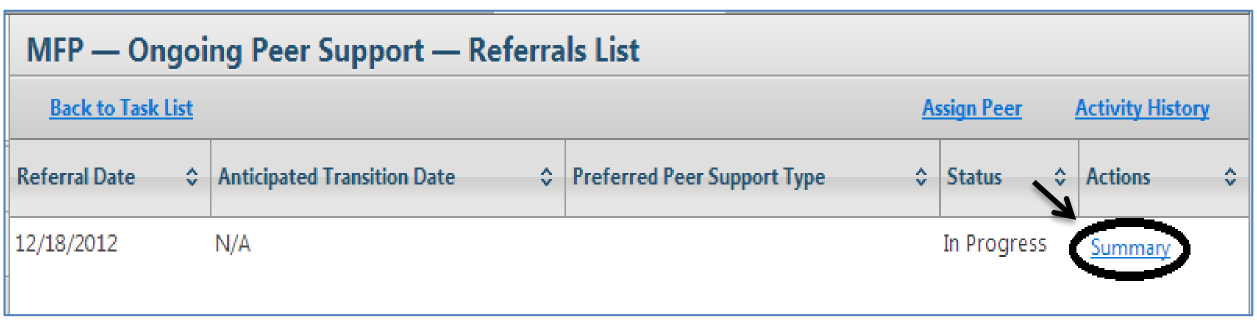
An actor with the role of CIL Administrator can also assign a CIL Peer to a client from the Assignments tab in LTSS. Click the *Assignments* tab at the top of the page and navigate to *Ongoing Peer Support* under the Assignment Menu section in the left hand navigation to perform **Batch Assignment**.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

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



2.5.2 View Summary for a Specific Referral

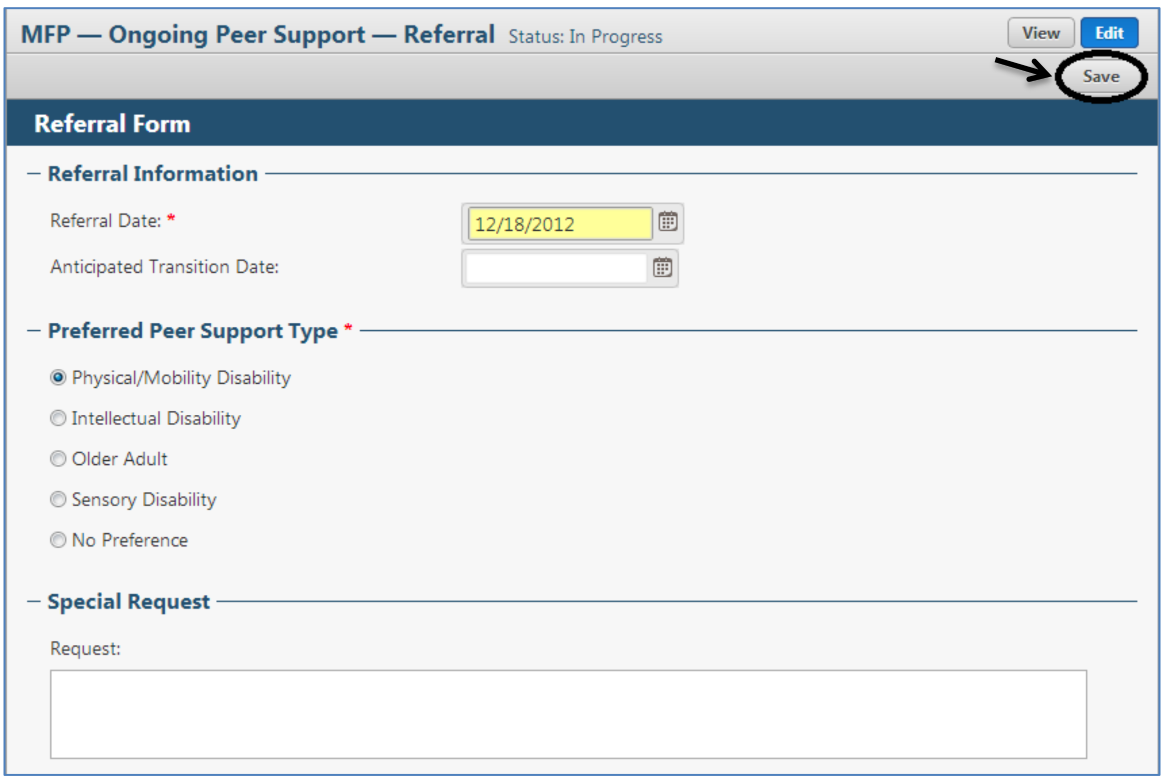
From the Ongoing Peer Support—Referral List the user can click the ***Summary link*** to **View** the **Ongoing Peer Support—Referral Summary** for that specific referral as seen in the figure below.



2.5.3 Edit and Save Peer Support Referral

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

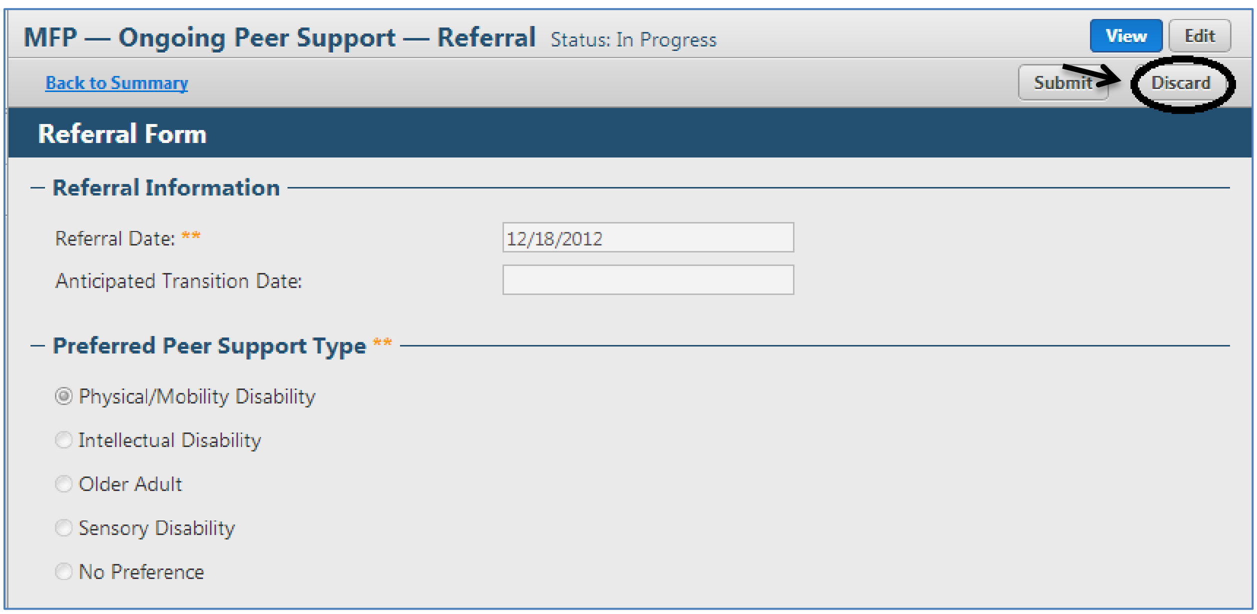
The user will then enter the required information on the **Referral Form** as indicated by fields *highlighted in yellow* or fields marked with an *asterisk* and then click the ***Save button***.



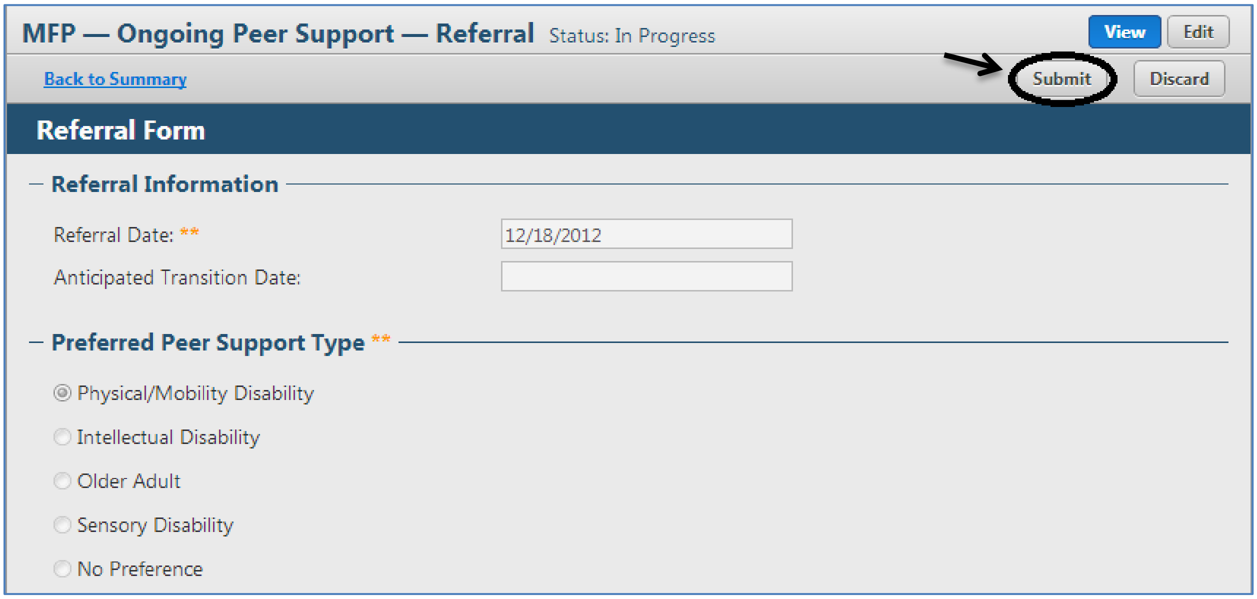
2.5.4 View, Discard and Submit Peer Support Referral

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

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

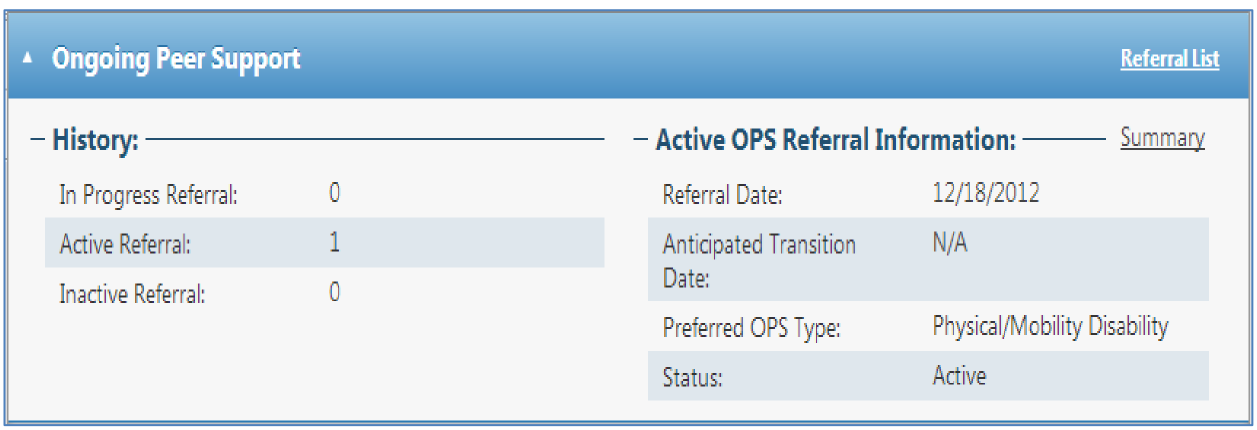


If the user does not wish to discard, click the ***Submit button*** to **Submit the Ongoing Peer Support- Referral** as seen in the figure below. Once submitted the Ongoing Peer Support--Referral can no longer be edited.



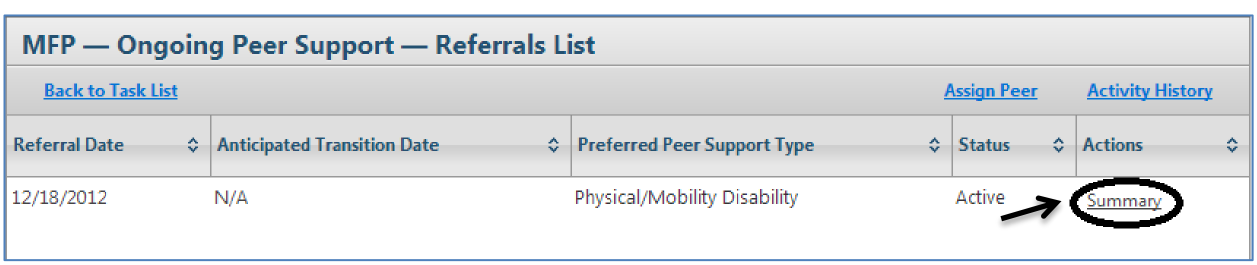
2.5.5 Ongoing Peer Support Status Change to Active

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

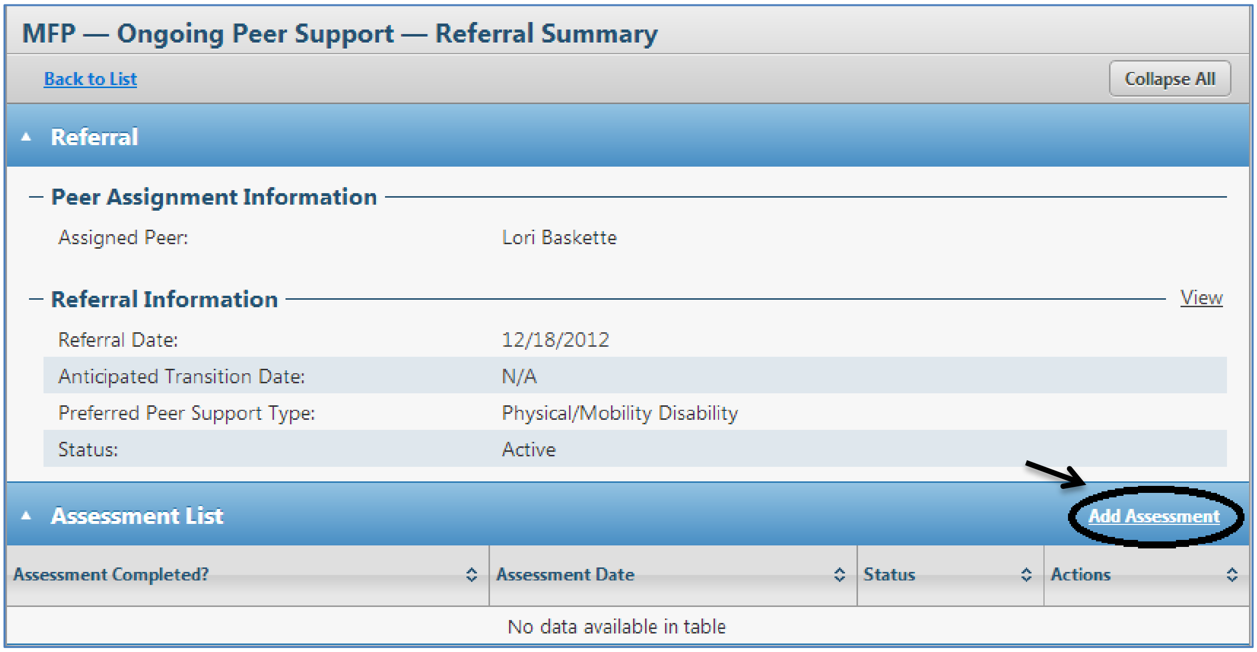


2.5.6 Add, Save and Edit Ongoing Peer Support Assessment

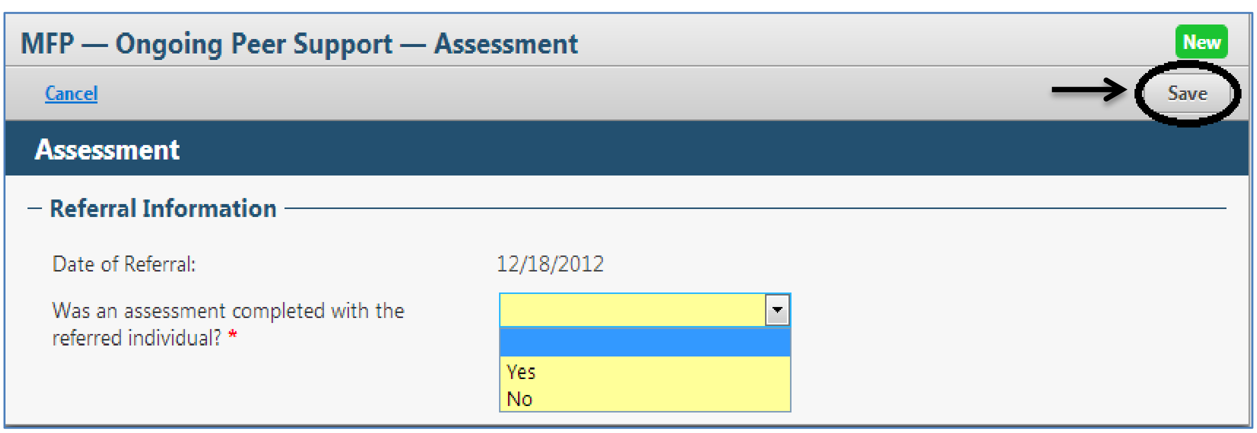
Navigate to the Ongoing Peer Support Referral List and click the ***Summary link*** for the referral you wish to create an assessment and/or an outcome for.



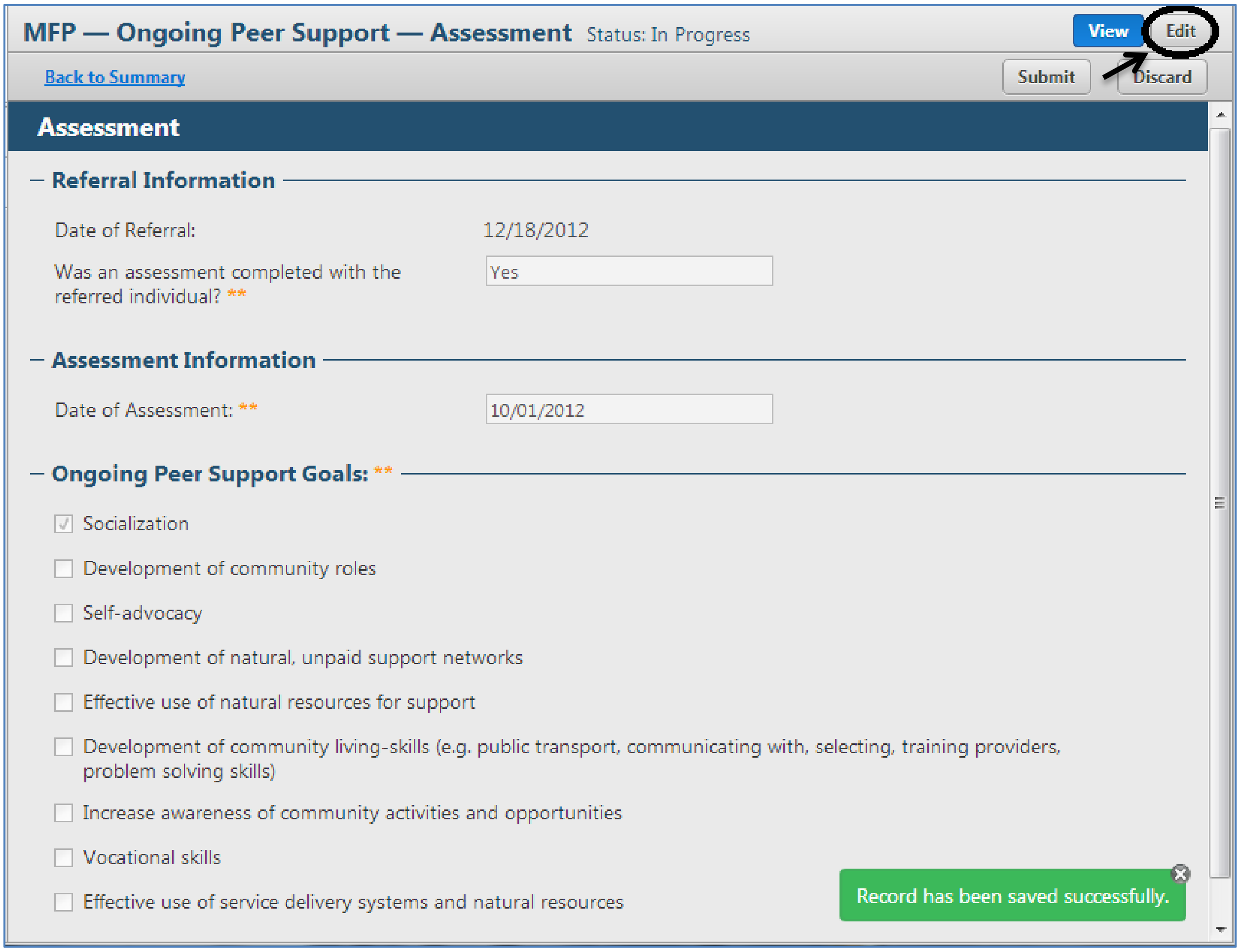
From the Ongoing Peer Support—Referral Summary page click the **Add Assessment link** as seen in the figure below.



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

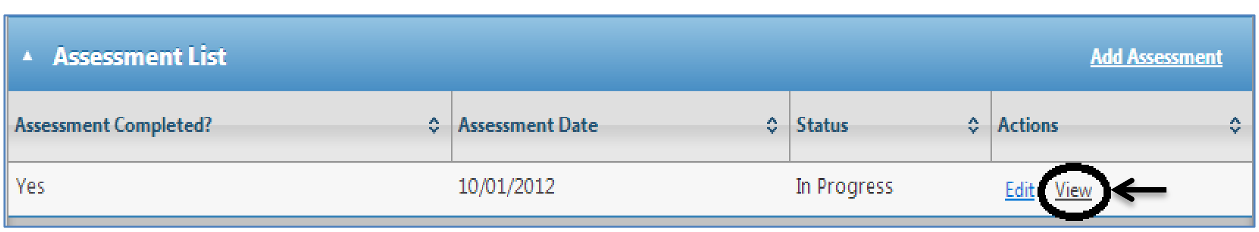


After clicking the Save button the user is taken to View-mode. Click the **Edit link** to make changes to the Ongoing Peer Support—Assessment as seen below. After making changes click the Save button again and the user will return to View-mode of the Ongoing Peer Support Assessment.

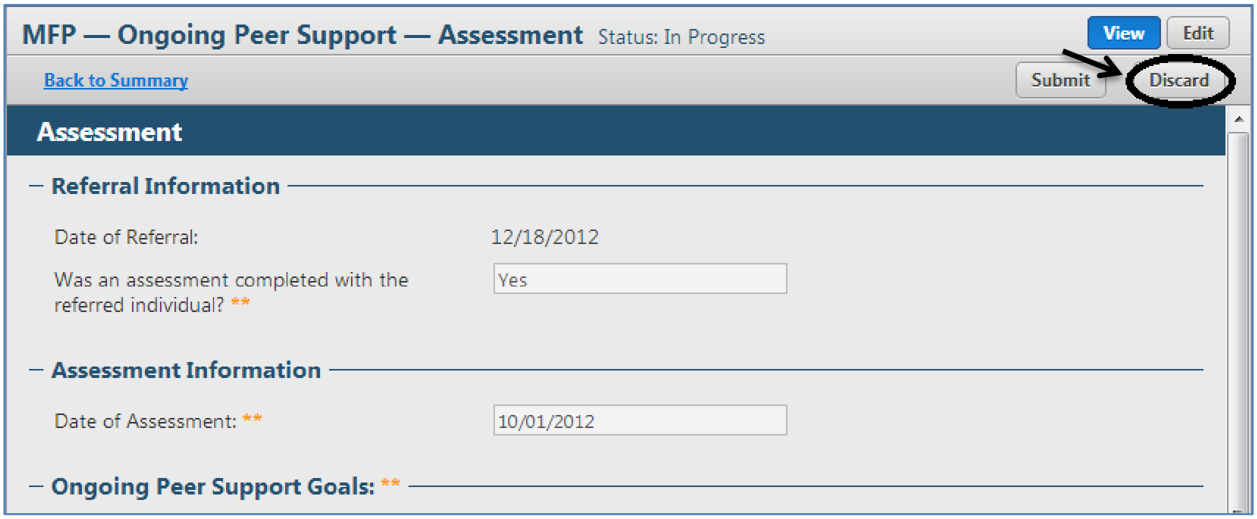


2.5.7 View, Discard and Submit Peer Support Assessment

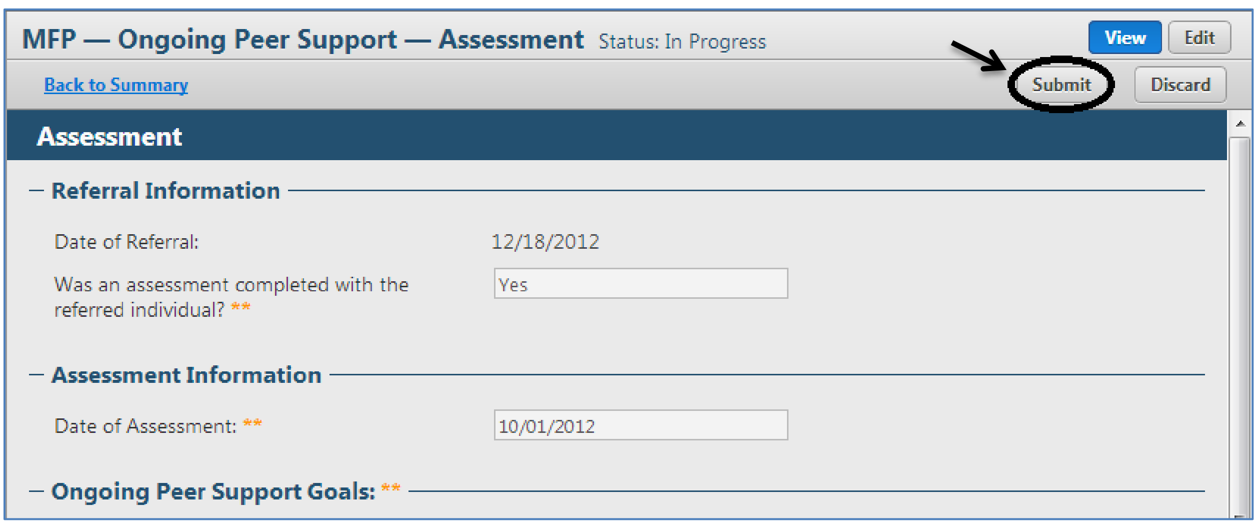
The user can **View the Ongoing Peer Support-- Assessment** in two ways. The first way was shown above where the user is taken to View-mode after saving the Ongoing Peer Support--Assessment. The user can also View the Ongoing Peer Support-- Assessment by clicking the ***View link*** on the Ongoing Peer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



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



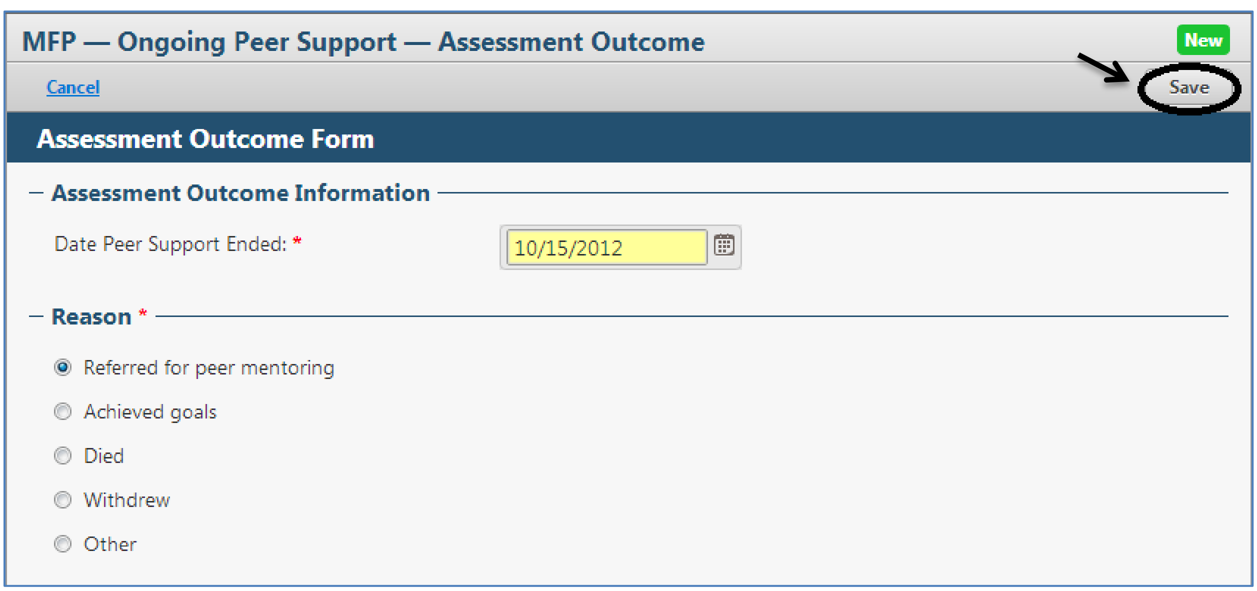
If the user does not wish to discard, click the ***Submit button*** to **Submit the Ongoing Peer Support—Assessment** as seen in the figure below. Once submitted the Ongoing Peer Support-- Assessment can no longer be edited.



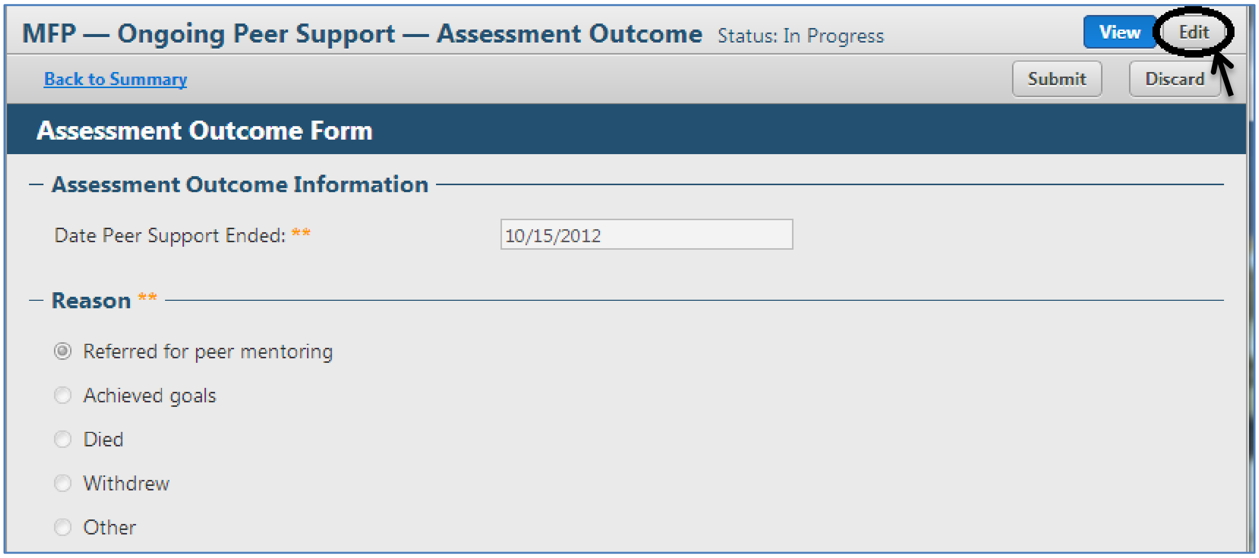
2.5.8 Add, Save and Edit Peer Support Assessment Outcome

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

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

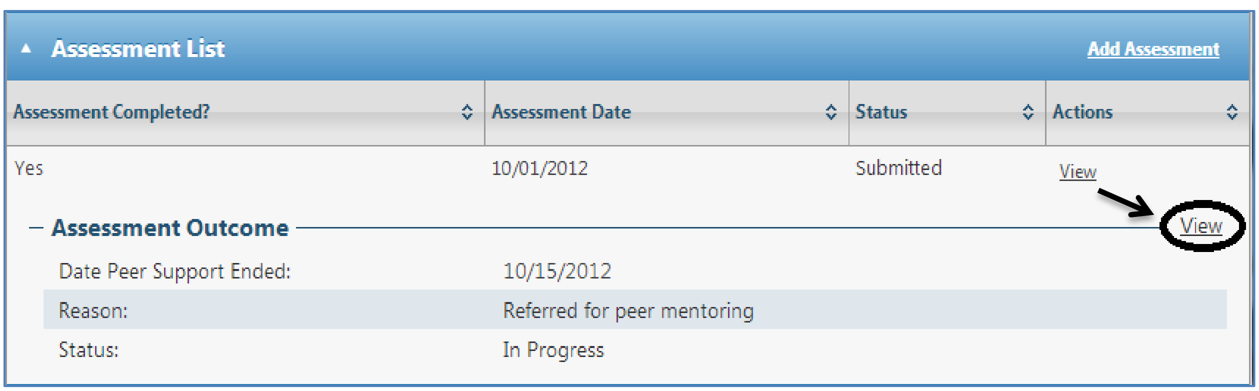


After clicking the Save button the user is taken to View-mode. Click the **Edit link** to make changes to the Ongoing Peer Support—Assessment Outcome as seen below. After making changes click the Save button again and the user will return to View-mode.

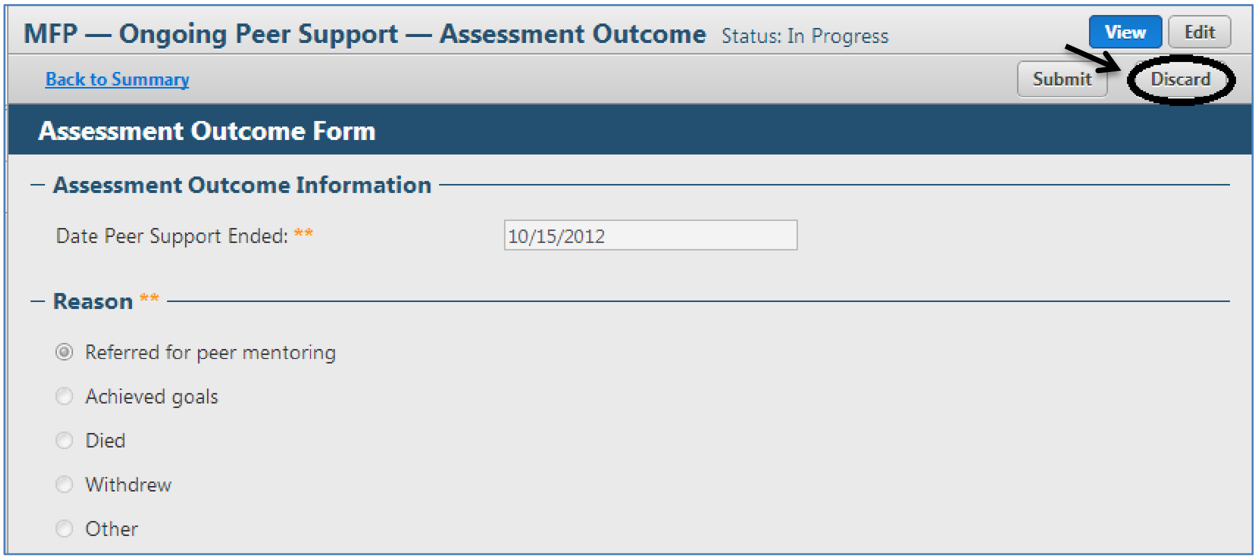


2.5.9 View, Discard and Submit Peer Support Assessment Outcome

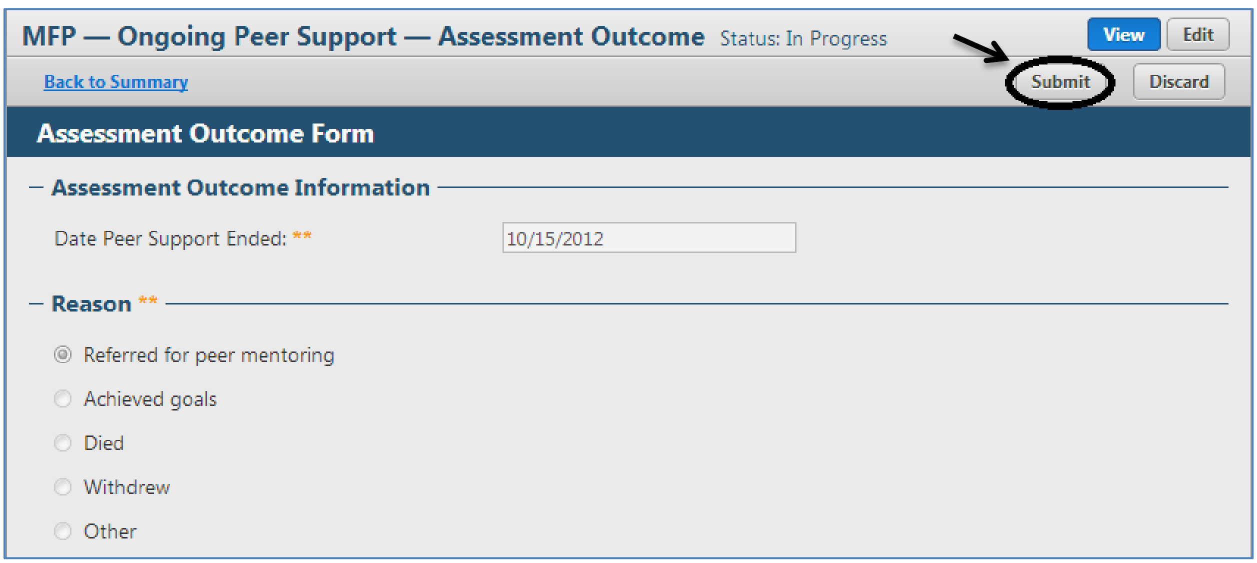
The user can **View the Ongoing Peer Support—Assessment Outcome** in two ways. The first way was shown above where the user is taken to View-mode after saving the Ongoing Peer Support—Assessment Outcome. The user can also View the Ongoing Peer Support—Assessment Outcome by clicking the ***View link***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



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

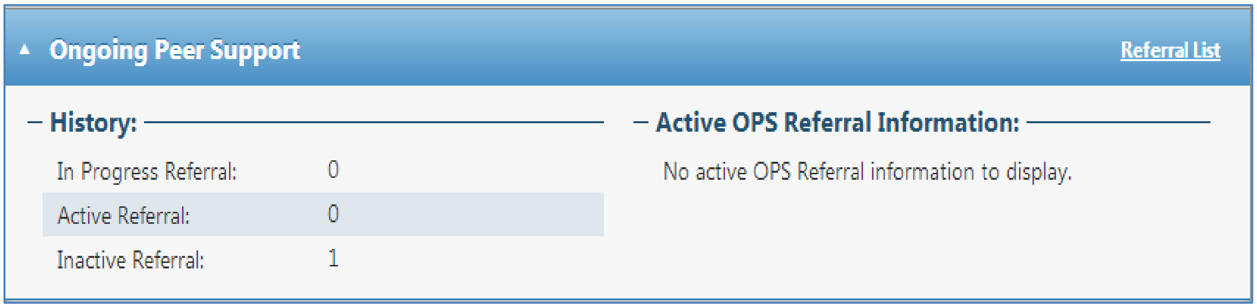


If the user does not wish to discard, click the ***Submit button*** to **Submit** the **Ongoing Peer Support—Assessment Outcome** as seen in the figure below. Once submitted the Ongoing Peer Support—Assessment Outcome can no longer be edited.



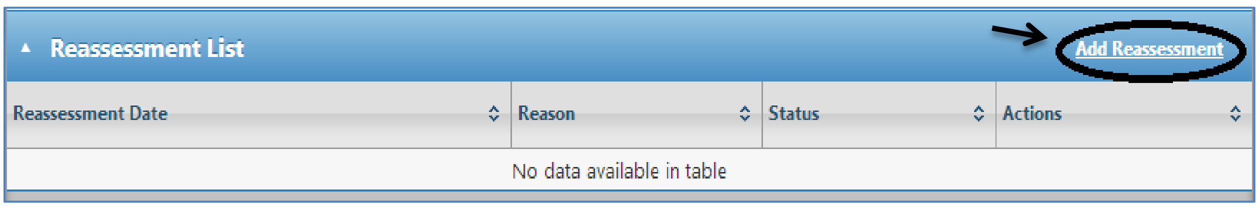
2.5.10 Peer Support Status Change to Inactive

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

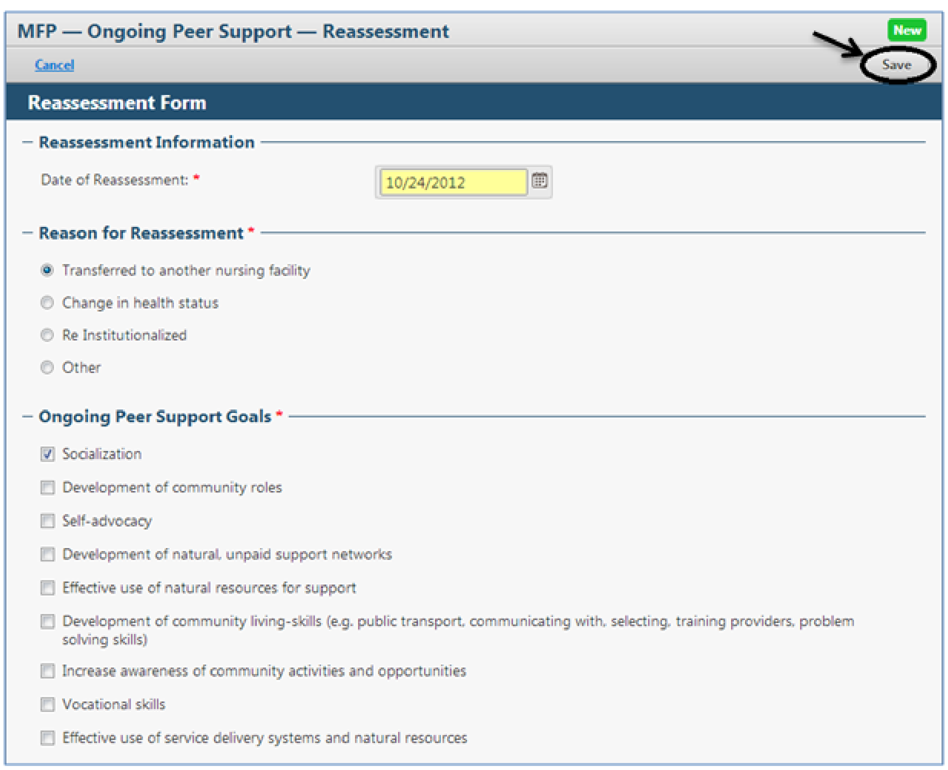


2.5.11 Add, Save and Edit Peer Support Reassessment

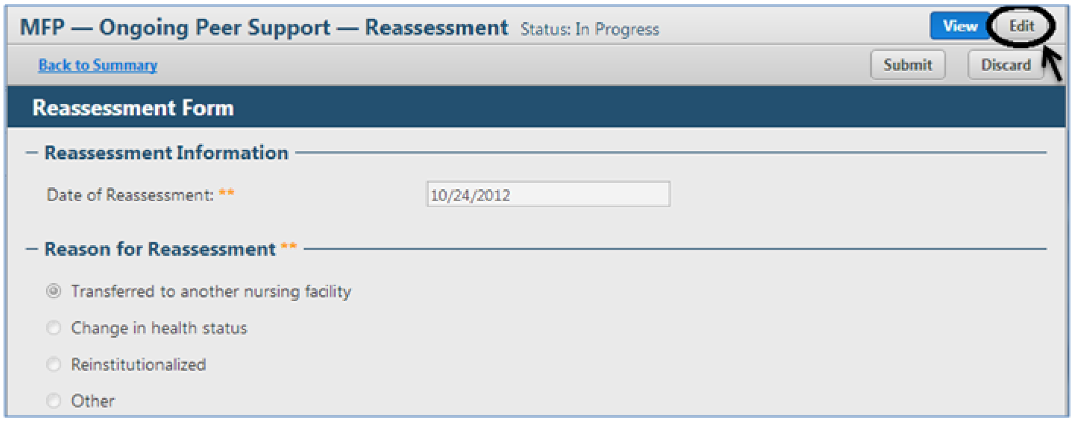
From the Ongoing Peer Support—Referral Summary page click the **Add Reassessment link** as seen in the figure below.



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

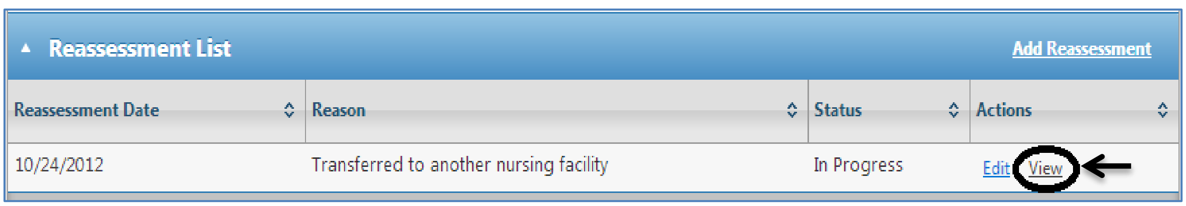


After clicking the Save button the user is taken to View-mode. Click the **Edit link** to make changes to the Ongoing Peer Support-- Reassessment as seen below. After making changes click the Save button again and the user will return to View-mode.

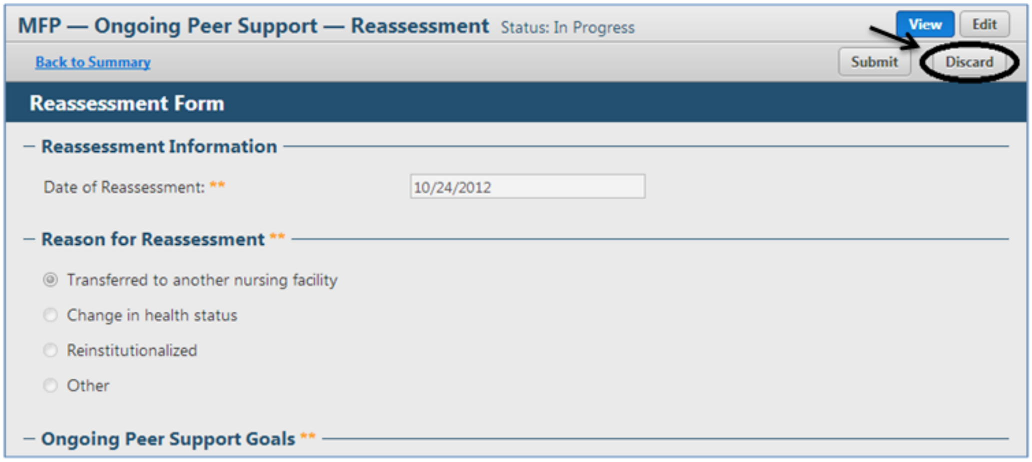


2.5.12 View, Discard and Submit Peer Support Reassessment

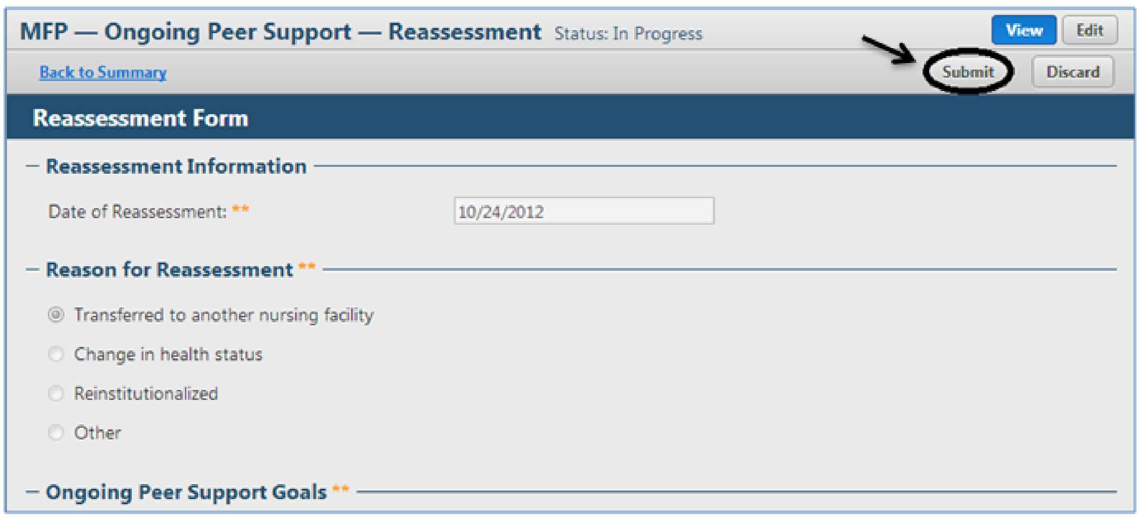
The user can **View the Ongoing Peer Support-- Reassessment** in two ways. The first way was shown above where the user is taken to View-mode after saving the Ongoing Peer Support-- Reassessment. The user can also View the Ongoing Peer Support-- Reassessment by clicking the ***View link*** on the Ongoing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



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

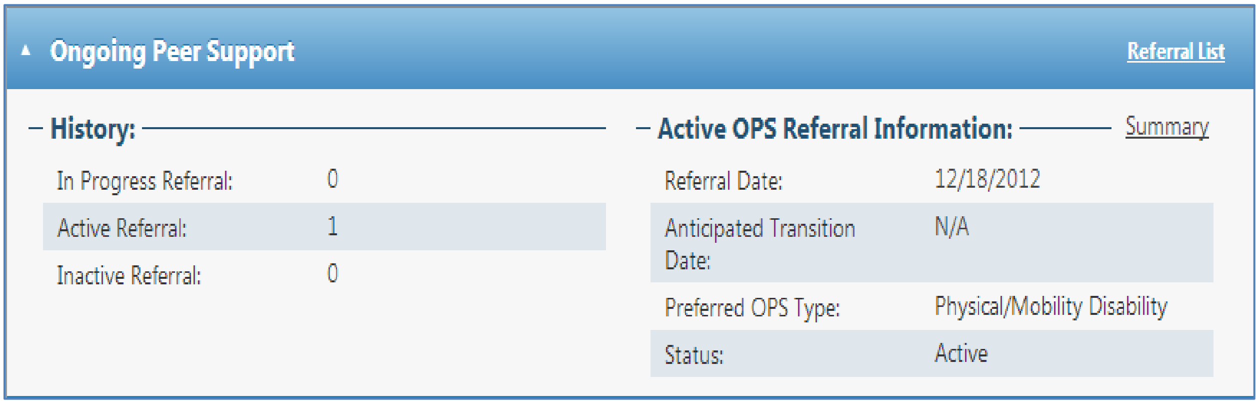


If the user does not wish to discard, click the ***Submit button*** to **Submit the Ongoing Peer Support-- Reassessment** as seen in the figure below. Once submitted the Ongoing Peer Support-- Reassessment can no longer be edited.



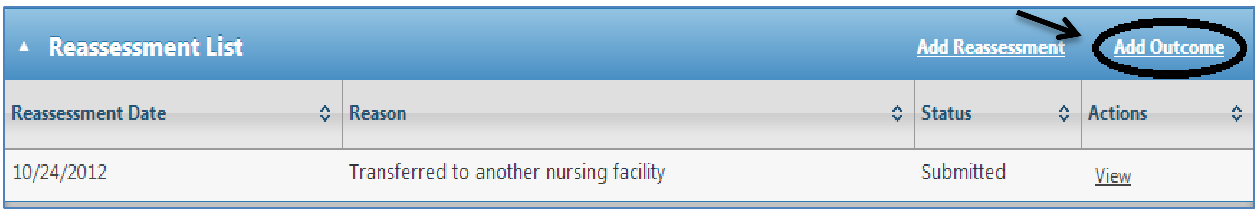
2.5.13 Peer Support Status Change to Active

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

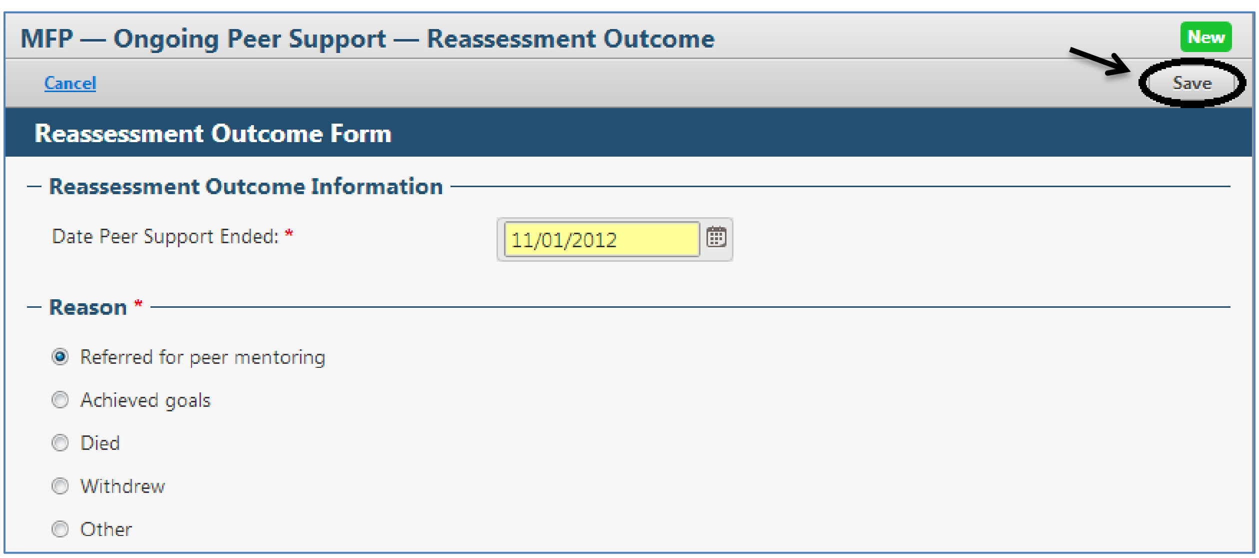


2.5.14 Add, Save and Edit Peer Support Reassessment Outcome

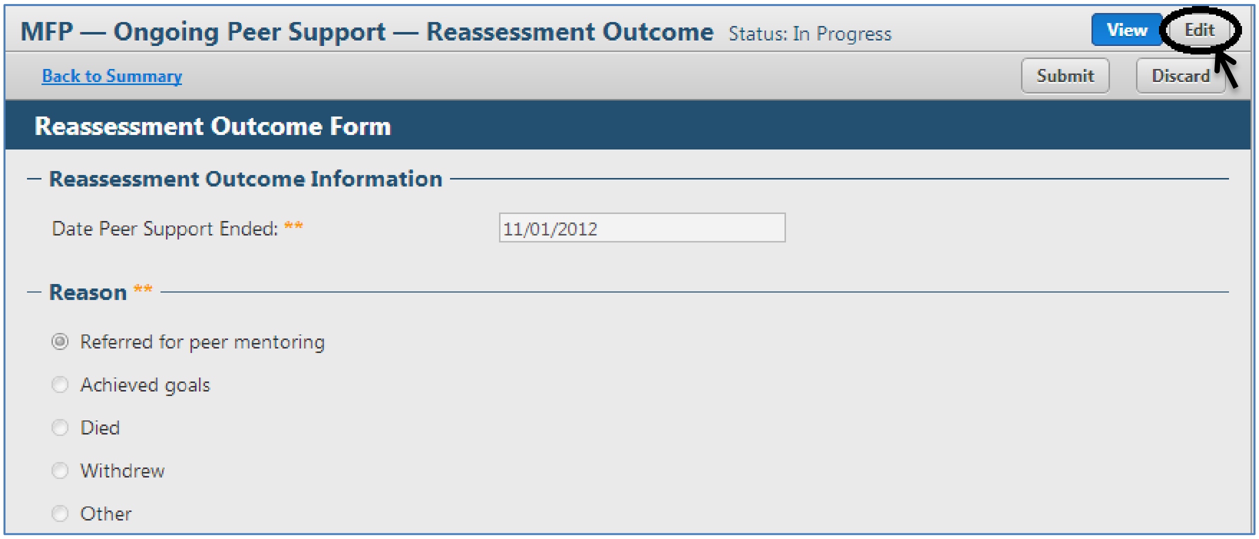
From the Ongoing Peer Support—Referral Summary page click the **Add Outcome link** as seen in the figure below.



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



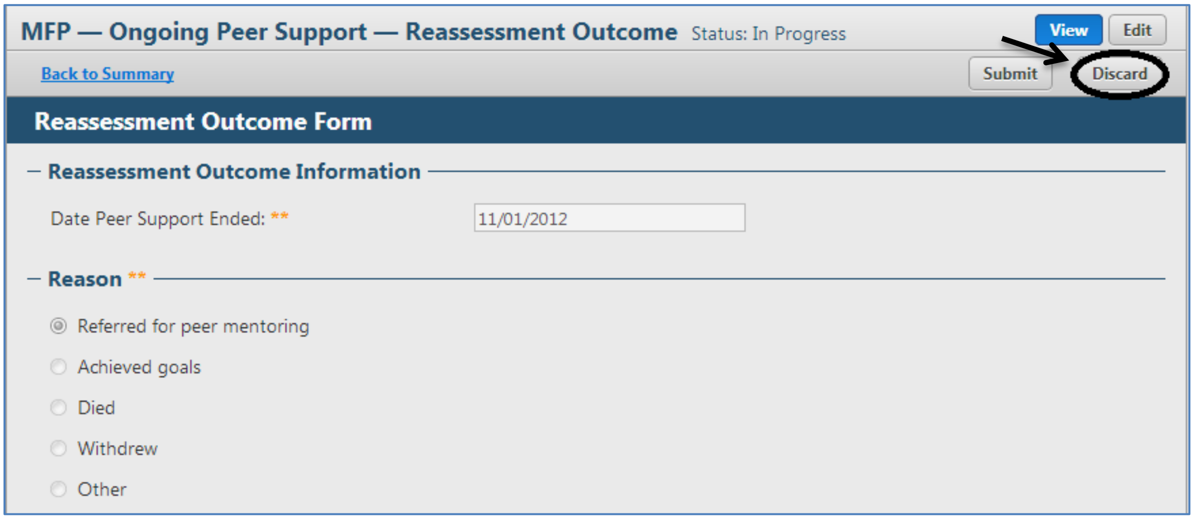
After clicking the Save button the user is taken to View-mode. Click the **Edit button** to make changes to the Ongoing Peer Support—Reassessment Outcome as seen below. After making changes click the Save button again and the user will return to View-mode.



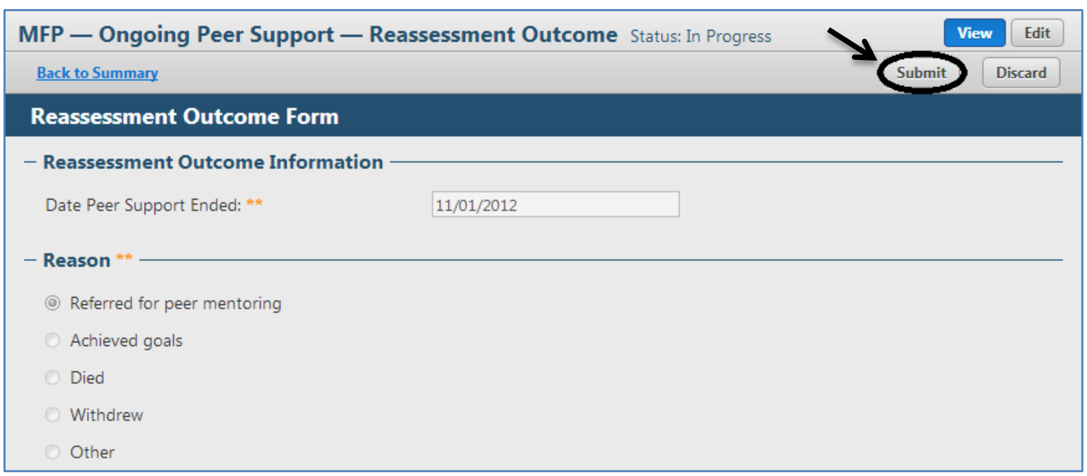
2.5.15 View, Discard and Submit Peer Support Reassessment Outcome

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

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

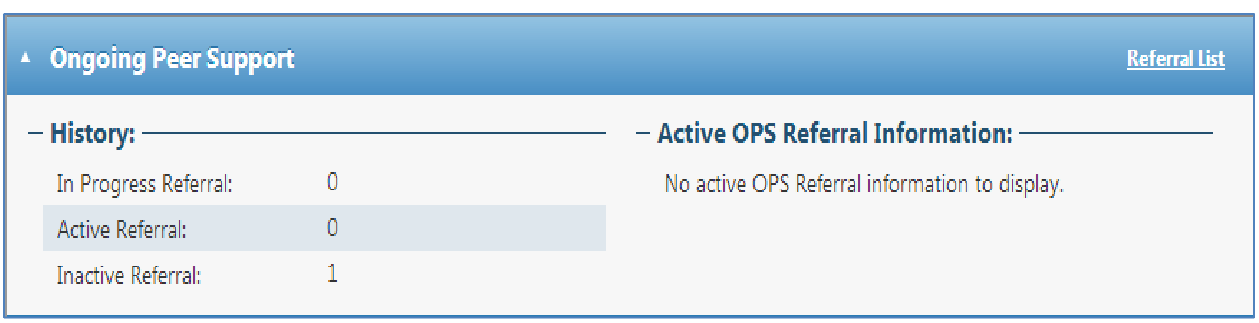


If the user does not wish to discard, click the ***Submit button*** to **Submit the Ongoing Peer Support—Reassessment Outcome** as seen in the figure below. Once submitted the Ongoing Peer Support—Reassessment Outcome can no longer be edited.



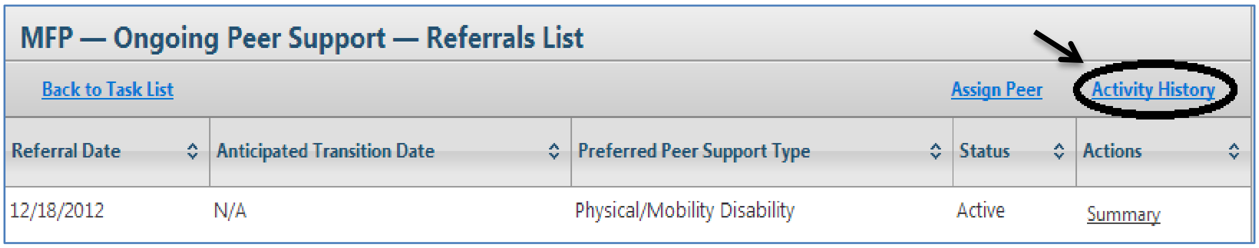
2.5.16 Peer Support Status Change to Inactive

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

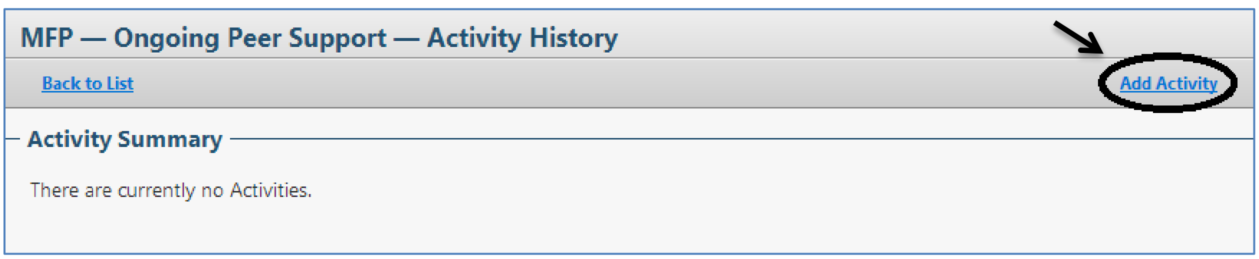


2.5.17 Peer Support Activity History

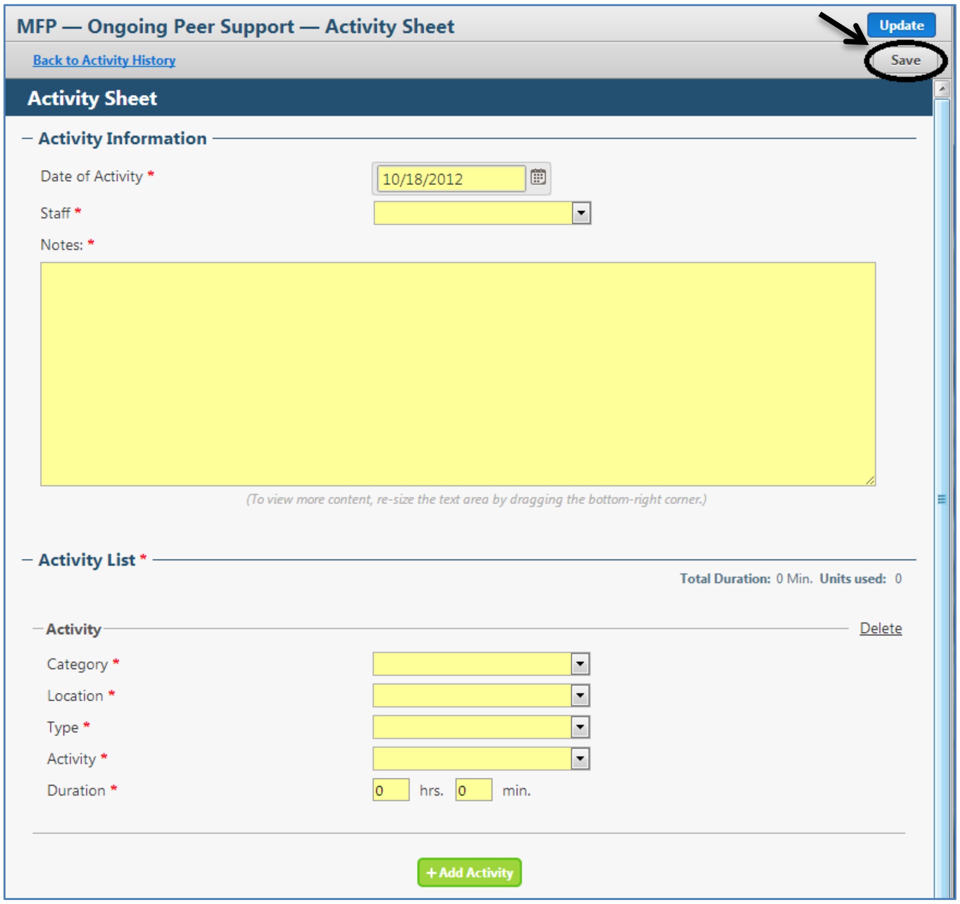
When a client has an *Active Ongoing Peer Support Referral,* an authorized actor can add Activities to the clients Activity History under the Ongoing Peer Support module. Click the ***Activity History link*** on the Ongoing Peer Support Referral List page as seen in the figure below to navigate to the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



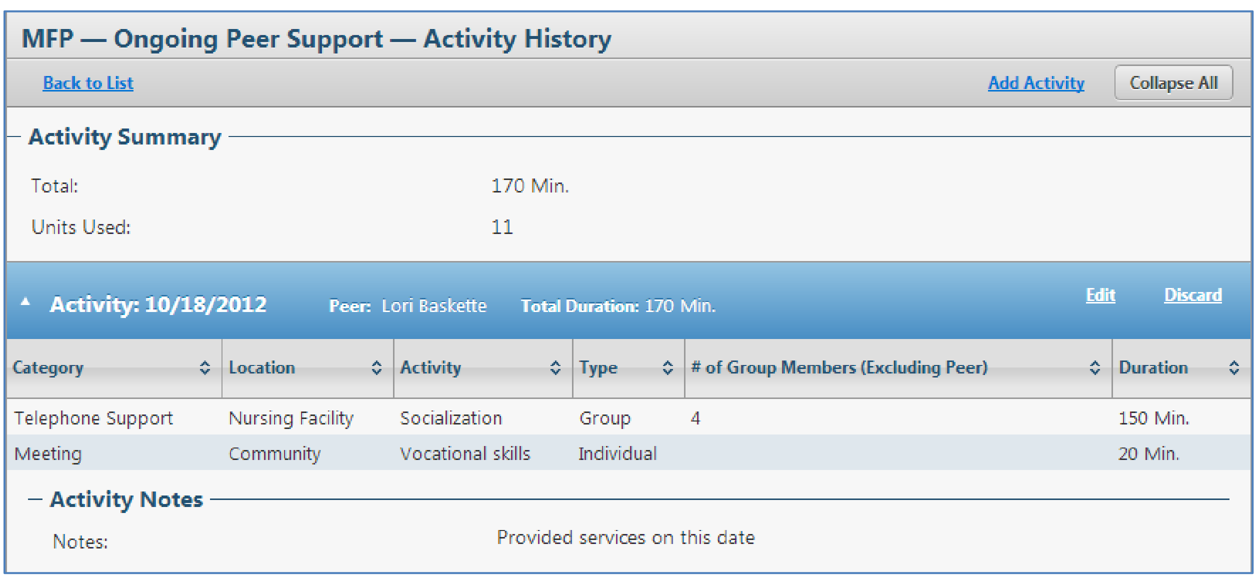
From the Ongoing Peer Support Activity History page click the Add Activity link as seen in the figure below.



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

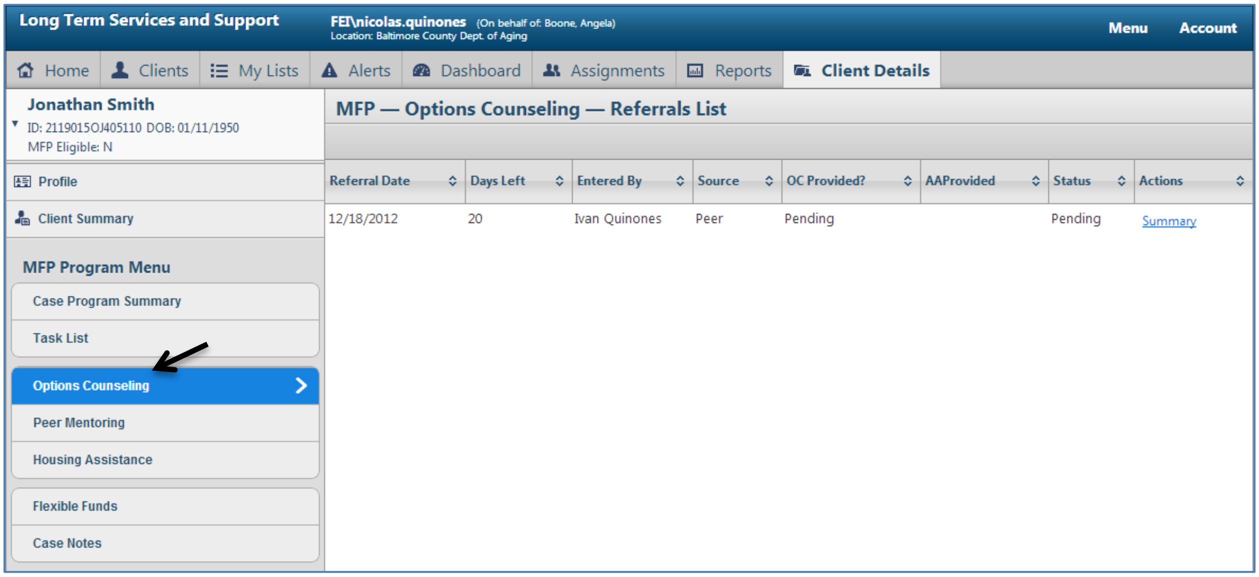


After saving an activity on the Ongoing Peer Support Activity History page, it will be updated as seen in the figure below. The actor can add additional activities using the Add Activity link, Edit an existing activity or Discard an existing activity.



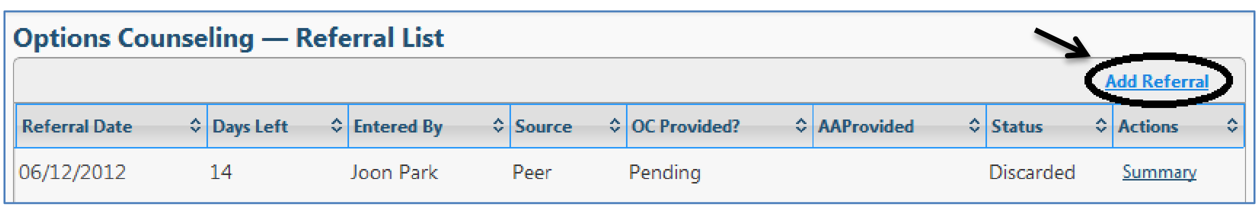
2.6 Options Counseling

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

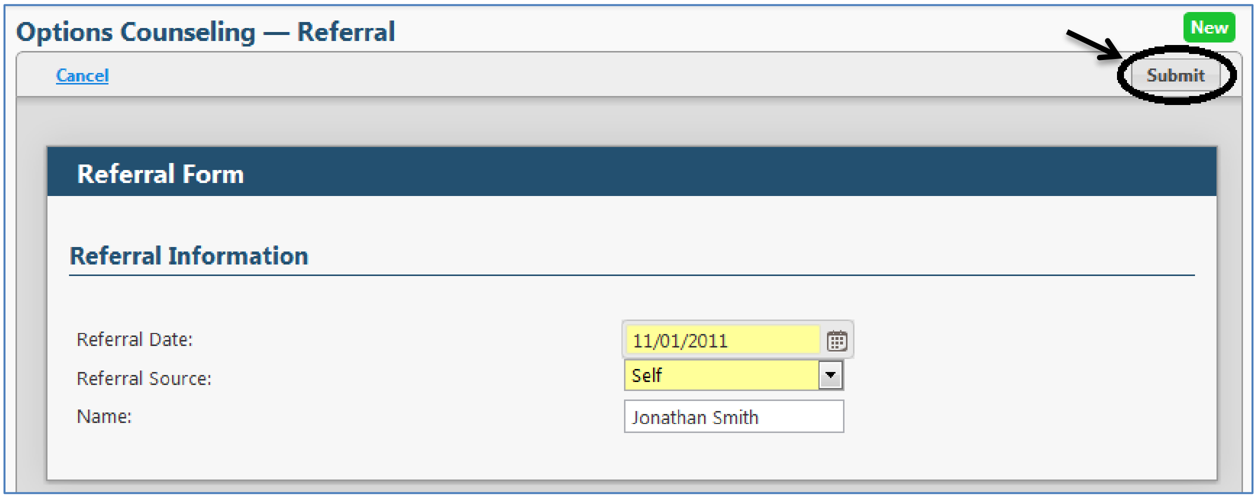


2.6.1 Add and Submit Options Counseling Referral

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

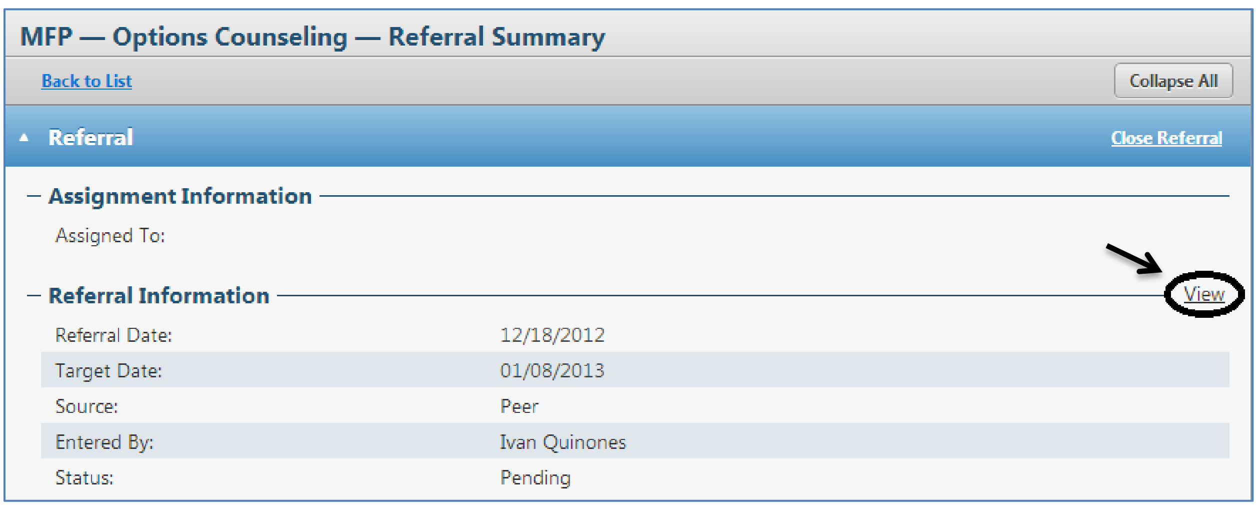


The **Options Counseling—Referral** form will appear. Enter the **required information**, which will either be *highlighted yellow* or marked with an *asterisk*. After completing the user can click the ***Submit button*** to **Save the Options Counseling—Referral** as seen below.

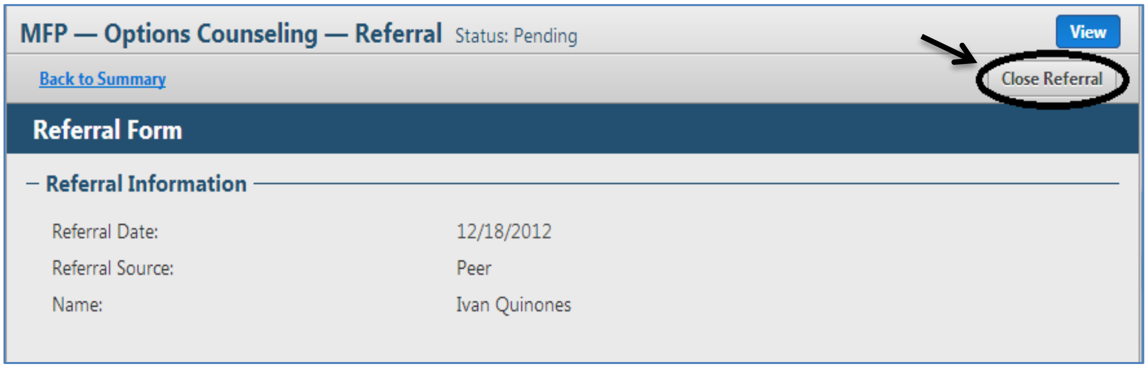


2.6.2 View and Close Options Counseling Referral

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

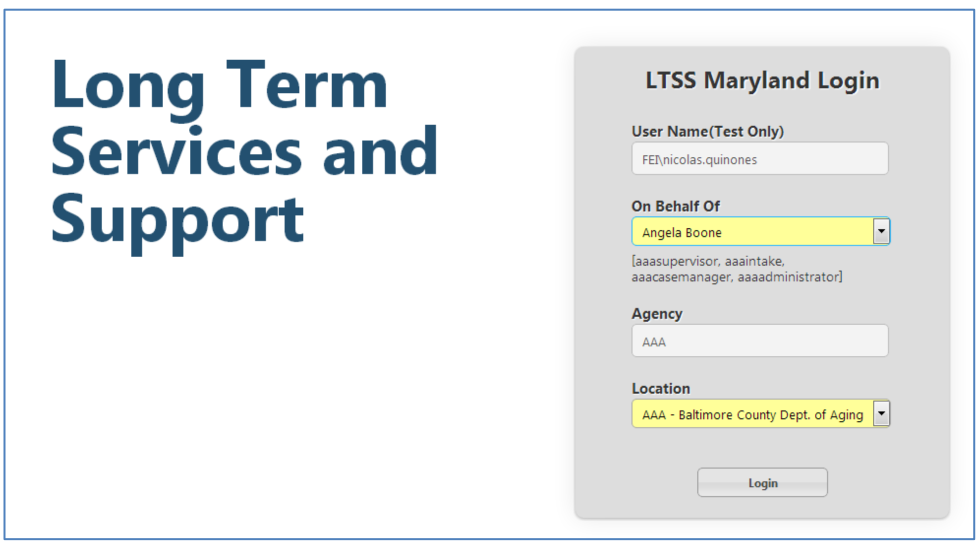


From View-mode of the Options Counseling Referral the user can **Close the Options Counseling- Referral** by clicking the ***Close Referral button*** as seen in the figure below. An Options Counseling Referral cannot be closed if Options Counseling form has been submitted for selected referral and “Application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

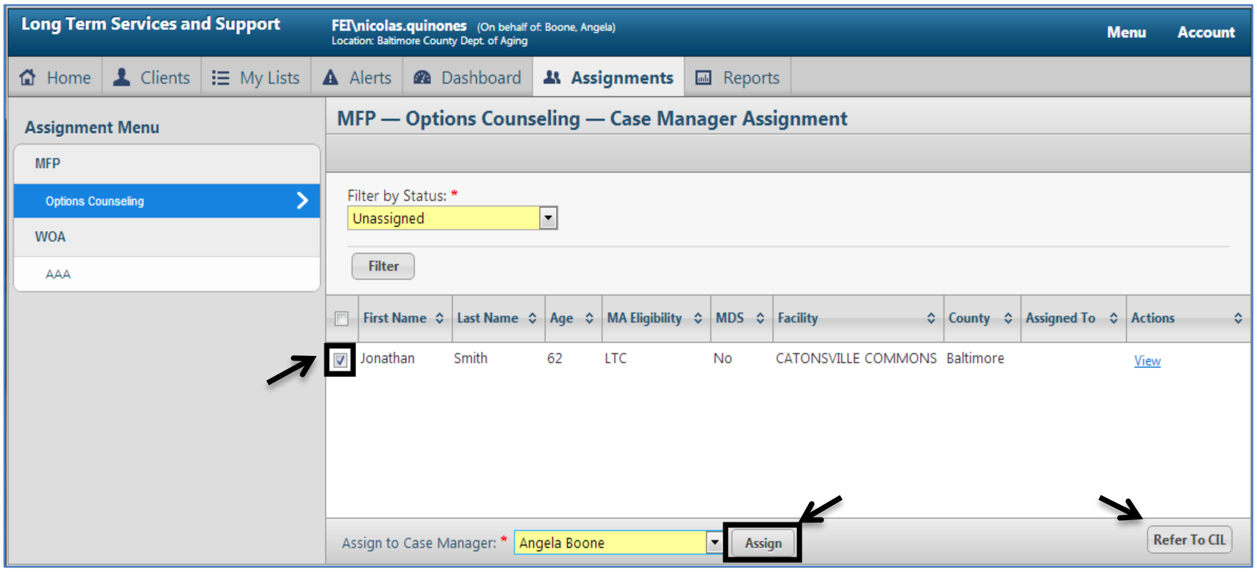


2.6.3 Assign AAA Case Manager or CIL Case Manager to Client

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

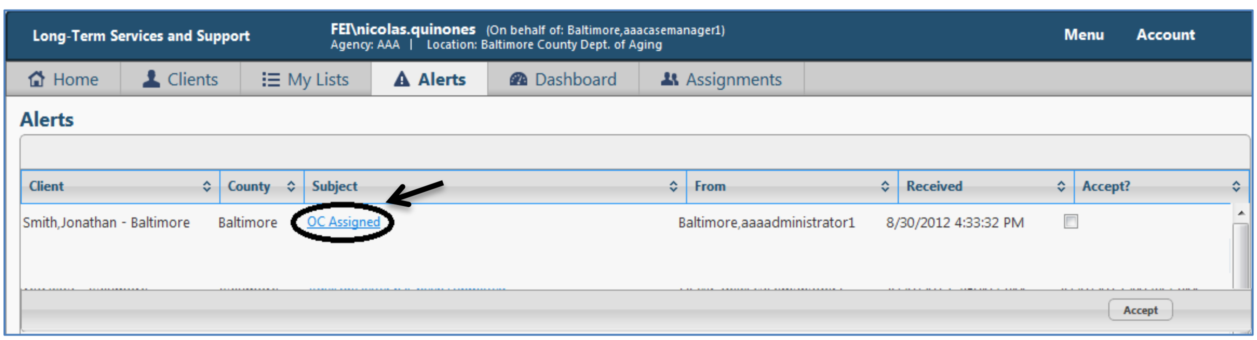


Click the *Assignments* tab at the top of the page and navigate to *Options Counseling* under the Assignment Menu section in the left hand navigation to perform **Batch Assignment**. Choose **Unassigned** from the Status dropdown menu and click the ***Filter button***. Locate the client you wish to assign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



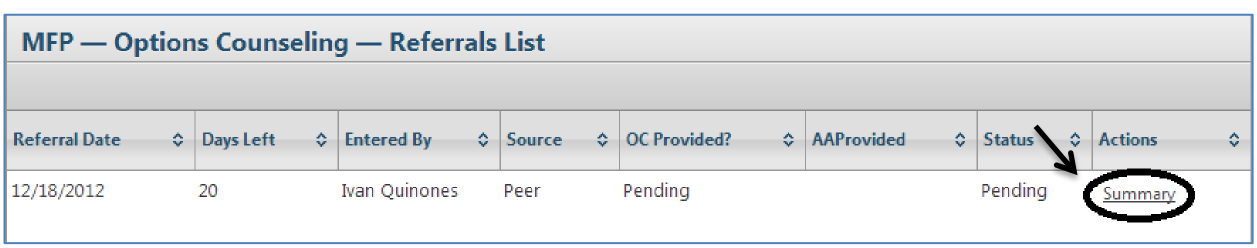
2.6.4 Alert Assigned AAA Case Manager

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



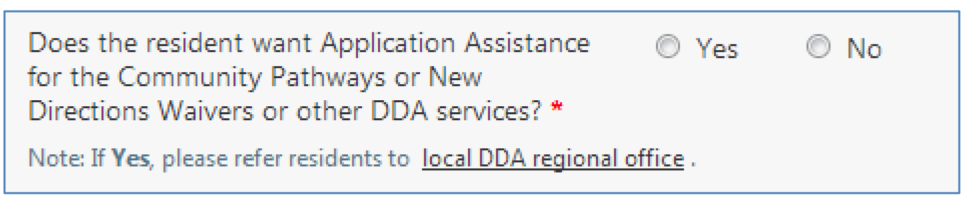
2.6.5 Add, Save and Edit Options Counseling Form

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

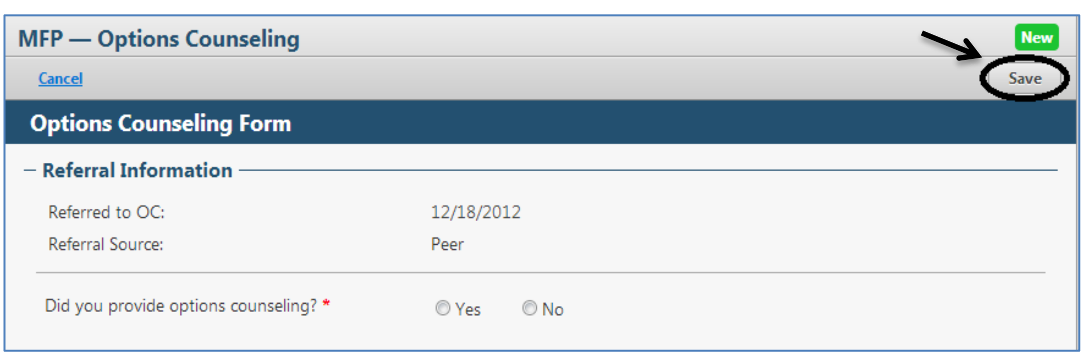


From the Options Counseling—Referral Summary page click the **Add Options Counseling Form link** as seen in the figure below.

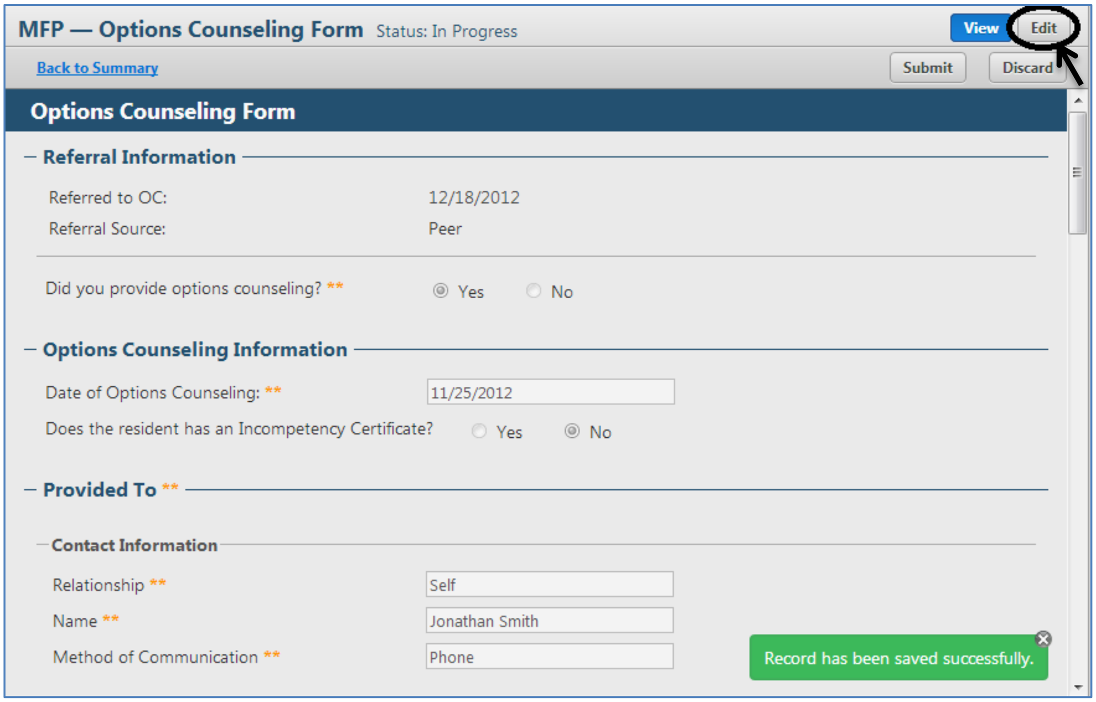
The **Options Counseling Form** will appear. The user will be prompted to answer whether or not options counseling was provided. By choosing Yes or No the user will see a different set of options as seen below. Enter the **required information**, which will either be *highlighted yellow* or marked with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



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

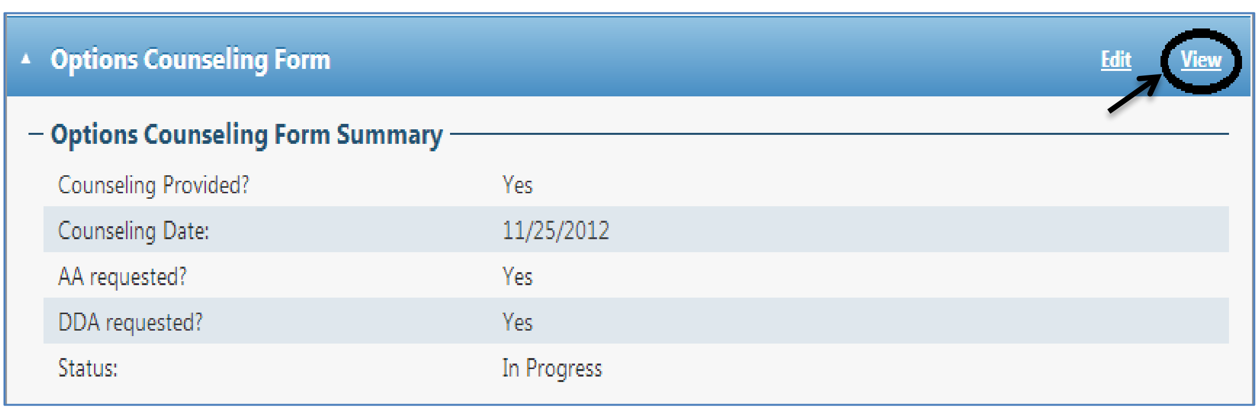


After clicking the Save button the user is taken to View-mode. Click the **Edit link** to make changes to the Options Counseling Form as seen below. After making changes click the Save button again and the user will return to View-mode.



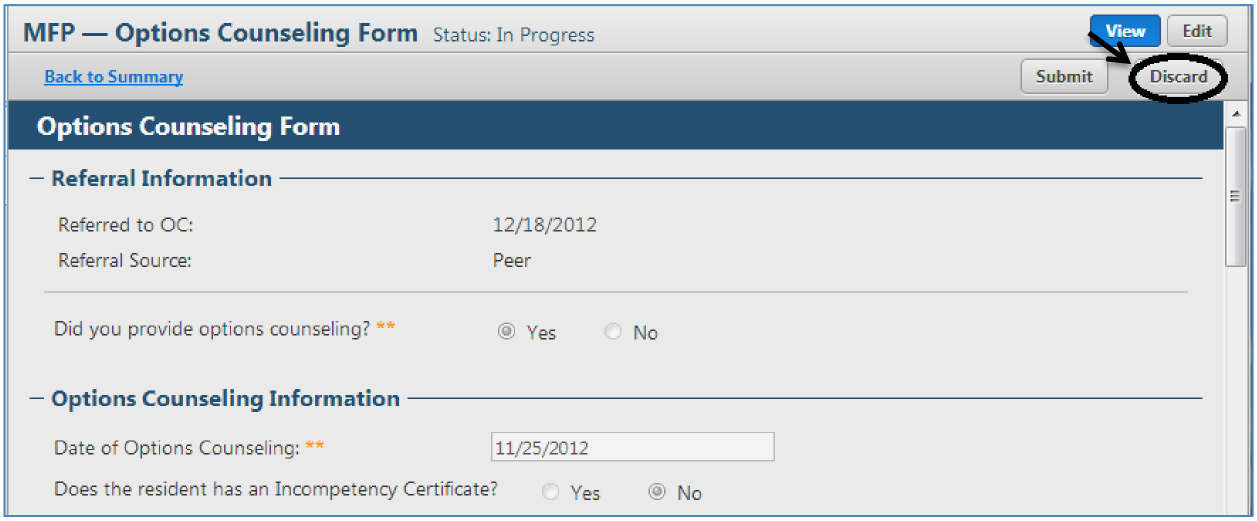
2.6.6 View, Discard and Submit Options Counseling Form

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

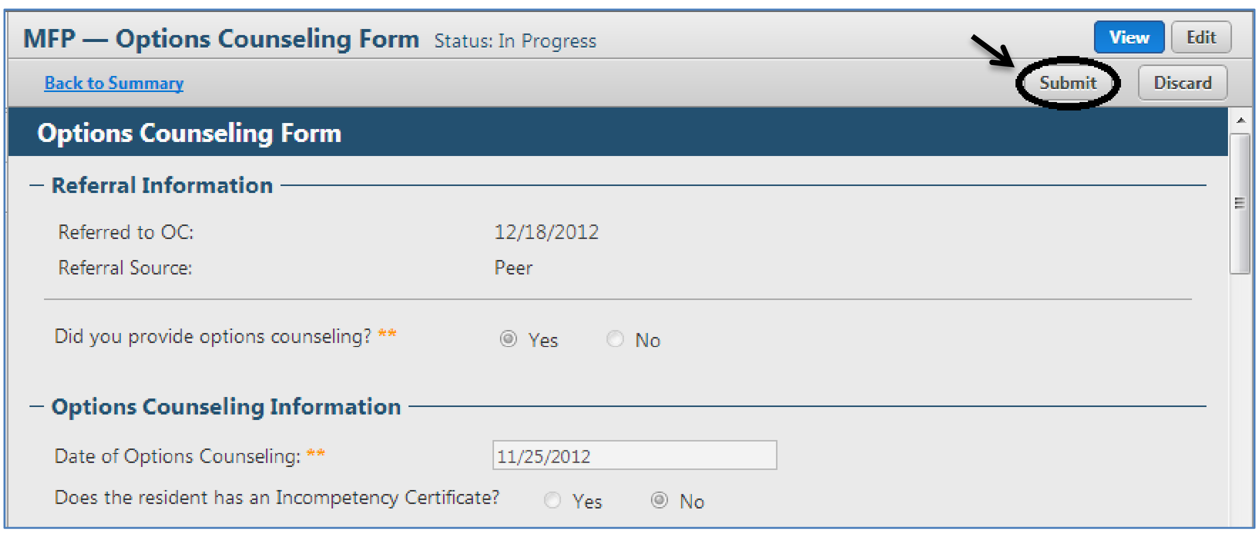


From View-mode the user can **Discard the Options Counseling Form** by clicking the ***Discard button*** as seen in the figure below. The user can discard an “In Progress” or “Submitted”

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

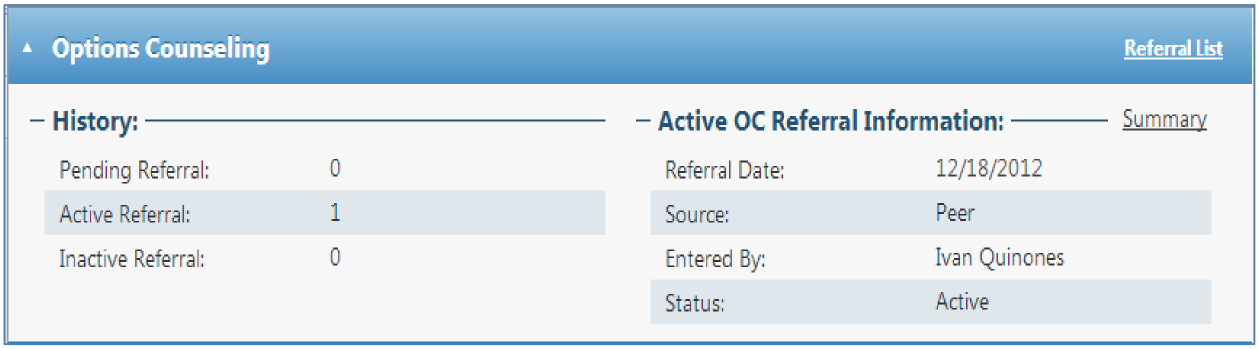


If the user does not wish to discard, click the ***Submit button*** to **Submit the Options Counseling Form** as seen in the figure below. Once submitted the Options Counseling Form can no longer be edited.



2.6.7 Options Counseling Status Change to Active

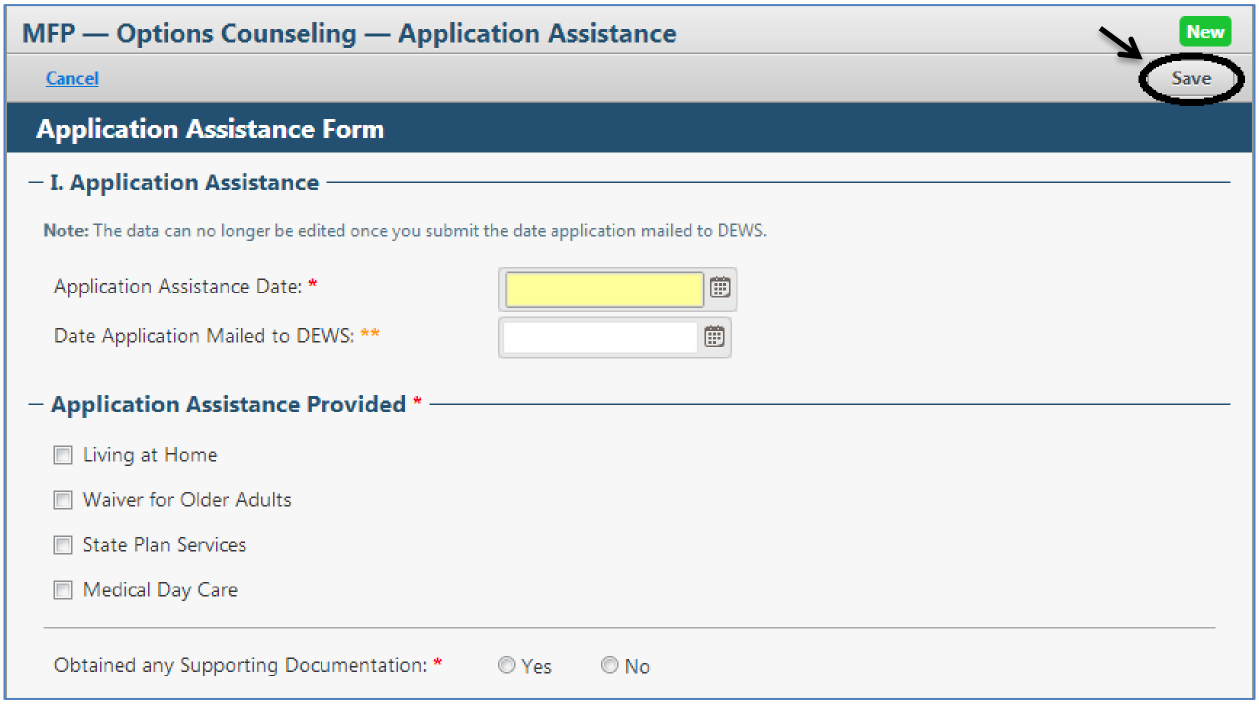
After an *Options Counseling Form* is “*In Progress*,” Options Counseling changes to an ***Active status*** on the **MFP Tasks List** page as seen below.



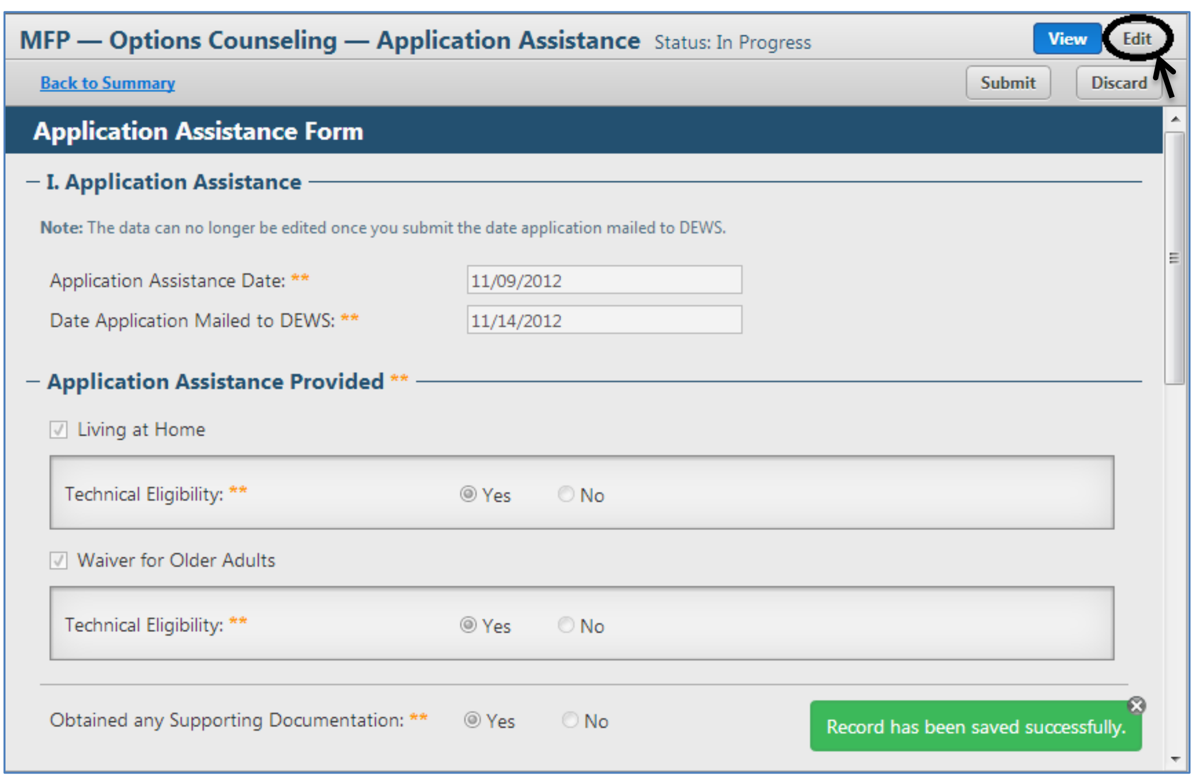
2.6.8 Add, Save and Edit OC Application Assistance

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

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

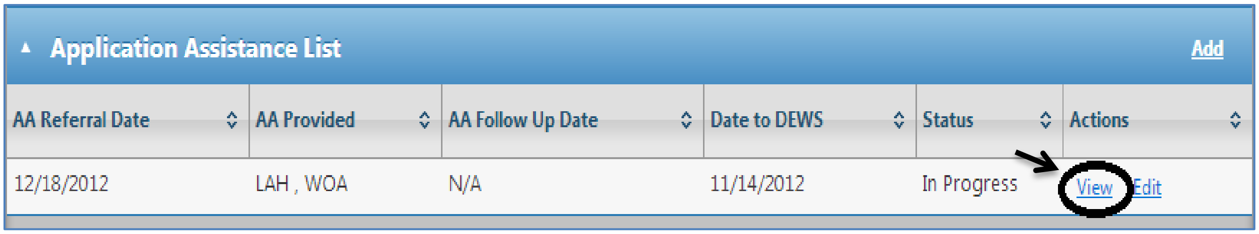


After clicking the Save button the user is taken to View-mode. Click the **Edit button** to make changes to the Options Counseling—Application Assistance Form as seen below. After making changes click the Save button again and the user will return to View-mode.

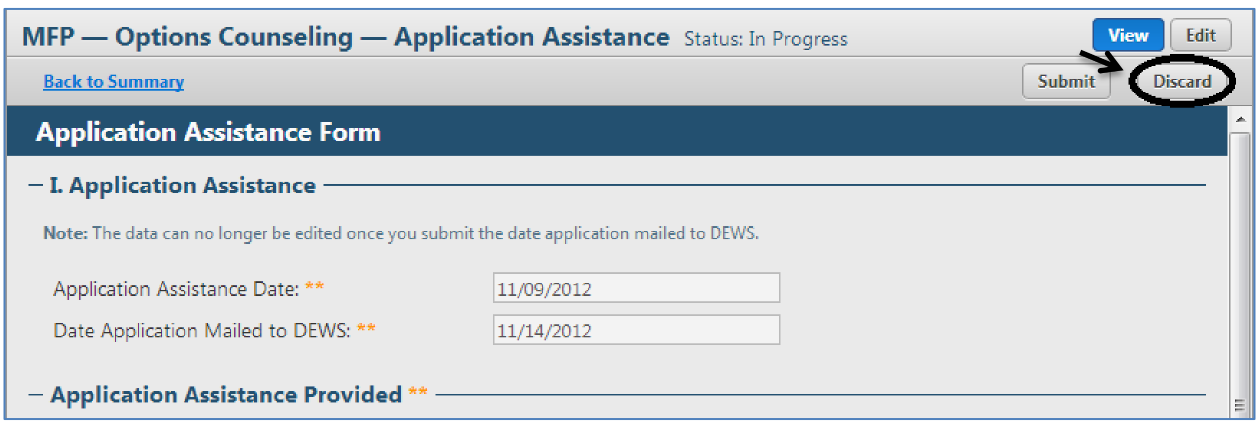


2.6.9 View, Discard and Submit OC Application Assistance

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



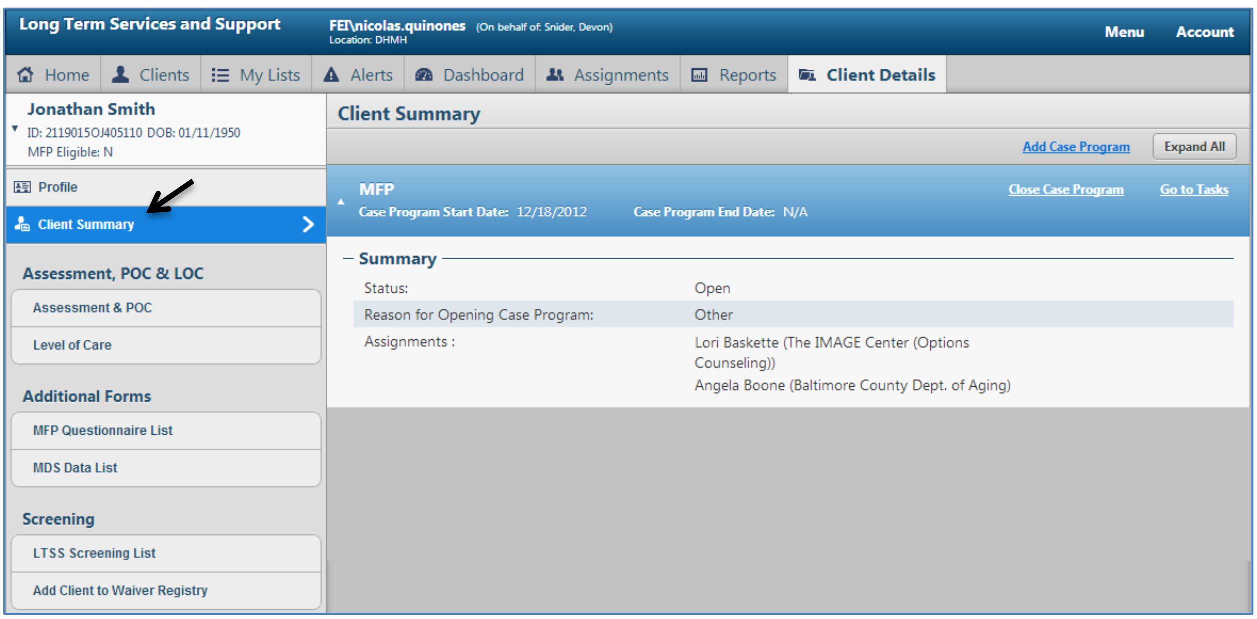
From View-mode the user can **Discard the Options Counseling—Application Assistance Form** by clicking the ***Discard button*** as seen in the figure below. The user can discard an "In Progress" Options Counseling—Application Assistance Form. Once "Submitted," the Options Counseling—Application Assistance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



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

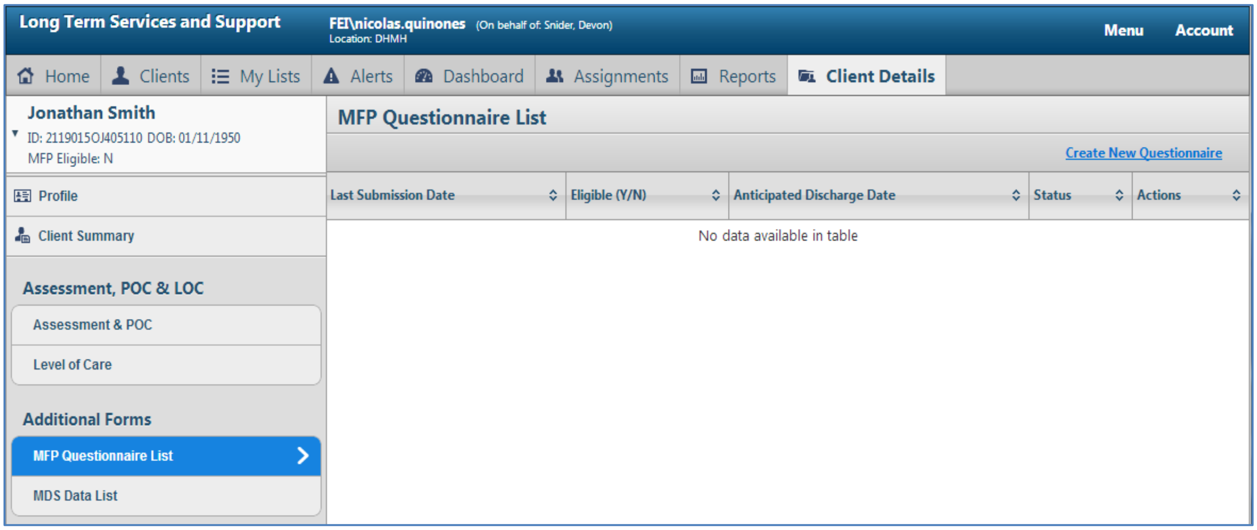
2.7 MFP Questionnaire

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



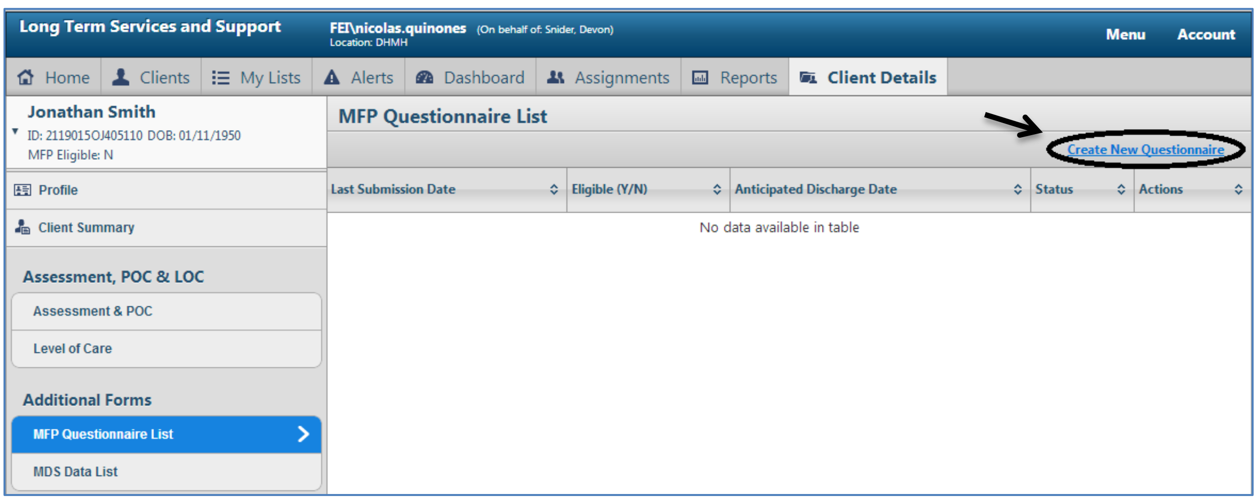
2.7.1 Navigate to the MFP Questionnaire List

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

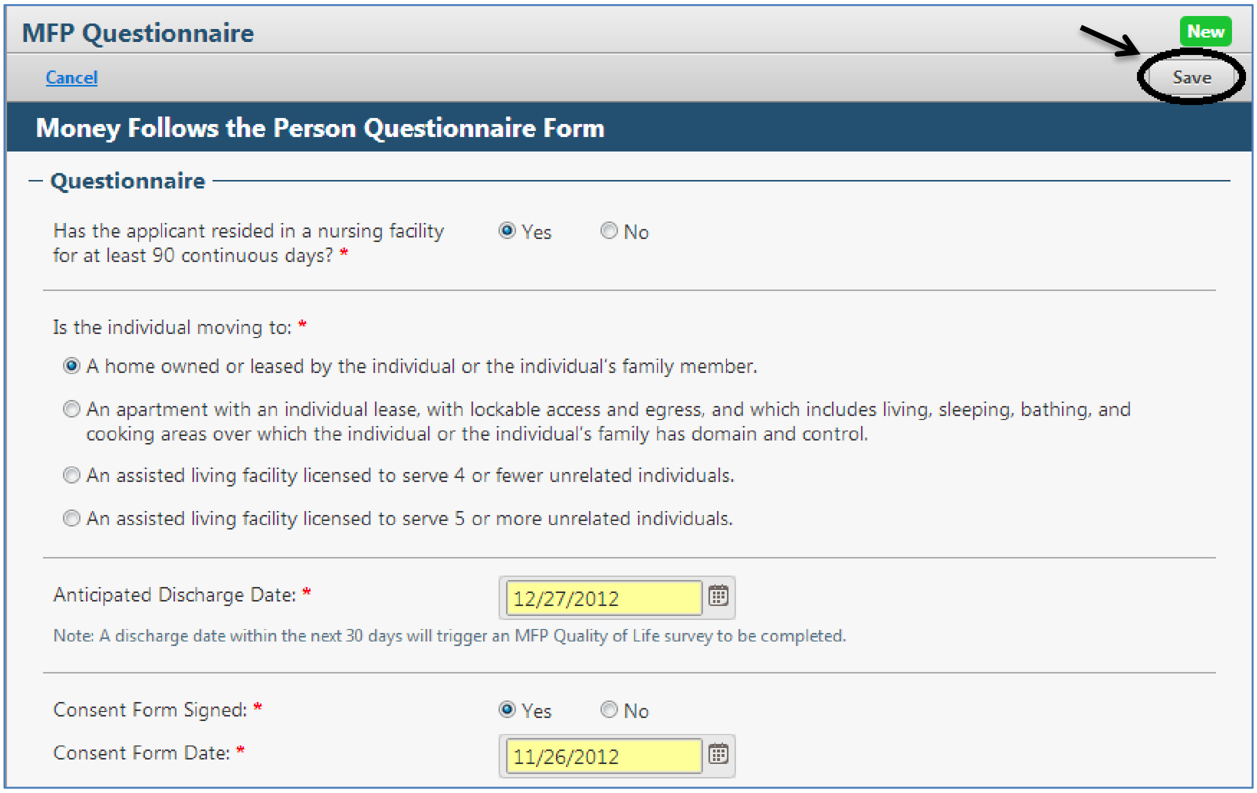


2.7.2 Create, Save and Edit New MFP Questionnaire

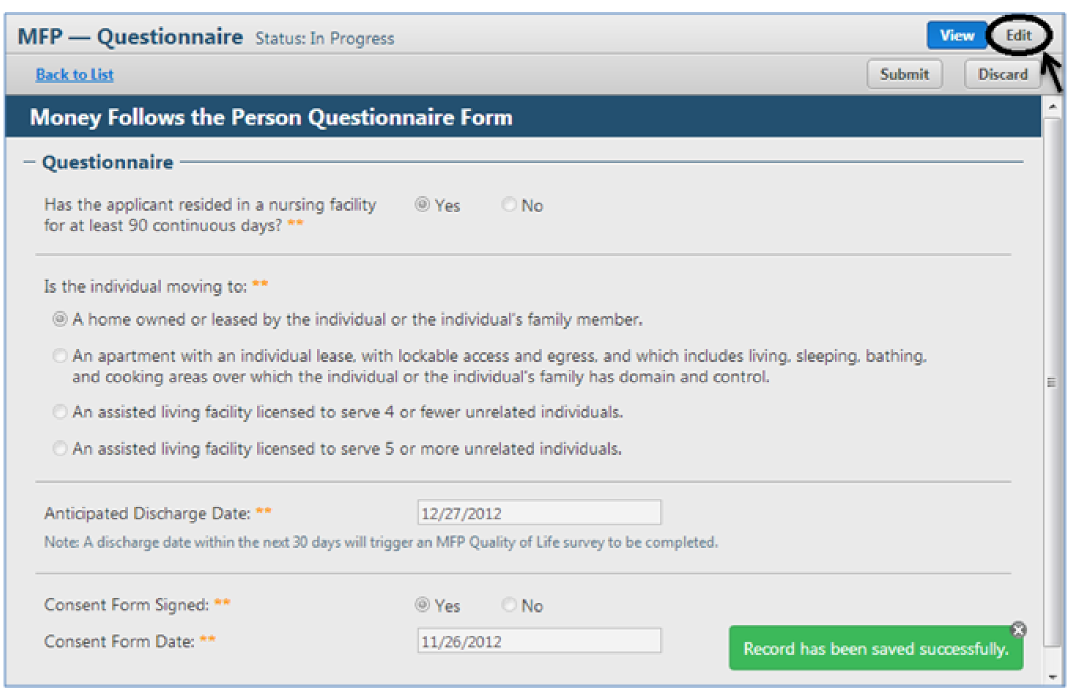
From the MFP Questionnaire List click the **Create New Questionnaire link** as seen in the figure below.



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

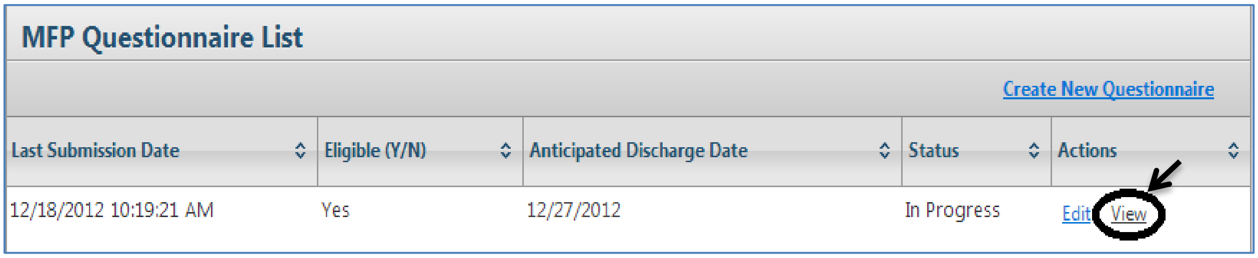


After clicking the Save button the user is taken to View-mode. Click the **Edit button** to make changes to the MFP Questionnaire as seen below. After making changes click the Save button again and the user will return to View-mode.

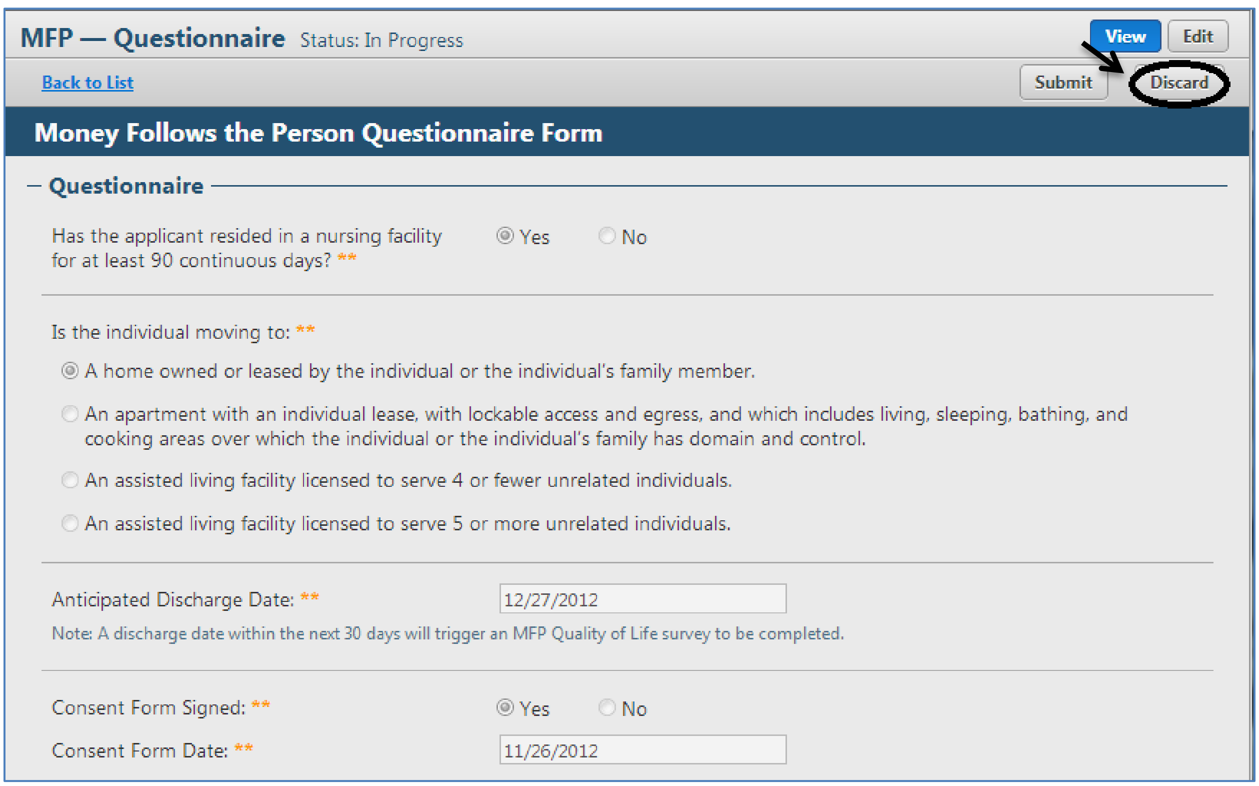


2.7.3 View, Discard and Submit New MFP Questionnaire

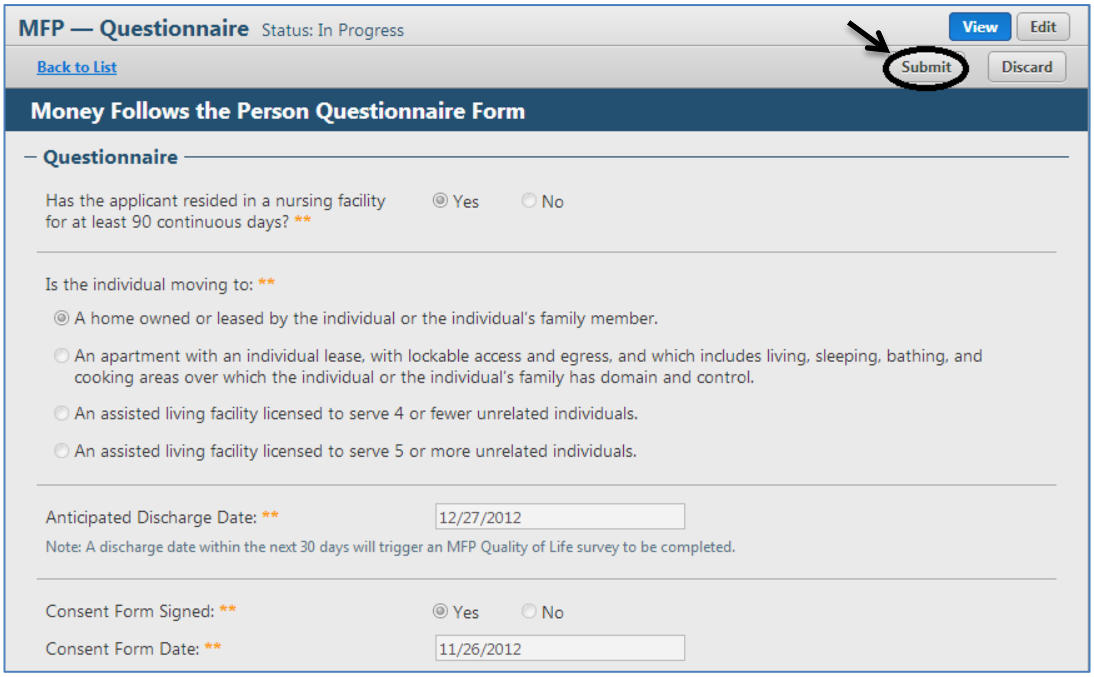
The user can **View the MFP Questionnaire** in two ways. The first way was shown above where the user is taken to View-mode after saving the MFP Questionnaire. The user can also View the MFP Questionnaire by clicking the ***View link*** on the MFP Questionnaire List page as shown below.



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

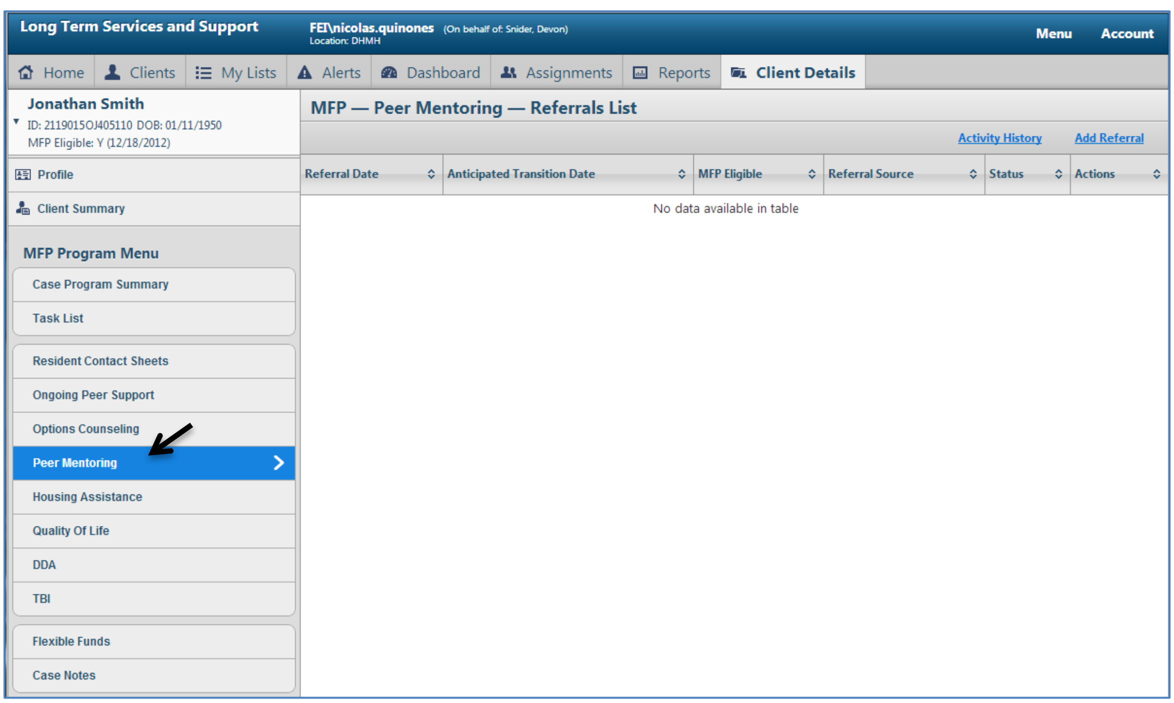


If the user does not wish to discard, click the ***Submit button*** to **Submit the MFP Questionnaire** as seen in the figure below. Once submitted the MFP Questionnaire can no longer be edited or discarded.



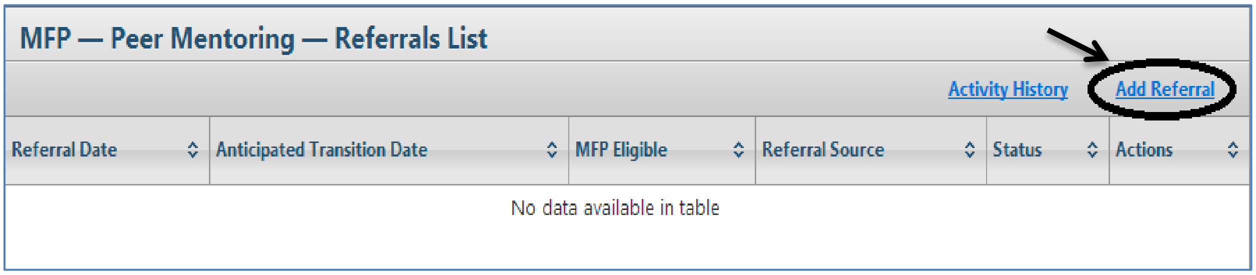
2.8 Peer Mentoring

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

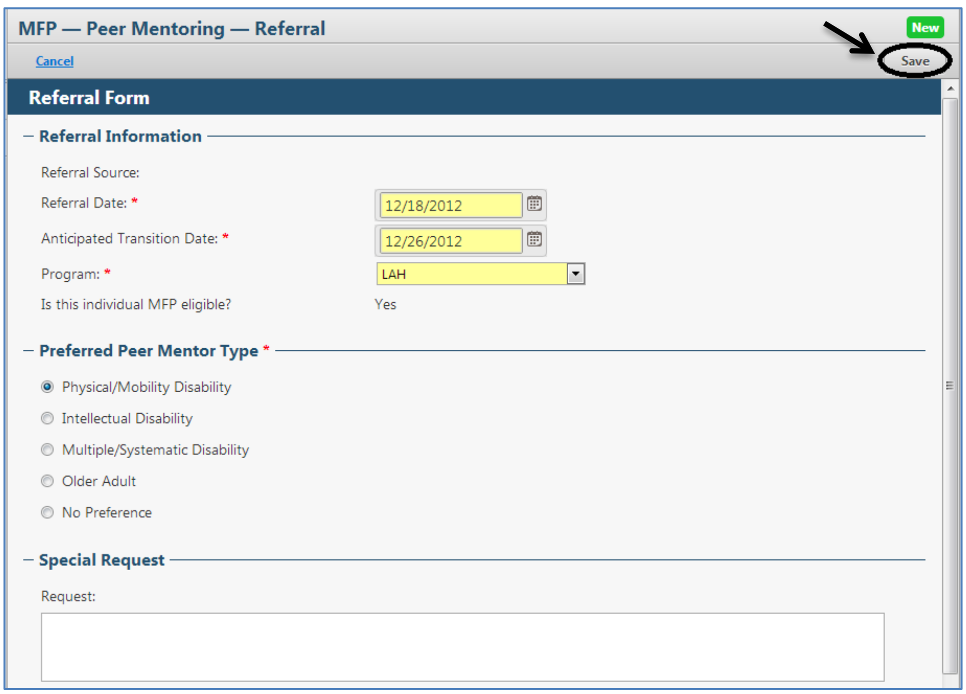


2.8.1 Add, Save and Edit Peer Mentoring Referral

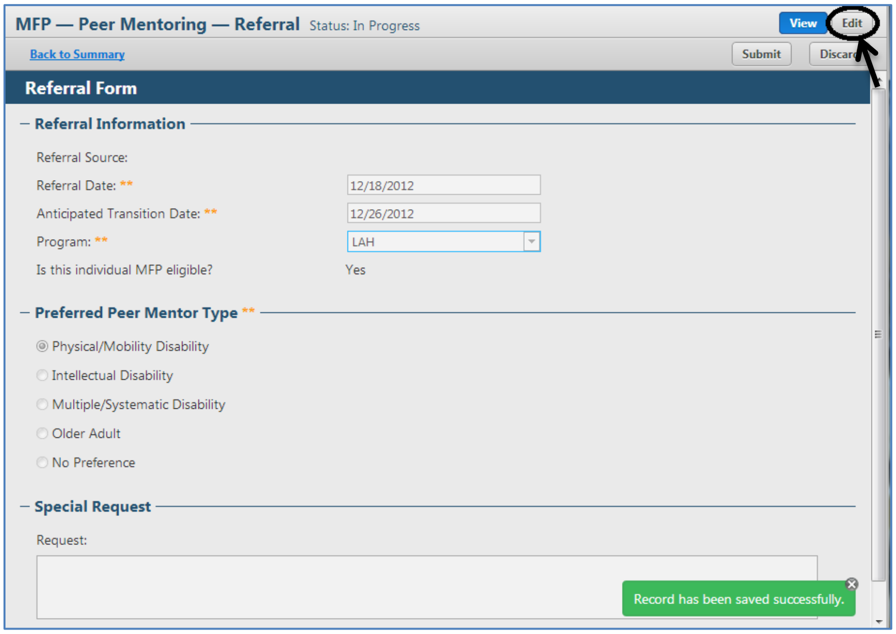
From the Peer Mentoring Referral List click the ***Add Referral link*** to **Add Peer Mentoring—Referral** for the client as seen in the figure below.



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



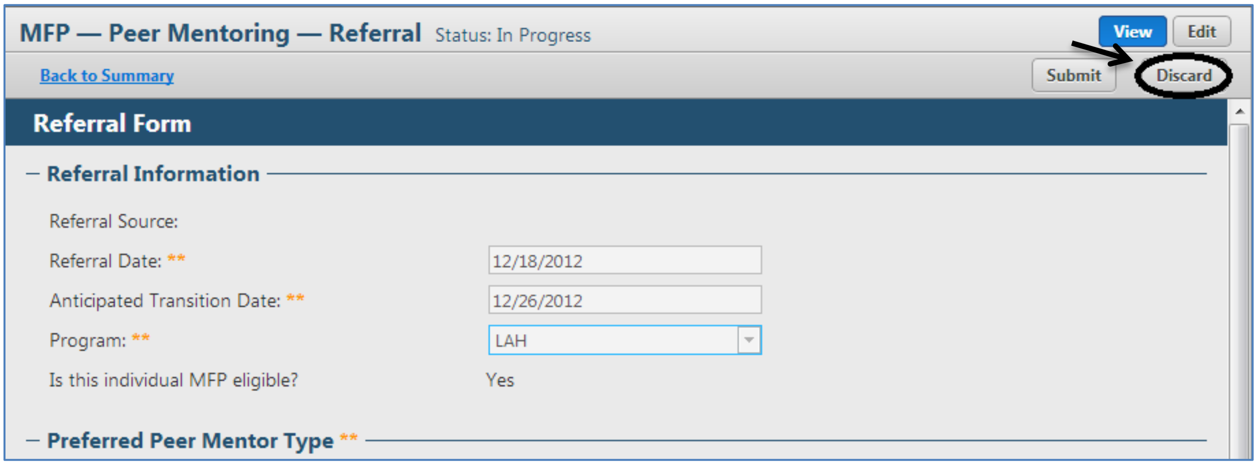
After clicking the Save button the user is taken to View-mode. Click the **Edit button** to make changes to the Peer Mentoring—Referral as seen below. After making changes click the Save button again and the user will return to View-mode.



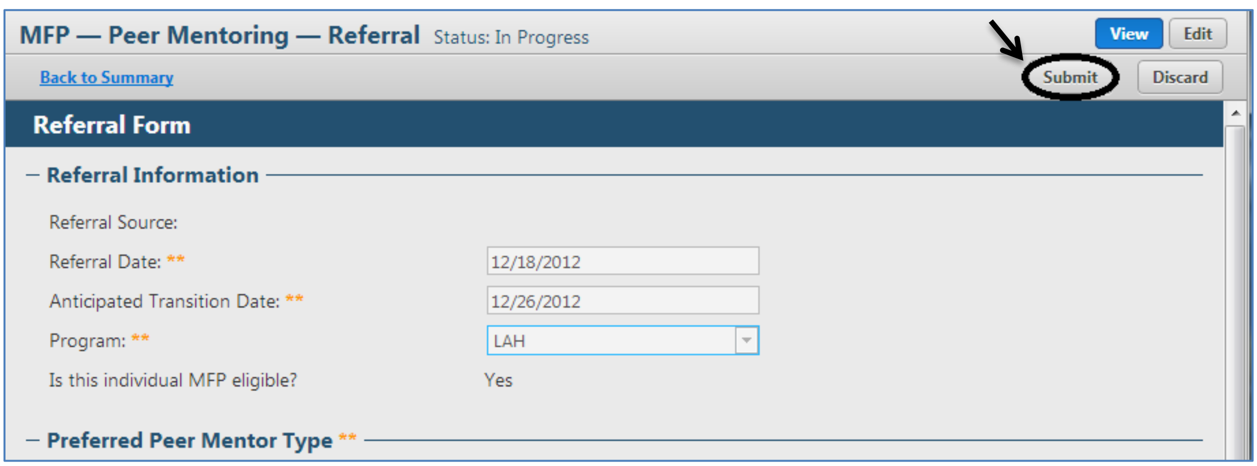
2.8.2 View, Discard and Submit Peer Mentoring Referral

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

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

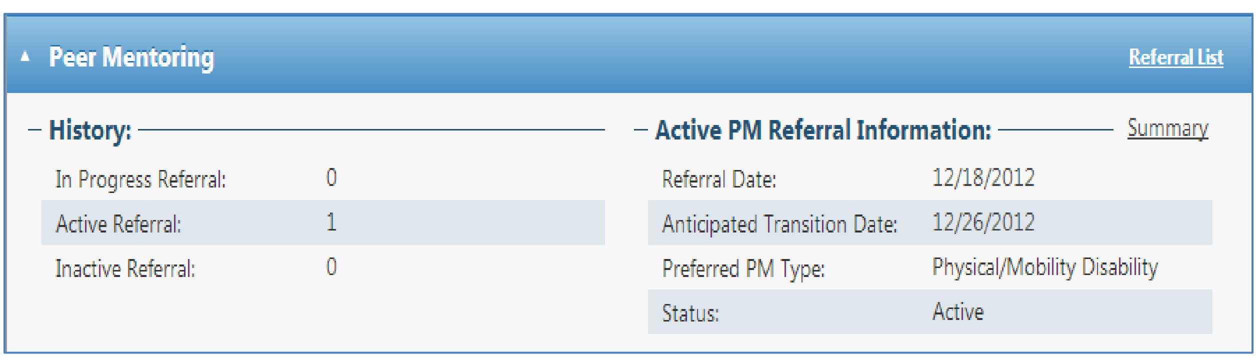


If the user does not wish to discard, click the ***Submit button*** to **Submit the Peer Mentoring—Referral** as seen in the figure below. Once submitted the Peer Mentoring—Referral can no longer be edited.



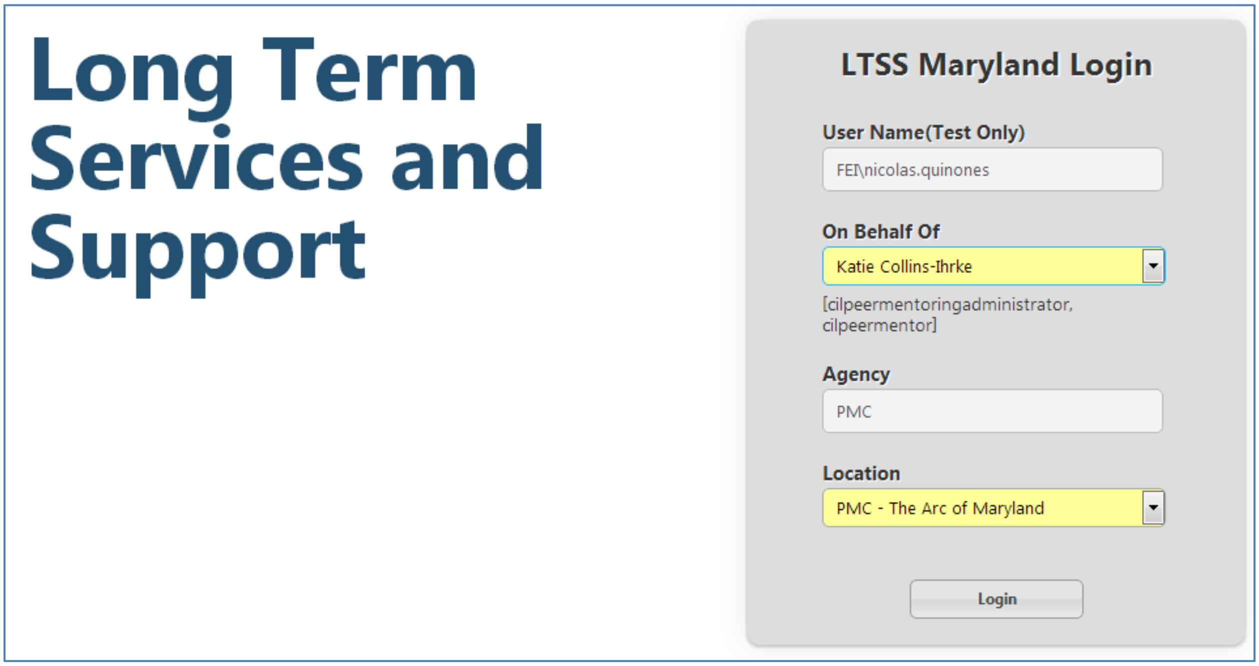
2.8.3 Peer Mentoring Status Change to Active

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

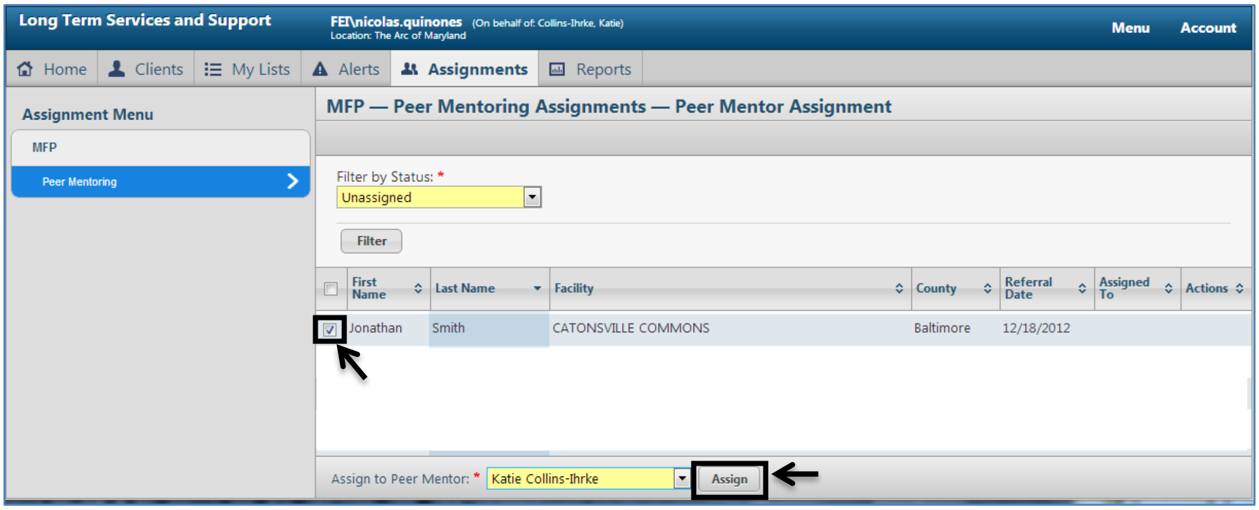


2.8.4 Assign CIL Peer Mentor to Client

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

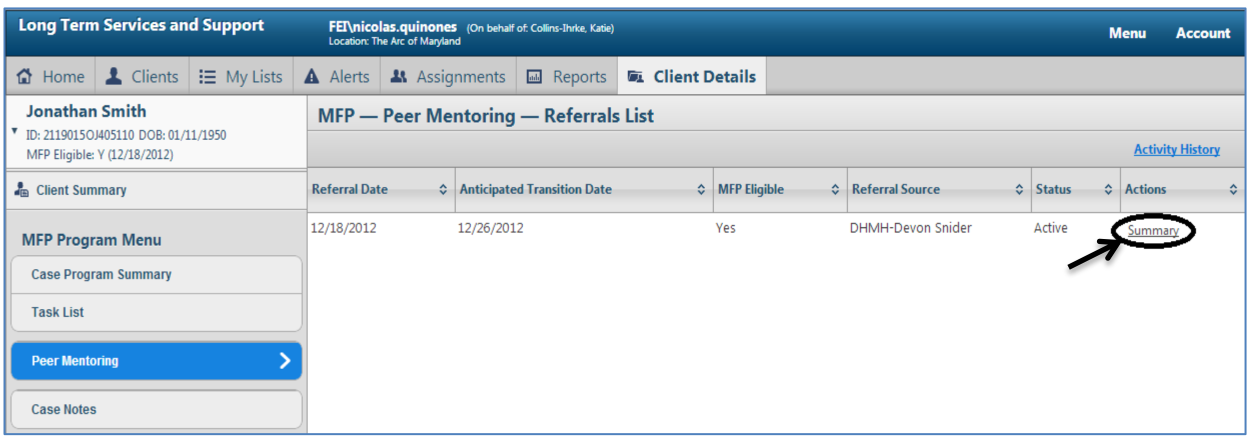


Click the *Assignments* tab at the top of the page and navigate to *Peer Mentoring* under the Assignment section in the left hand navigation to perform **Batch Assignment**. Choose **Unassigned** from the Status dropdown menu and click the ***Filter button***. Locate the client you wish to assign a Peer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

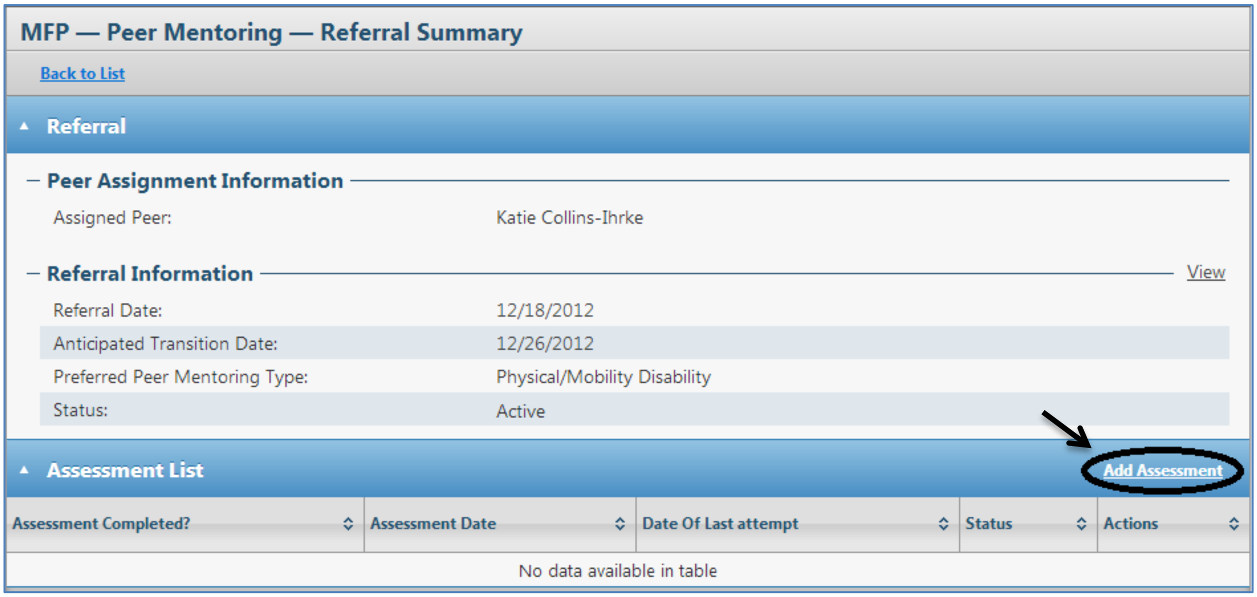


2.8.5 Add, Save and Edit Peer Mentoring Assessment

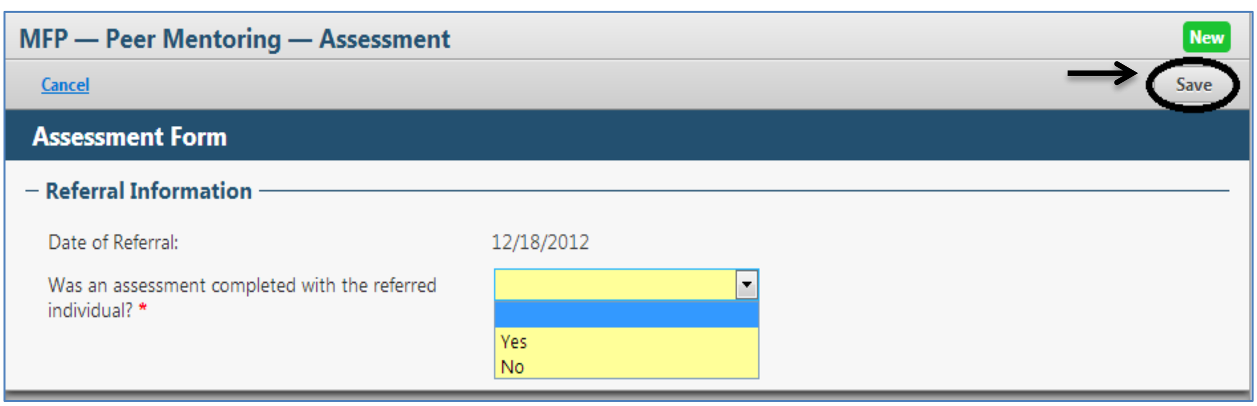
Navigate to the Peer Mentoring Referral List and click the ***Summary link*** for the referral you wish to create an assessment and/or an outcome for.



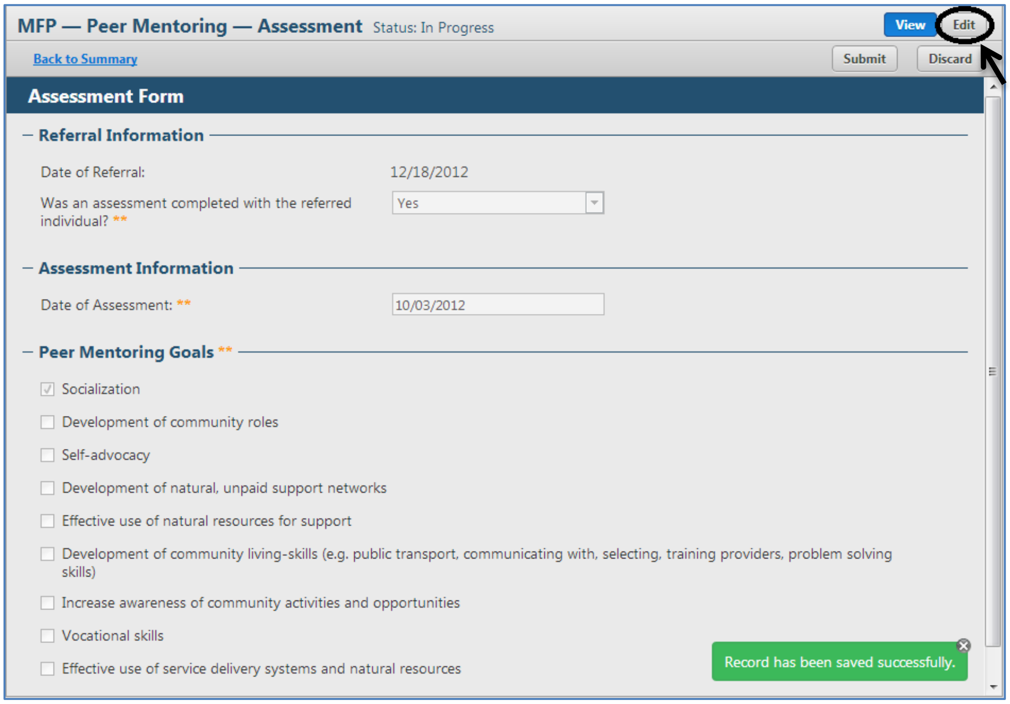
From the Peer Mentoring—Referral Summary page click the **Add Assessment link** as seen in the figure below.



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

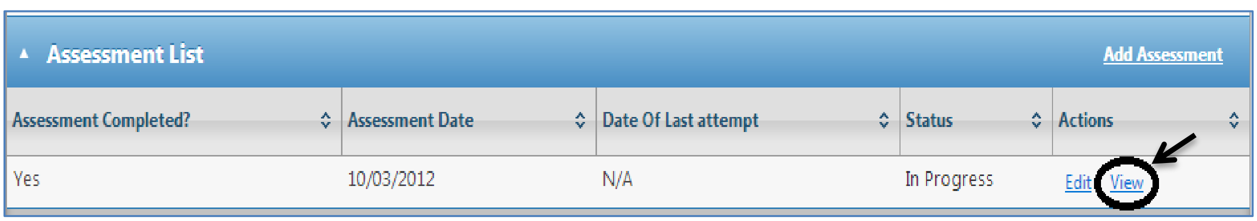


After clicking the Save button the user is taken to View-mode. Click the **Edit button** to make changes to the Peer Mentoring—Assessment as seen below. After making changes click the Save button again and the user will return to View-mode.

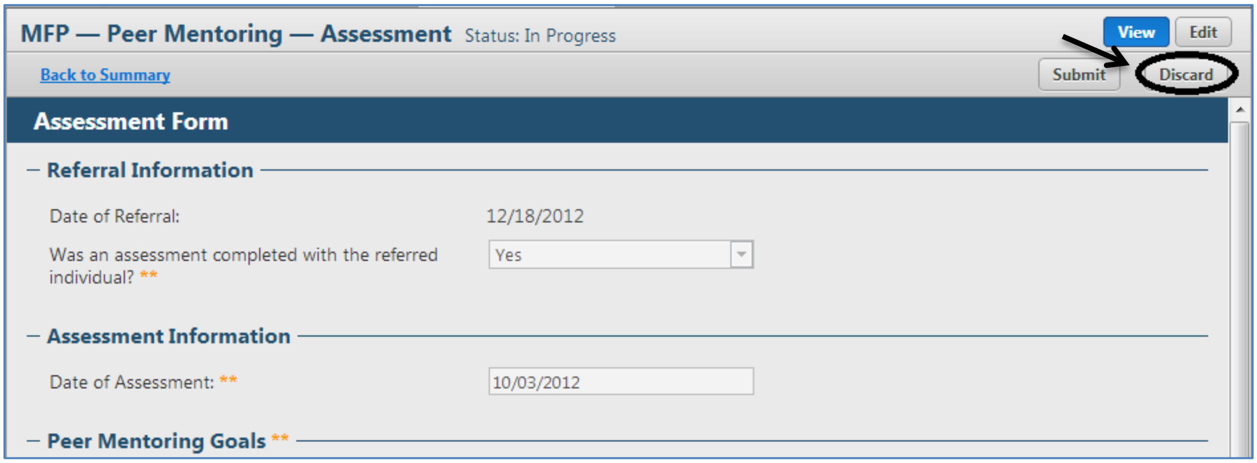


2.8.6 View, Discard and Submit Peer Mentoring Assessment

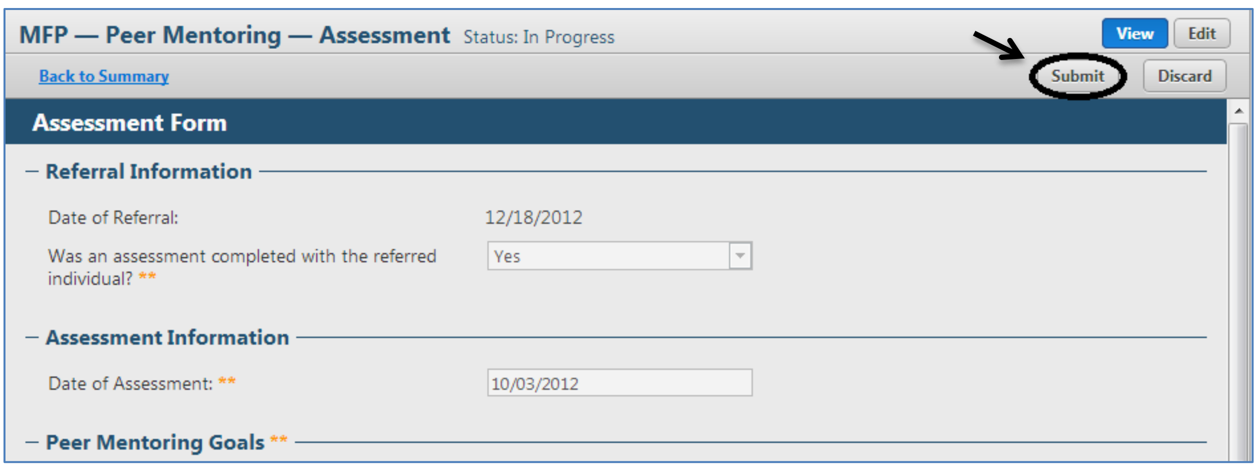
The user can **View the Peer Mentoring—Assessment** in two ways. The first way was shown above where the user is taken to View-mode after saving the Peer Mentoring—Assessment. The user can also View the Peer Mentoring—Assessment by clicking the ***View link*** on the Peer Mentoring—Referral Summary page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



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

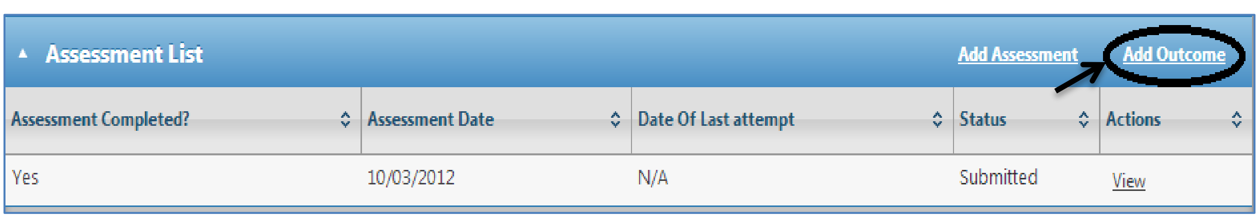


If the user does not wish to discard, click the ***Submit button*** to **Submit the Peer Mentoring—Assessment** as seen in the figure below. Once submitted the Peer Mentoring-- Assessment can no longer be edited. However, the user can add multiple Peer Mentoring—Assessments for a given referral.

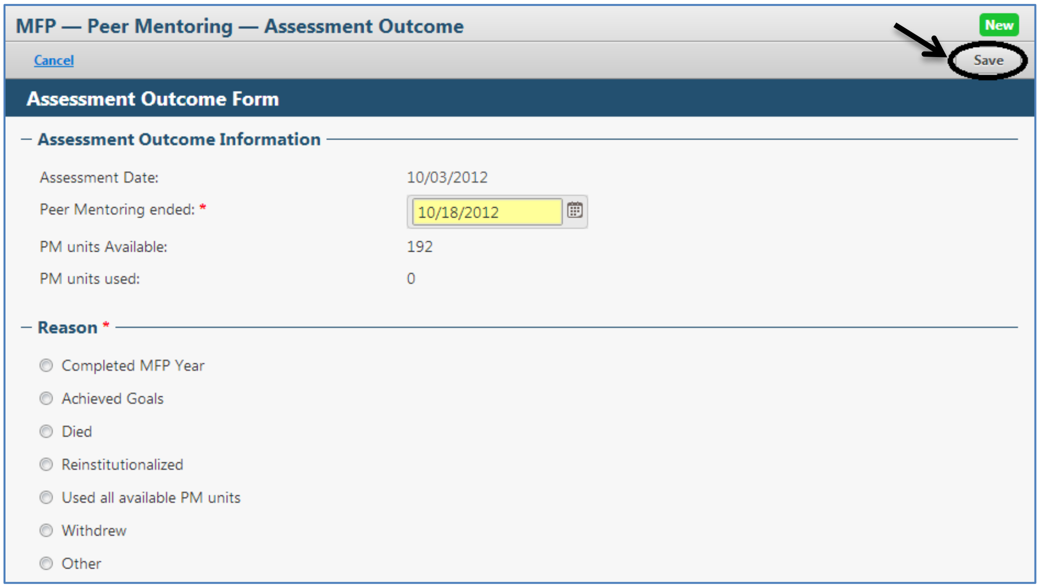


2.8.7 Add, Save and Edit Peer Mentoring Assessment Outcome

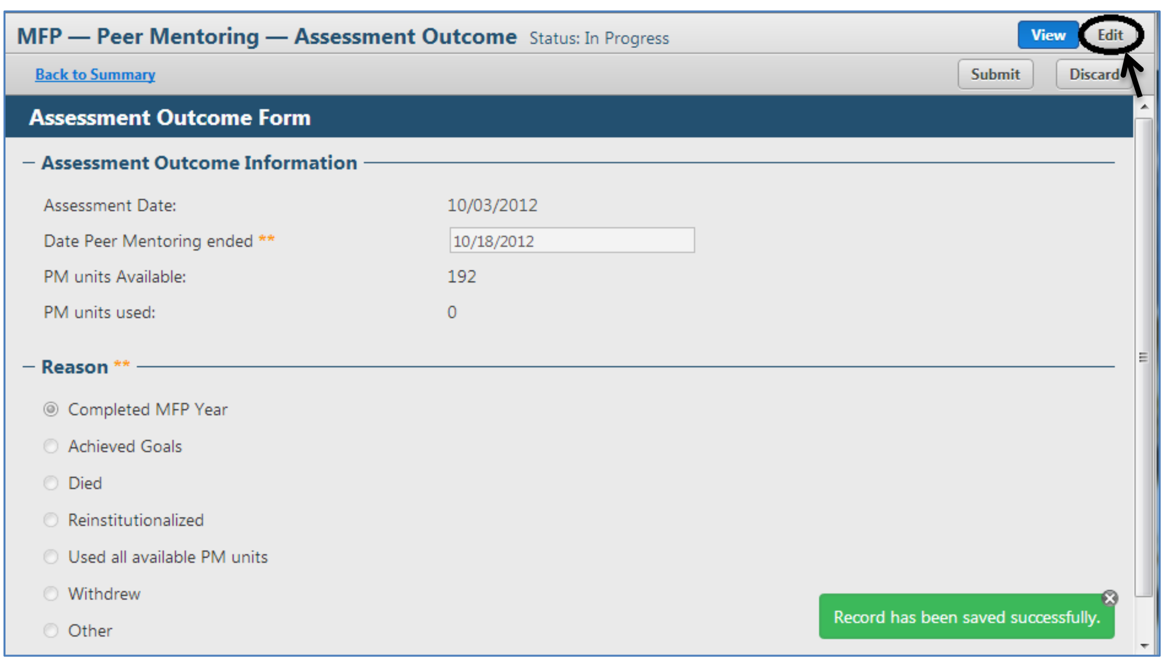
From the Peer Mentoring—Referral Summary page click the **Add Outcome link** as seen in the figure below.



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



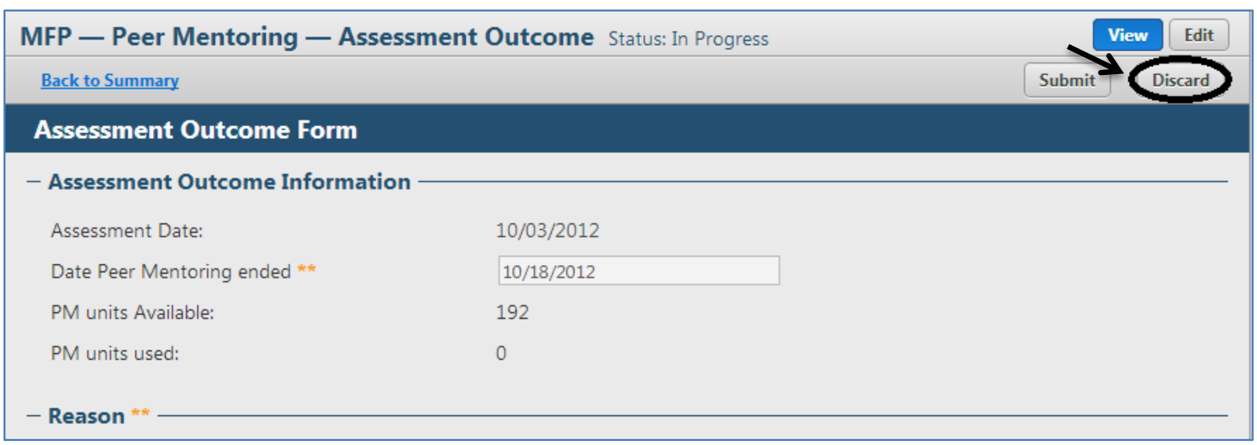
After clicking the Save button the user is taken to View-mode. Click the **Edit link** to make changes to the Peer Mentoring—Assessment Outcome as seen below. After making changes click the Save button again and the user will return to View-mode.



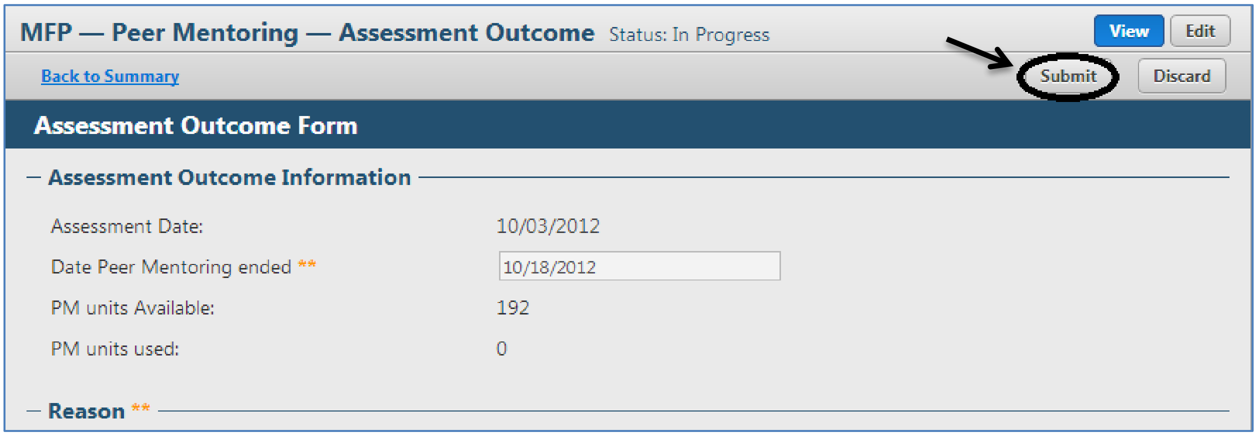
2.8.8 View, Discard and Submit Peer Mentoring Assessment Outcome

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

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

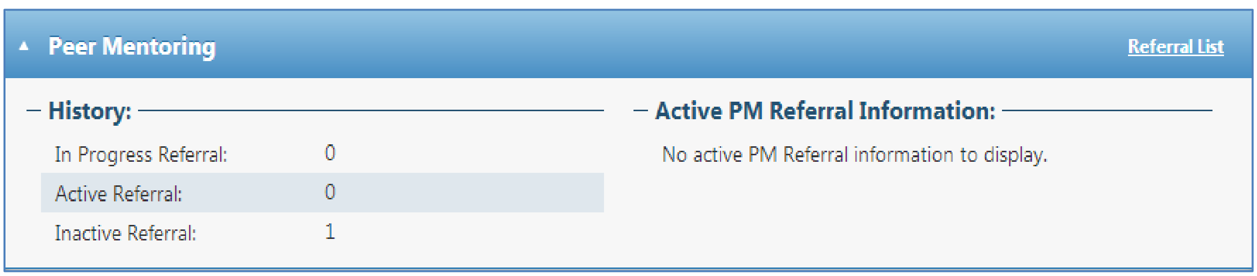


If the user does not wish to discard, click the ***Submit button*** to **Submit the Peer Mentoring—Assessment Outcome** as seen in the figure below. Once submitted the Peer Mentoring—Assessment Outcome can no longer be edited.



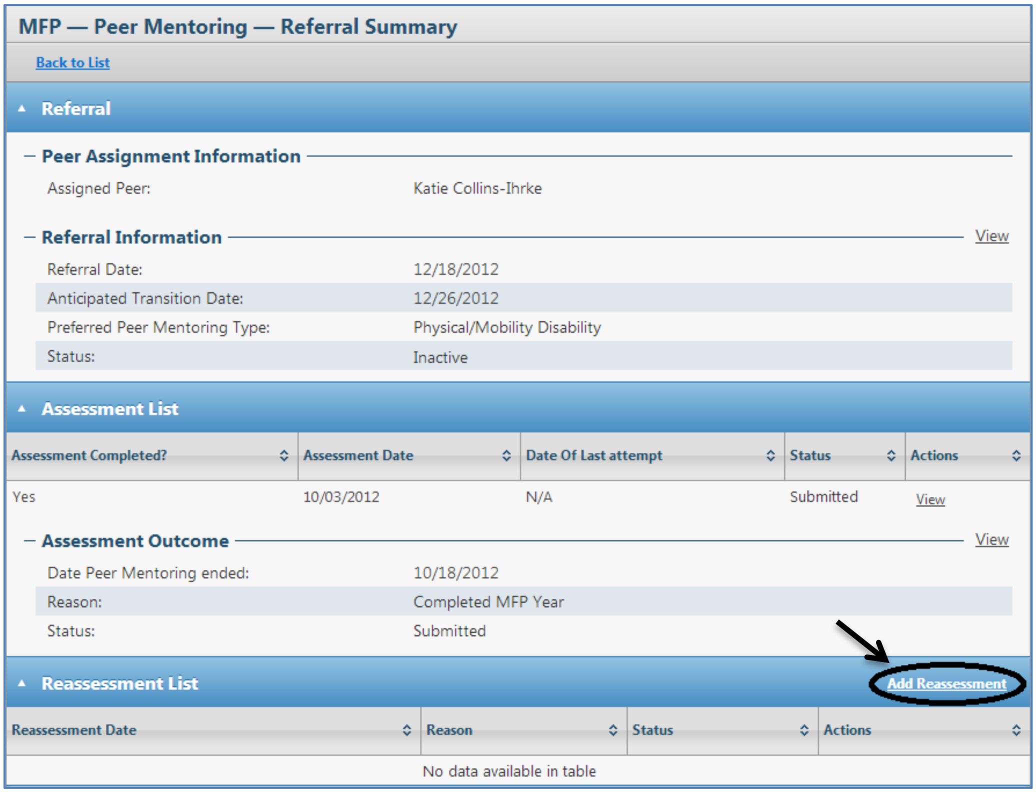
2.8.9 Peer Mentoring Status Change to Inactive

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



2.8.10 Add, Save and Edit Peer Mentoring Reassessment

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



MFP — Peer Mentoring — Referral Summary

Back to List

Referral

Peer Assignment Information

Assigned Peer: Katie Collins-Ihrke

Referral Information View

Referral Date: 12/18/2012

Anticipated Transition Date: 12/26/2012

Preferred Peer Mentoring Type: Physical/Mobility Disability

Status: Inactive

Assessment List

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

Assessment Outcome View

Date Peer Mentoring ended: 10/18/2012

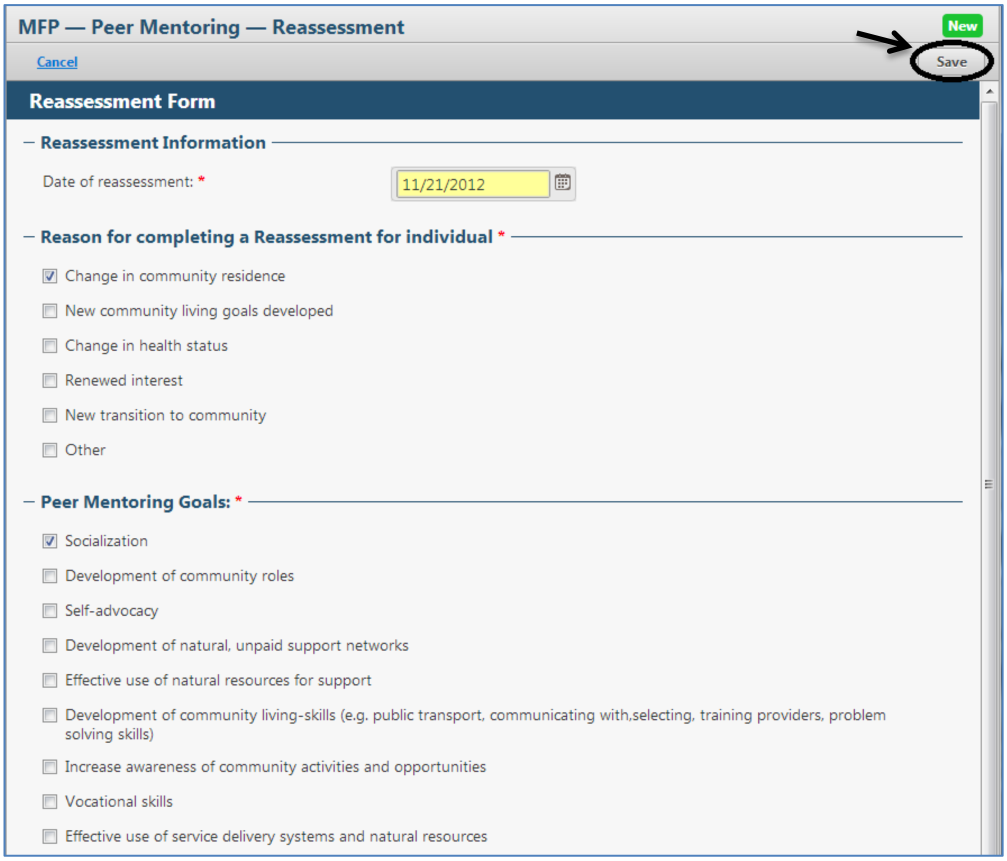
Reason: Completed MFP Year

Status: Submitted

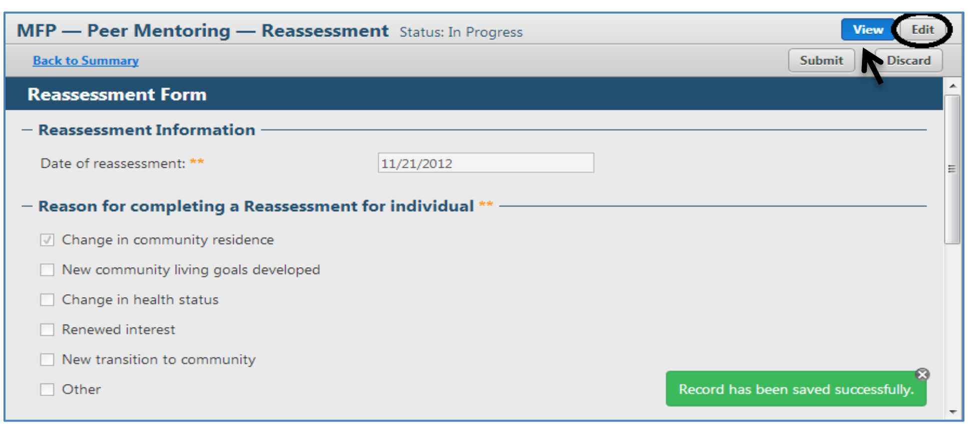
Reassessment List Add Reassessment

Reassessment Date	Reason	Status	Actions
No data available in table			

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



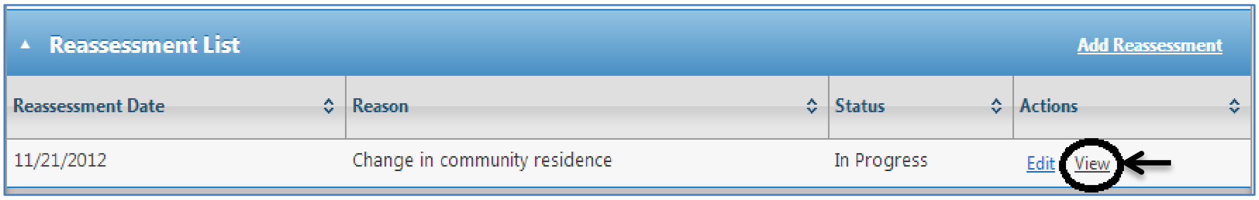
After clicking the Save button the user is taken to View-mode. Click the **Edit button** to make changes to the Peer Mentoring—Reassessment as seen below. After making changes click the Save button again and the user will return to View-mode.



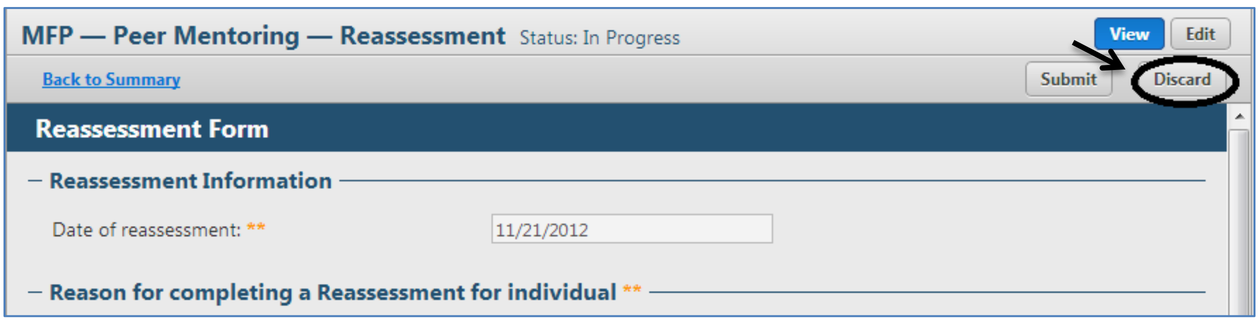
2.8.11 View, Discard and Submit Peer Mentoring Reassessment

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

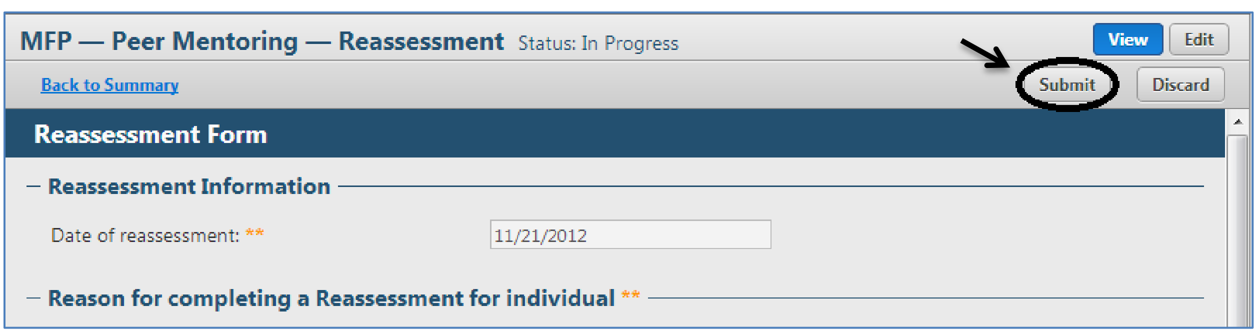
The user can also View the Peer Mentoring—Reassessment by clicking the ***View link*** on the Peer Mentoring—Referral Summary page as shown below.



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

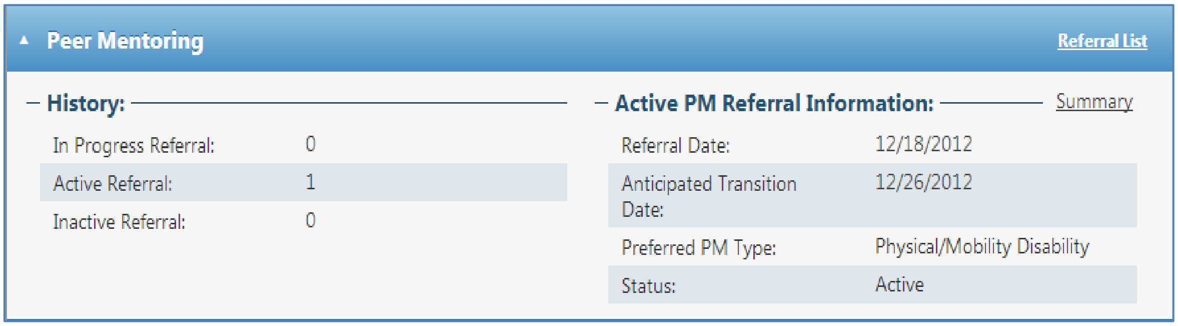


If the user does not wish to discard, click the ***Submit button*** to **Submit the Peer Mentoring—Reassessment** as seen in the figure below. Once submitted the Peer Mentoring-- Reassessment can no longer be edited. However, the user can add multiple Peer Mentoring—Reassessments for a given referral.



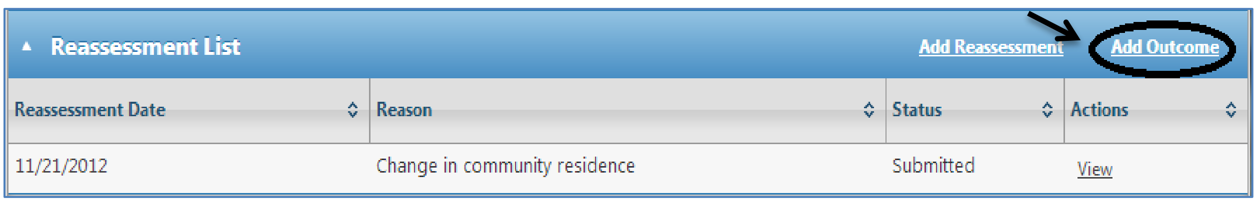
2.8.12 Peer Mentoring Status Change to Active

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

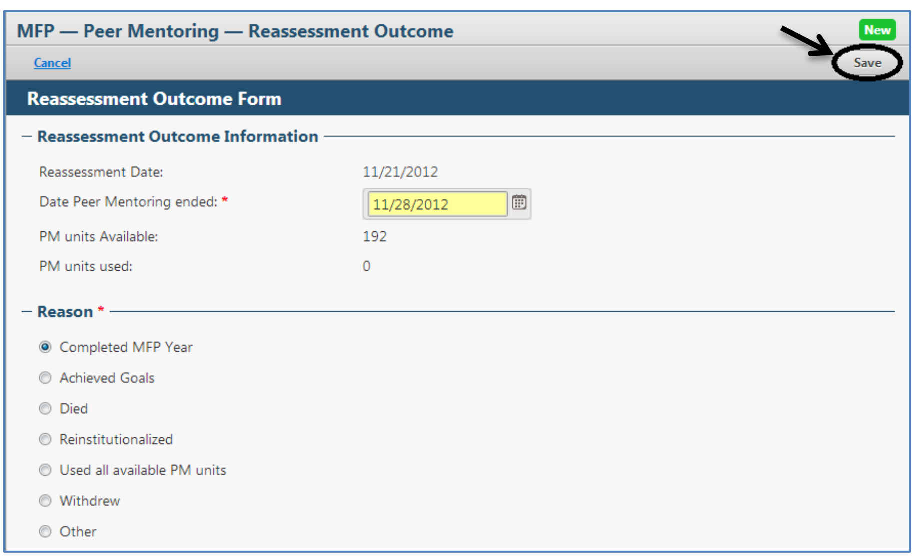


2.8.13 Add, Save and Edit Peer Mentoring Reassessment Outcome

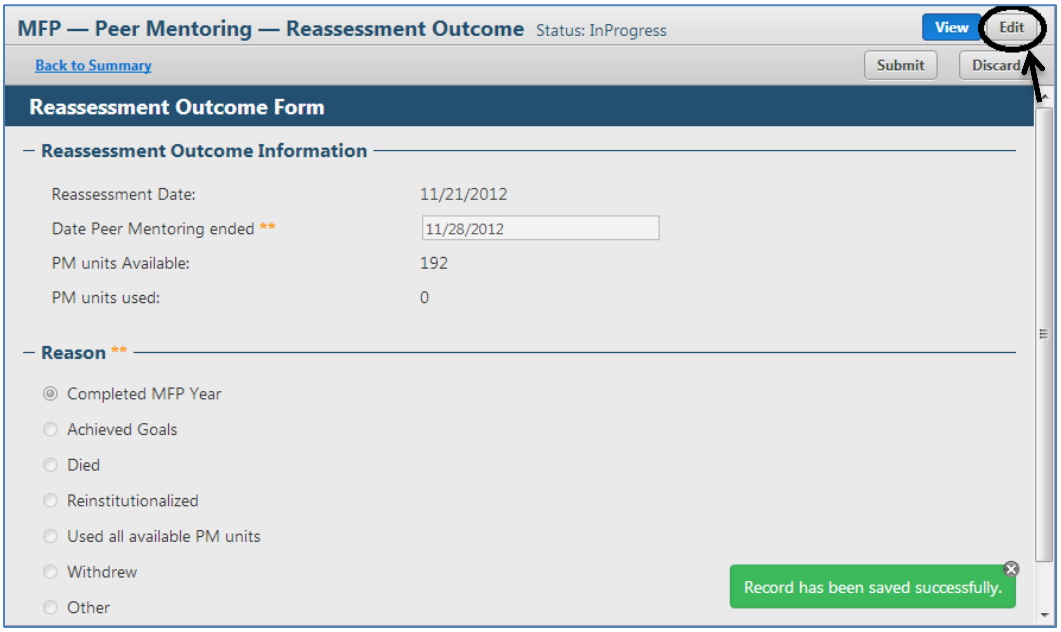
From the Peer Mentoring—Referral Summary page click the **Add Outcome link** under the Reassessment List section as seen in the figure below.



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

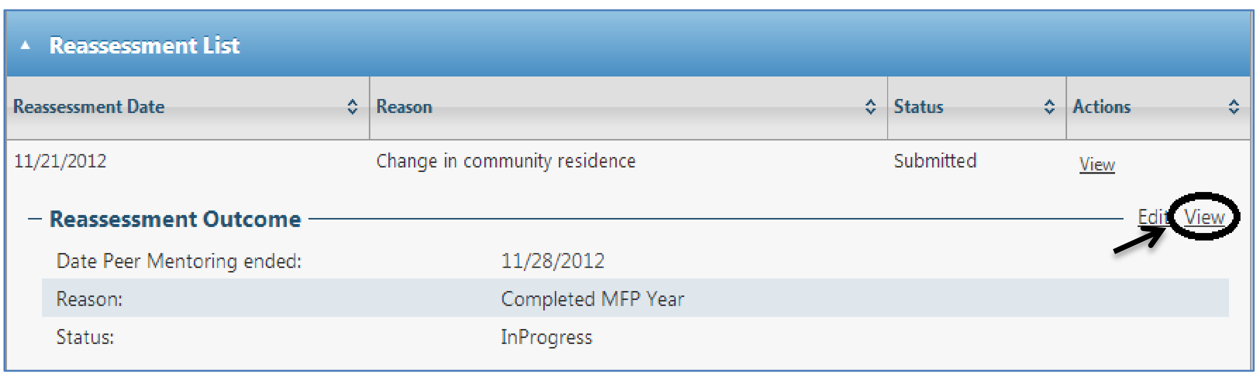


After clicking the Save button the user is taken to View-mode. Click the **Edit button** to make changes to the Peer Mentoring—Reassessment Outcome as seen below. After making changes click the Save button again and the user will return to View-mode.

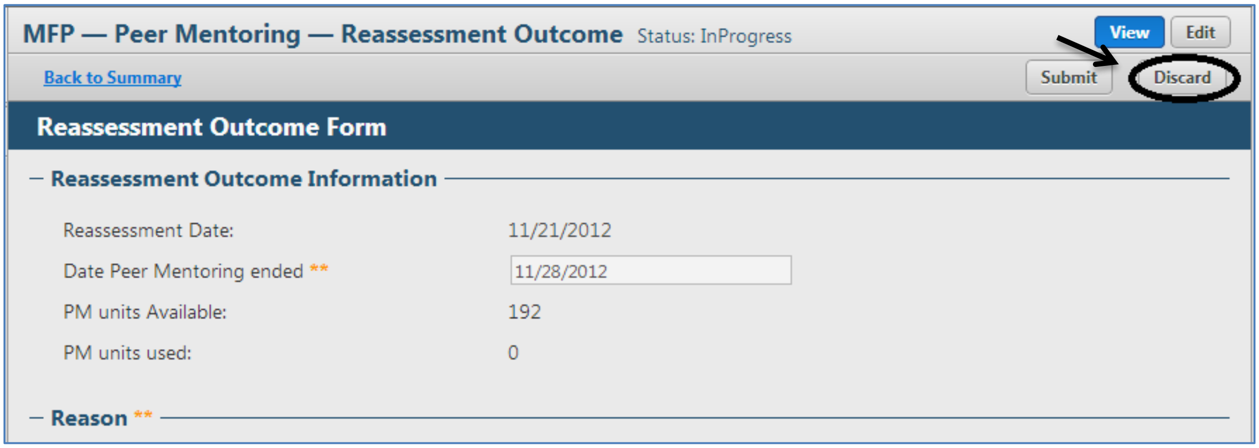


2.8.14 View, Discard and Submit Peer Mentoring Reassessment Outcome

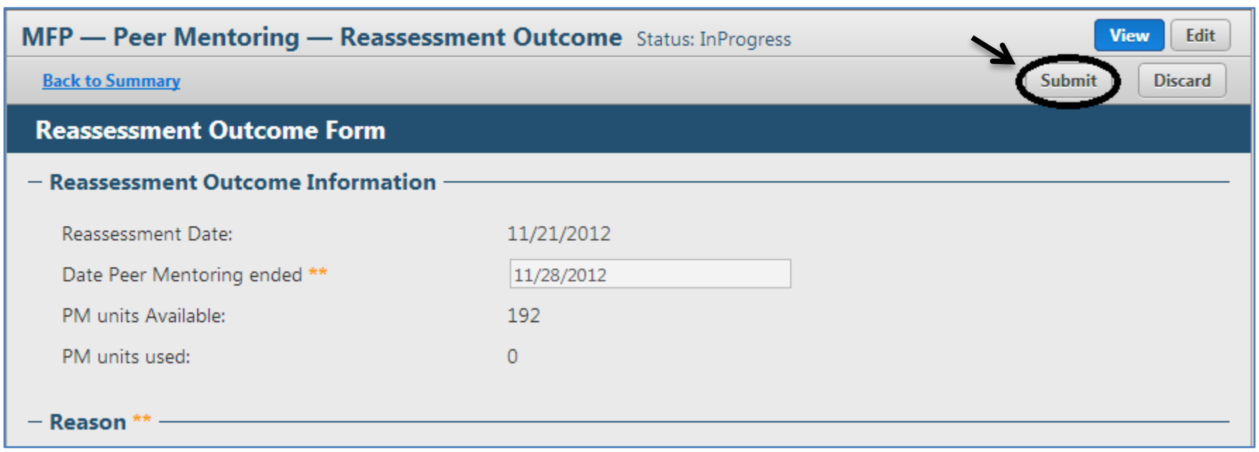
The user can **View the Peer Mentoring—Reassessment Outcome** in two ways. The first way was shown above where the user is taken to View-mode after saving the Peer Mentoring—Reassessment Outcome. The user can also View the Peer Mentoring—Reassessment Outcome by clicking the ***View link*** on the Peer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



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

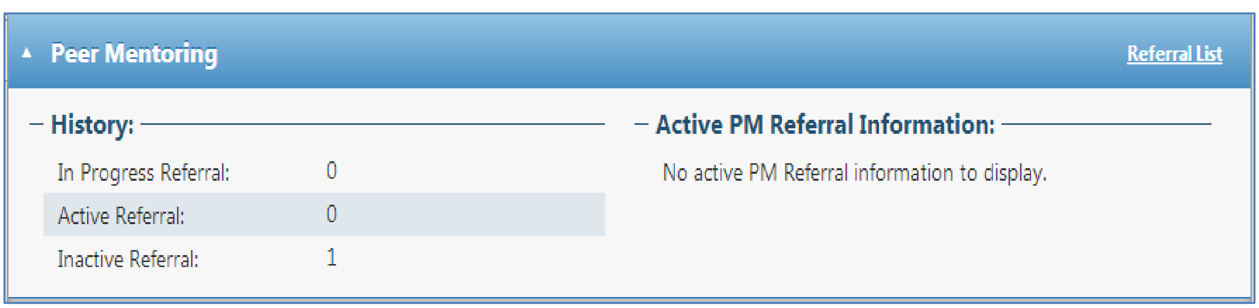


If the user does not wish to discard, click the ***Submit button*** to **Submit the Peer Mentoring—Reassessment Outcome** as seen in the figure below. Once submitted the Peer Mentoring—Reassessment Outcome can no longer be edited.



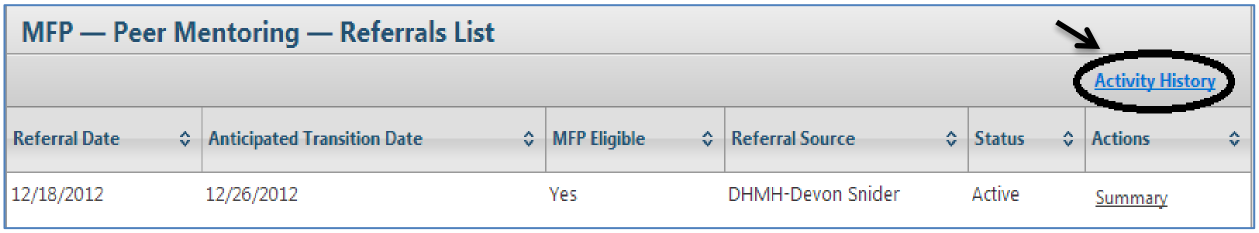
2.8.15 Peer Mentoring Status Change to Inactive

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



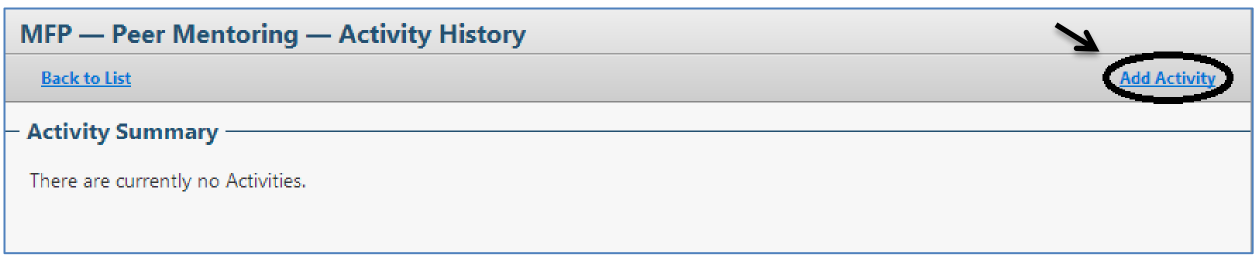
2.8.16 View Peer Mentoring Activity History

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

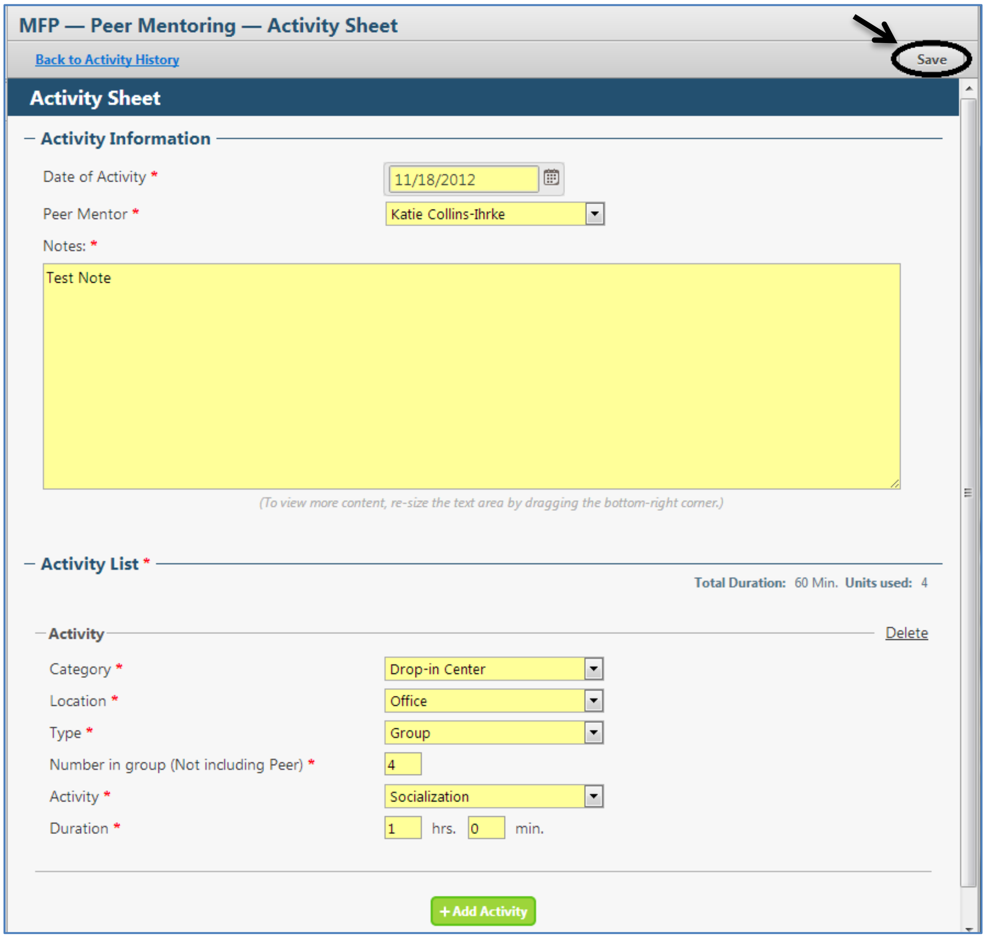


2.8.17 Create, Save, Edit and Delete Peer Mentoring Activity History

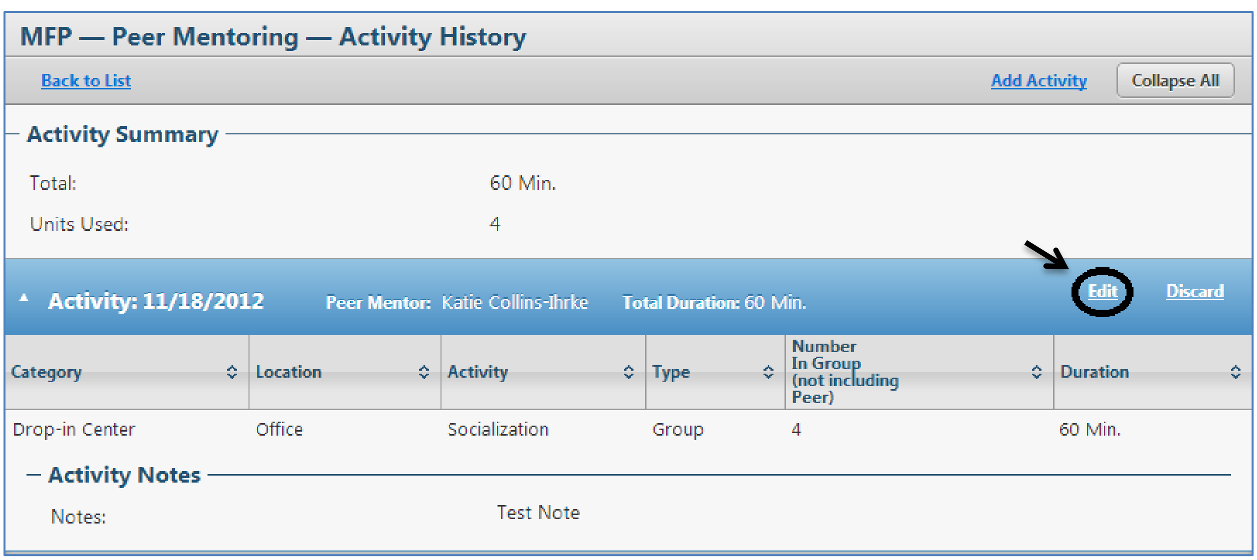
From the **Peer Mentoring—Activity Sheet History** the user can add new activities by clicking the ***Add Activity link*** as shown in the figure below.



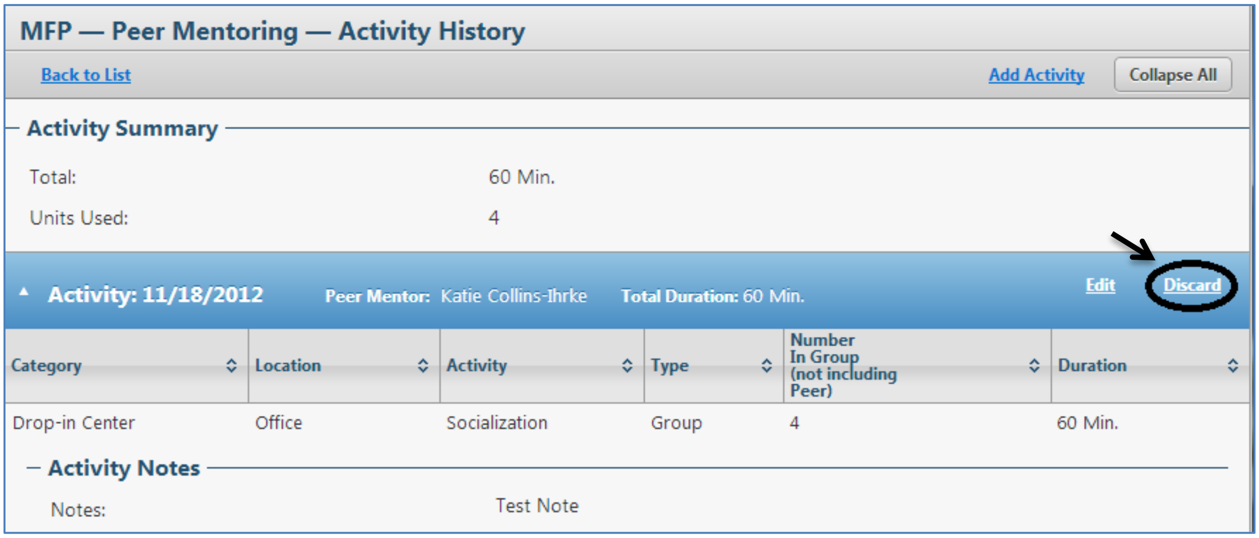
The **Peer Mentoring—Activity Sheet** will appear. Enter the **required information**, which will either be *highlighted yellow* or marked with an *asterisk*. After entering the required information the user can click the ***Add Activity button*** to add additional activities for that date or they can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



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

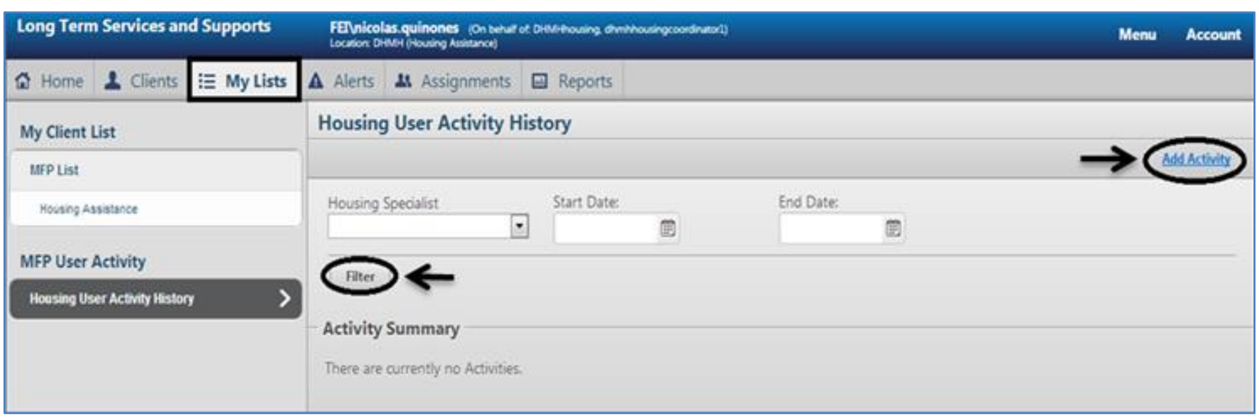


From the Peer Mentoring—Activity Sheet List the user can **Discard an Activity Sheet** by clicking the ***Discard link*** as seen in the figure below. The user can only Edit or Discard the Peer Mentoring—Activity Sheet while the referral is in an Active status.

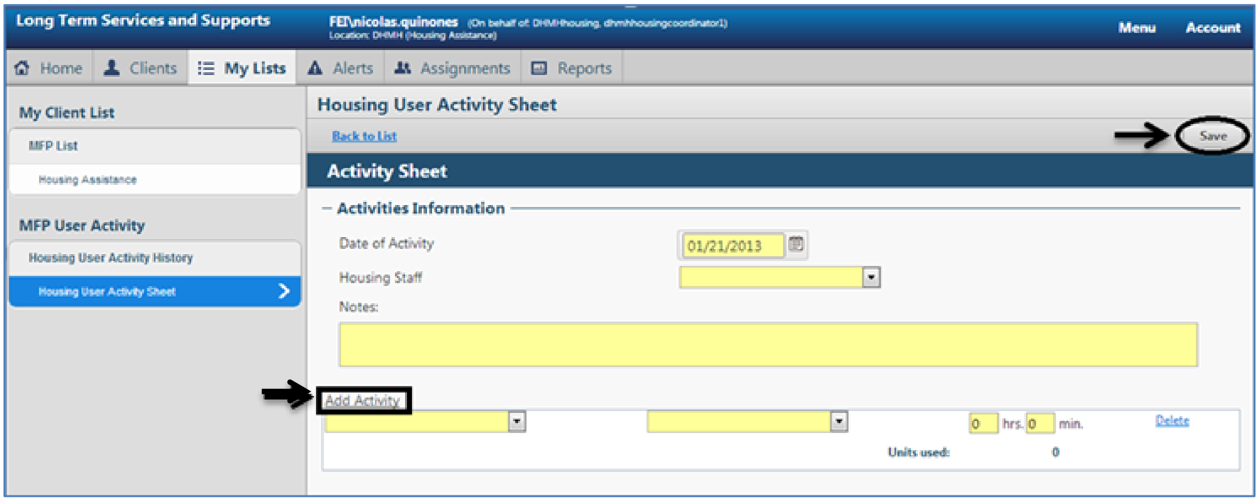


2.9 Housing User Activity History

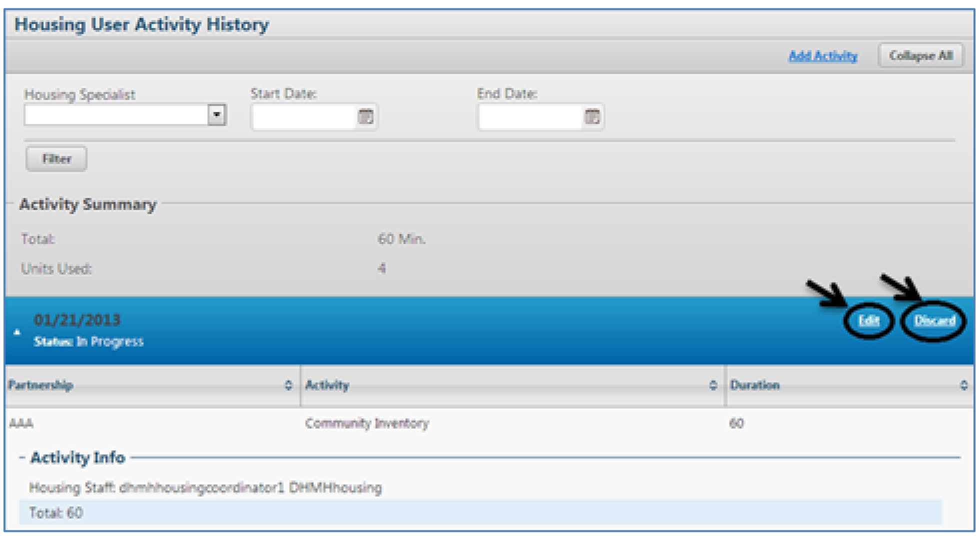
The Housing User Activity History page can be accessed through My List. Under the My List tab at the top of LTSS, authorized users will have access to the MFP User Activity section located in the left hand navigation. To access the Housing User Activity History page click on **Housing User Activity History**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



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

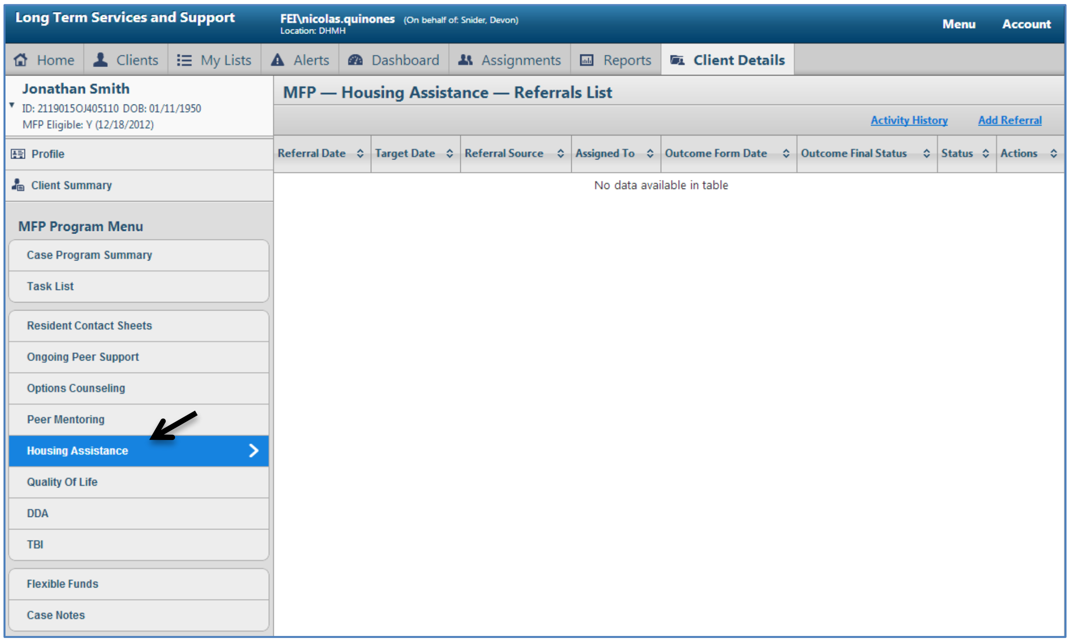


After adding an Activity Sheet to the Housing User Activity History page, authorized users will be able to view Activity Sheet information, edit Activity Sheet information by clicking the **Edit link** and discard Activity Sheet information by clicking the **Discard link** as seen in the figure below.



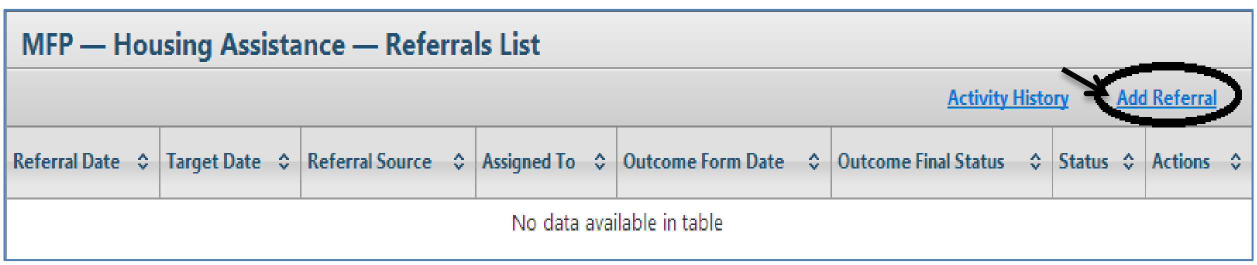
2.10 Housing Assistance

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

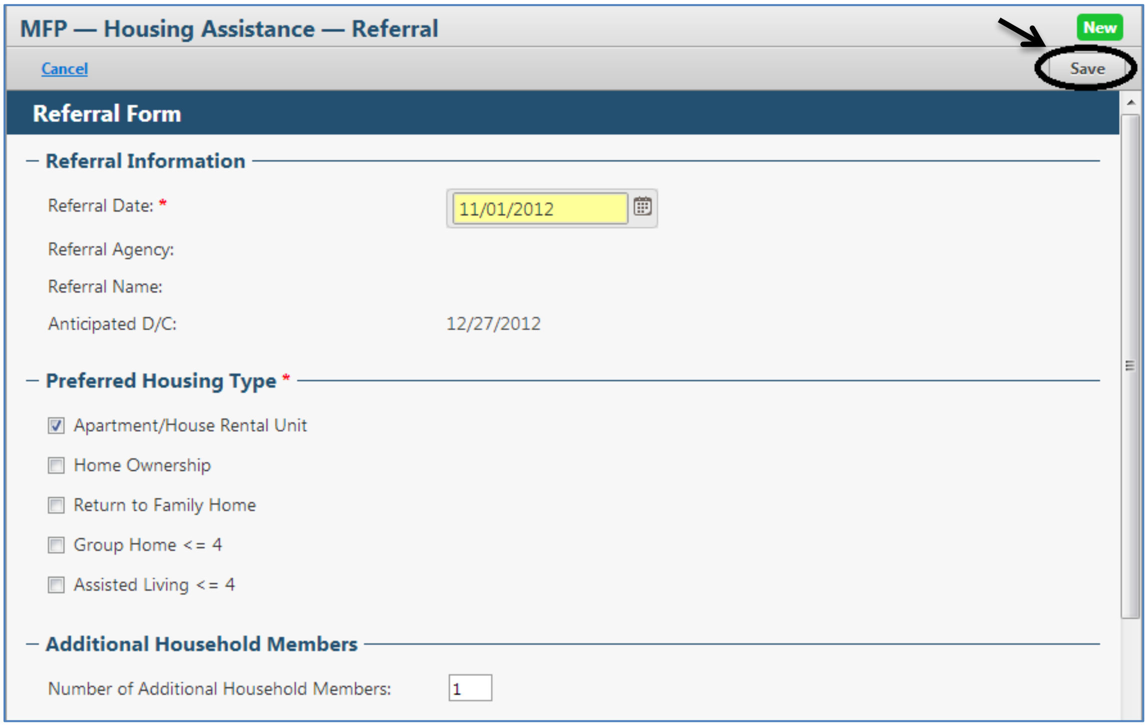


2.10.1 Add, Save and Edit Housing Assistance Referral

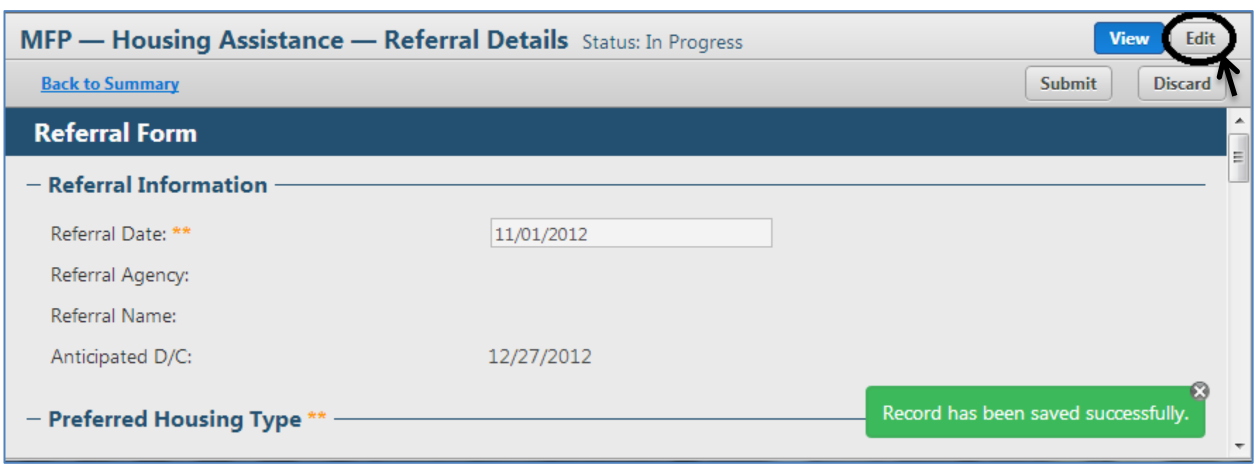
From the Housing Assistance—Referral List click the ***Add Referral link*** to **Add Housing Assistance—Referral** for the client as seen in the figure below.



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



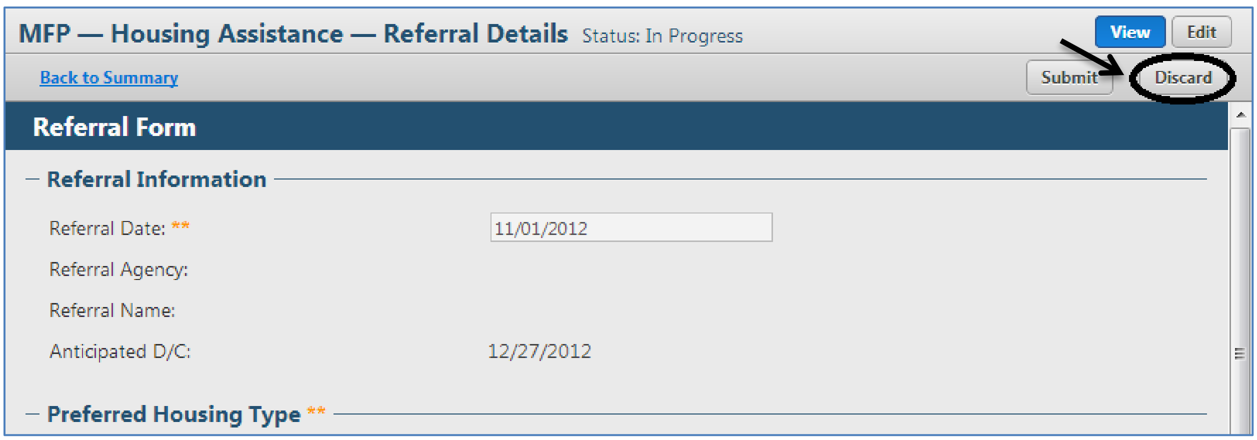
After clicking the Save button the user is taken to View-mode. Click the **Edit button** to make changes to the Housing Assistance—Referral as seen below. After making changes click the Save button again and the user will return to View-mode.



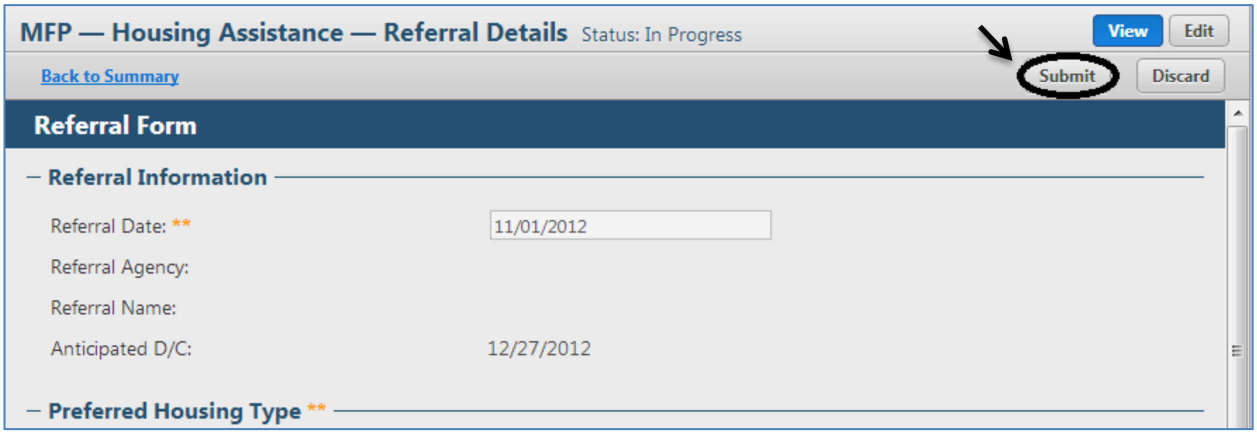
2.10.2 View, Discard and Submit Housing Assistance Referral

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

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

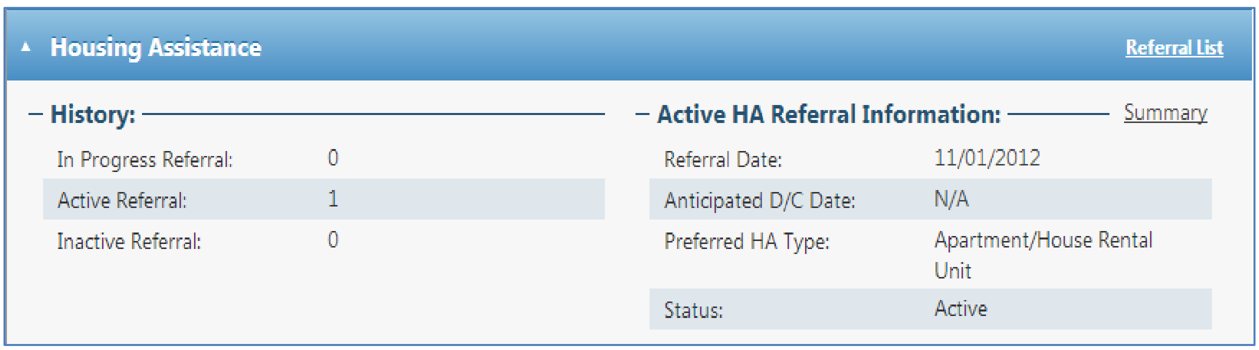


If the user does not wish to discard, click the ***Submit button*** to **Submit the Housing Assistance—Referral** as seen in the figure below. Once submitted the Housing Assistance—Referral can no longer be edited.



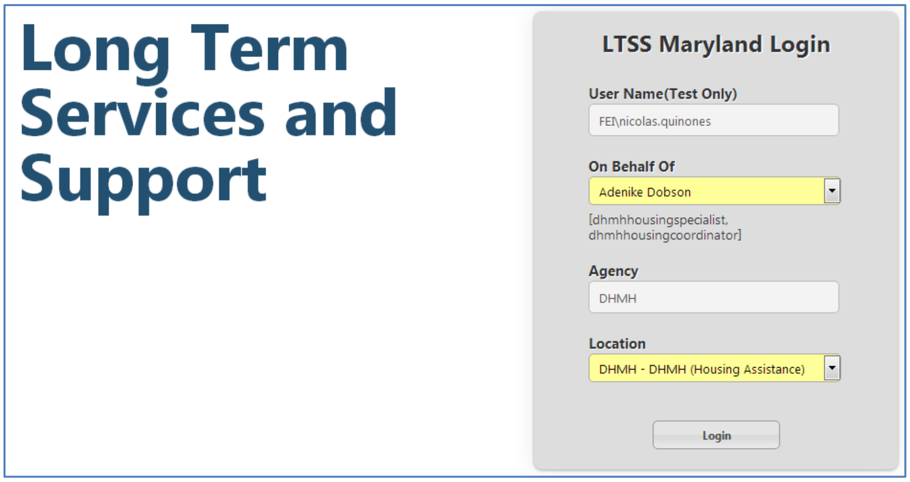
2.10.3 Housing Assistance Status Change to Active

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

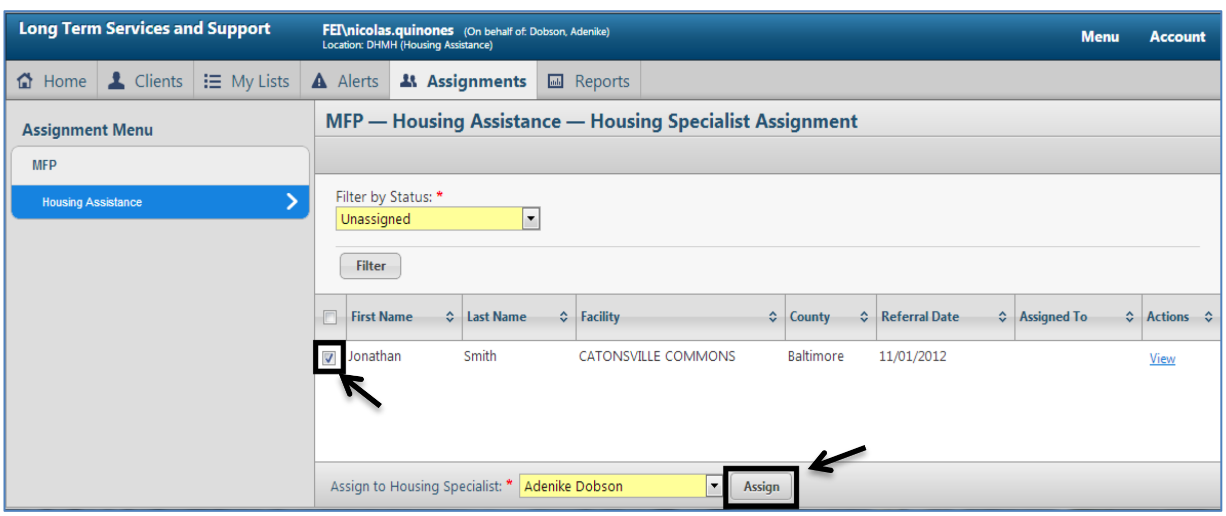


2.10.4 Assign DHMH Housing Specialist to Client

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

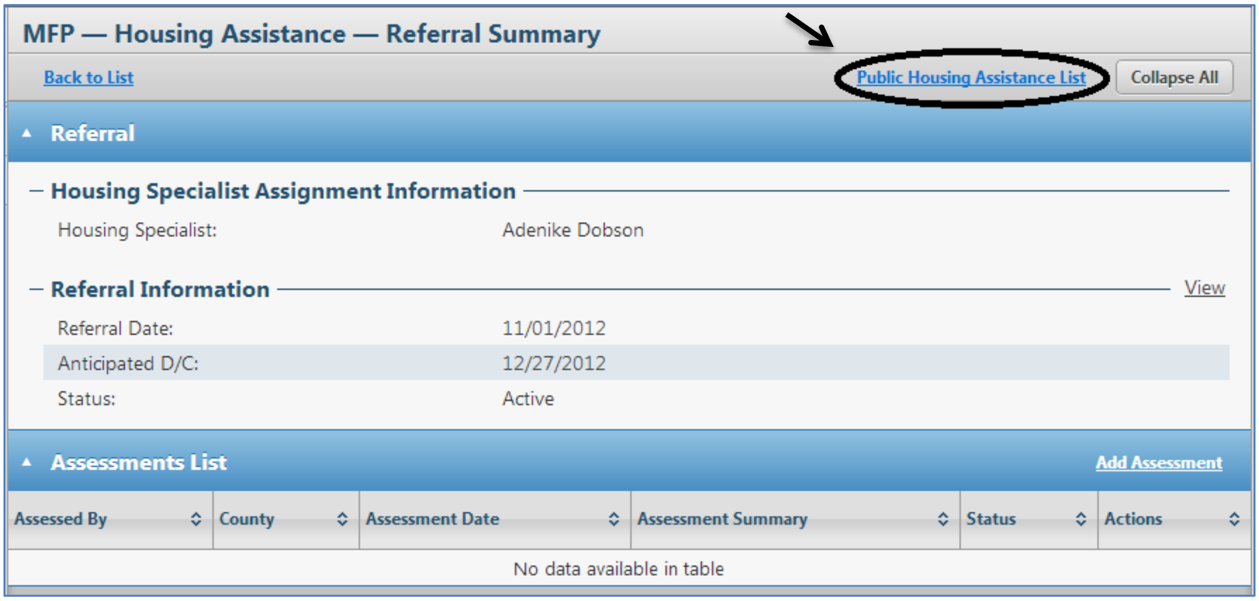


Click the *Assignments* tab at the top of the page and navigate to *Housing Assistance* under the Assignment Menu section in the left hand navigation to perform **Batch Assignment**. Choose **Unassigned** from the Status dropdown menu and click the ***Filter button***. Locate the client you wish to assign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



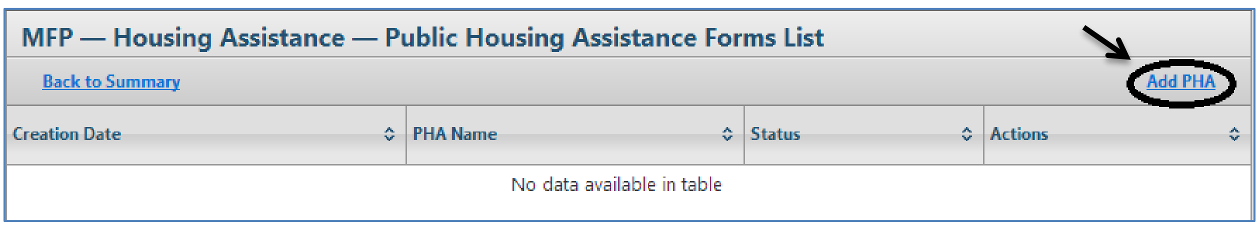
2.10.5 Public Housing Assistance Form List

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

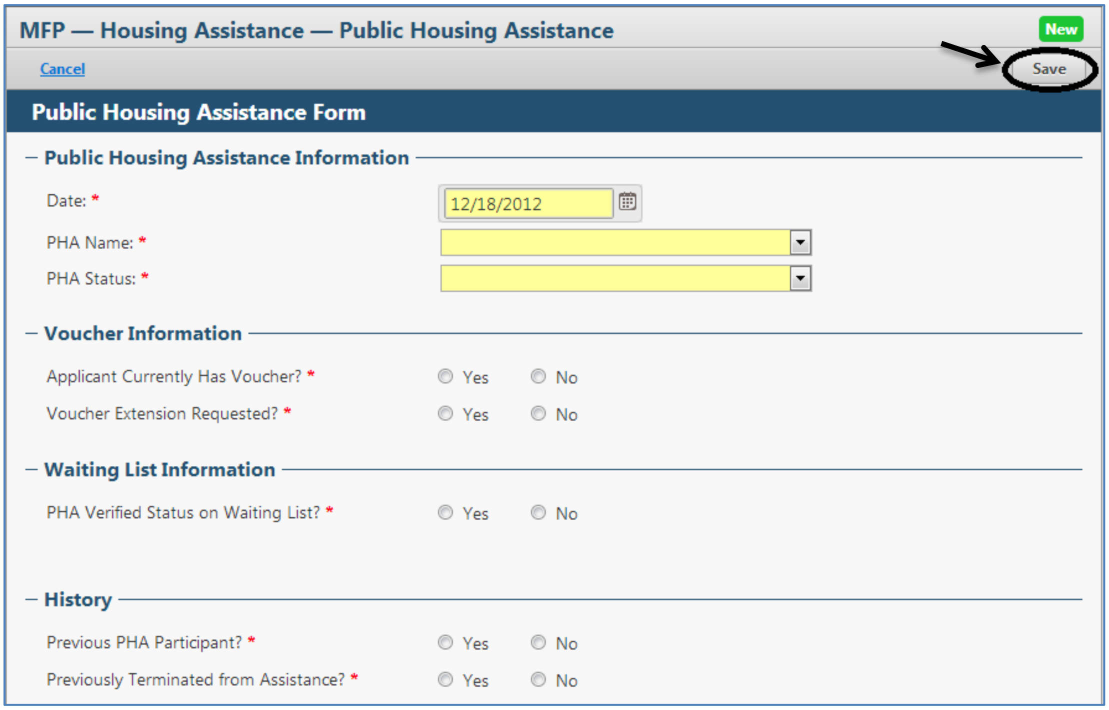


2.10.6 Add, Save and Edit Public Housing Assistance Form

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



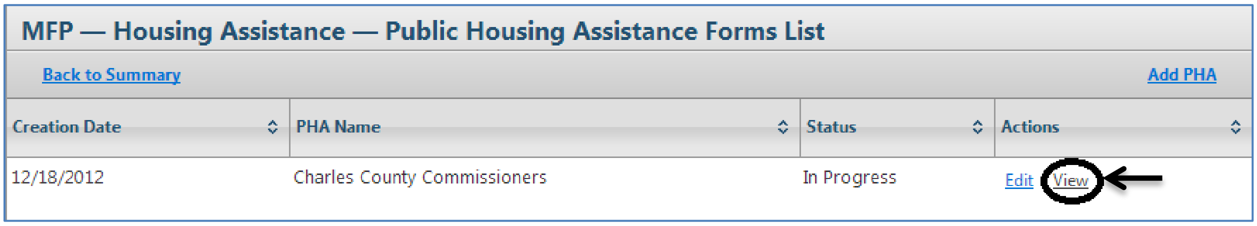
The **Housing Assistance—Public Housing Assistance Form** will appear. Enter the **required information**, which will either be *highlighted yellow* or marked with an *asterisk*. After completing, or while in progress, the user can click the ***Save button*** to **Save the Housing Assistance—Public Housing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



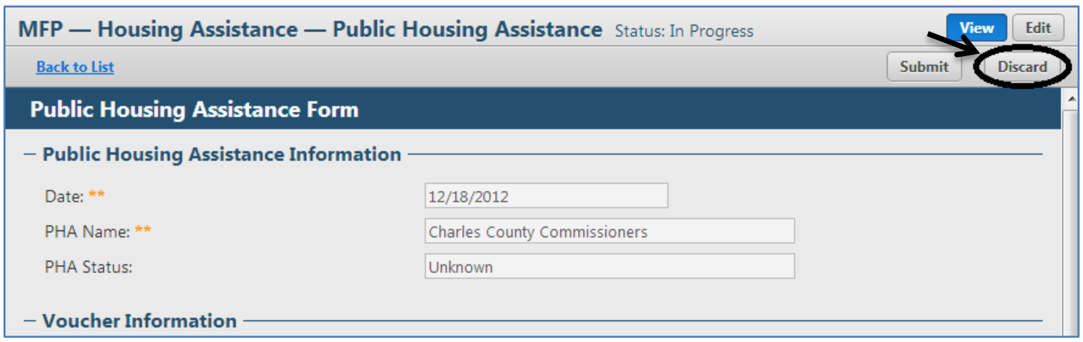
After clicking the Save button the user is taken to View-mode. Click the **Edit link** to make changes to the Housing Assistance—Public Housing Assistance Form as seen below. After making changes click the Save button again and the user will return to View-mode.

2.10.7 View, Discard and Submit Public Housing Assistance Form

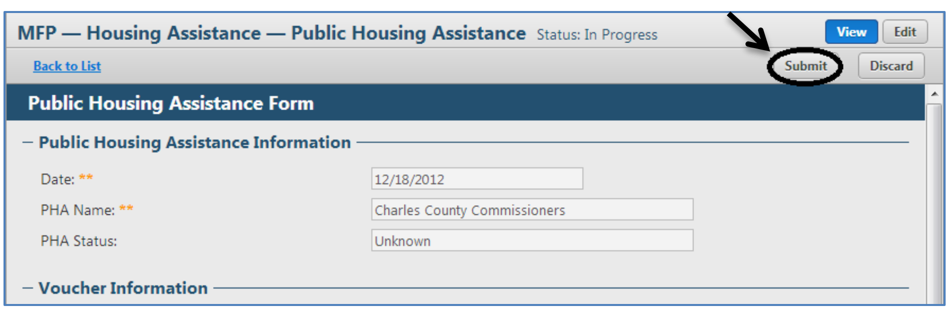
The user can **View the Housing Assistance—Public Housing Assistance Form** in two ways. The first way was shown above where the user is taken to View-mode after saving the Housing Assistance—Public Housing Assistance Form. The user can also View the Housing Assistance—Public Housing Assistance Form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



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

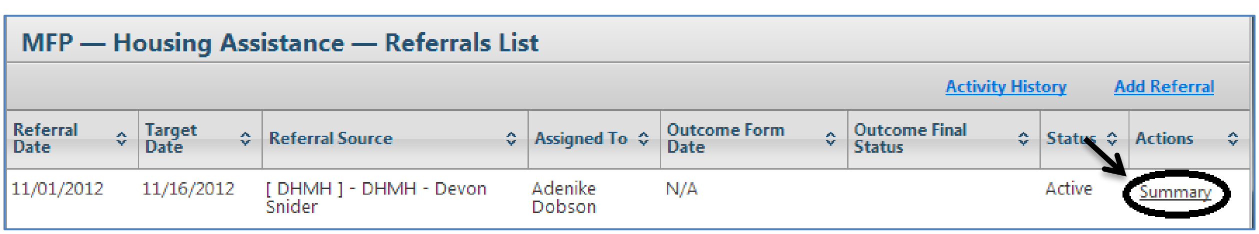


If the user does not wish to discard, click the ***Submit button*** to **Submit the Housing Assistance—Public Housing Assistance Form** as seen in the figure below. Once submitted the Housing Assistance—Public Housing Assistance Form can no longer be edited.



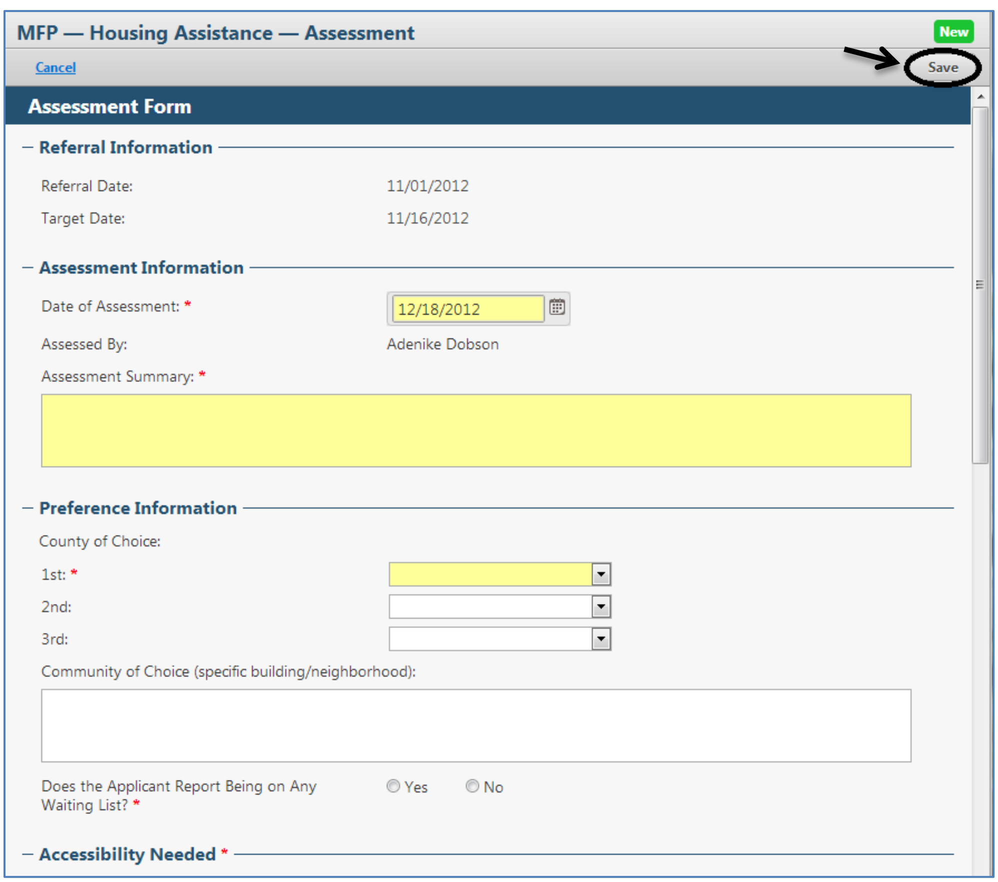
2.10.8 Add, Save and Edit Housing Assistance Assessment

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

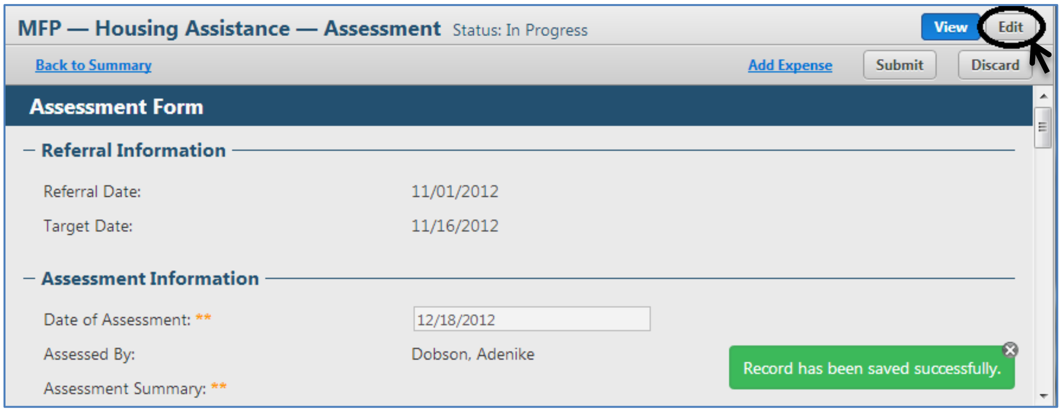


From the Housing Assistance—Referral Summary page click the **Add Assessment link** as seen in the figure below.

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

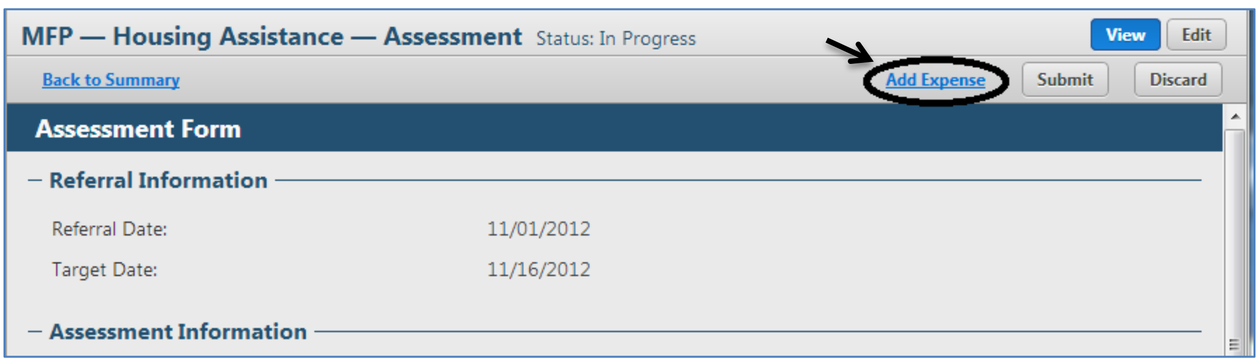


After clicking the Save button the user is taken to View-mode. Click the **Edit button** to make changes to the Housing Assistance—Assessment as seen below. After making changes click the Save button again and the user will return to View-mode.

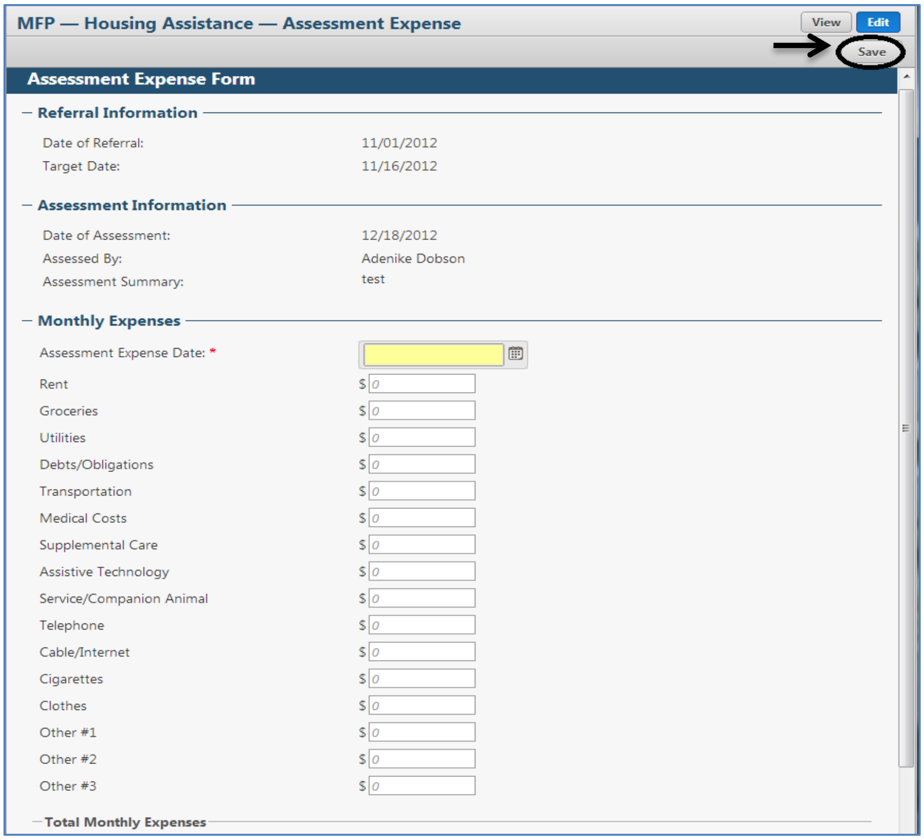


2.10.9 Add, Save, Edit and View Housing Assistance Assessment Expense

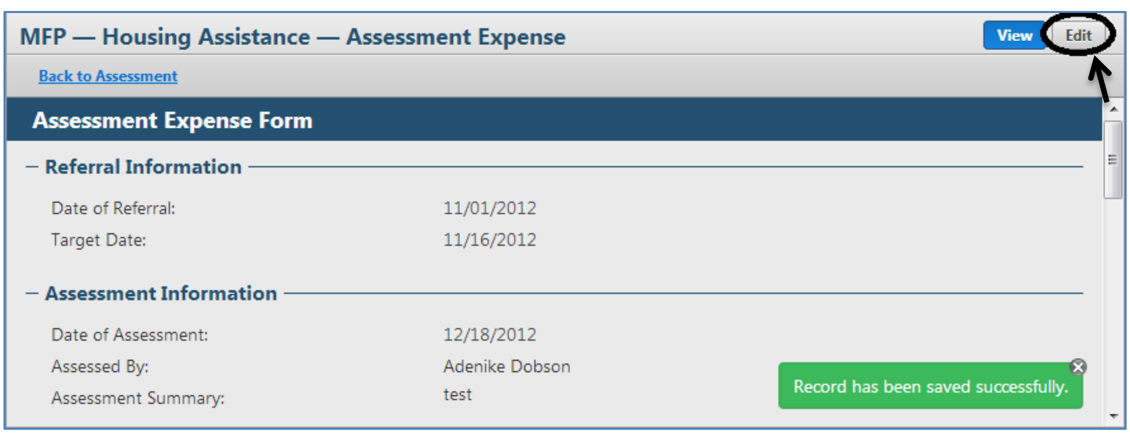
From the **Housing Assistance—Assessment View Page**, click the ***Add Expense link*** as shown in the figure below. An authorized actor will only be able to Add/Edit an Expense Form for a Housing Assistance Assessment if the Assessment is in a Status of "In Progress."



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

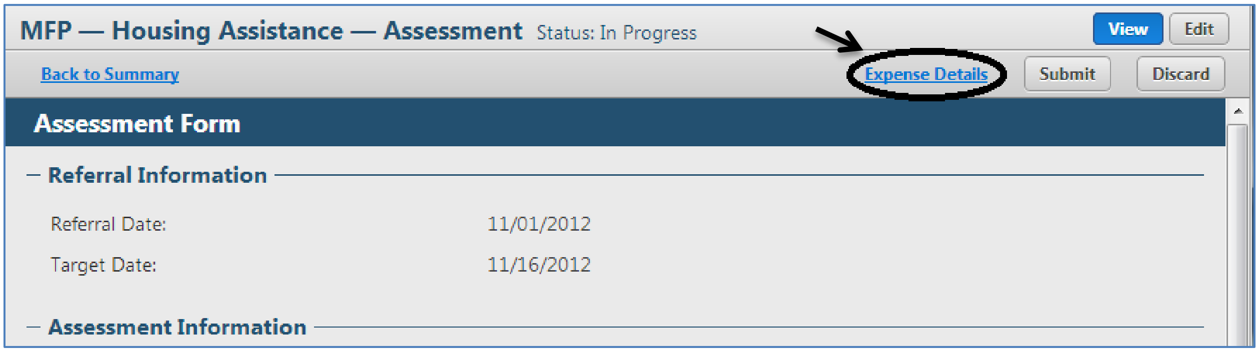


After clicking the Save button the user is taken to Housing Assistance—Assessment Expense View-mode. Click the **Edit button** to make changes to the Housing Assistance—Assessment Expense as seen below. After making changes click the Save button again and the user will return to View-mode.



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

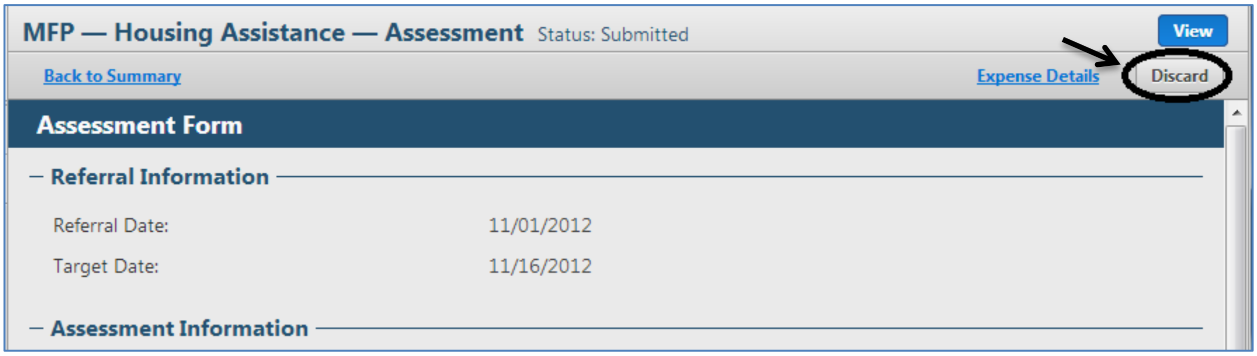
Assessment Expense. The user can also View the Housing Assistance—Assessment Expense by clicking the ***Expense Details link*** on the Housing Assistance—Assessment page as shown below. After an Expense Form is Saved for a HA Assessment the Expense Details link will remain available after the HA Assessment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



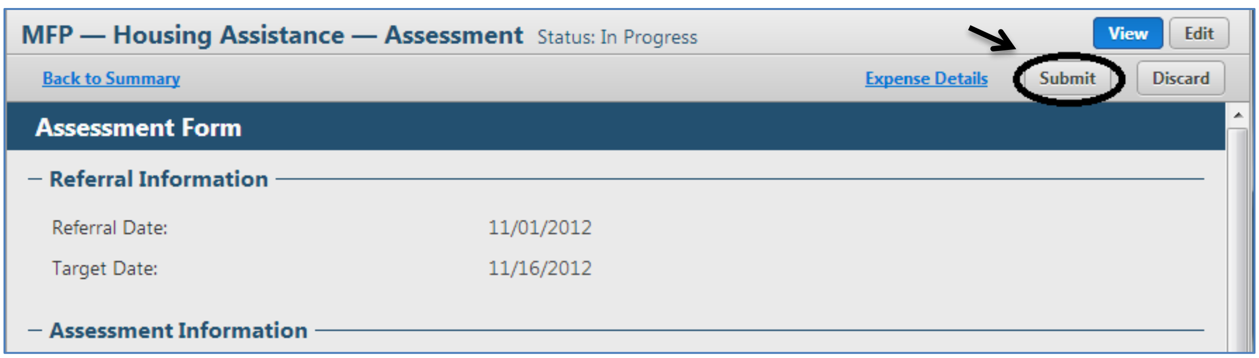
2.10.10 View, Discard and Submit Housing Assistance Assessment

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

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

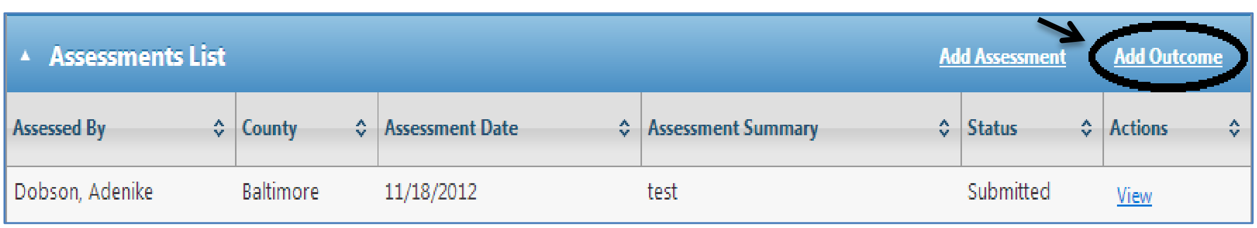


If the user does not wish to discard, click the ***Submit button*** to **Submit the Housing Assistance—Assessment** as seen in the figure below. Once submitted the Housing Assistance—Assessment can no longer be edited. However, the user can add multiple Housing Assistance—Assessments for a given referral.

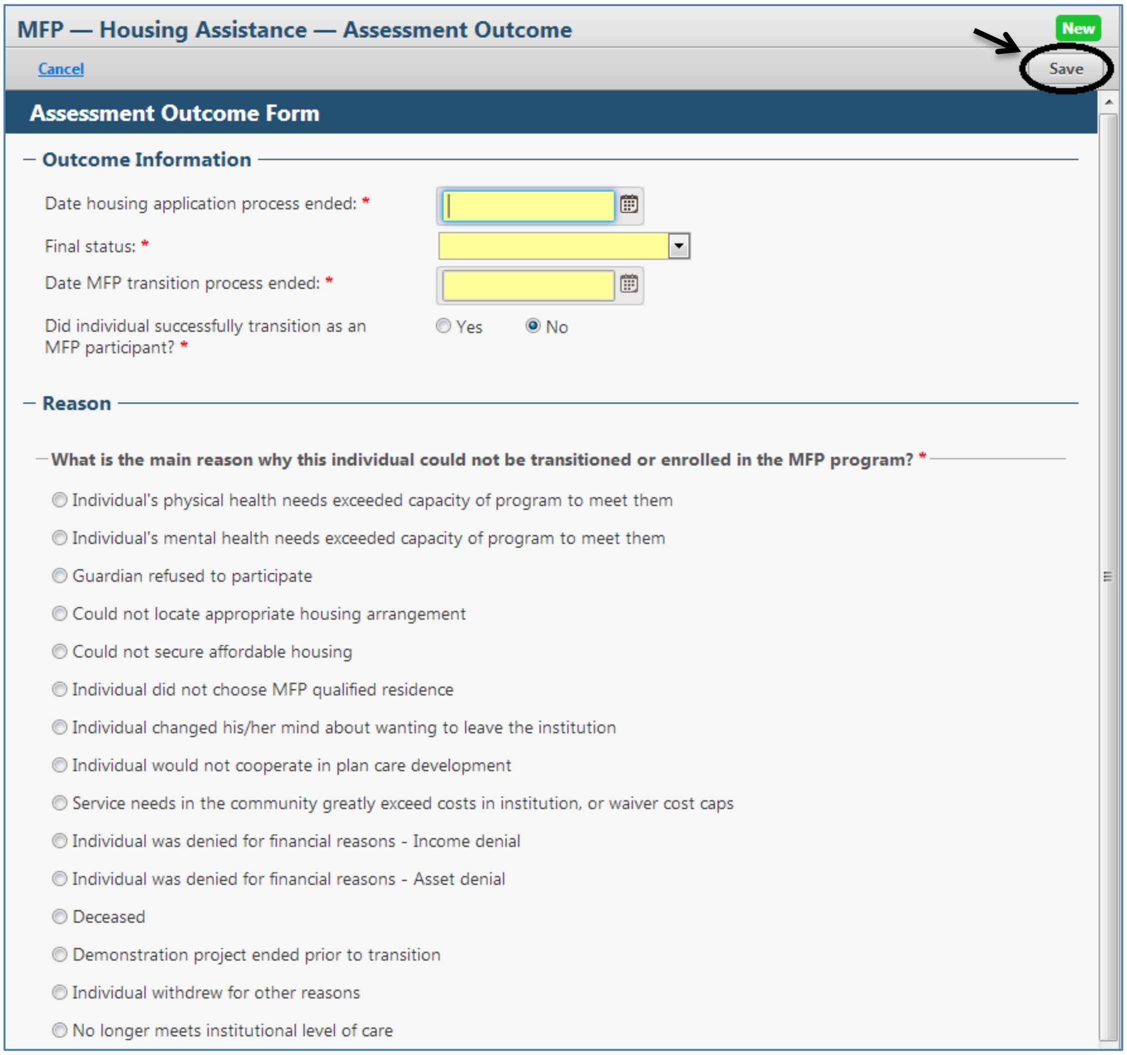


2.10.11 Add, Save and Edit Housing Assistance Assessment Outcome

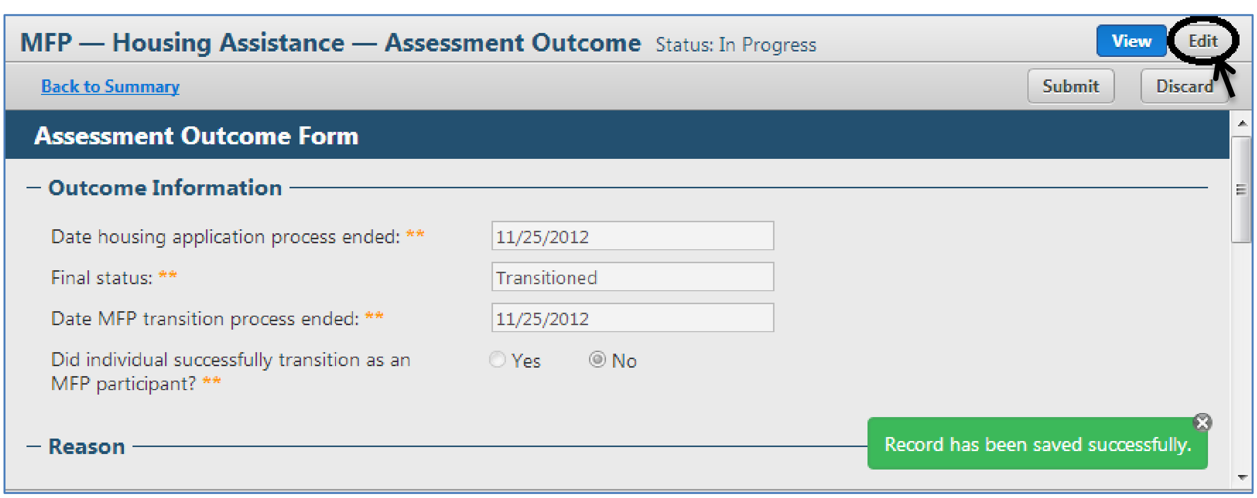
From the Housing Assistance—Referral Summary page click the **Add Outcome link** as seen in the figure below.



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

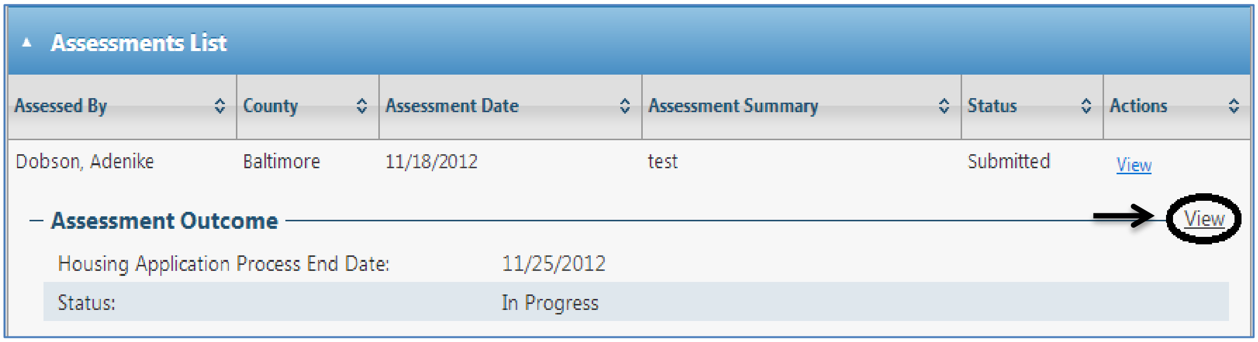


After clicking the Save button the user is taken to View-mode. Click the **Edit button** to make changes to the Housing Assistance—Assessment Outcome as seen below. After making changes click the Save button again and the user will return to View-mode.

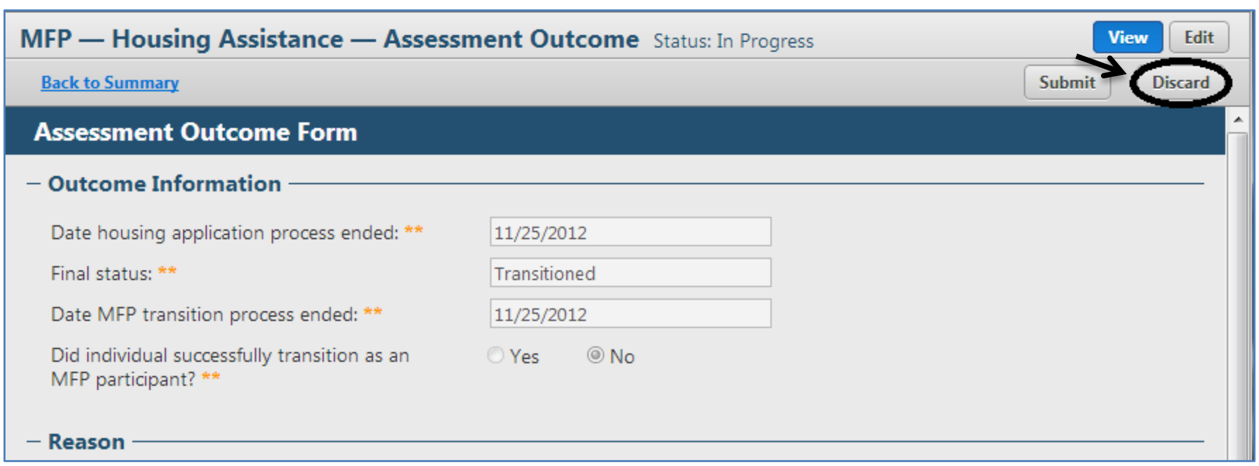


2.10.12 View, Discard and Submit Housing Assistance Assessment Outcome

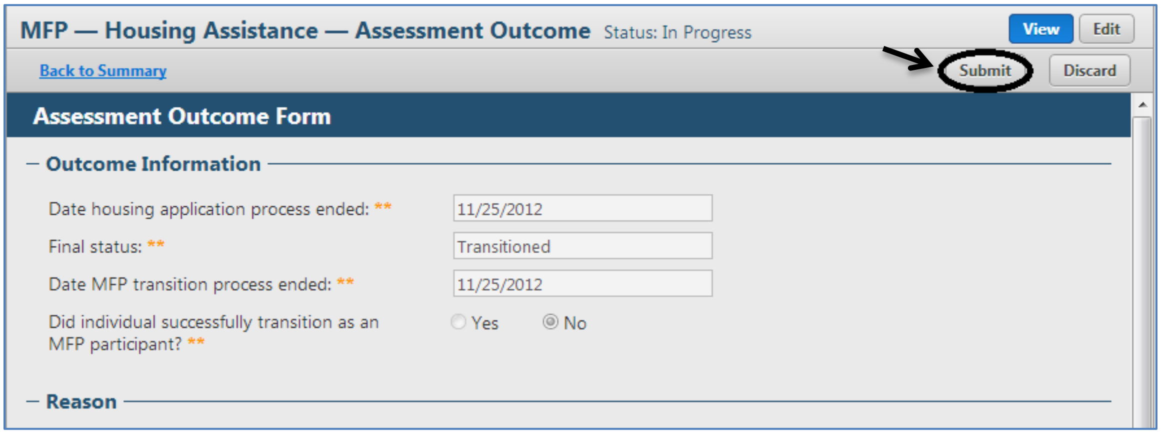
The user can **View the Housing Assistance—Assessment Outcome** in two ways. The first way was shown above where the user is taken to View-mode after saving the Housing Assistance—Assessment Outcome. The user can also View the Housing Assistance—Assessment Outcome by clicking the ***View link*** on the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



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

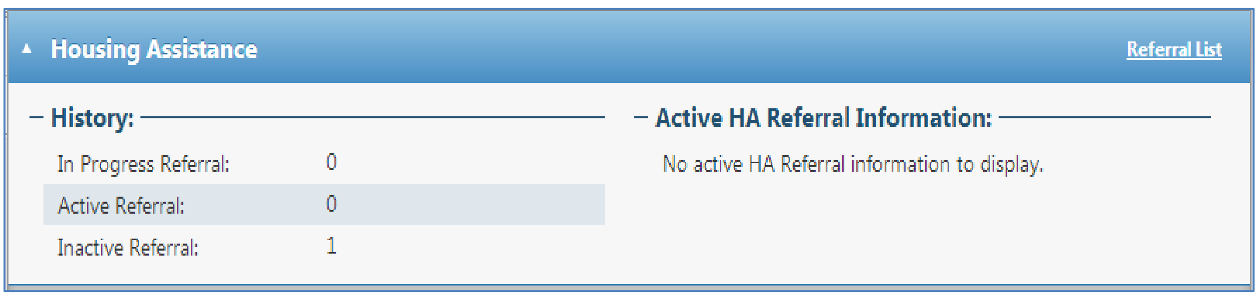


If the user does not wish to discard, click the ***Submit button*** to **Submit the Housing Assistance—Assessment Outcome** as seen in the figure below. Once submitted the Housing Assistance—Assessment Outcome can no longer be edited.



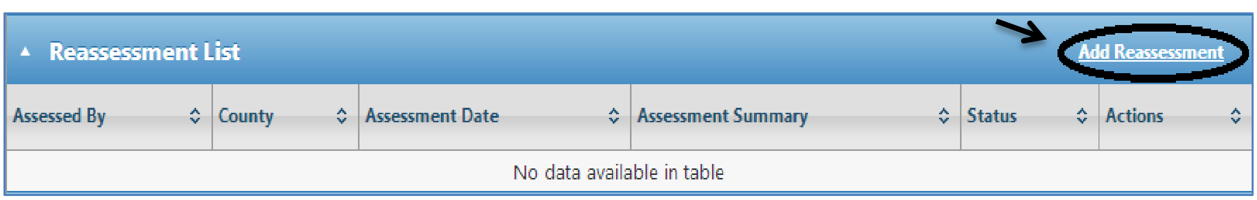
2.10.13 Housing Assistance Status Change to Inactive

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

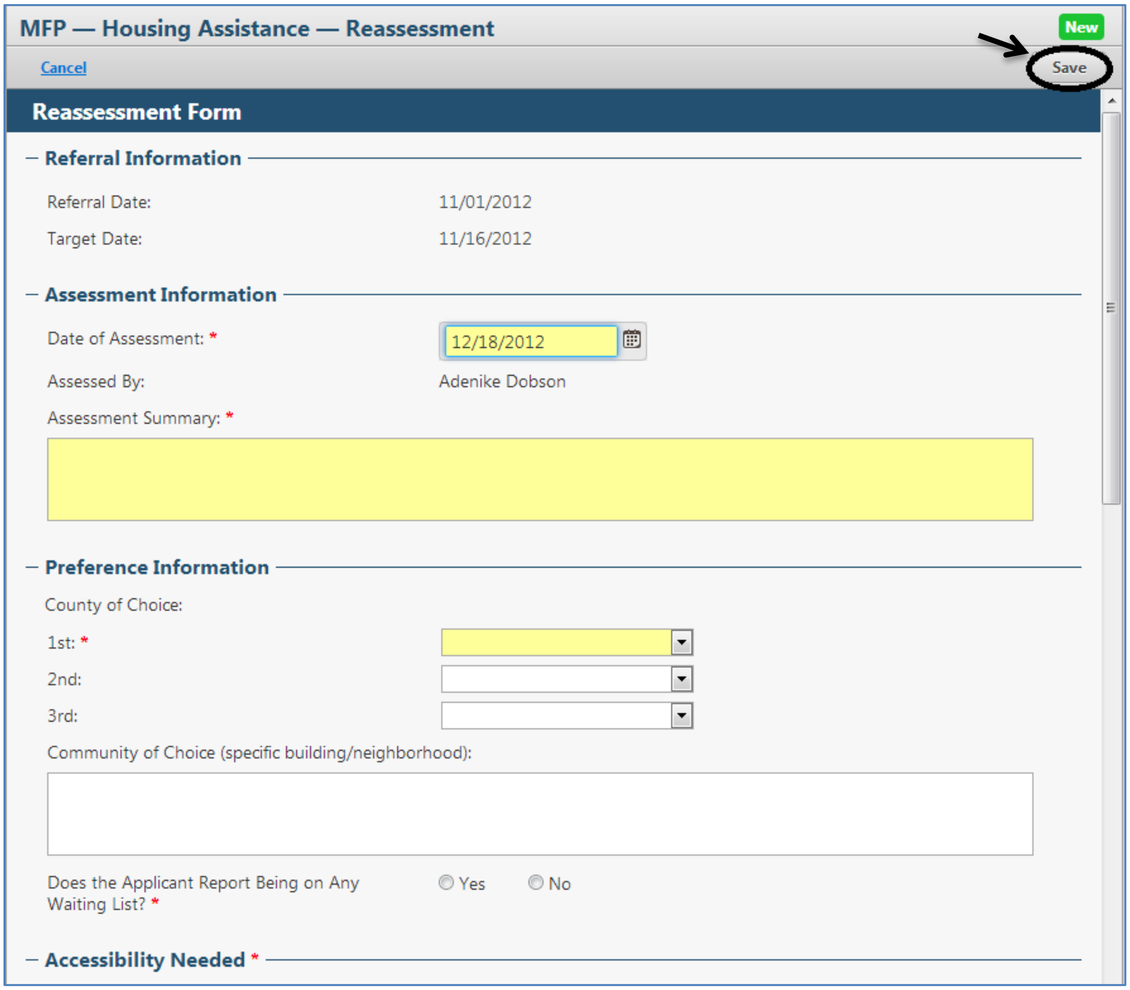


2.10.14 Add, Save and Edit Housing Assistance Reassessment

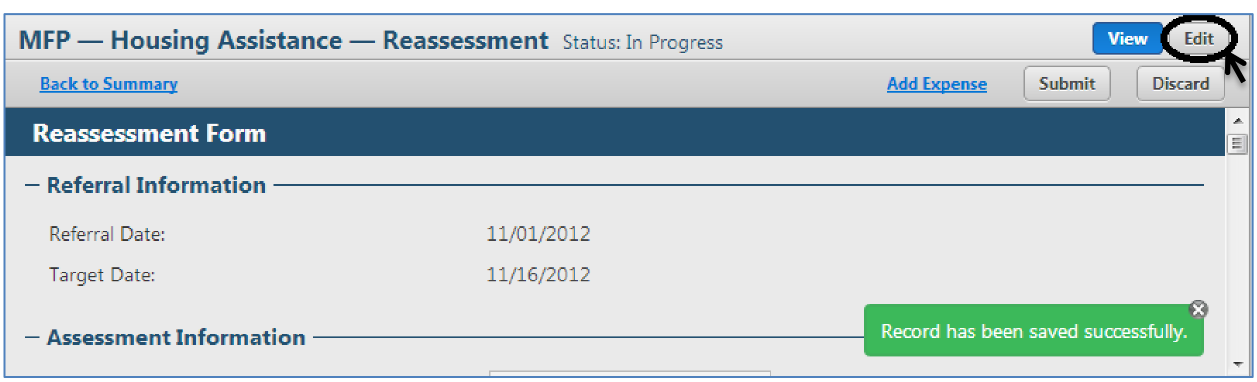
From the Housing Assistance—Referral Summary page click the **Add Reassessment link** as seen in the figure below.



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

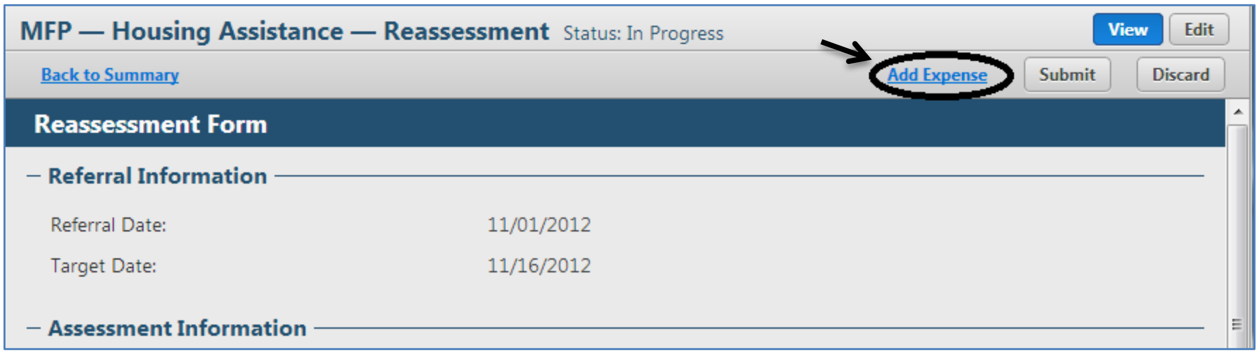


After clicking the Save button the user is taken to View-mode. Click the **Edit button** to make changes to the Housing Assistance—Reassessment as seen below. After making changes click the Save button again and the user will return to View-mode.

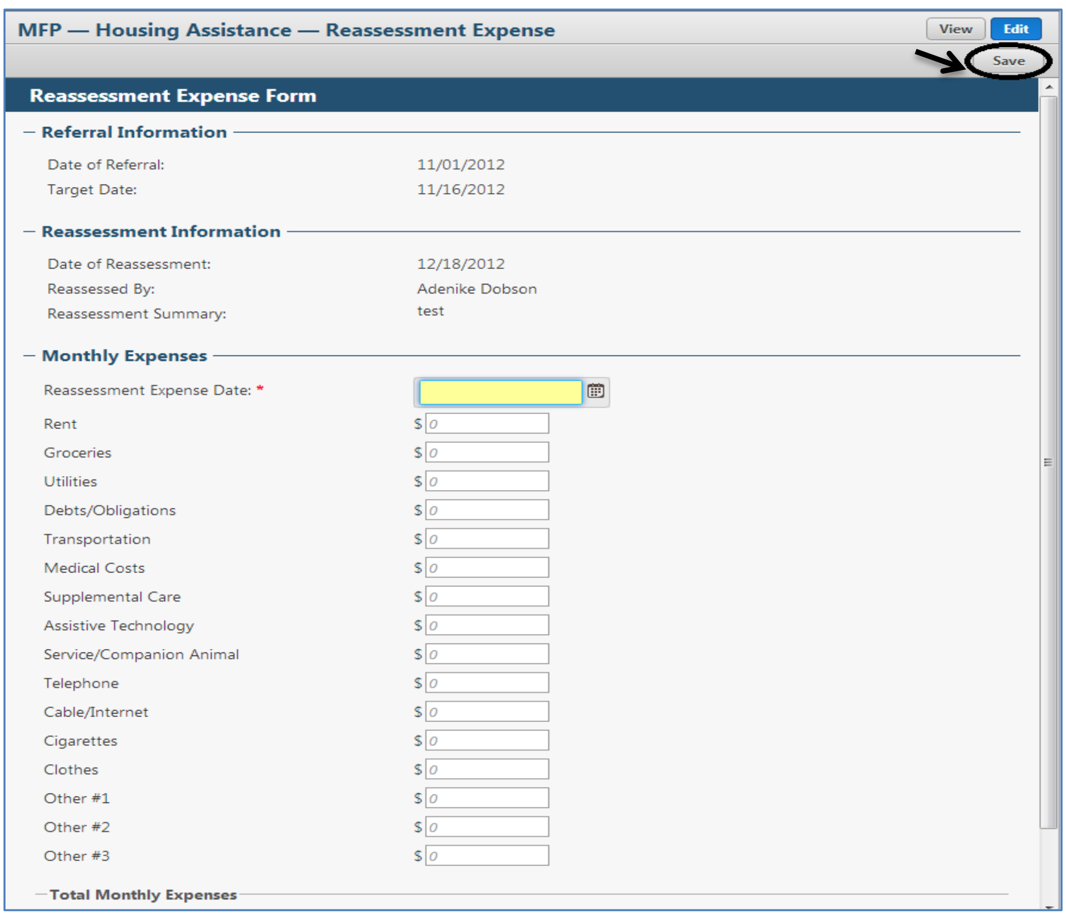


2.10.15 Add, Save, Edit and View Housing Assistance Reassessment Expense

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

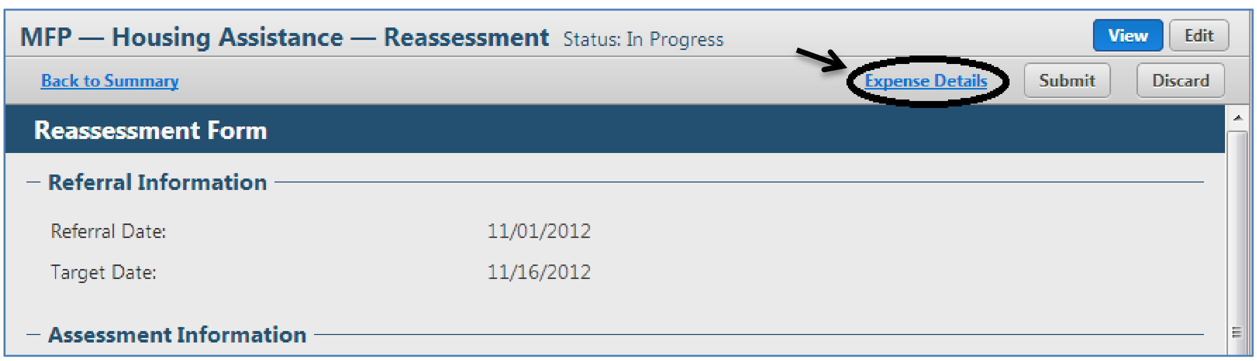


The **Housing Assistance—Reassessment Expense Form** will appear. Enter the **required information**, which will either be *highlighted yellow* or marked with an *asterisk*. After completing, or while in progress, the user can click the ***Save button*** to **Save the Housing Assistance—Reassessment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



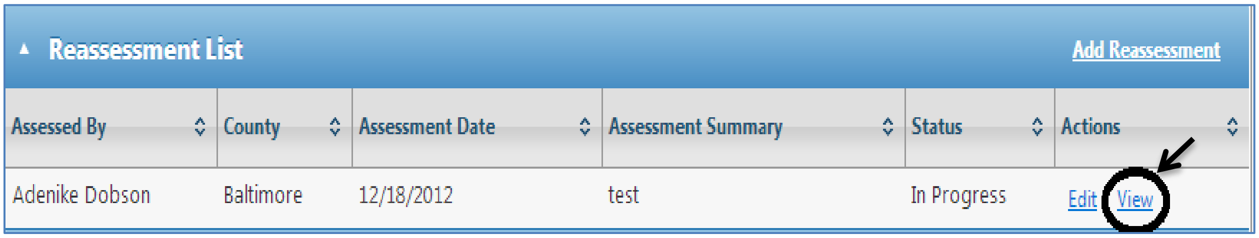
After clicking the Save button the user is taken to Housing Assistance—Reassessment Expense View-mode. Click the **Edit button** to make changes to the Housing Assistance—Reassessment Expense as seen below. After making changes click the Save button again and the user will return to View-mode.

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

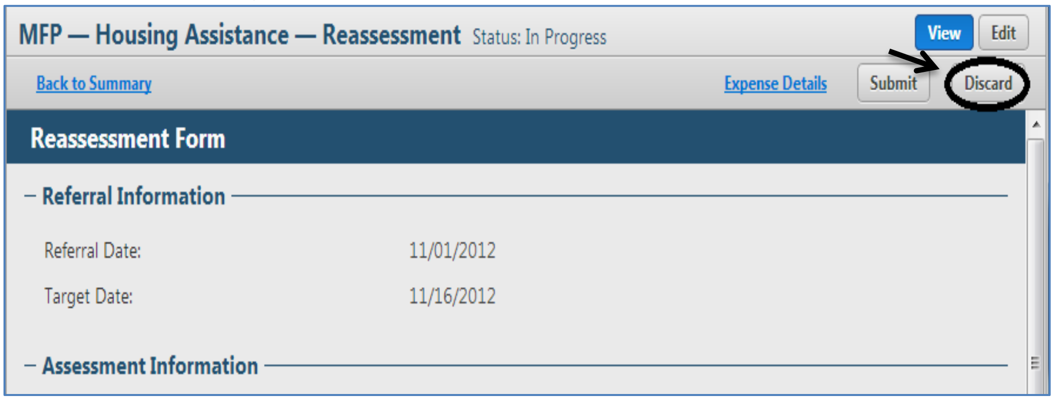


2.10.16 View, Discard and Submit Housing Assistance Reassessment

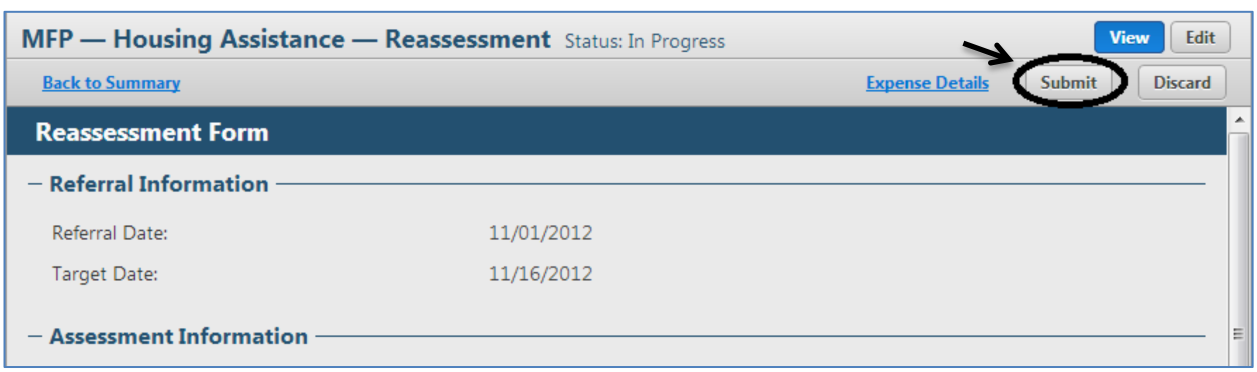
The user can **View the Housing Assistance—Reassessment** in two ways. The first way was shown above where the user is taken to View-mode after saving the Housing Assistance—Reassessment. The user can also View the Housing Assistance—Reassessment by clicking the ***View link*** on the Housing Assistance—Referral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



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

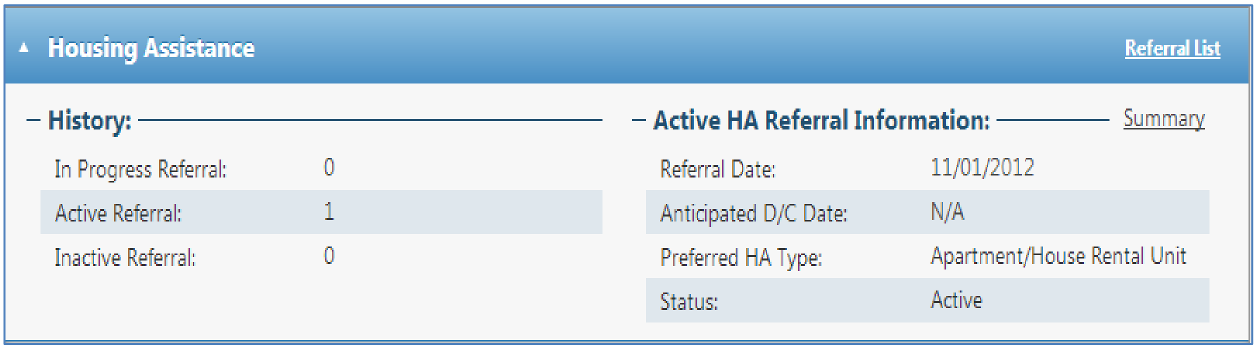


If the user does not wish to discard, click the ***Submit button*** to **Submit the Housing Assistance—Reassessment** as seen in the figure below. Once submitted the Housing Assistance—Reassessment can no longer be edited. However, a user can add multiple Housing Assistance—Reassessments for a given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



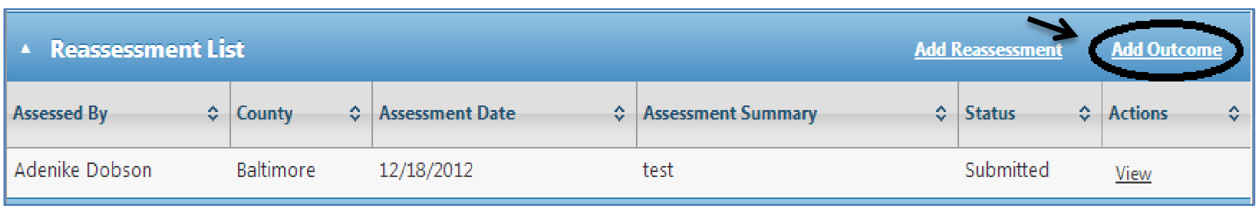
2.10.17 Housing Assistance Status Change to Active

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

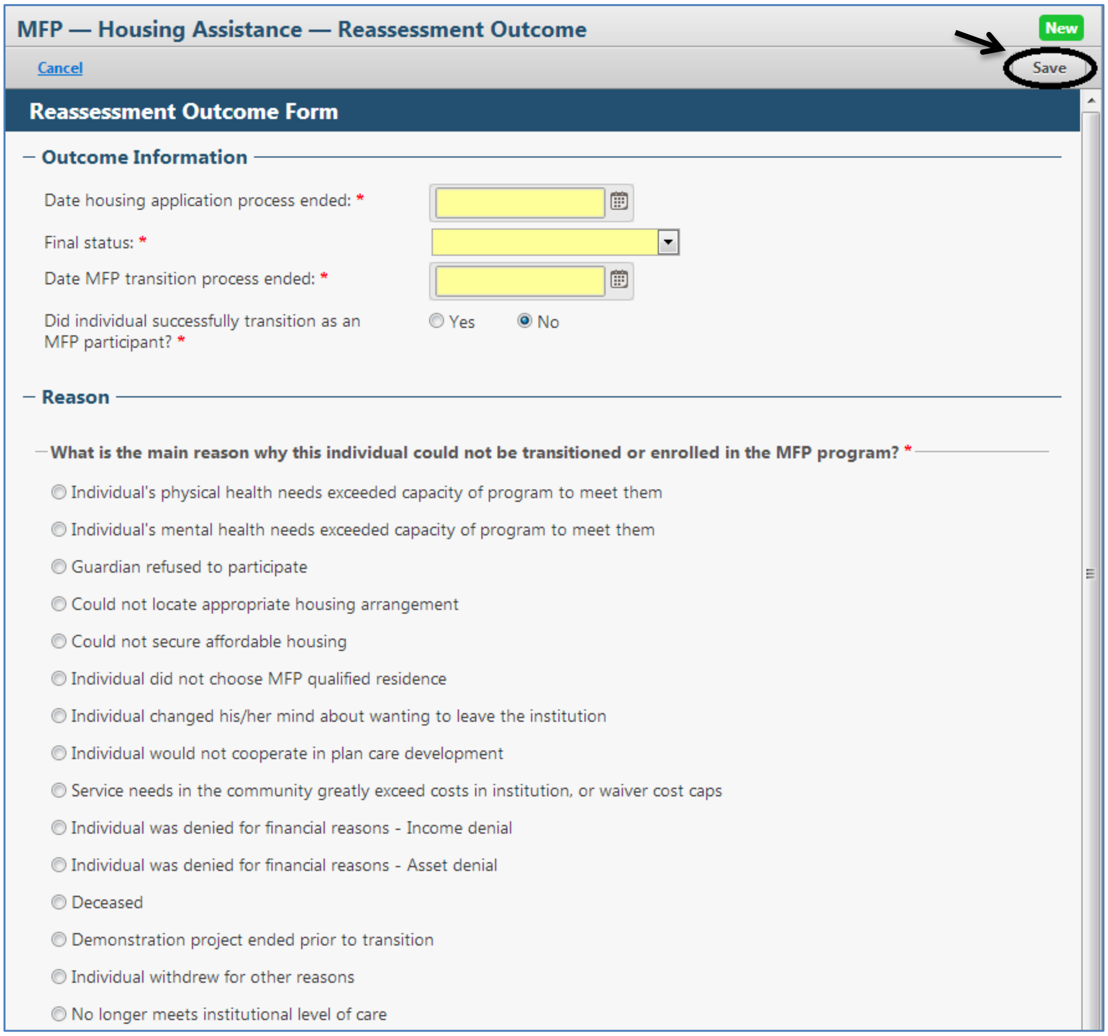


2.10.18 Add, Save and Edit Housing Assistance Reassessment Outcome

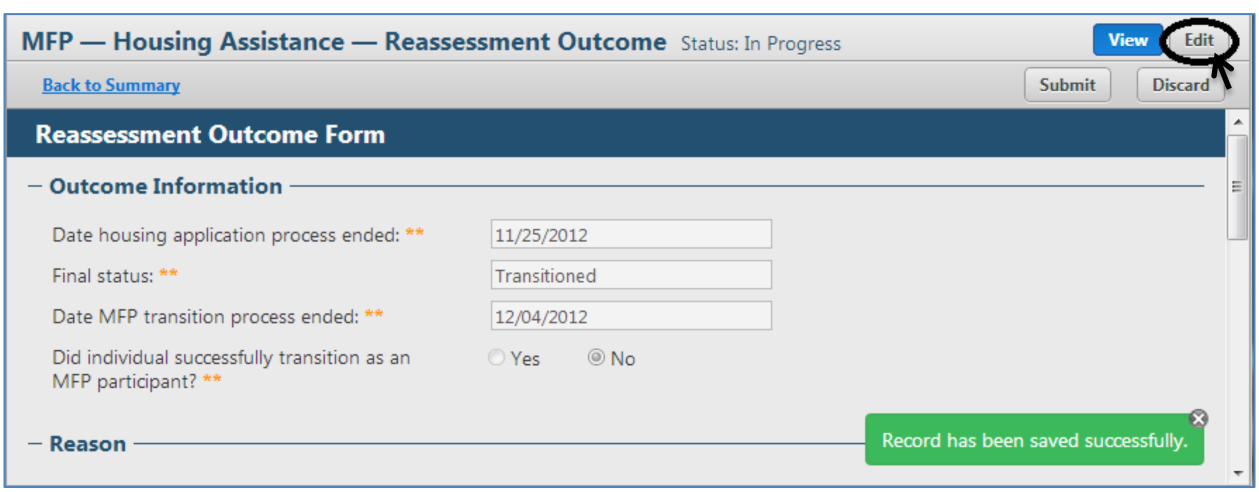
From the Housing Assistance—Referral Summary page click the **Add Outcome link** as seen in the figure below.



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

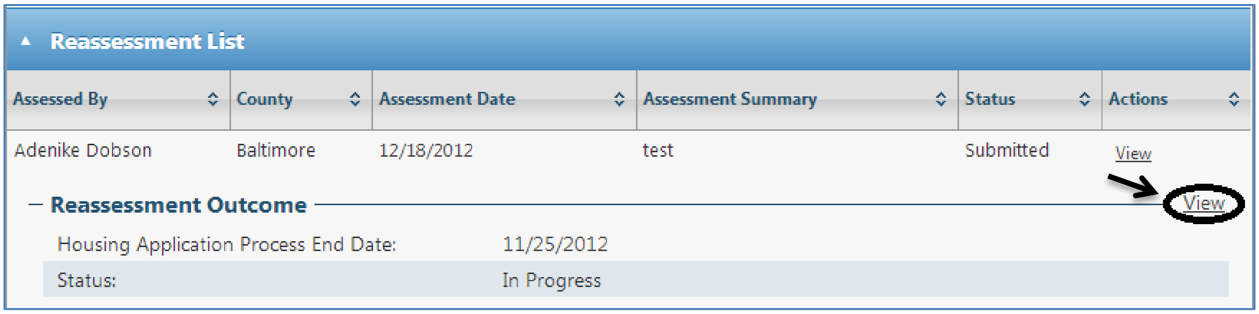


After clicking the Save button the user is taken to View-mode. Click the **Edit button** to make changes to the Housing Assistance—Reassessment Outcome as seen below. After making changes click the Save button again and the user will return to View-mode.

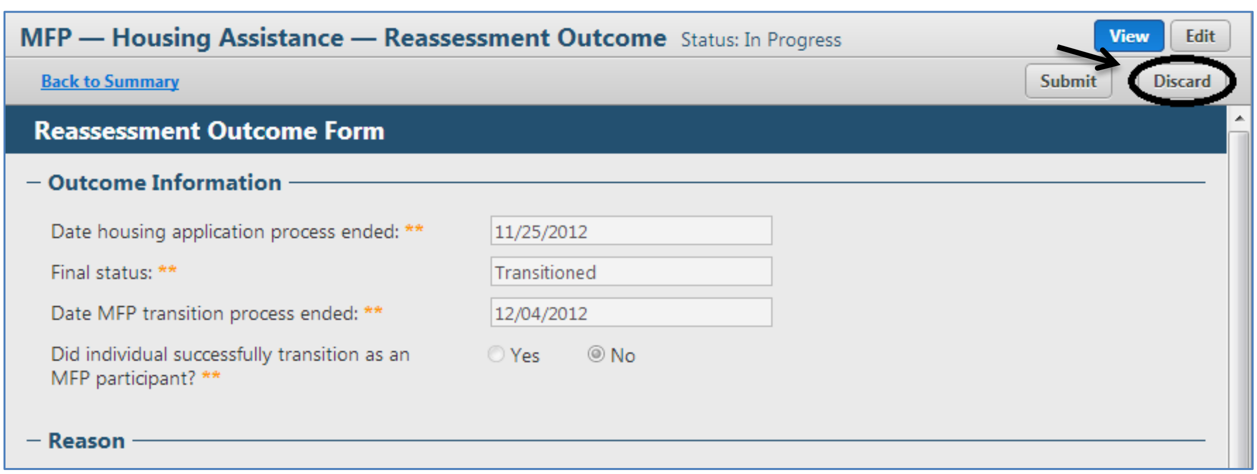


2.10.19 View, Discard and Submit Housing Assistance Reassessment Outcome

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



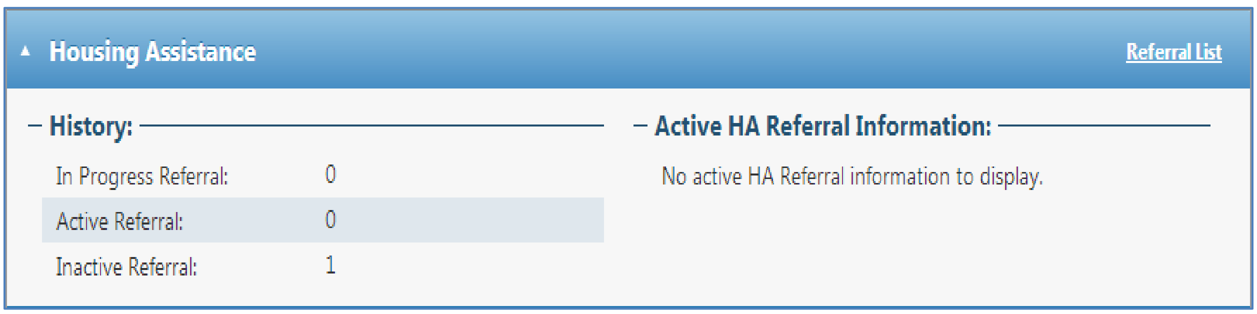
From View-mode the user can **Discard the Housing Assistance—Reassessment Outcome** by clicking the ***Discard button*** as seen in the figure below. An "In Progress" or "Submitted" Housing Assistance—Reassessment Outcome can be discarded as long as no additional Housing Assistance—Reassessment is "In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



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

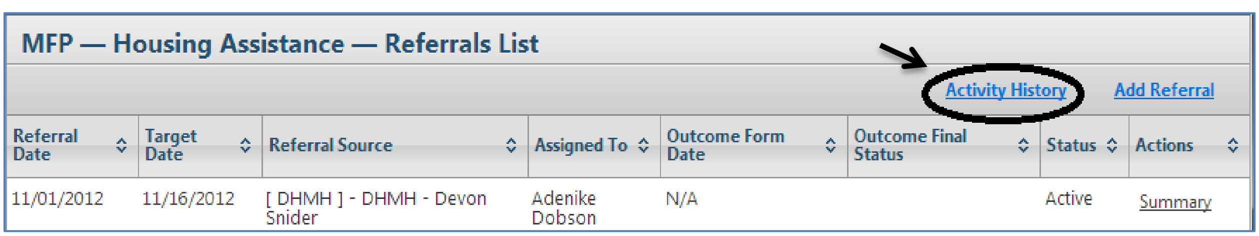
2.10.20 Housing Assistance Status Change to Inactive

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



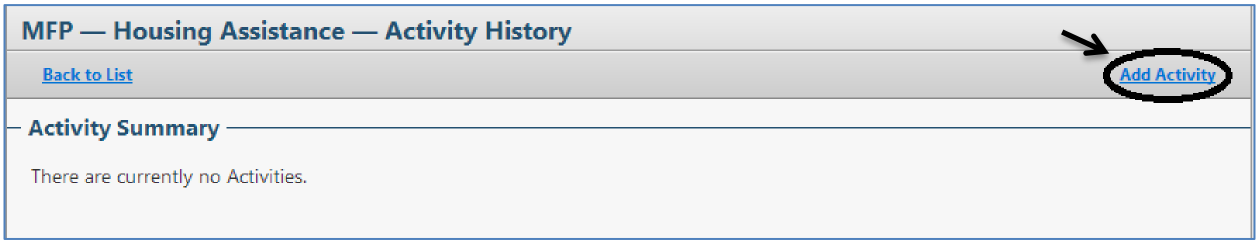
2.10.21 View Housing Assistance Activity History

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

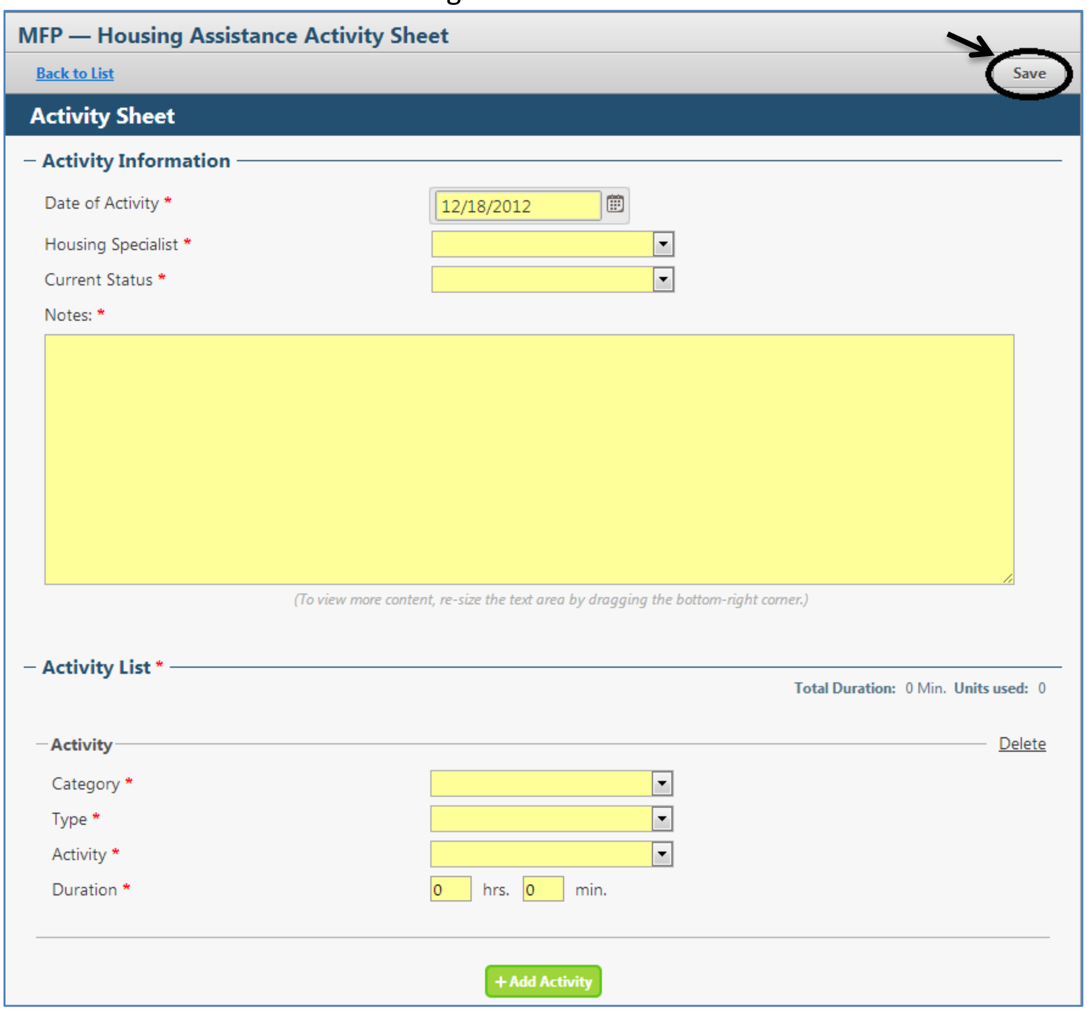


2.10.22 Create, Save, Edit and Delete Housing Assistance Activity History

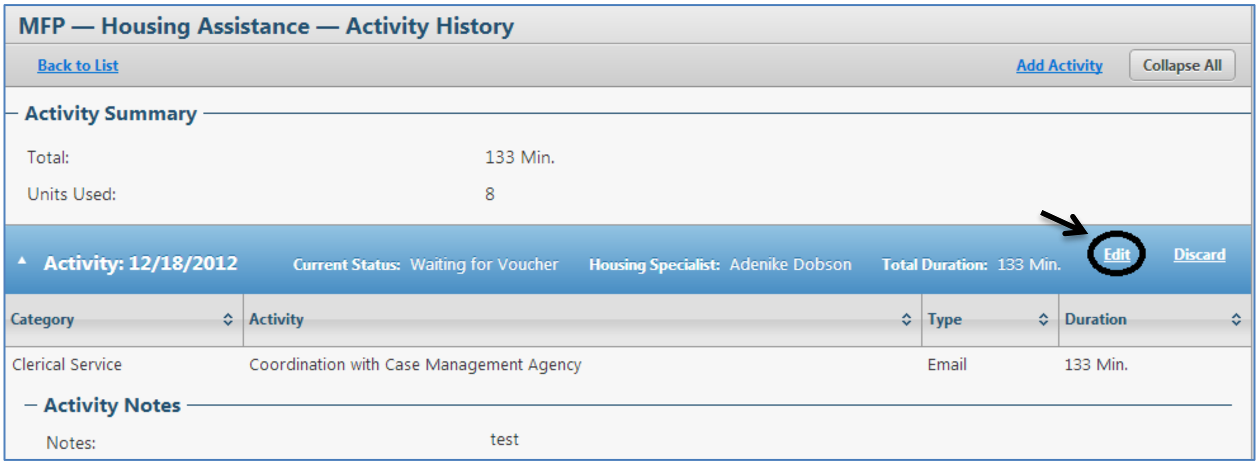
From the **Housing Assistance—Activity History** page the user can add new activities by clicking the ***Add Activity link*** as shown in the figure below.



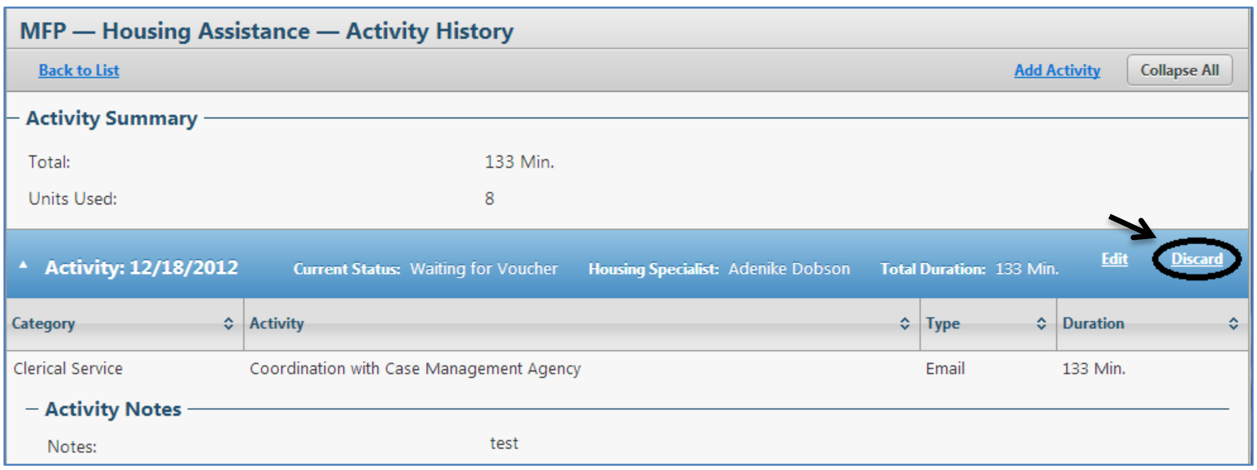
The **Housing Assistance—Activity Sheet** will appear. Enter the **required information**, which will either be *highlighted yellow* or marked with an *asterisk*. After entering the required information the user can click the ***Add Activity link*** to add additional activities for that date or they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



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

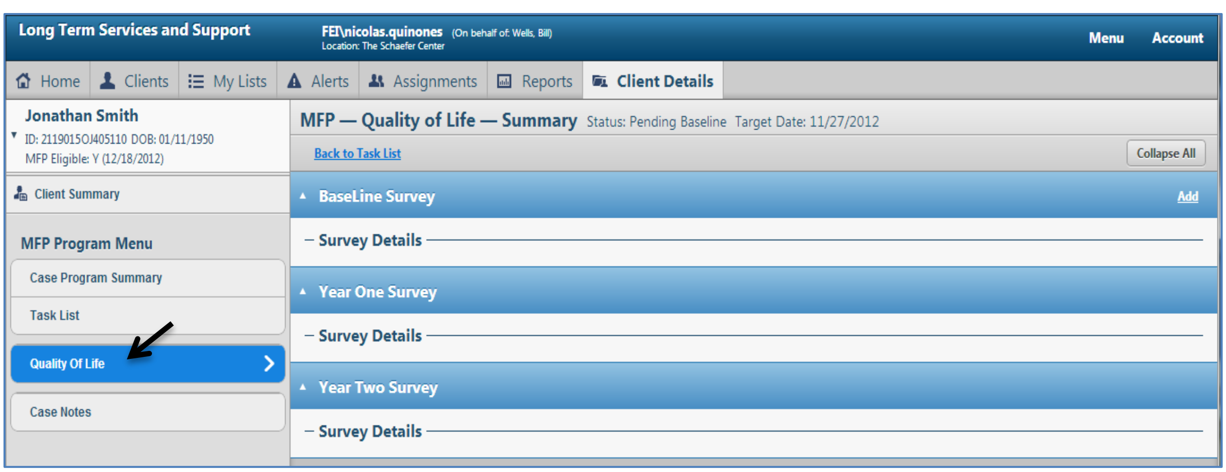


From the Housing Assistance—Activity History page the user can **Discard an Activity Sheet** by clicking the ***Discard link*** as seen in the figure below.



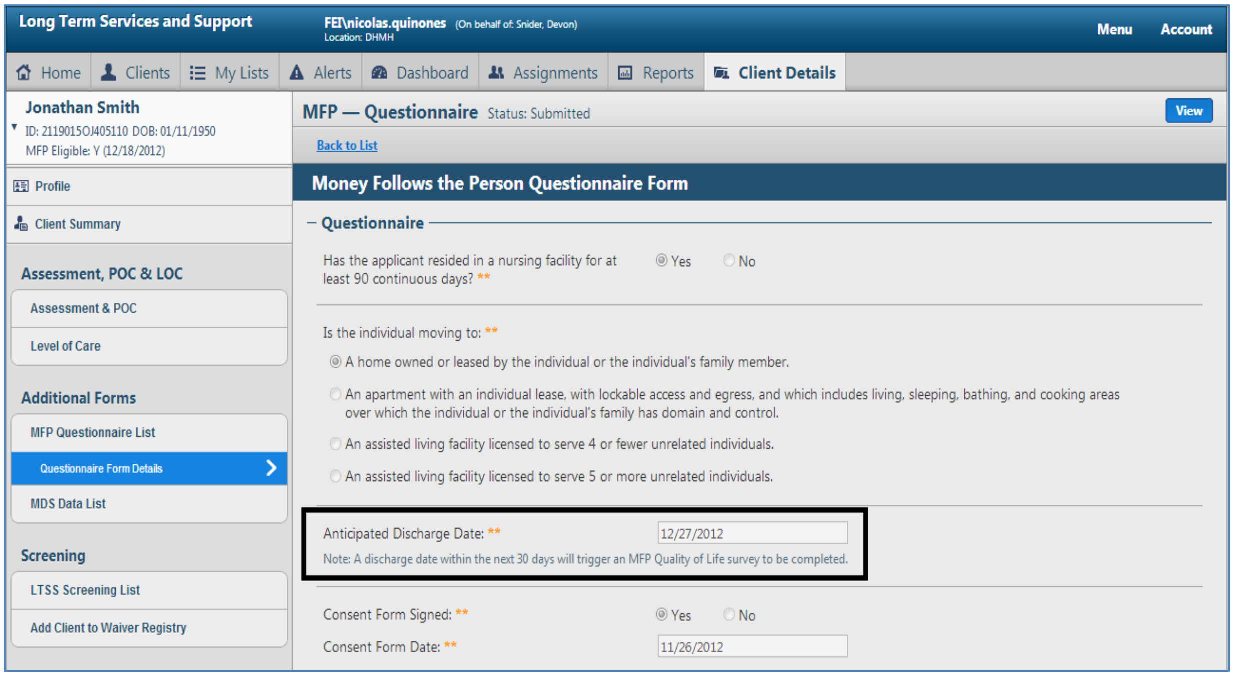
2.11 Quality of Life

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



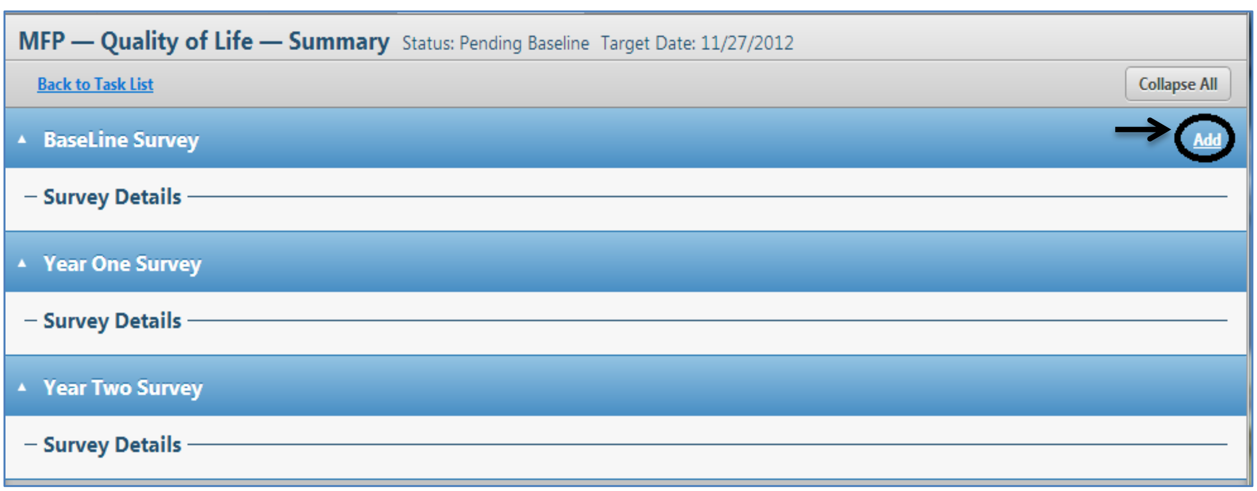
2.11.1 Meeting Requirements to Add Baseline Survey- Anticipated Discharge Date

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



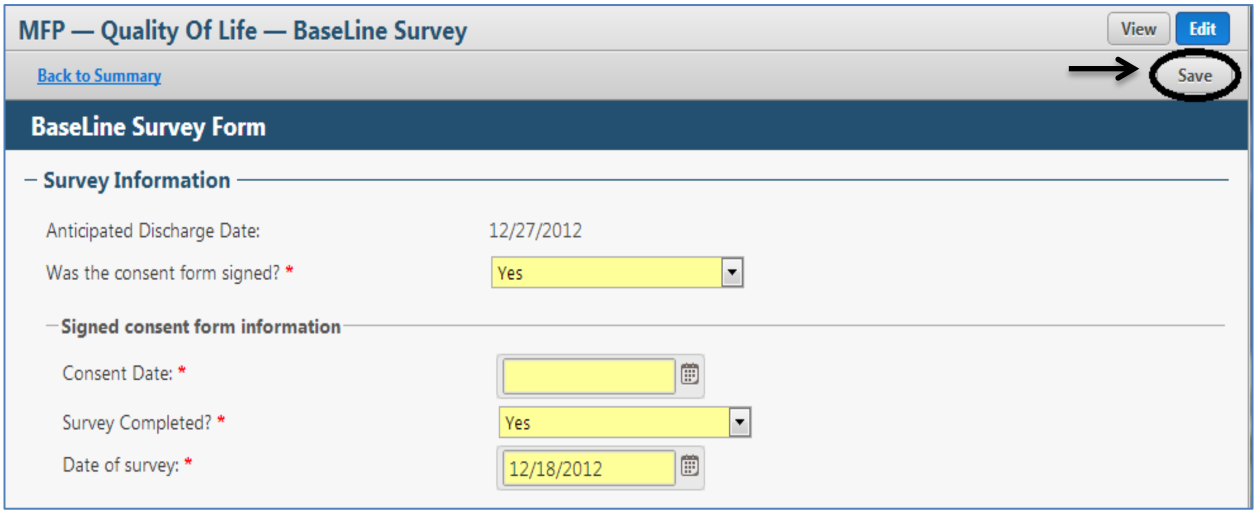
2.11.2 Add, Save and Edit QoL Baseline Survey

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

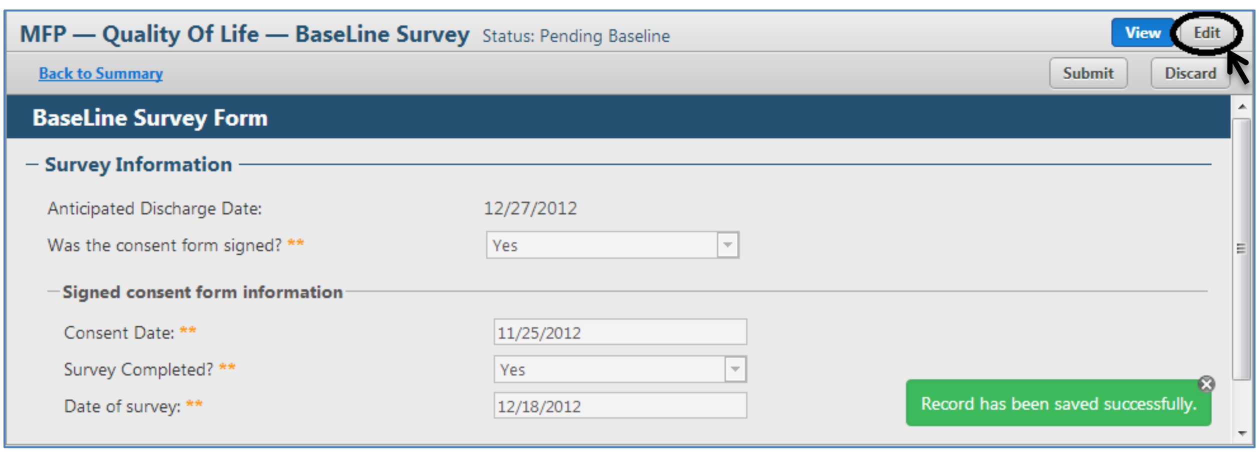


The **Quality of Life—Baseline Survey** form will appear. The form view and required fields on the form will alter based on the actors answers to questions on the Quality of Life—Baseline

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

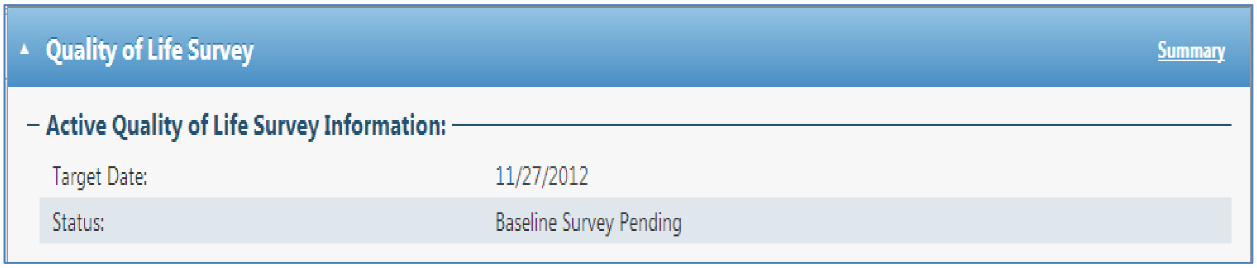


After clicking the Save button the user is taken to View-mode. Click the **Edit link** to make changes to the Quality of Life—Baseline Survey as seen below. After making changes click the Save button again and the user will return to View-mode.



2.11.3 Quality of Life Status Change to Baseline Survey Pending

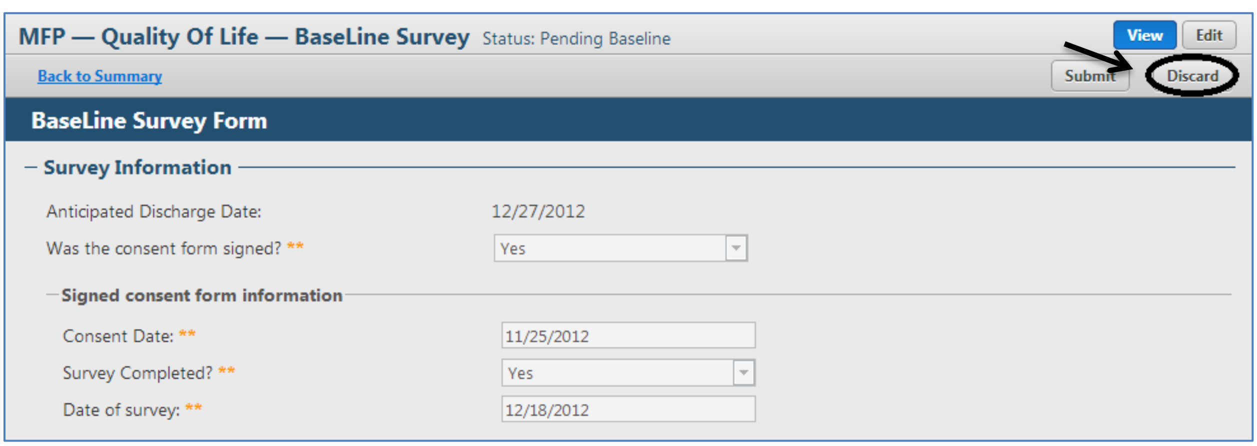
After a *Quality of Life- Baseline Survey* is "*In Progress*," Quality of Life changes to a Status of "***Baseline Survey Pending***" on the **MFP Tasks List** page as seen below.



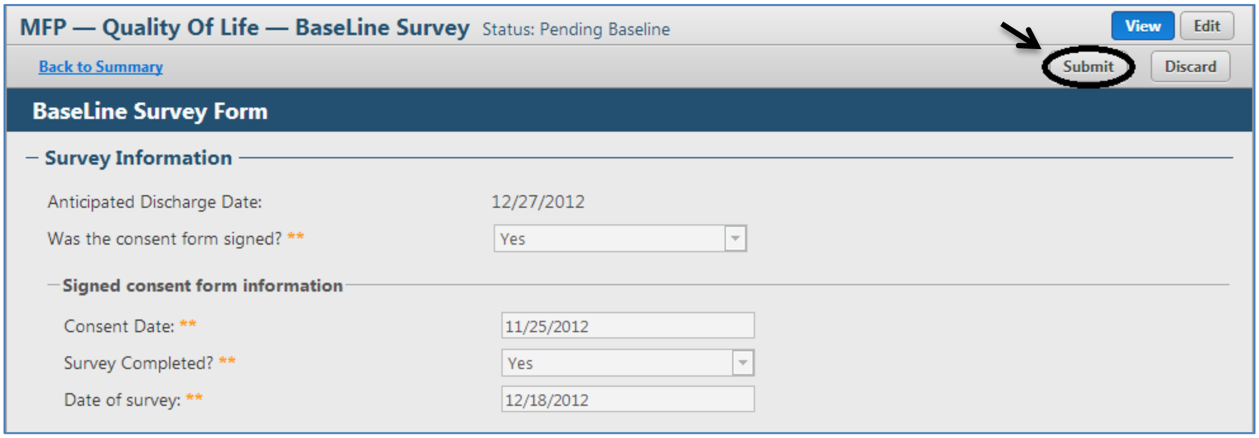
2.11.4 View, Discard and Submit QoL Baseline Survey

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

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

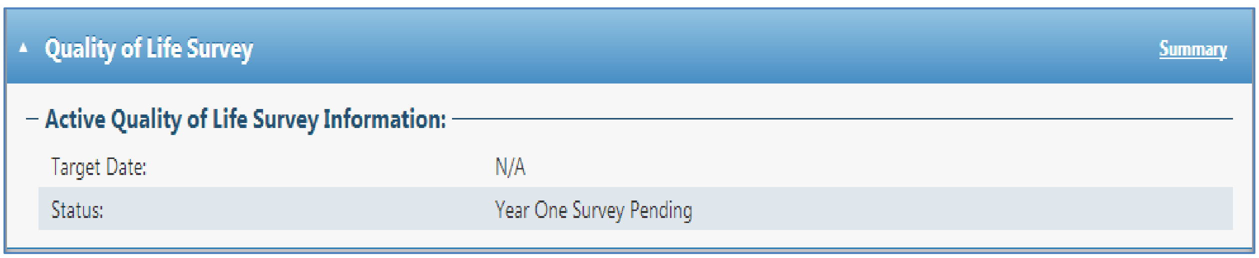


If the user does not wish to discard, click the ***Submit button*** to **Submit the Quality of Life—Baseline Survey** as seen in the figure below. Once submitted the Quality of Life—Baseline Survey can no longer be edited.



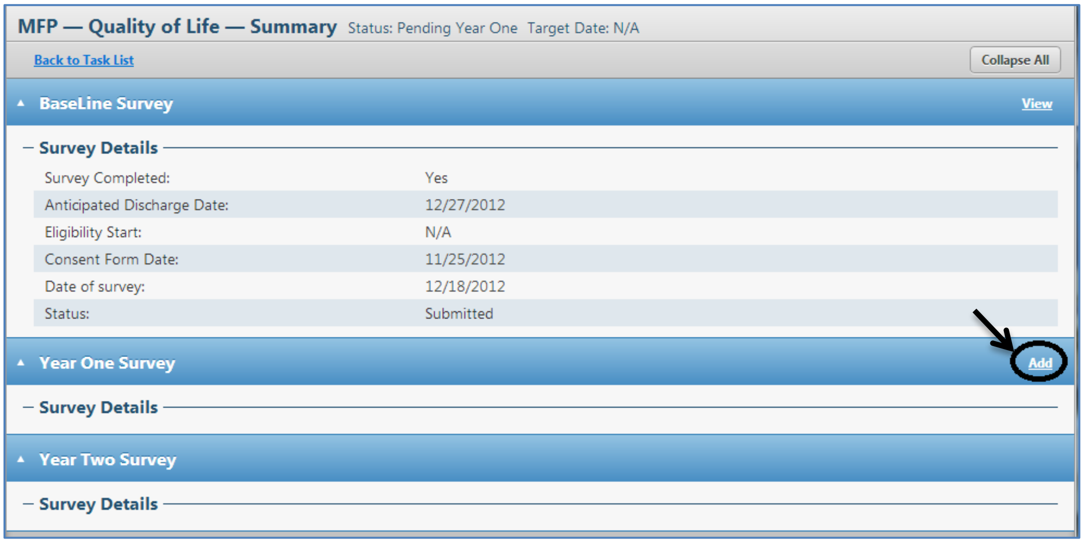
2.11.5 Quality of Life Status Change to Year One Survey Pending

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

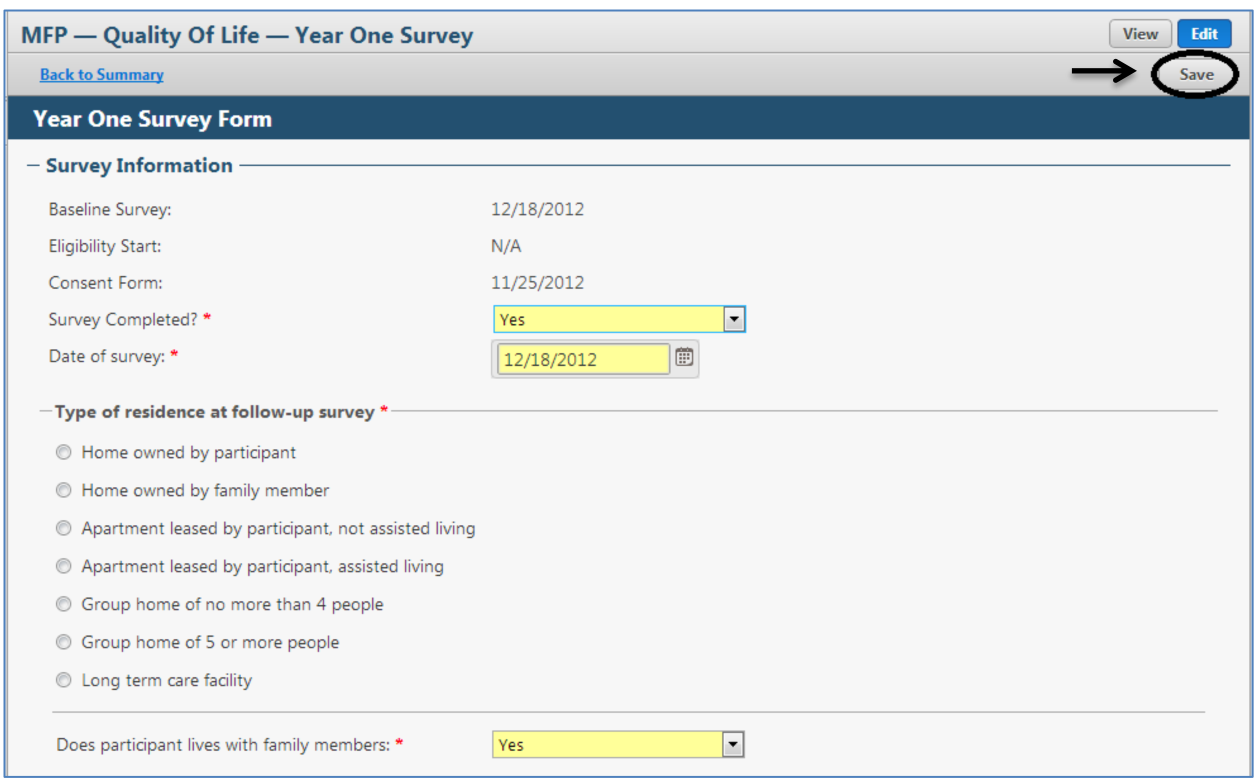


2.11.6 Add, Save and Edit QoL Year One Survey

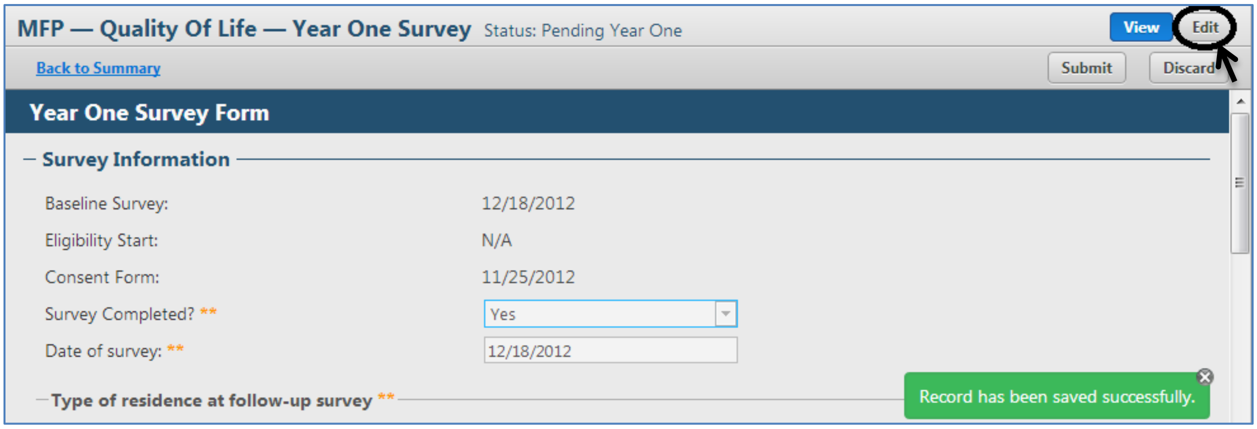
From the Quality of Life—Summary page click the **Add link** in the Year One Survey panel as seen in the figure below.



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



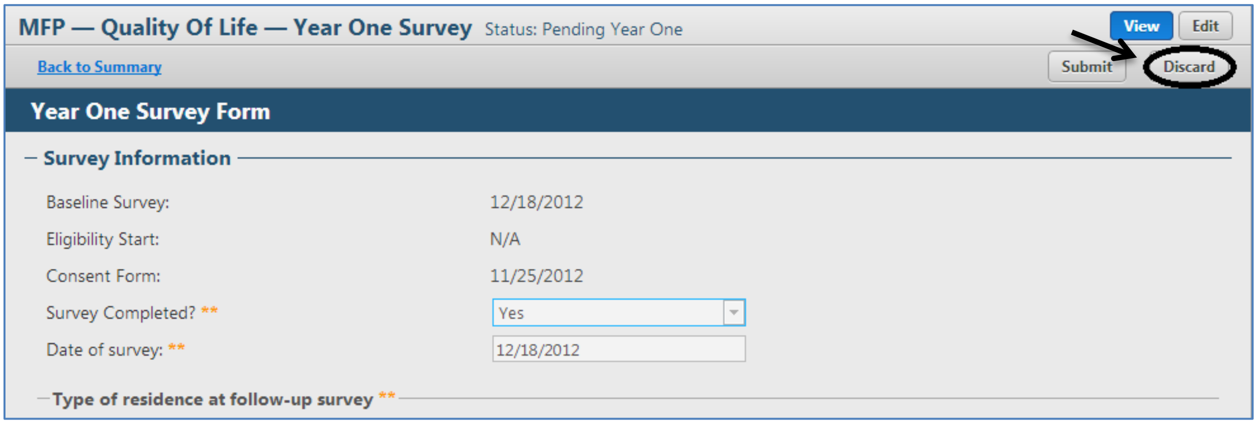
After clicking the Save button the user is taken to View-mode. Click the **Edit link** to make changes to the Quality of Life—Year One Survey as seen below. After making changes click the Save button again and the user will return to View-mode.



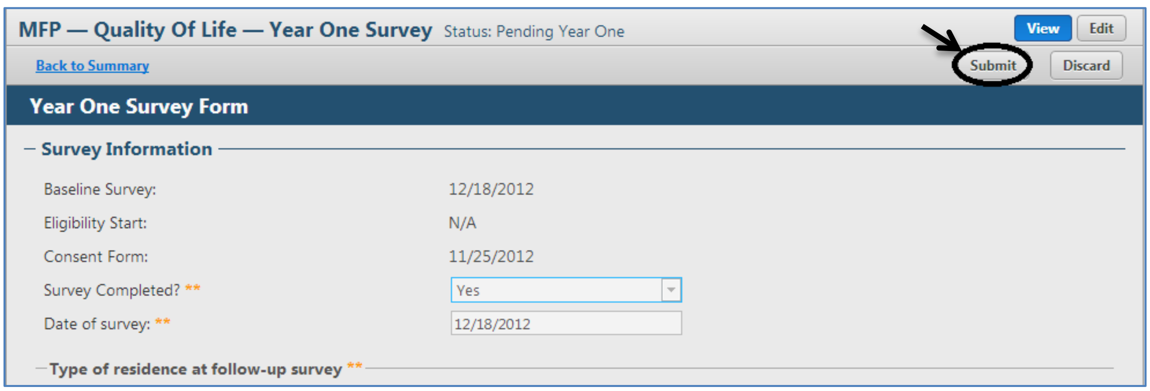
2.11.7 View, Discard and Submit QoL Year One Survey

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

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

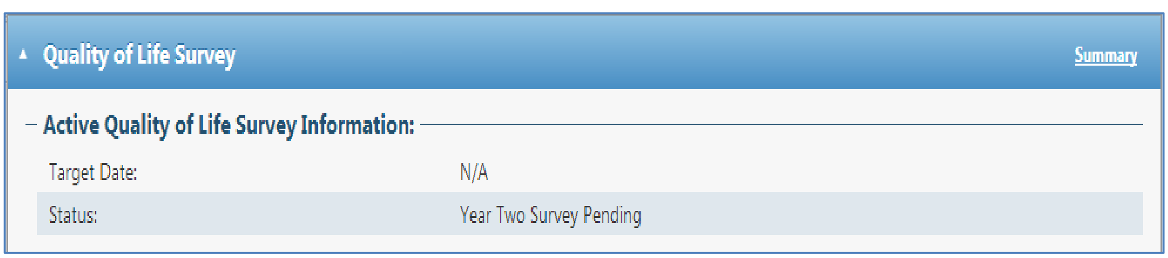


If the user does not wish to discard, click the ***Submit button*** to **Submit the Quality of Life—Year One Survey** as seen in the figure below. Once submitted the Quality of Life—Year One Survey can no longer be edited.



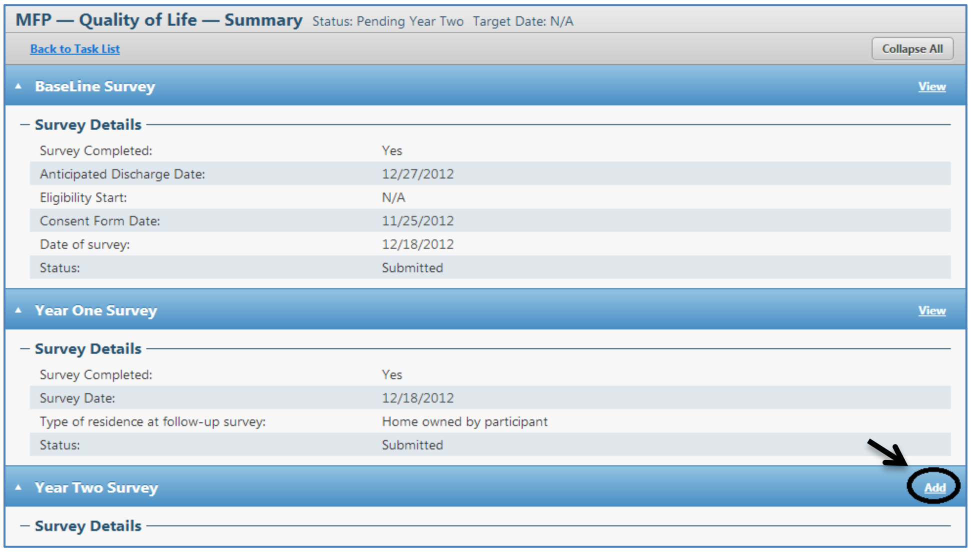
2.11.8 Quality of Life Status Change to Year Two Survey Pending

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

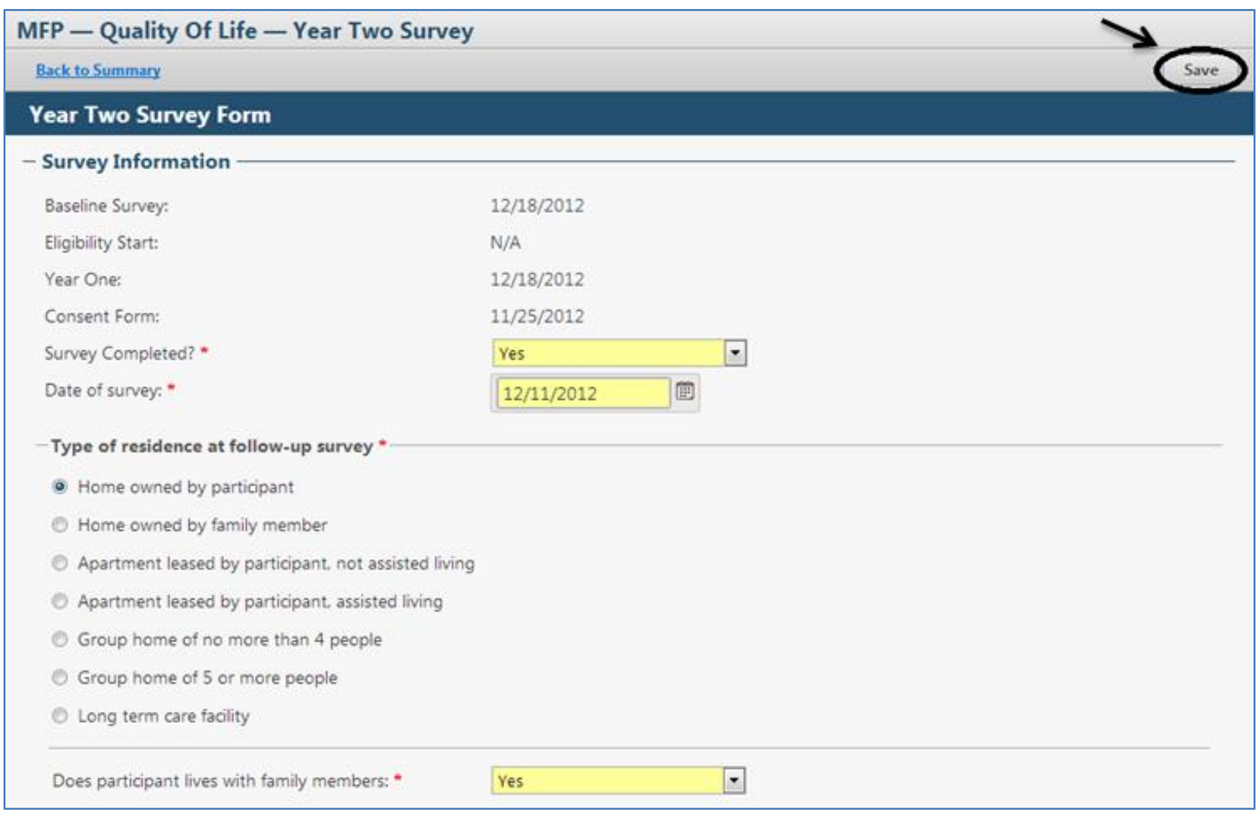


2.11.9 Add, Save and Edit QoL Year Two Survey

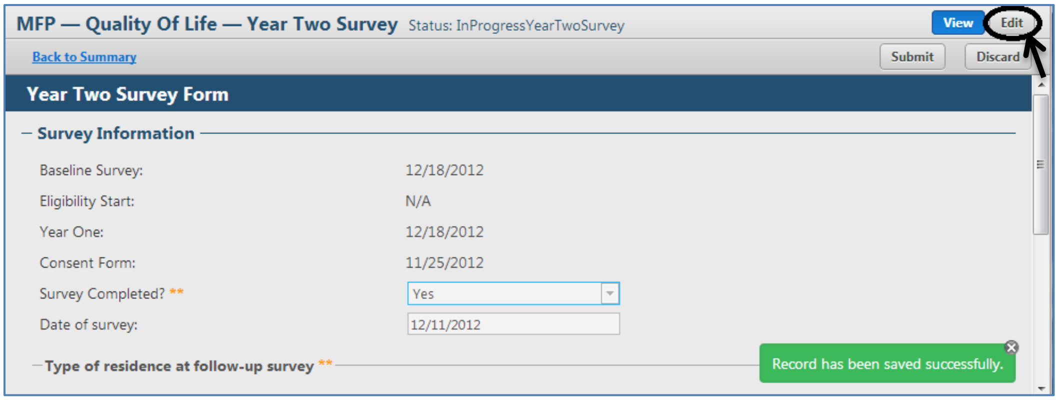
From the Quality of Life—Summary page click the **Add link** on the Year Two Survey panel as seen in the figure below.



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



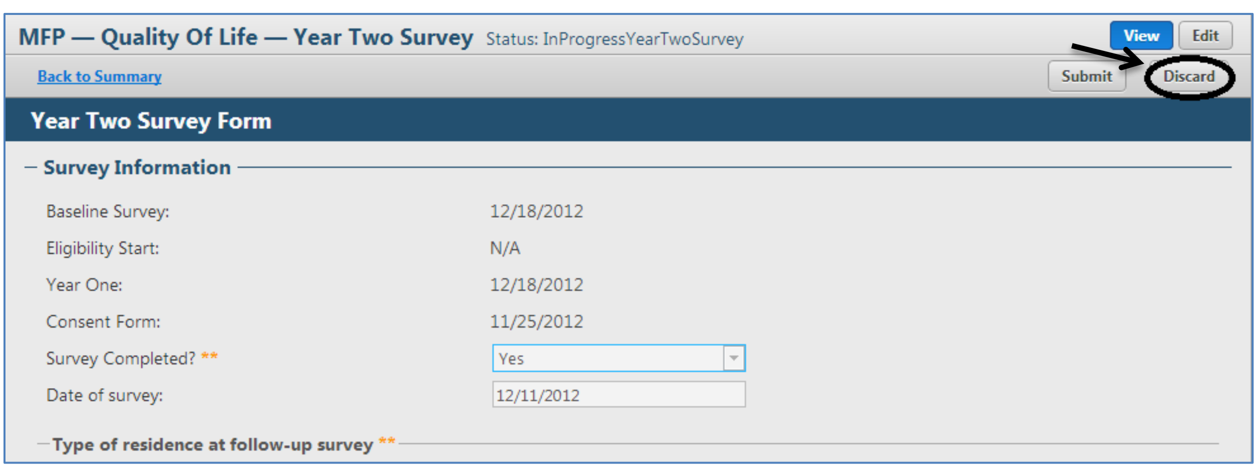
After clicking the Save button the user is taken to View-mode. Click the **Edit button** to make changes to the Quality of Life—Year Two Survey as seen below. After making changes click the Save button again and the user will return to View-mode.



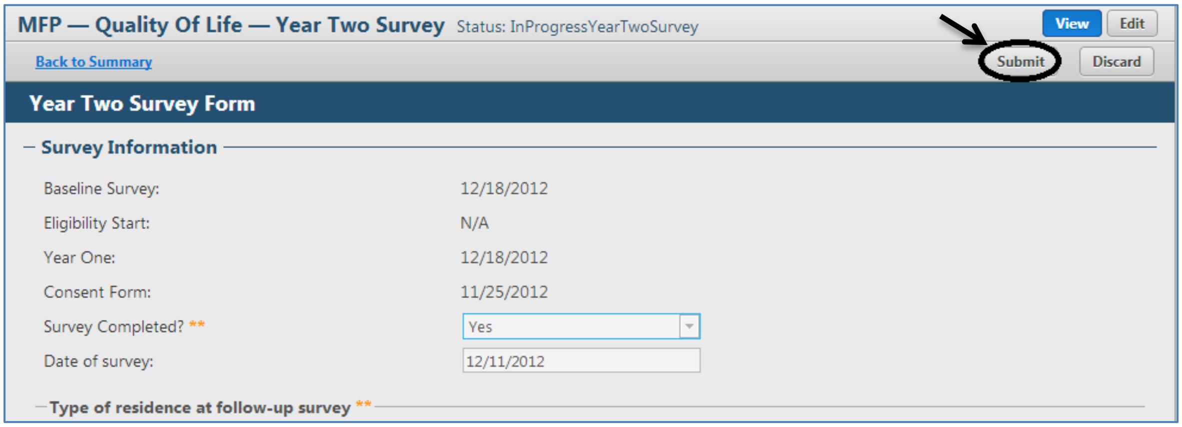
2.11.10 View, Discard and Submit QoL Year Two Survey

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

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

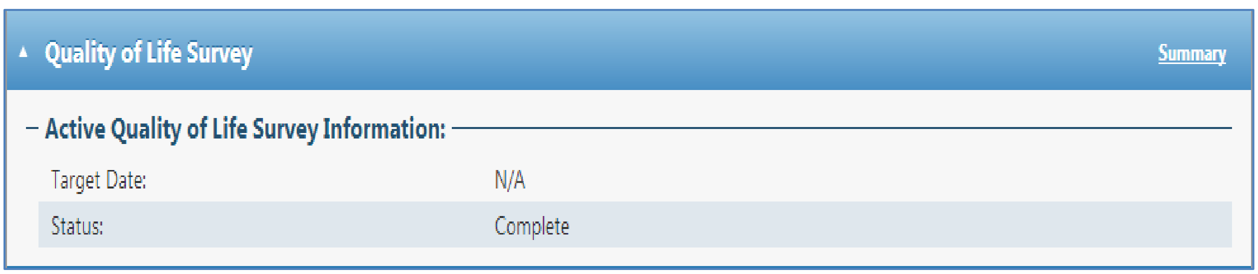


If the user does not wish to discard, click the ***Submit button*** to **Submit the Quality of Life—Year Two Survey** as seen in the figure below. Once submitted the Quality of Life—Year Two Survey can no longer be edited.



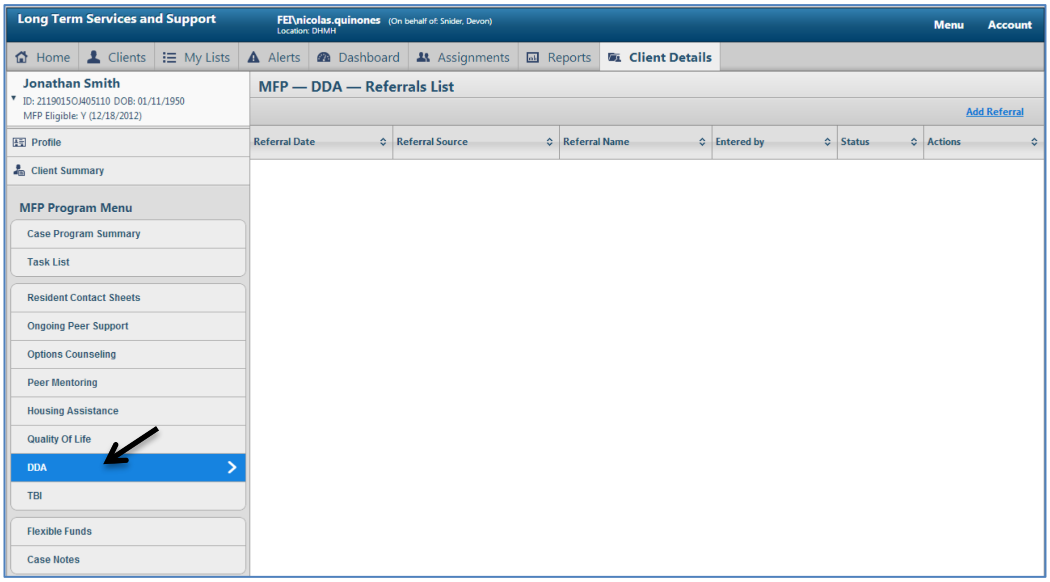
2.11.11 Quality of Life Status Change to Complete

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



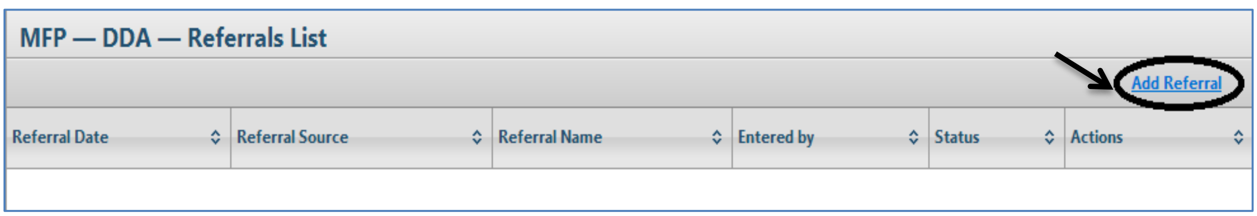
2.12 DDA

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

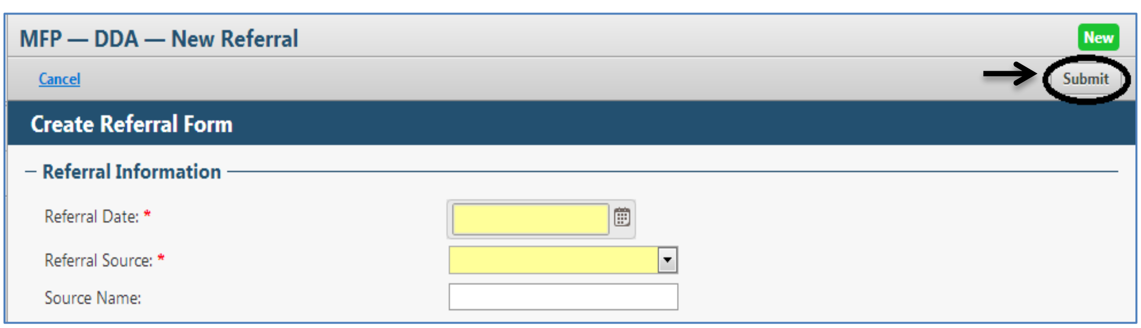


2.12.1 Add and Submit DDA Referral

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

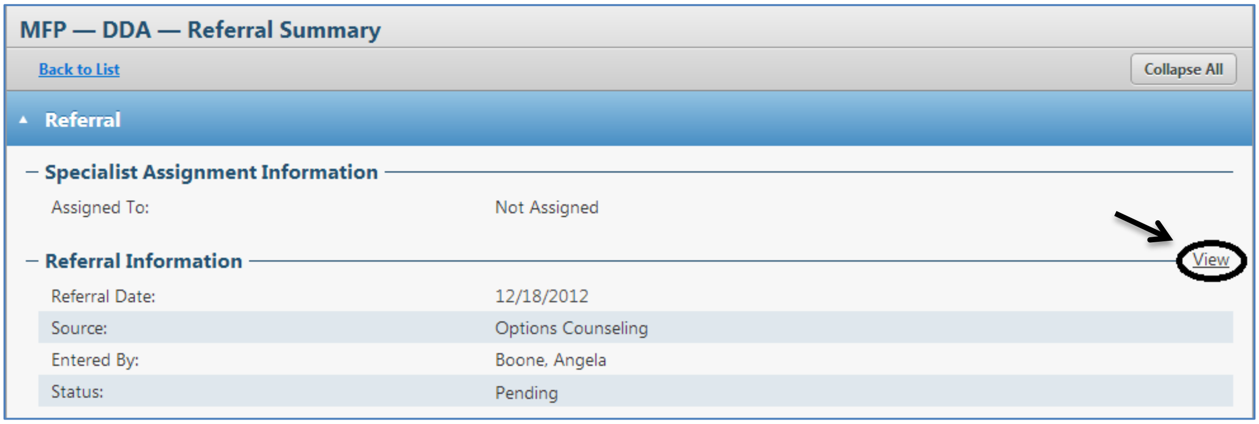


The **DDA—Referral** will appear. Enter the **required information**, which will either be *highlighted yellow* or marked with an *asterisk*. After completing the user can click the ***Submit button*** to **Submit the DDA—Referral** as seen below.

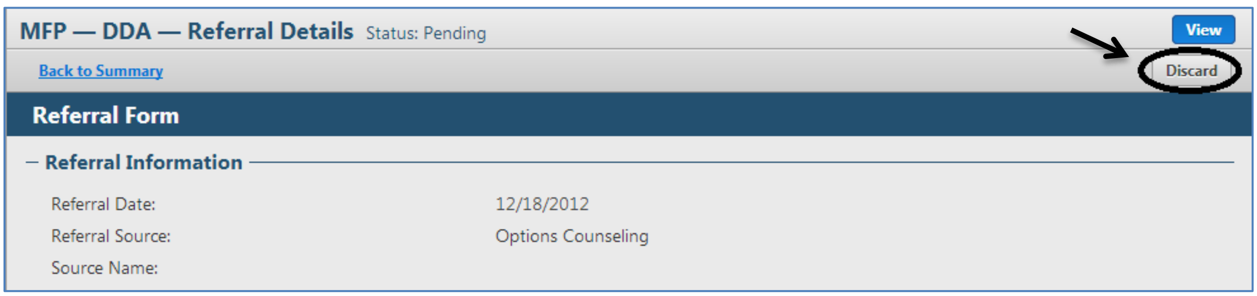


2.12.2 View and Discard DDA Referral

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

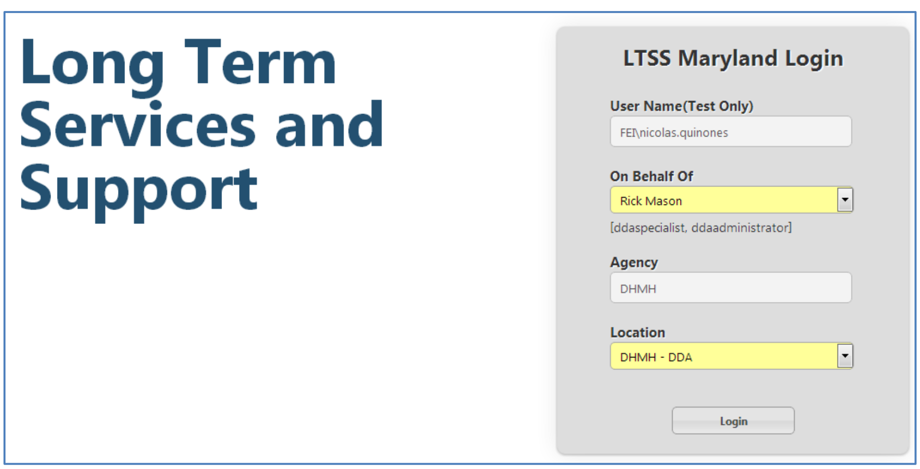


From View-mode the user can **Discard the DDA—Referral** by clicking the ***Discard button*** as seen in the figure below. The user is allowed to Discard a “Pending” DDA Referral.

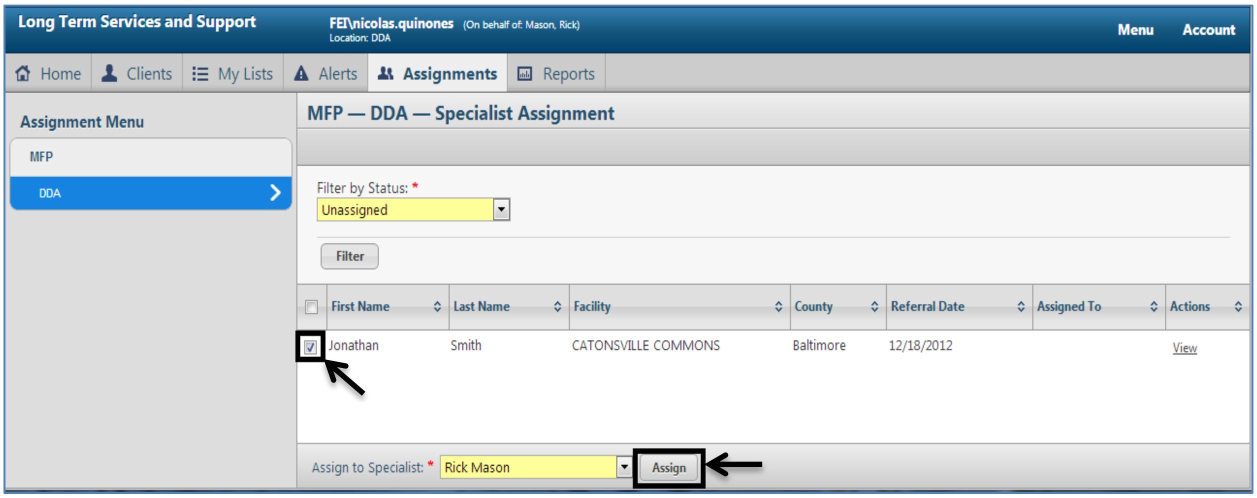


2.12.3 Assign DDA Specialist to Client

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

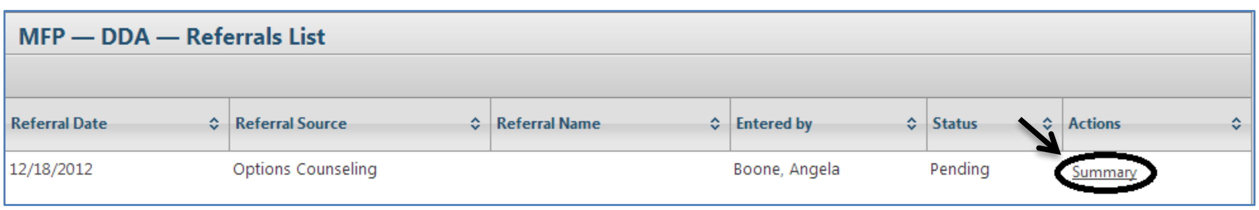


Click the *Assignments* tab at the top of the page and navigate to *DDA* under the Assignment section in the left hand navigation to perform **Batch Assignment**. Choose **Unassigned** from the Status dropdown menu and click the ***Filter button***. Locate the client you wish to assign a DDA Specialist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



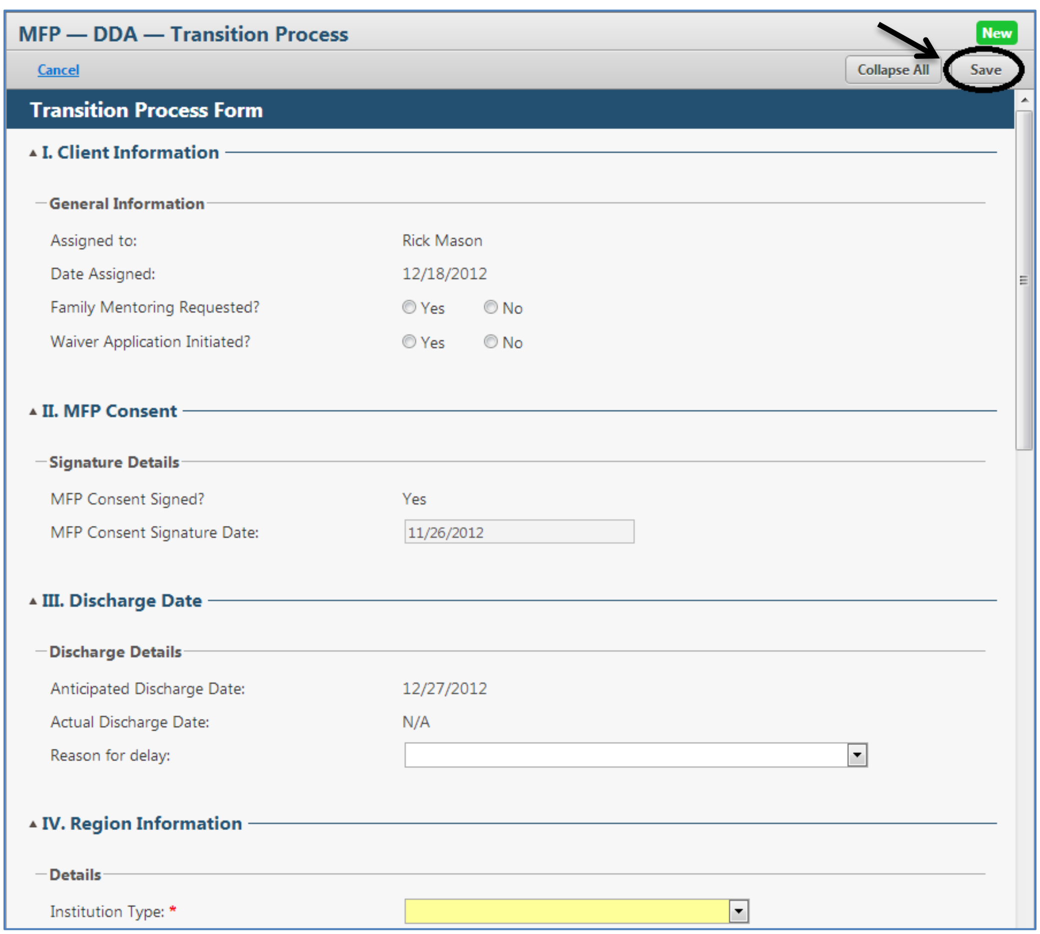
2.12.4 Add, Save and Edit DDA Transition Process Form

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



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

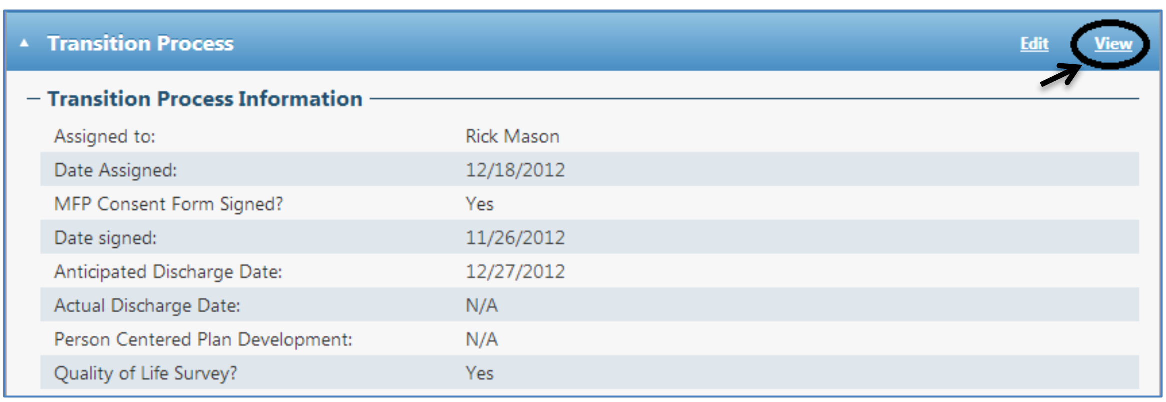
The **DDA Transition Process Form** will appear. Enter the **required information**, which will either be *highlighted yellow* or marked with an *asterisk*. After completing, or while in progress, the user can click the ***Save button*** to **Save the DDA Transition Process Form** as seen below.



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

2.12.5 View and Discard DDA Transition Form

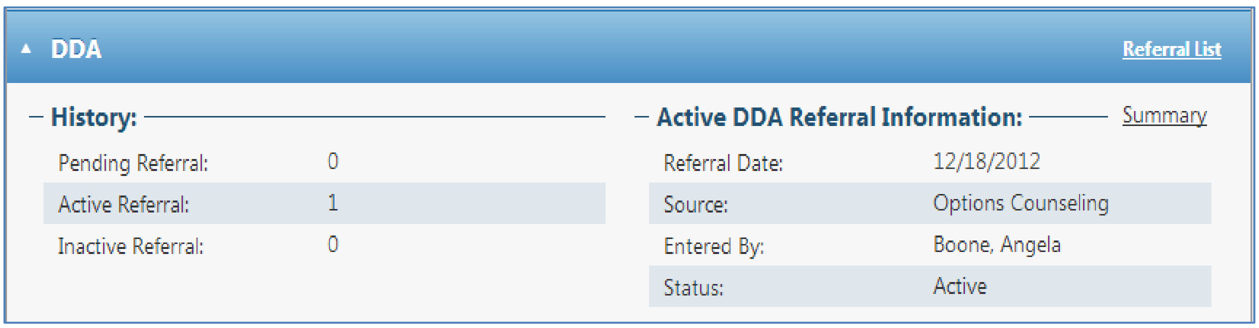
The user can **View the DDA Transition Form** in two ways. The first way was shown above where the user is taken to View-mode after saving the DDA Transition Form. The user can also View the DDA Transition Form by clicking the ***View link*** on the DDA—Referral Summary page as shown below.



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

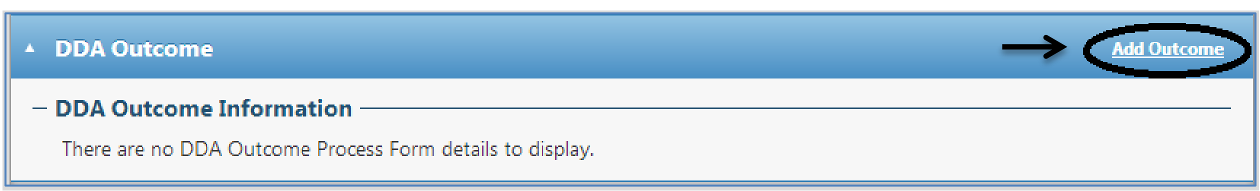
2.12.6 DDA Status Change to Active

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

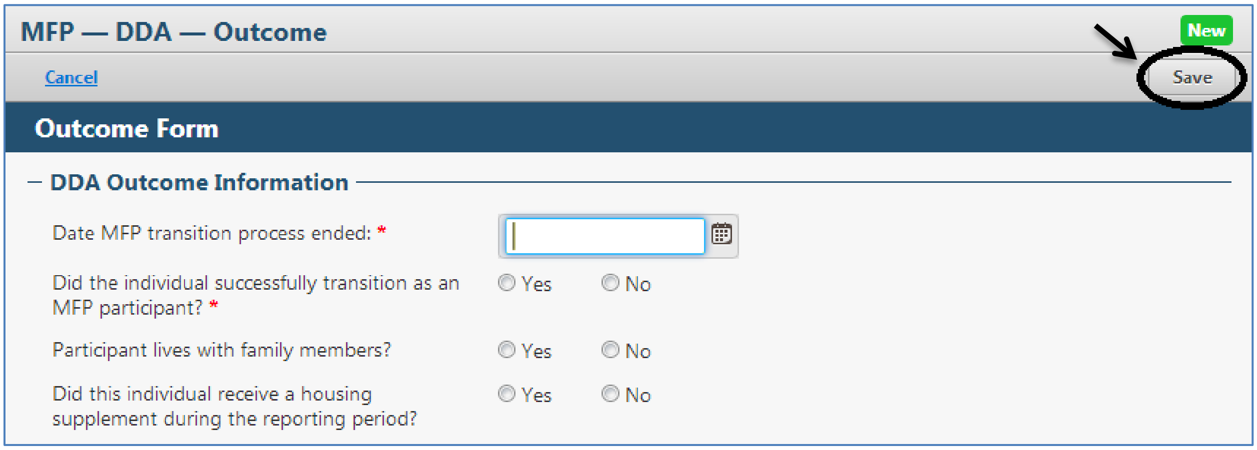


2.12.7 Add, Save and Edit DDA Outcome

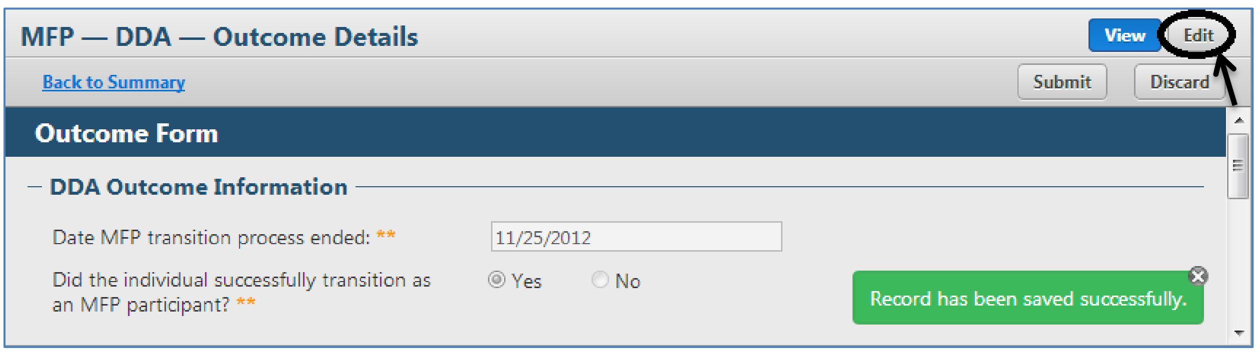
From the DDA—Summary page click the **Add Outcome link** as seen in the figure below.



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

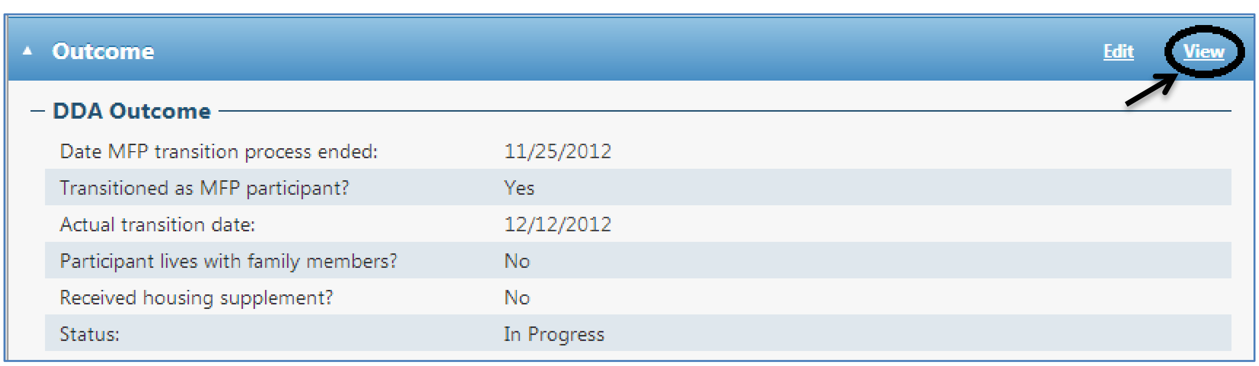


After clicking the Save button the user is taken to View-mode. Click the **Edit button** to make changes to the DDA—Outcome as seen below. After making changes click the Save button again and the user will return to View-mode.

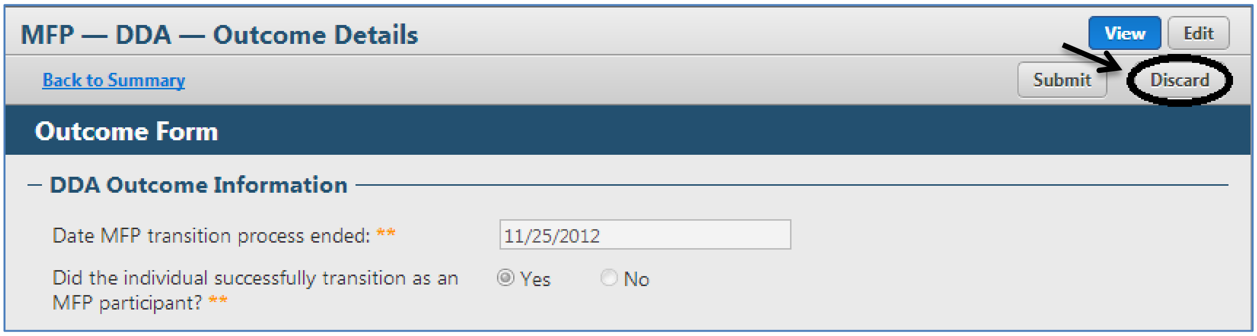


2.12.8 View, Discard and Submit DDA Outcome

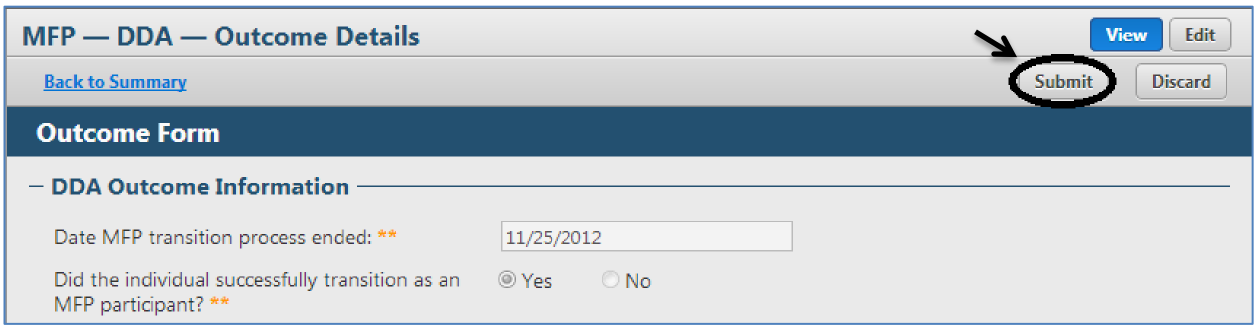
The user can **View the DDA—Outcome** in two ways. The first way was shown above where the user is taken to View-mode after saving the DDA—Outcome. The user can also View the DDA—Outcome by clicking the ***View link*** on the DDA—Summary page as seen below.



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

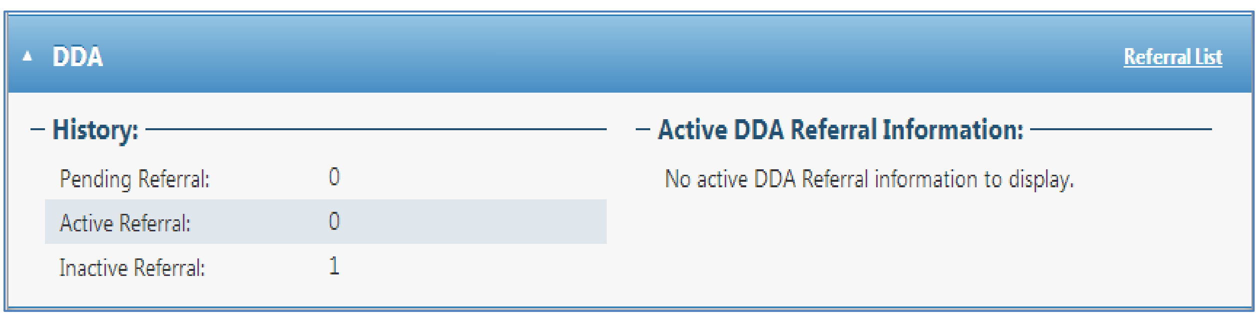


If the user does not wish to discard, click the ***Submit button*** to **Submit the DDA—Outcome** as seen in the figure below. Once submitted the DDA—Outcome can no longer be edited.



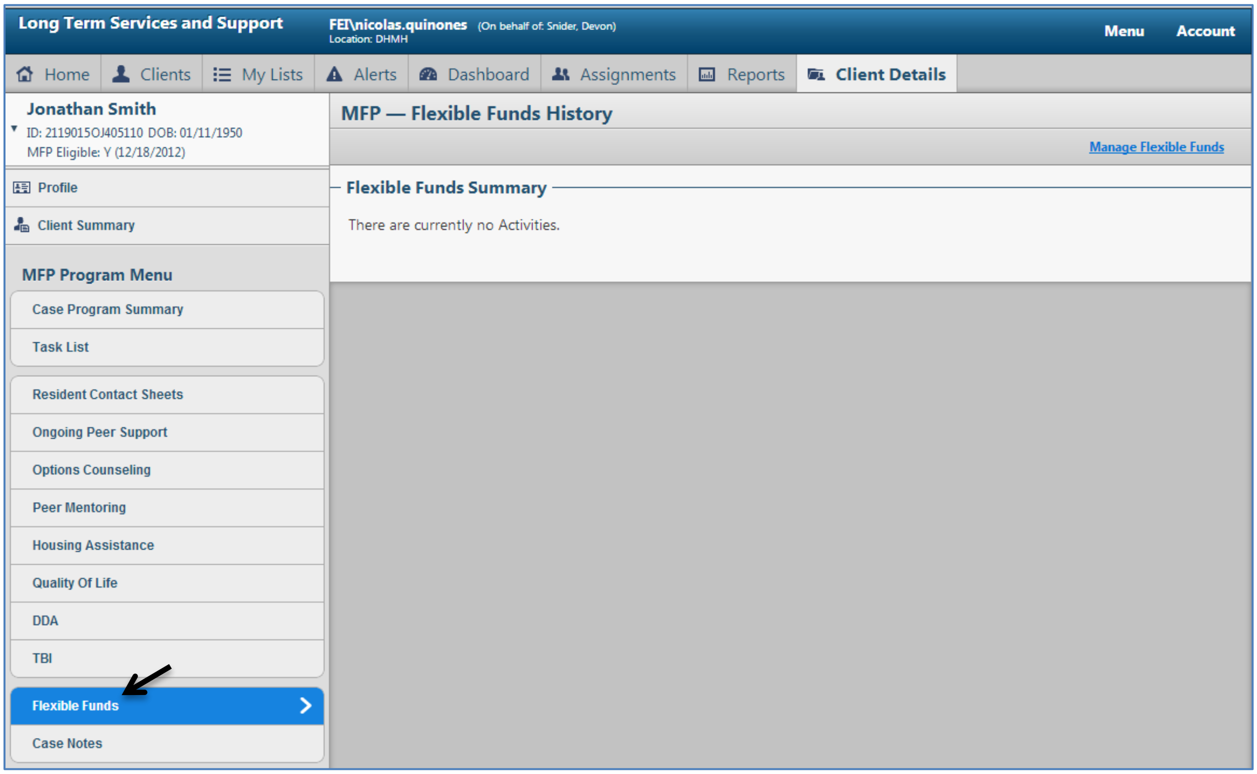
2.12.9 DDA Status Change to Inactive

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



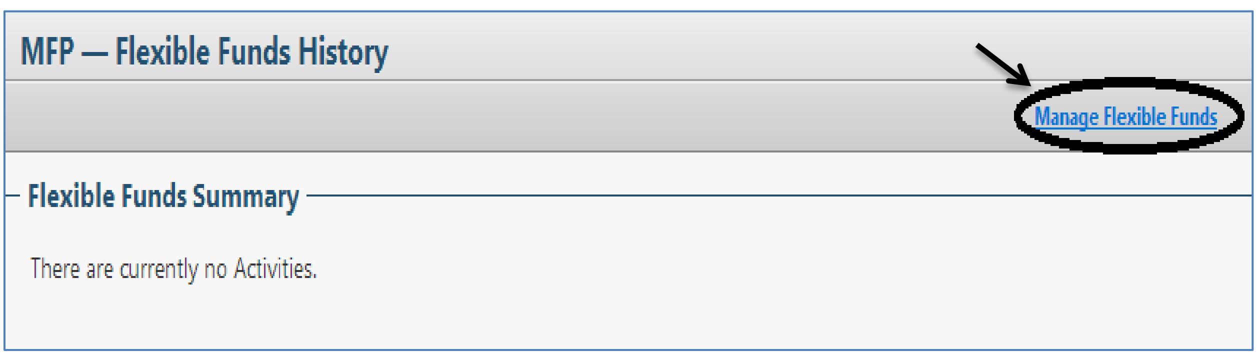
2.13 Flexible Funds

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



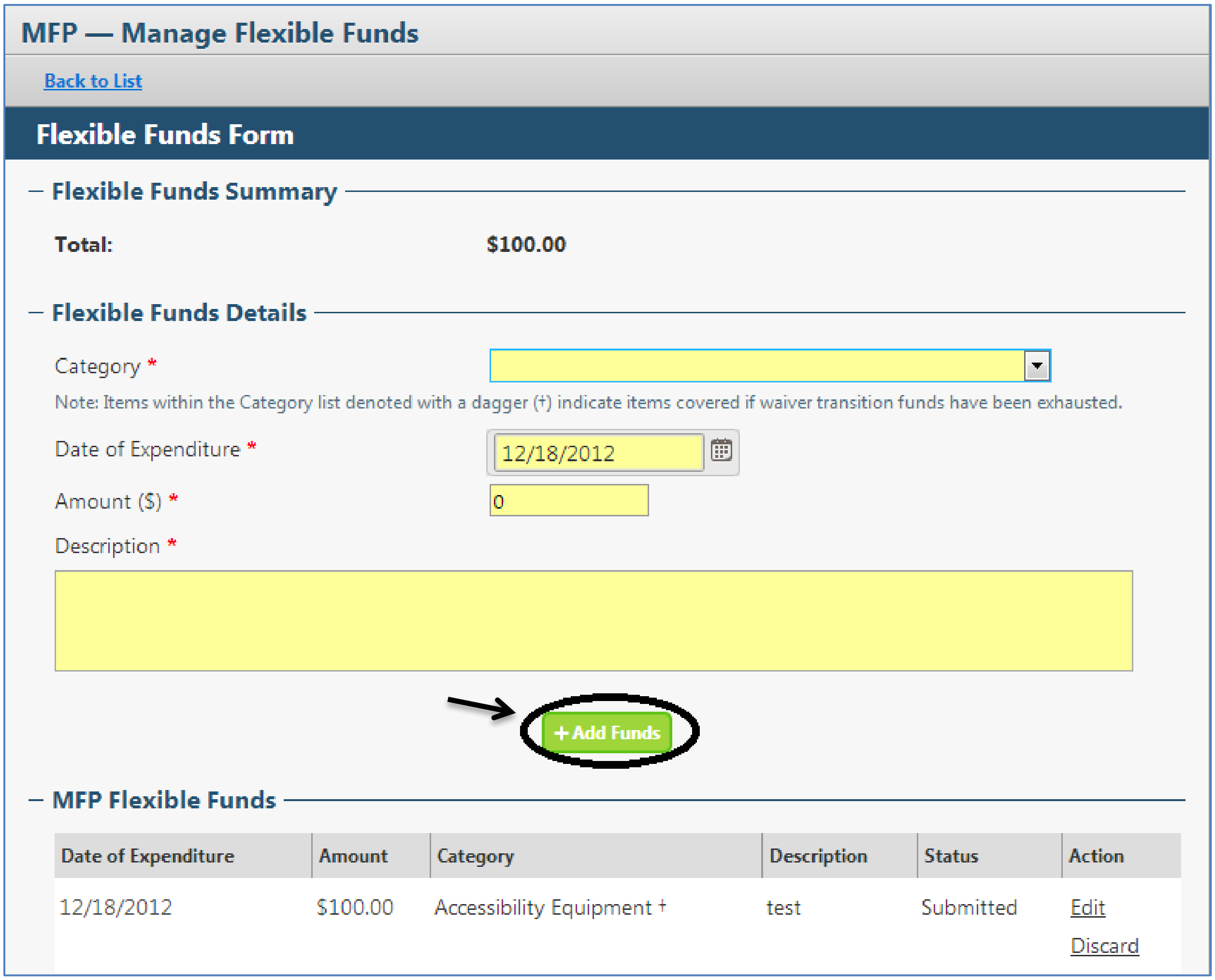
2.13.1 Flexible Funds History and Manage Flexible Funds

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



2.13.2 Add, Edit and Discard Flexible Funds

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



MFP — Manage Flexible Funds

Back to List

Flexible Funds Form

Flexible Funds Summary

Total: **$100.00**

Flexible Funds Details

Category *

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

Date of Expenditure * 12/18/2012

Amount ($) * 0

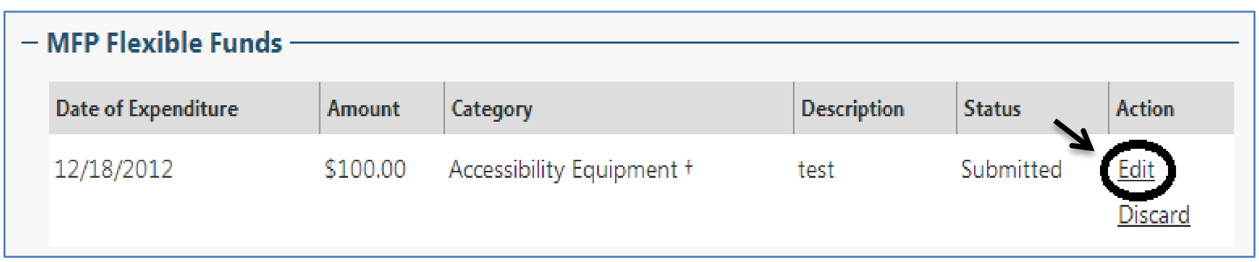
Description *

+ Add Funds

MFP Flexible Funds

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

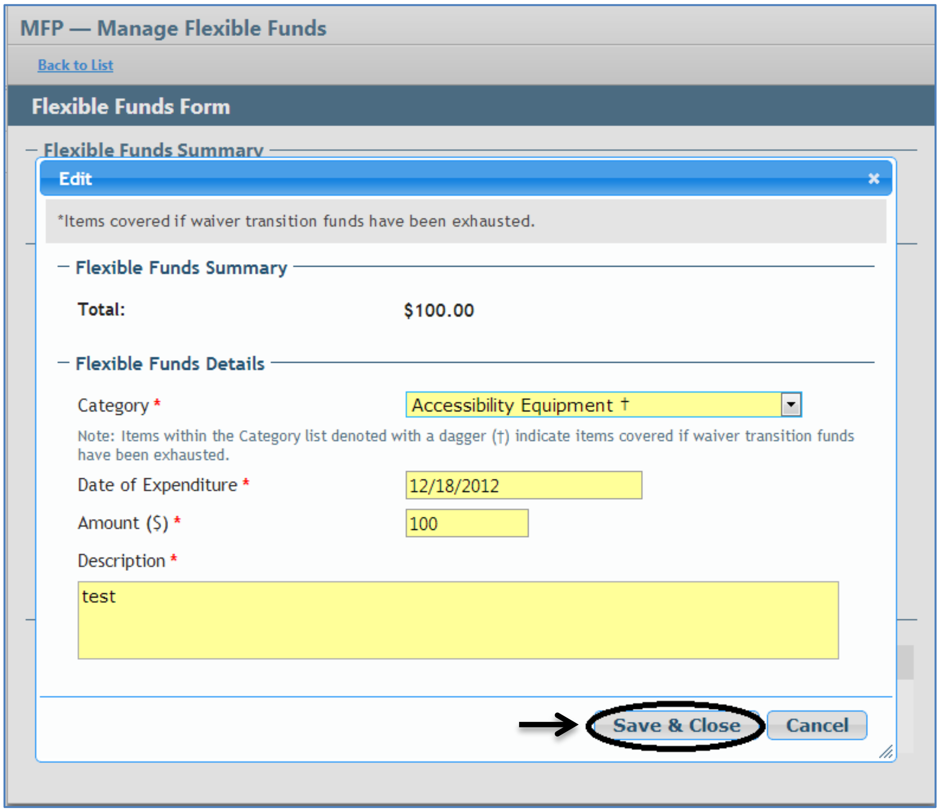
After clicking the Add Flexible Funds button the Manage Flexible Funds page is updated. Click the ***Edit link*** to make changes to a Flexible Fund entry as seen below.



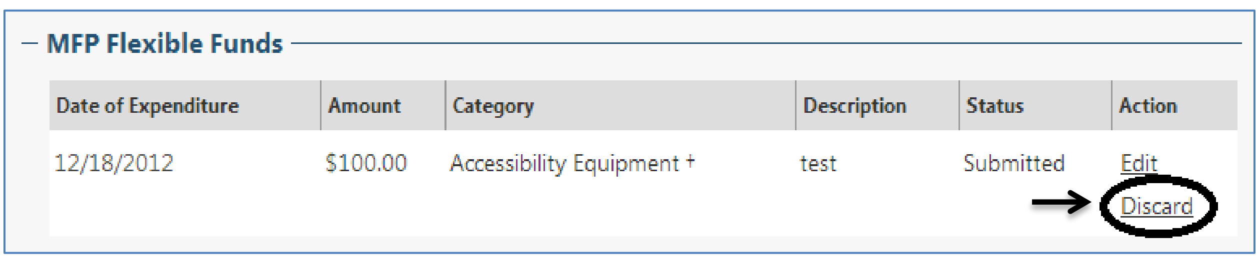
MFP Flexible Funds

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

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

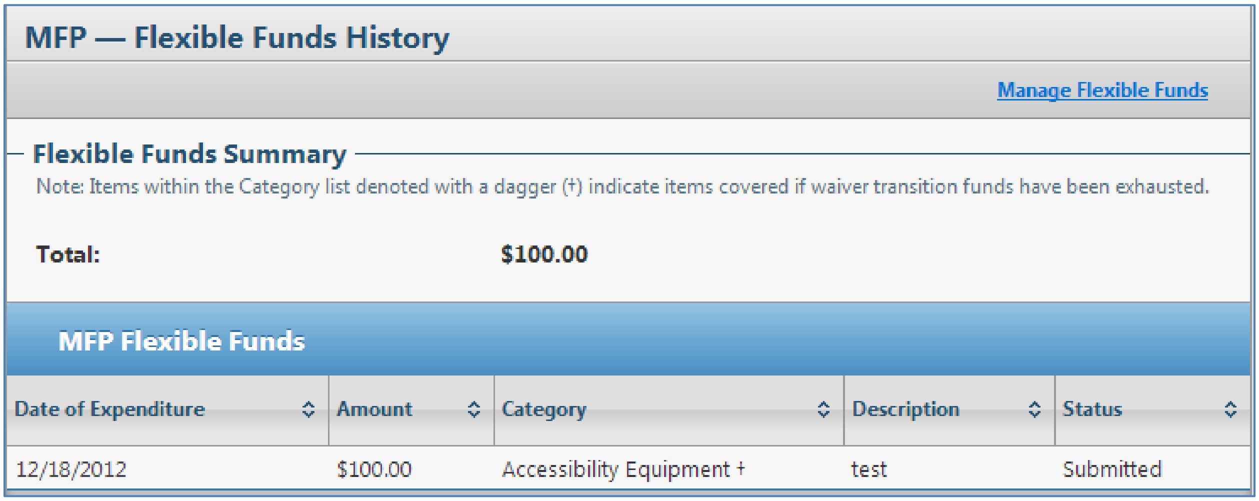


From the manage Flexible Funds page the user can **Discard a Flexible Funds entry** by clicking the ***Discard link*** as seen in the figure below. The user can discard a Flexible Fund entry at any time.



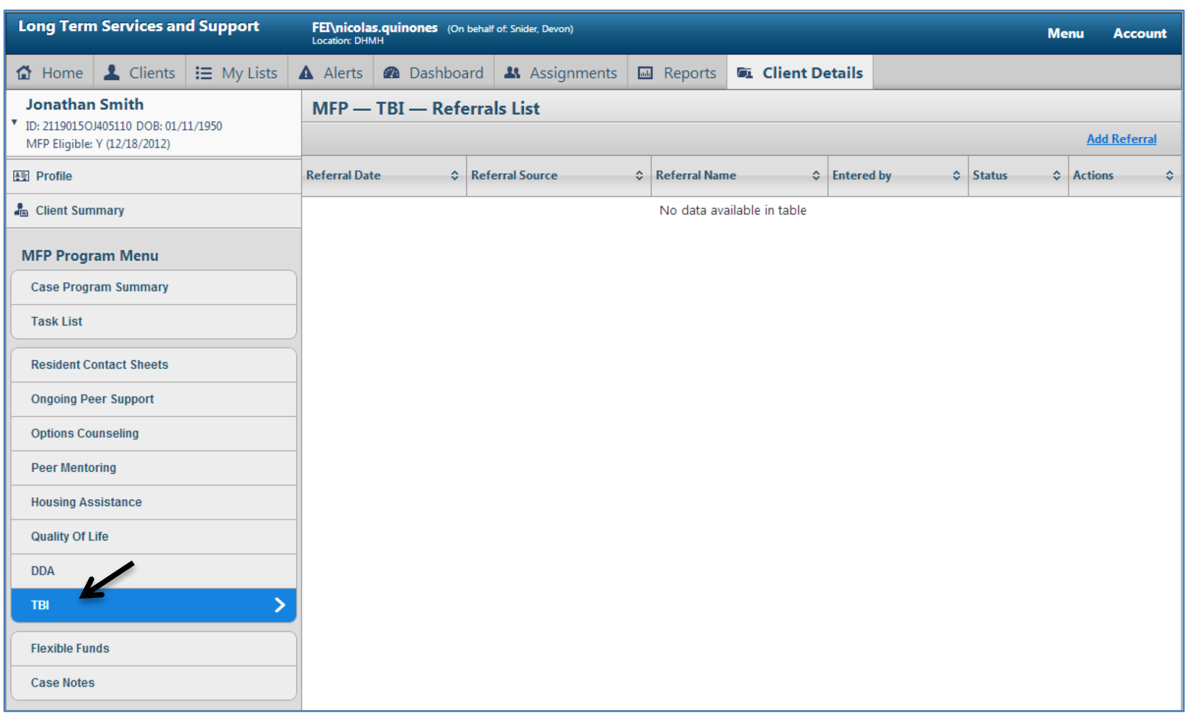
2.13.3 Updated Flexible Funds History

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



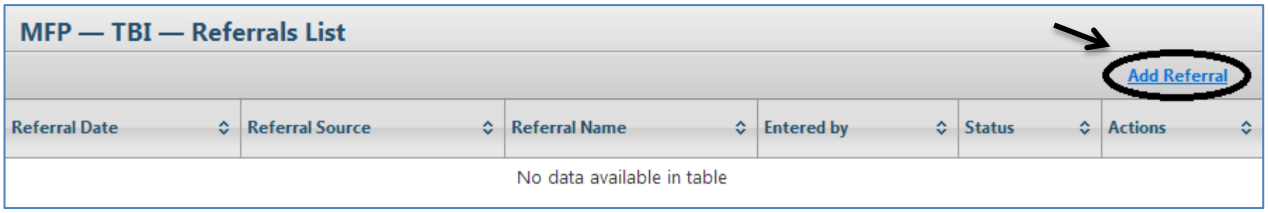
2.14 TBI

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

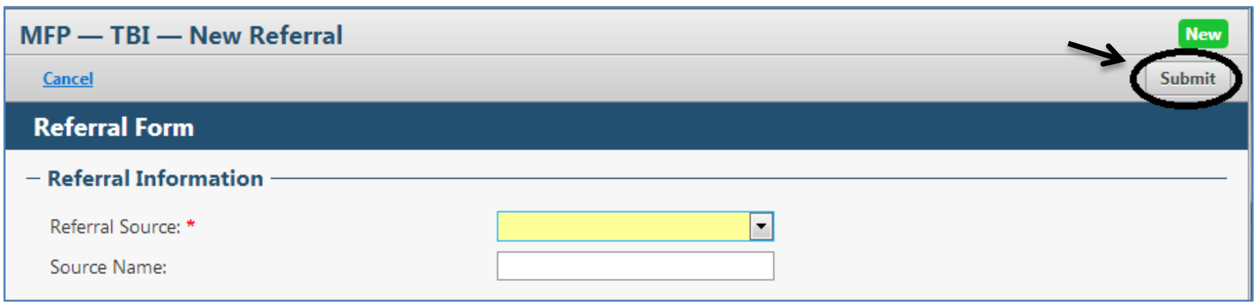


2.14.1 Add, Submit and View TBI Referral

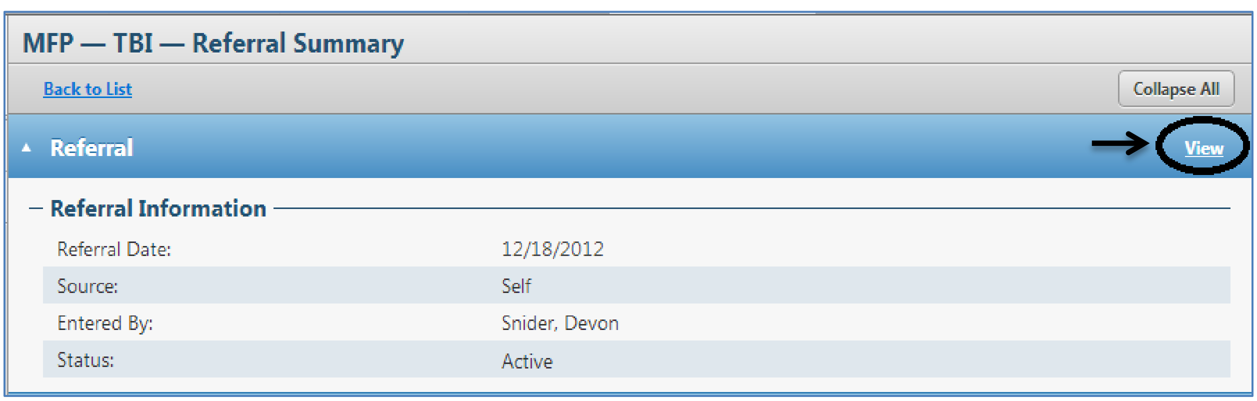
From the TBI—Referral List click the ***Add Referral link*** to **Add TBI—Referral** for the client as seen in the figure below.



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



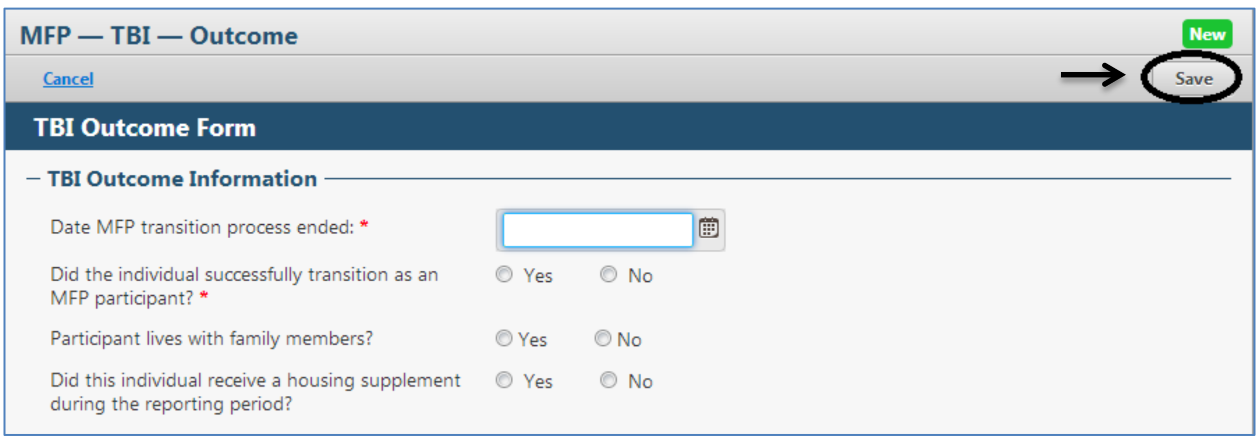
The user can View the TBI—Referral in two ways. The first way was shown above as the user is taken to View-mode after submitting the Referral Form. The user can also navigate to TBI—Referral Summary page and click the ***View link*** to **View the TBI—Referral**.



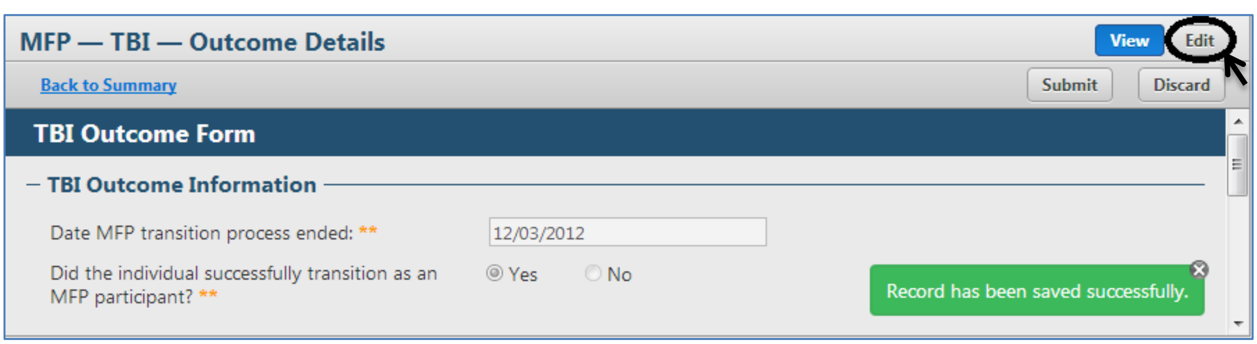
2.14.2 Add, Save and Edit TBI Outcome Process Form

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

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



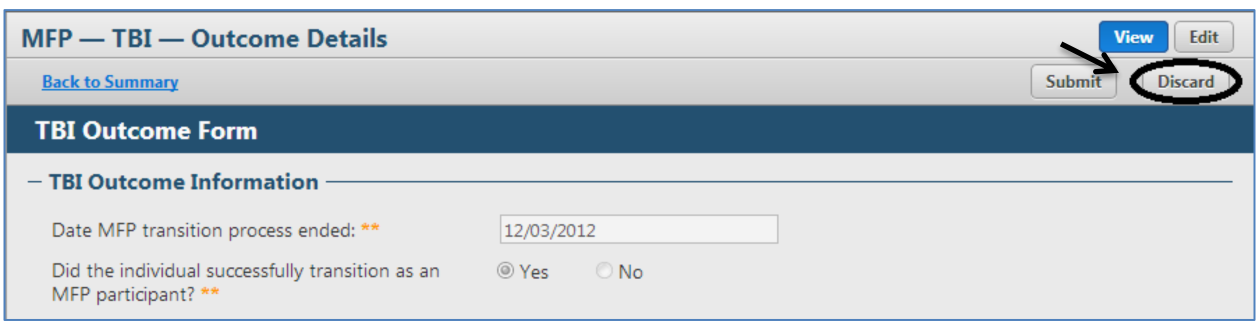
After clicking the Save button the user is taken to View-mode. Click the **Edit link** to make changes to the TBI—Outcome Form as seen below. After making changes click the Save button again and the user will return to View-mode.



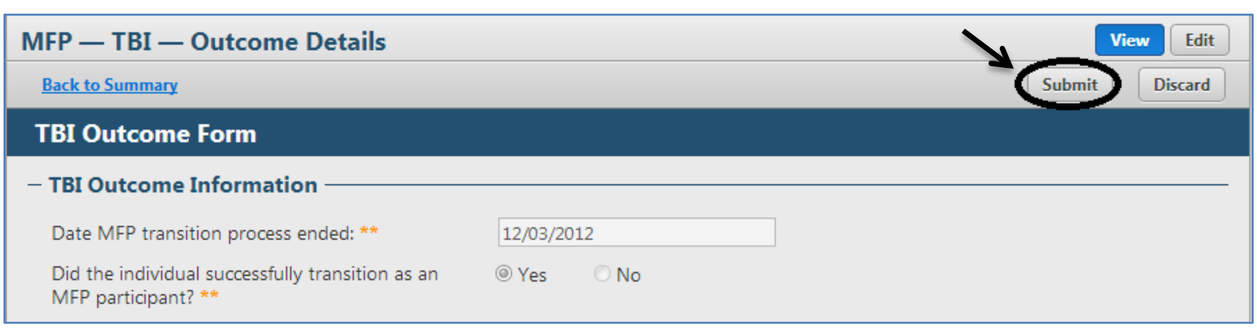
2.14.3 View, Discard and Submit TBI Outcome Process Form

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

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

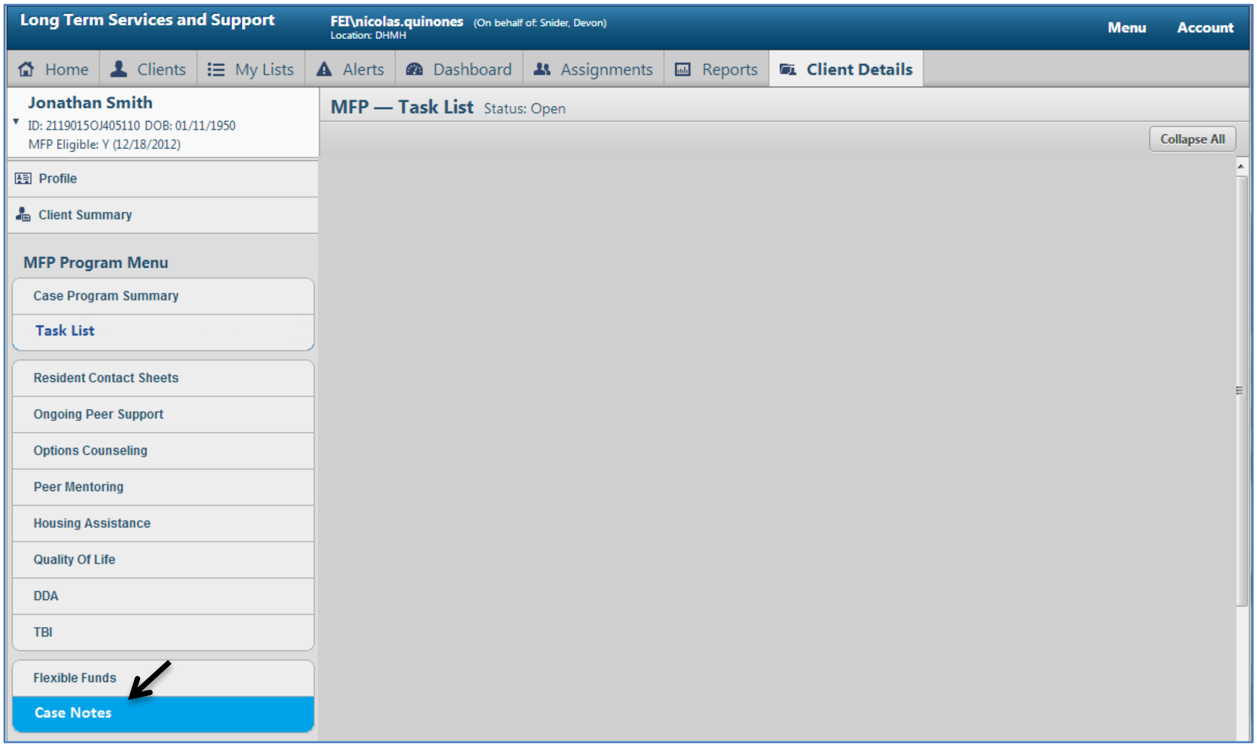


If the user does not wish to discard, click the ***Submit button*** to **Submit the TBI—Outcome Form** as seen in the figure below. Once submitted the TBI—Outcome Form can no longer be edited.

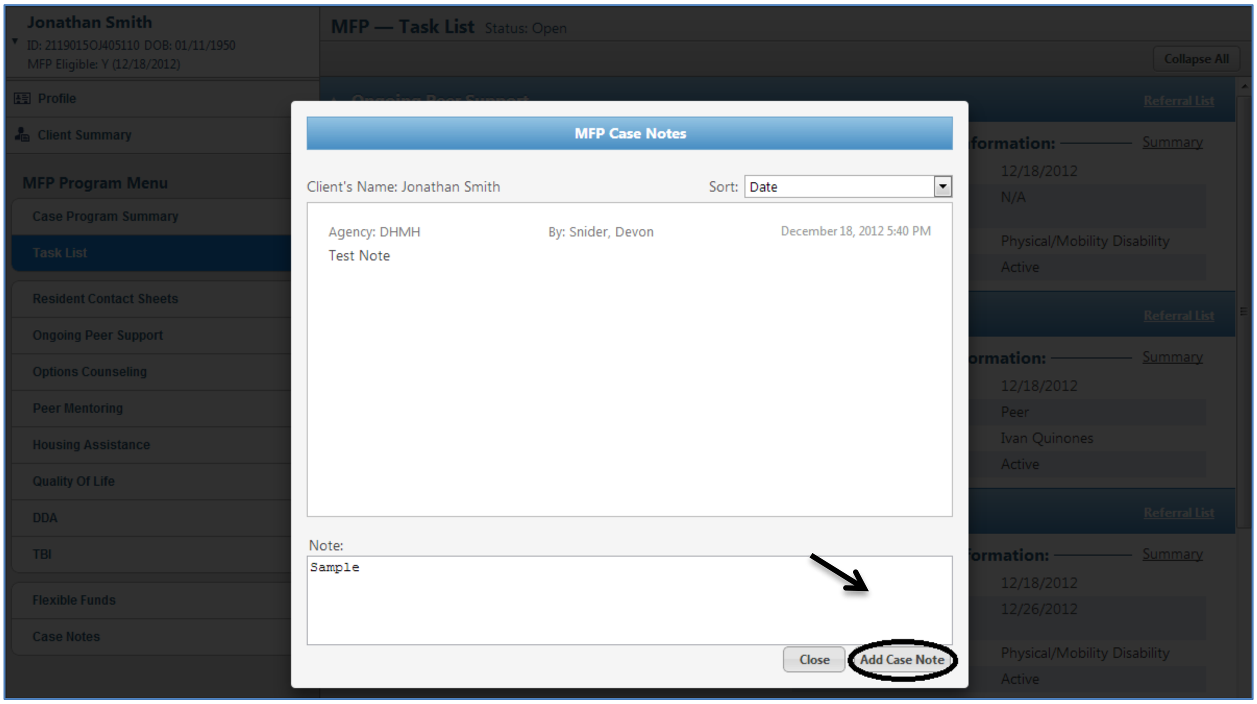


2.15 Case Notes

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



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



2.16 MFP Program Summary

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