Common Functions User Manual

A step by step navigational process

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Common Functions User Manual

Contents

1 Welcome to the Long-term Services and Supports system .... **Error! Bookmark not defined.**
1.1 Background 1
1.2 Guide to navigate through user manuals 1
1.2.1 User Manuals Descriptions 1
1.2.2 Recommended approach 3
2 Getting Started 3
2.1 Accessing LTSS 3
2.2 Login 4
2.3 Authorize 4
2.4 Logout 5
3 LTSS User Interface 6
4 LTSS Top-Level Navigation 7
4.1 LTSS Home 7
• Recent Alerts 8
4.1.1 Notice to Administrators 8
4.1.2 Upcoming Events 8
4.1.3 Technical Support 8
4.1.4 Quick Tips 8
4.1.5 Training Materials, User Manuals and Webinars 8
4.2 Clients 8
4.3 My Lists 9
4.4 Alerts 10
4.4.1 Viewing Alerts 11
4.4.2 Accepting Alerts 11
4.5 Dashboard 12

4.6 Assignments 13
4.6.1 Assigning Clients 14
4.6.2 Reassigning Clients 15
5 LTSS Left Side Navigation 17
6 Global Menu 20
6.1 Main 20
6.2 Administration 21
6.3 QCR 21
6.4 Technical support 21
6.5 Feedback 22
6.5.1 Feedback List 22
6.5.2 Create Feedback 23
6.6 Print 24
7 System-wide Controls 25
7.1 Input Fields 25
7.1.1 Text Boxes 25
7.1.2 Drop-down Lists / Combo Boxes 26
7.1.3 Check Boxes 26
7.1.4 Radio Buttons 27
7.2 Buttons 27
7.2.1 Acknowledge Button 27
7.2.2 Discard Button 27
7.2.3 Expand All Button 27
7.2.4 Collapse All Button 28
7.2.5 Edit Button 29
7.2.6 Search Buttons 29
7.2.7 Clear Button 29
7.2.8 Save Button 29
7.2.9 Submit Button 30

7.3 Links 30
7.3.1 Table Links 30
7.3.2 Back To List Link 30
7.3.3 Add or Create Link 30
7.3.4 Cancel Link 31
7.3.5 Print Link 31

1 Introduction

1.1 Background

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

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

1.2 Guide to navigate through user manuals

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

1.2.1 User Manuals Descriptions

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

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

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

1.2.2 Recommended approach

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

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

2 Getting Started

2.1 Accessing LTSS

Enter https://ltssmaryland.org in the URL (or web address) in the browser.

Note: The site can be accessed using any of the following browsers and versions:

- Google Chrome 19 and later
- Microsoft Internet Explorer 10 and later
- Firefox 12 and later
- Safari 5.1 and later

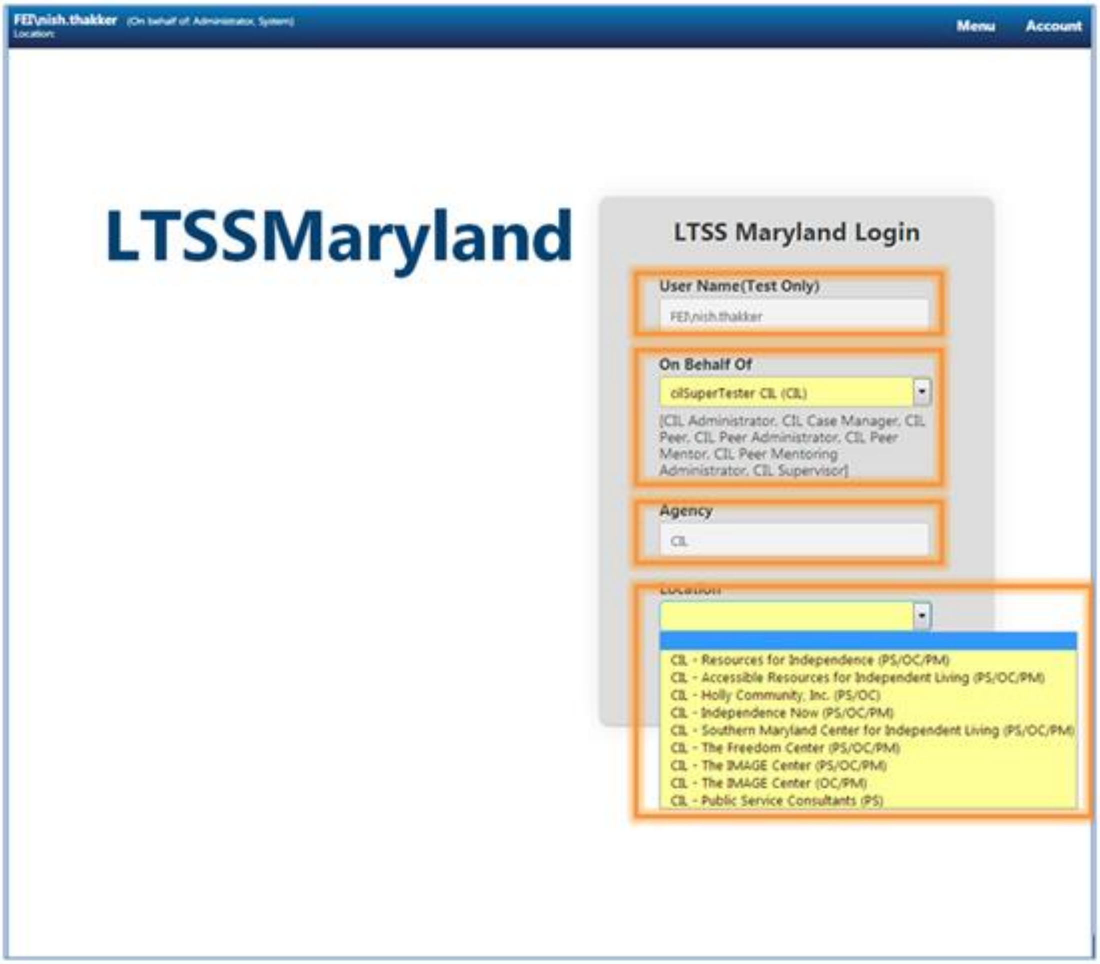
2.2 Login

This will open the sign-in page for LTSS. Please enter your **user name**, press the tab key, enter your **password** and click on the *Sign In* button. This will take you to the *Authorize* page (Screenshot below).

2.3 Authorize

When you login to LTSS, on the *authorize* page, you will see the following information:

- You will be able to see your own name in the *User Name* section.
- If you are a DHMH user, you will be able to select names of various staff members from the *On Behalf of* drop-down menu.
- The *Agency* section will display the name of the logged-in users' agency.
- The *Location* drop-down will be available for those staff members that are associated with multiple locations of an agency. For example, if AAA Baltimore County has 2 offices (locations), and John Smith works at both locations, then John Smith will be able to select from both locations. In the screenshot below, you may notice that the role "CIL super tester" is associated with multiple CIL locations and would be able to select any of the locations from the list.

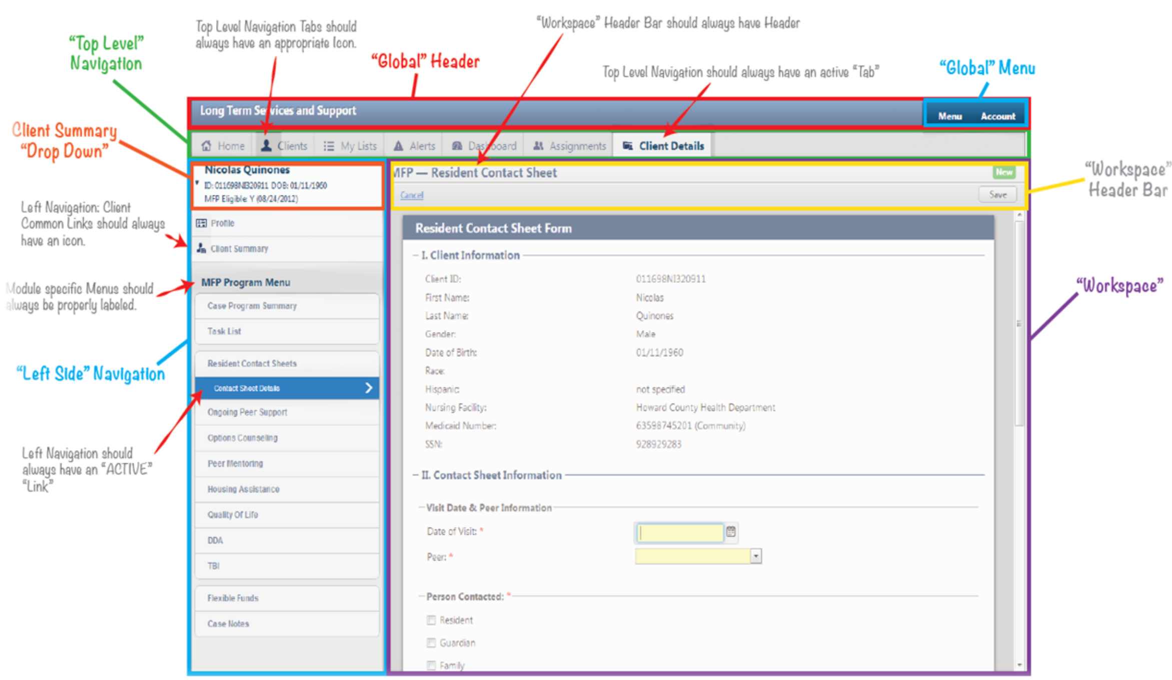


2.4 Logout

Every time you want to exit the LTSS System, it is important that you logout and close the browser window. This ensures protection and privacy of client data and Protected Health Information (PHI). To exit the LTSS System, simply hover over the *Account* tab in the upper right hand corner and click *Sign Out*.

3 LTSS User Interface

The image below provides an overview of the standard layout of LTSS screens. It also gives you a quick description of the different elements on the screen and their significance. This can be your guide to navigate quickly through the system. For new LTSS users, it would be helpful to print a copy of this screenshot and place it close to your workstation.



4 LTSS Top-Level Navigation

The top-level navigation is useful for high-level navigation through the system, across different clients.

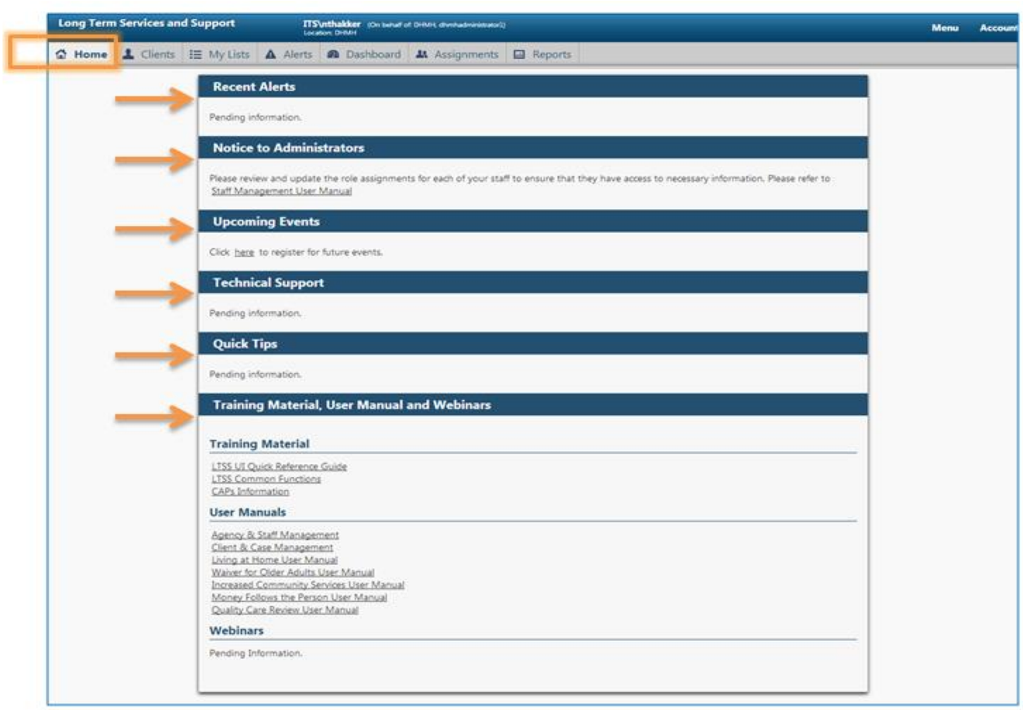
The following tabs are included in the top-level navigation:

- Home
- Clients
- My lists
- Alerts
- Dashboard
- Assignments reports

Each of these tabs is described in detail below.

4.1 LTSS Home

The Home page is the landing page when you first login to the LTSS system. This page will provide you with all the tools and materials necessary to use the system with ease.



The Home page consists of the following sections:

4.1.1 Recent Alerts

This section will contain most recent alerts for the user logged in. Alerts are described in further detail later in this document.

4.1.2 Notice to Administrators

This section will display announcements sent by DHMH or system administrators pertaining to the LTSS system. For example, reminder to change your passwords periodically will appear here.

4.1.3 Upcoming Events

This section will display information about any upcoming events that agencies may want to attend. For example, information about in-person LTSS system trainings or training webinars will appear here.

4.1.4 Technical Support

This section will contain information in case you need technical support. It will provide you with contact information such as a helpline number to call for support.

4.1.5 Quick Tips

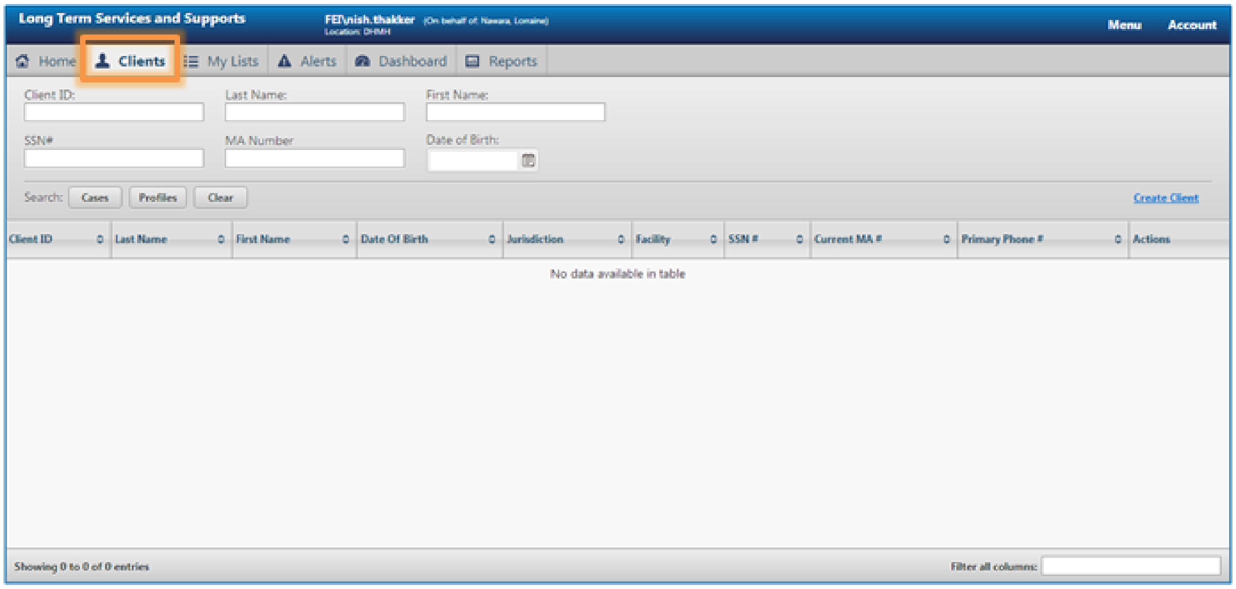
This section will contain quick and easy instructions about the LTSS system. The screenshot in the LTSS user interface section is an example of one of these quick tips.

4.1.6 Training Materials, User Manuals and Webinars

This section will provide you with abundant detailed instructional materials, guides, presentations and video recordings on how to use the LTSS system. Materials will include user manuals (as mentioned in the introduction), PowerPoint presentations used during training sessions, recordings of webinars provided by topic, detailed additional information about certain modules (such as interRAI), etc.

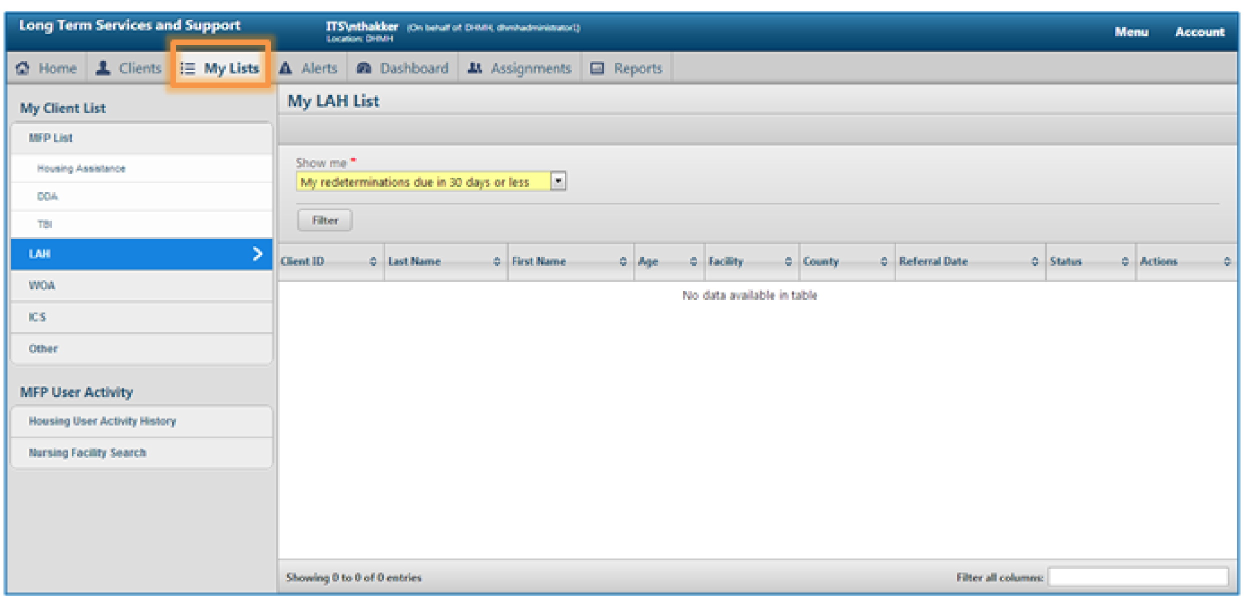
4.2 Clients

Since LTSS is a client-centered system, this will be your go-to tab for any information about a client, regardless of the Medicaid program they are interested in applying for or are enrolled in. This tab will let you search for clients in LTSS, including MMIS and MDS imports and also let you add new clients. **Note:** For more information regarding the Clients tab please refer to the *Client and Case Management manual*.



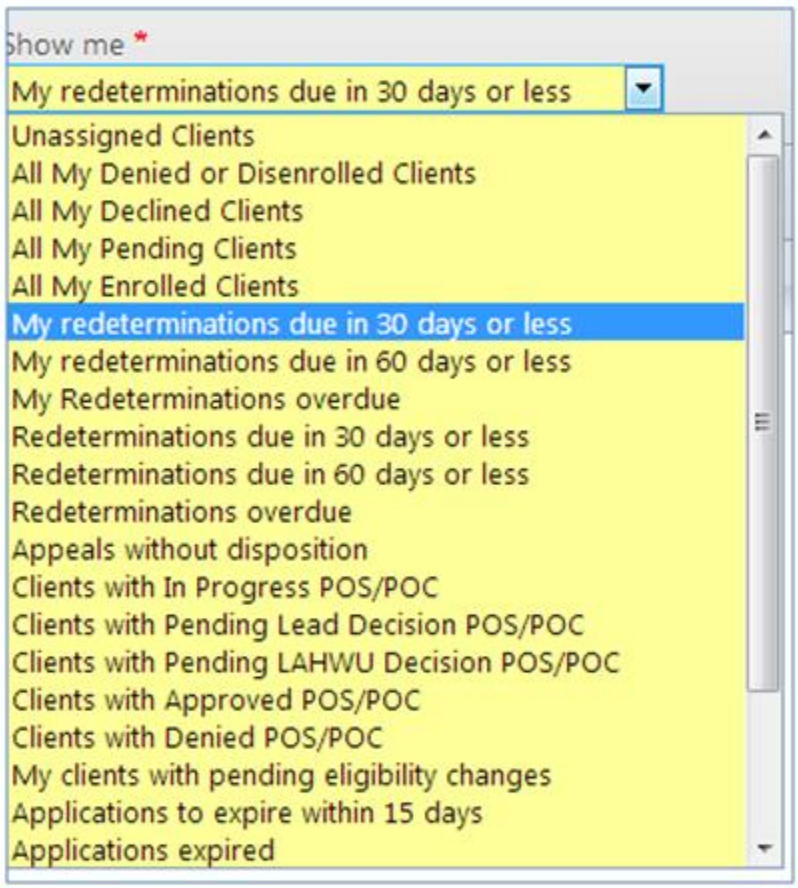
4.3 My Lists

My Lists tab allows users to search for a subset of clients based on a certain criteria or category as defined in the drop-down list (screenshot below). For example, users can view a list of all clients with Redeterminations due in 30 days or less, within their agency location. The lists are available strictly based on the agency and role of the user logged in.



Step-by-step instructions:

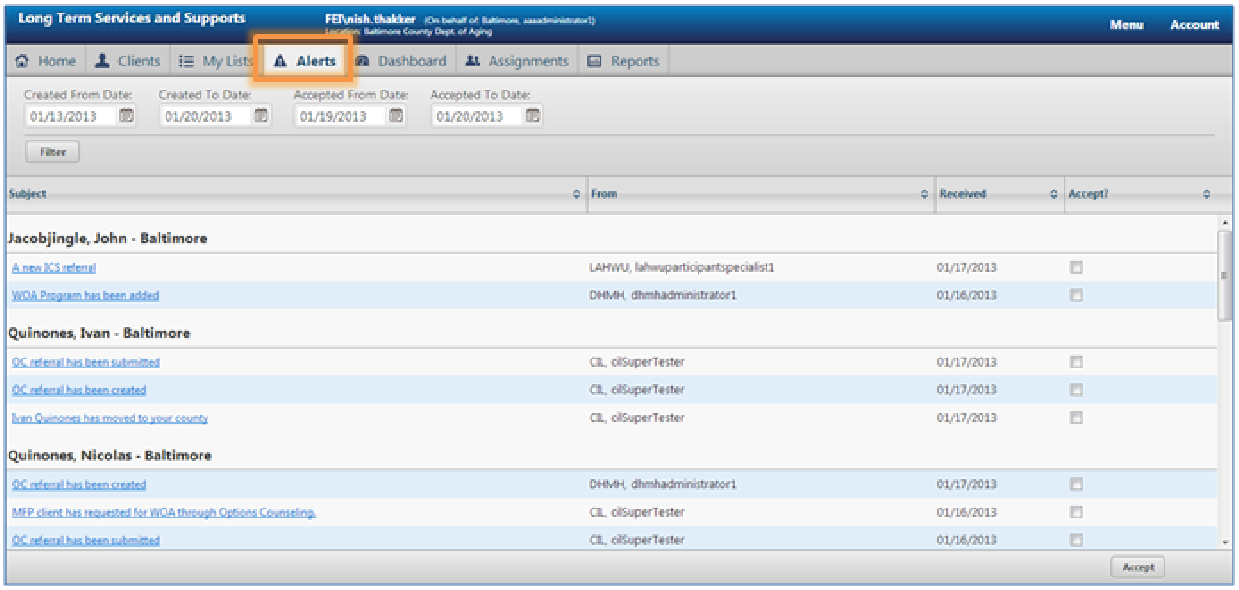
1. After clicking on the *My Lists* tab, you need to select the program from the left side navigation. In the screenshot above, the user has selected LAH as the program and therefore sees the lists accordingly.
2. After selecting the program, you click on the highlighted yellow drop-down menu and select a specific list.



3. Then click on the *Filter* button to display the list.
4. If the list is too long, you can type in any of the column values for your client, such as last name, first name, county, etc. in the *filter all columns*, in the bottom right corner, to further filter (or shorten) then list.

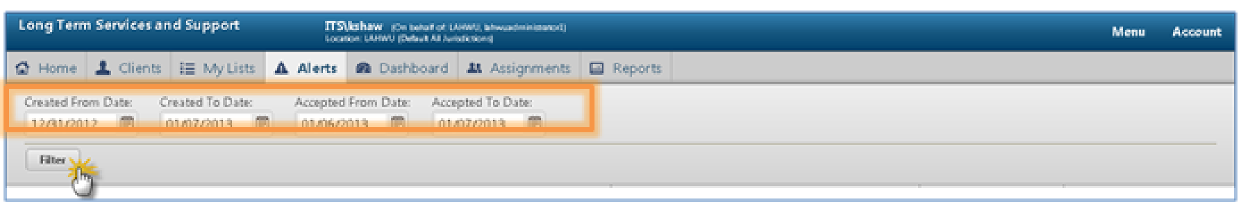
4.4 Alerts

The Alerts tab allows users to view and accept notifications from other users in the system. Alerts inform the recipient that some type of action is required or has been completed. Alerts are specific to the logged-in user’s role and assignments to specific tasks.



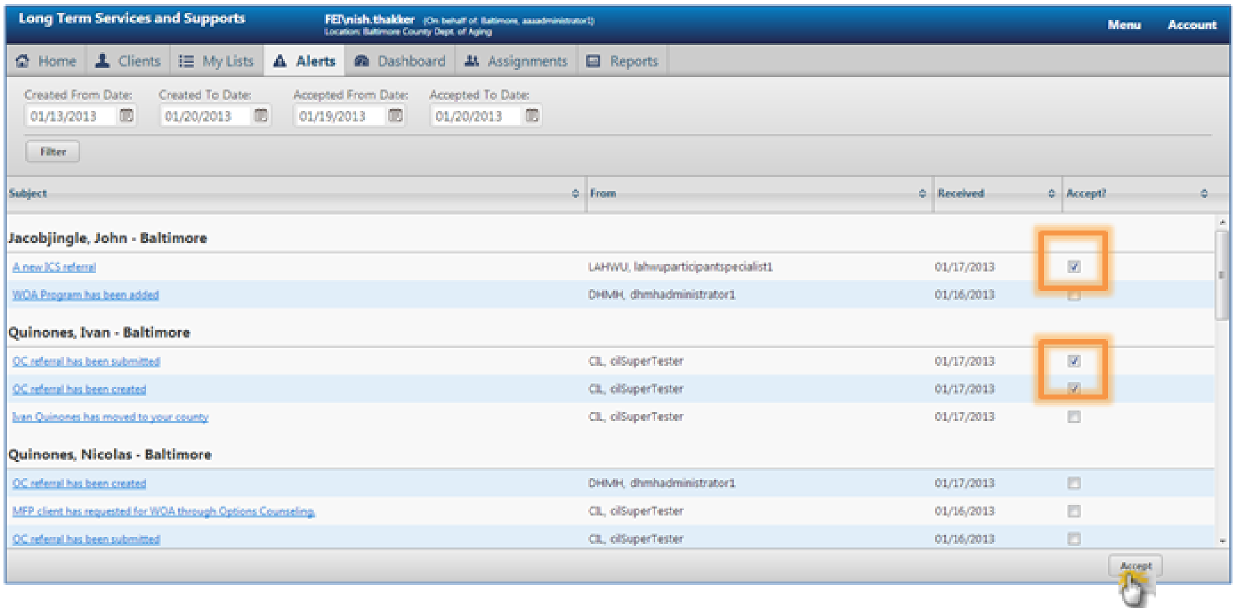
4.4.1 Viewing Alerts

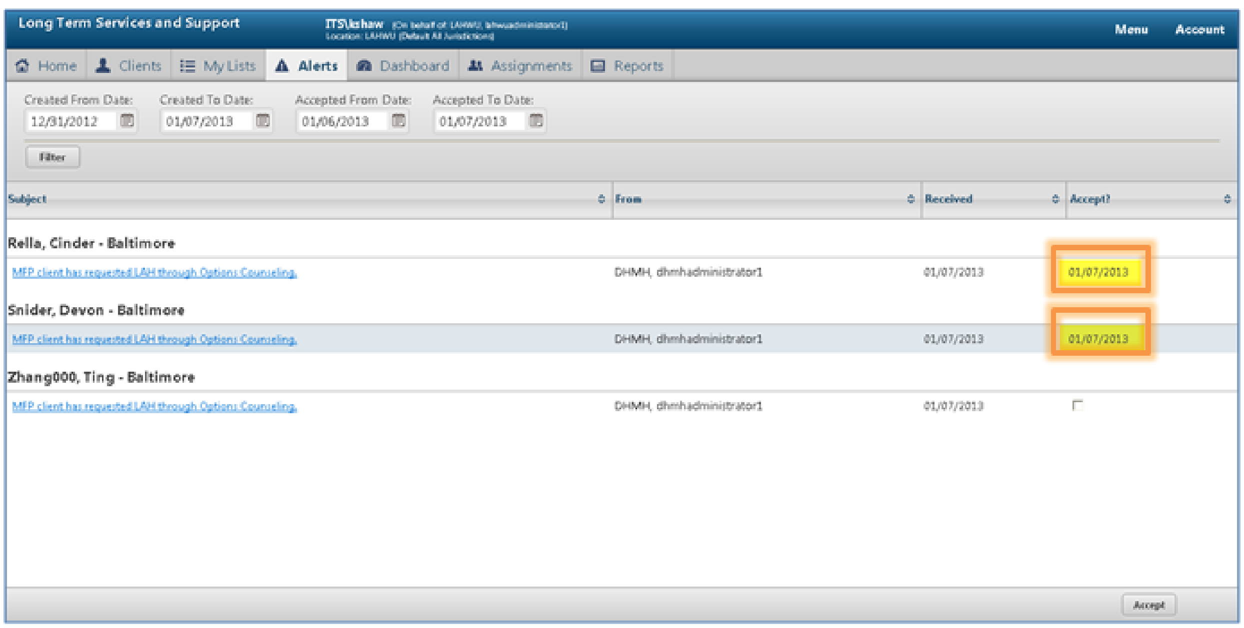
When you click on the Alerts tab, you can view all alerts sorted by client's last name for the user logged in. In order to filter this search, you can enter the dates between which the alerts may have been created (received) or enter the dates between which the alerts may have been accepted. Once you enter any of these dates, and click on the Filter button, the list can be filtered based on the criteria entered.



4.4.2 Accepting Alerts

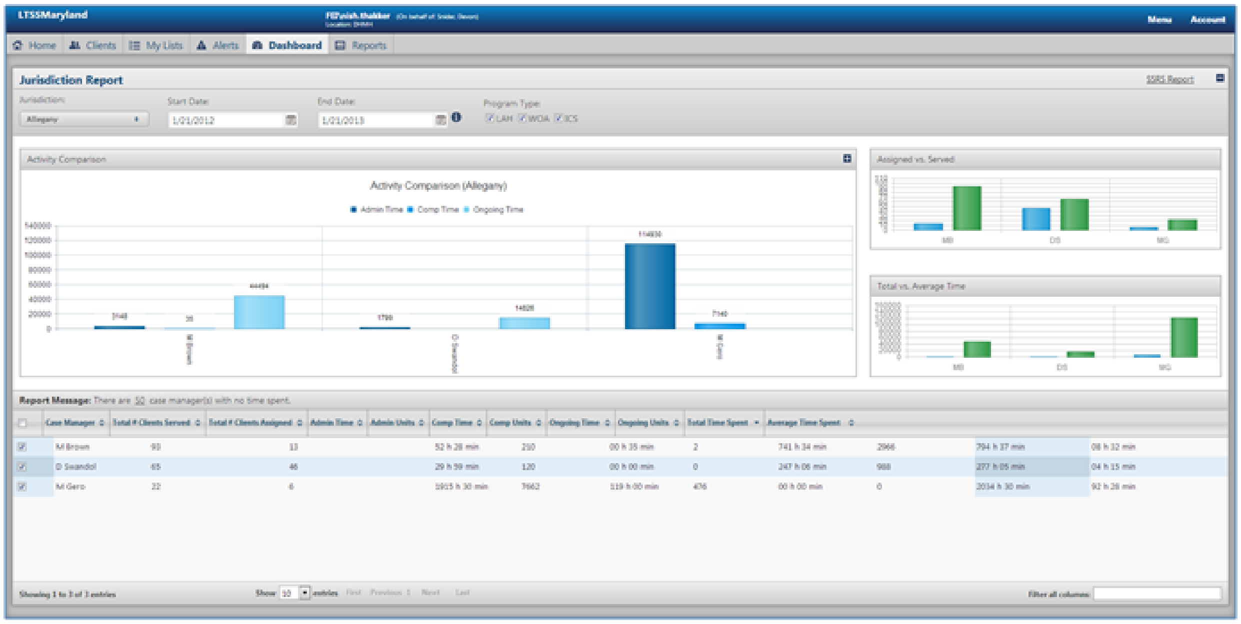
To select the alerts you would like to accept, simply click on the checkbox(es) in the *Accept?* column and then click on the Accept button at the bottom of the page. The page will refresh and the *Accept?* column will be updated with the date the alert was accepted.

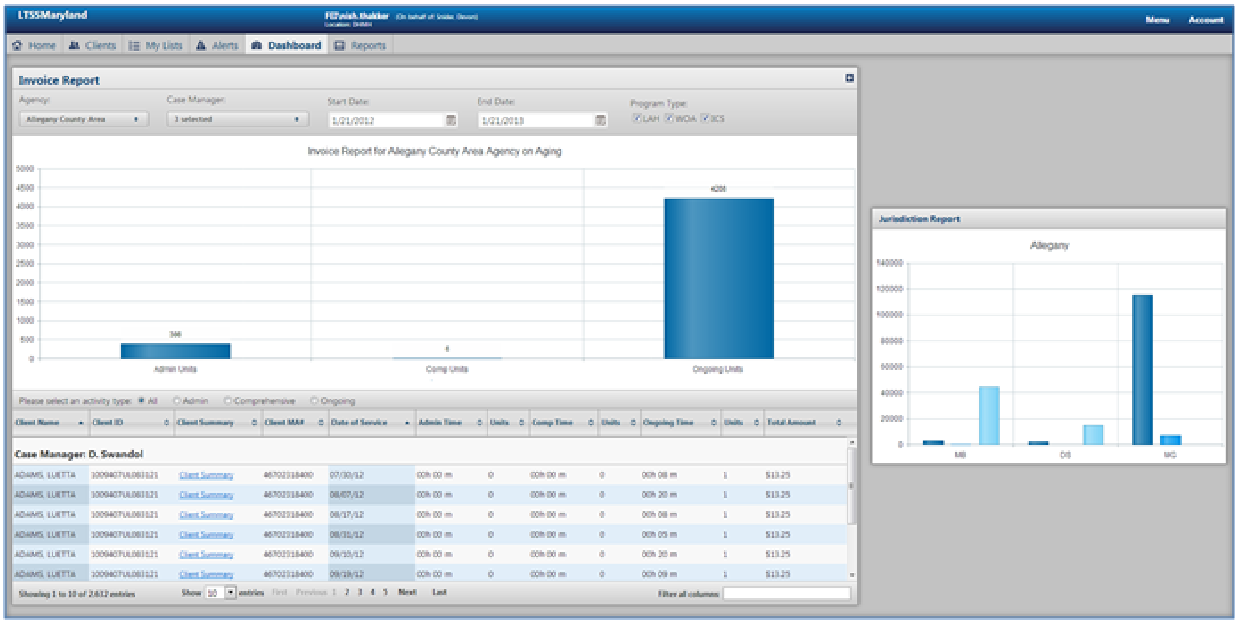




4.5 Dashboard

The Dashboard tab in LTSS provides a way to visualize certain selective reports that are used on a daily basis, to better understand the data. In other words, dashboard acts as a data visualization tool. The screenshots below, based on test data, show you the Jurisdiction report and the invoice reports.



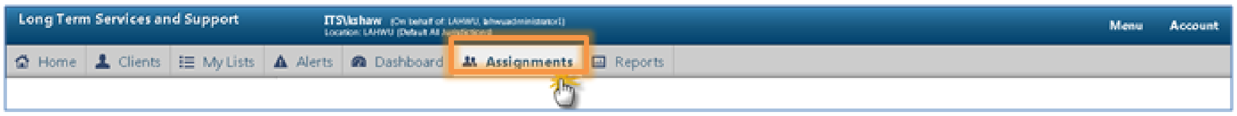


4.6 Assignments

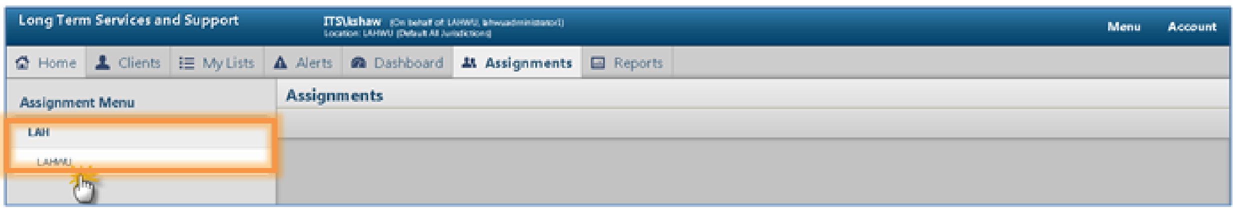
The Assignments tab allows authorized users (intake personnel, administrators or supervisors) to assign or reassign staff within their agency to a client's case program. Even though non-assigned staff can work with a client (within the same agency), it is important to assign at least one staff member, since all alerts are sent to the assigned staff only.

4.6.1 Assigning Clients

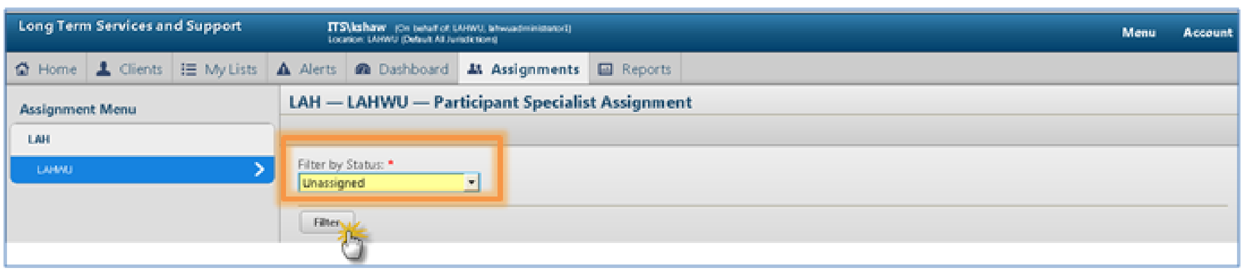
1. Click on the Assignments tab



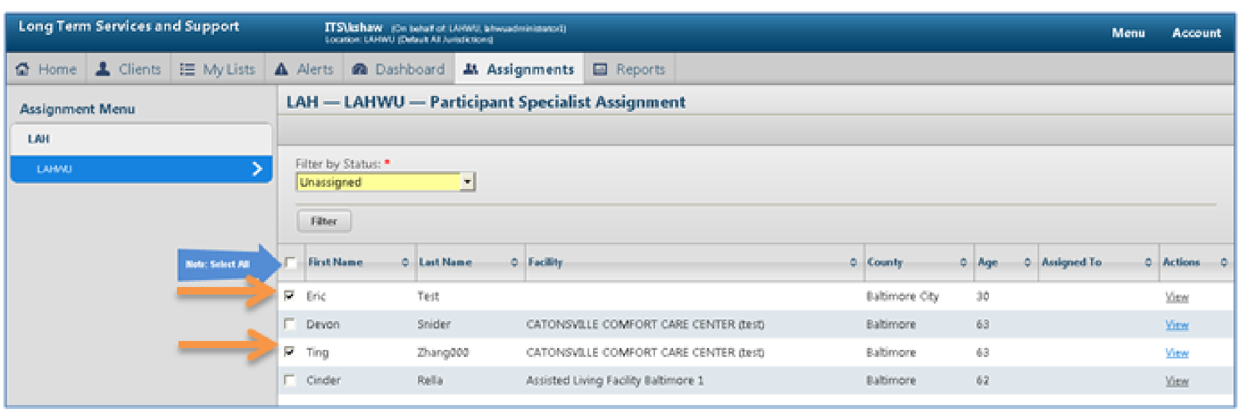
2. Select the program from the left side navigation



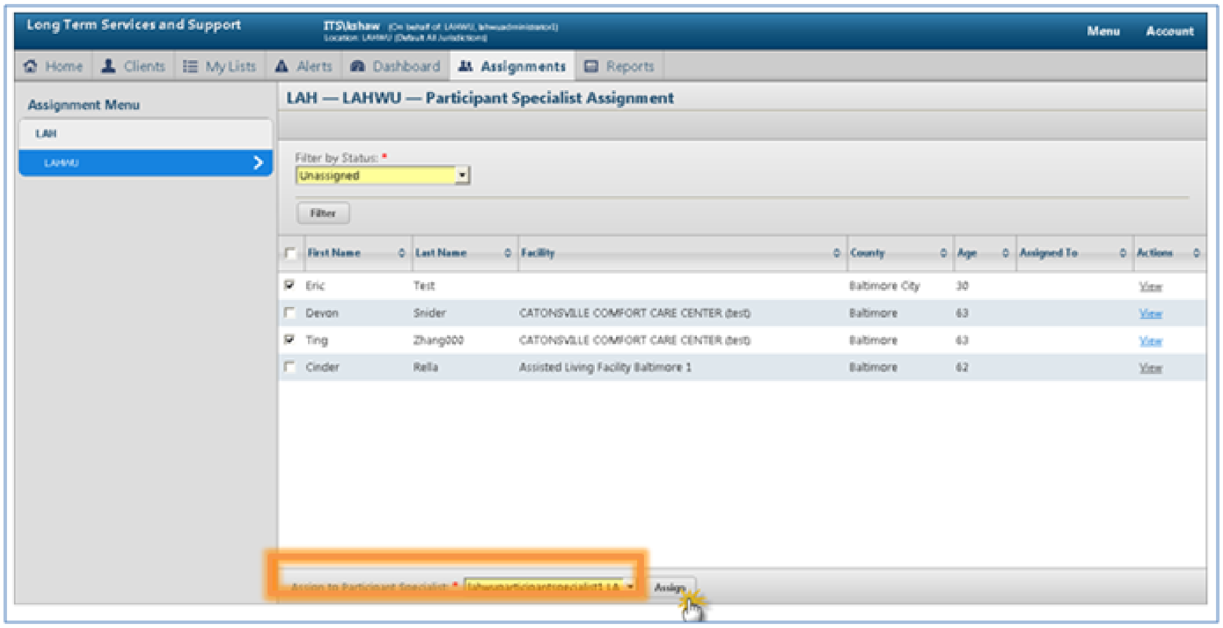
3. Select Unassigned from the *Filter by Status* drop down list and click on the Filter button.



4. Click on the checkbox in front of the client's first name you would like to assign. You can assign multiple clients at a time, known as batch assignment, in order to save time.



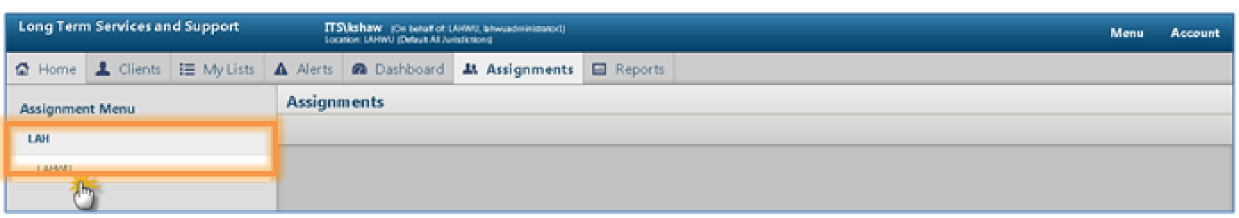
5. Select the name of the staff member you would like to assign from the Assign drop down list at the bottom of the page and click on the *Assign* button. The selected clients will be removed from the *Unassigned* list and moved to the *Active* list.



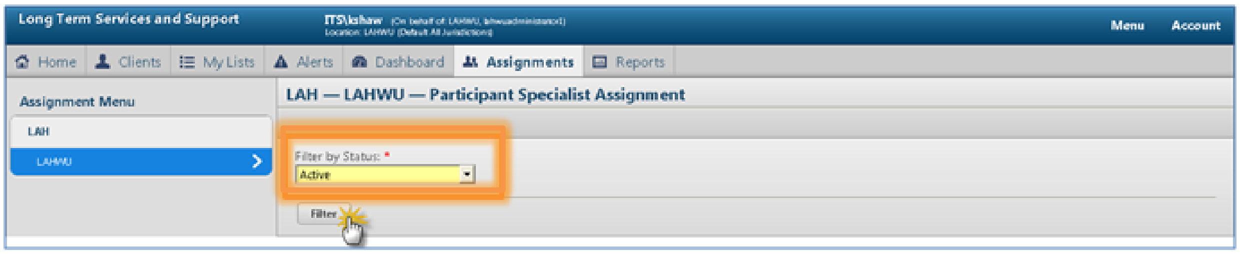
4.6.2 Reassigning Clients

1. Click on the Assignments tab in the Top Level Navigation bar.

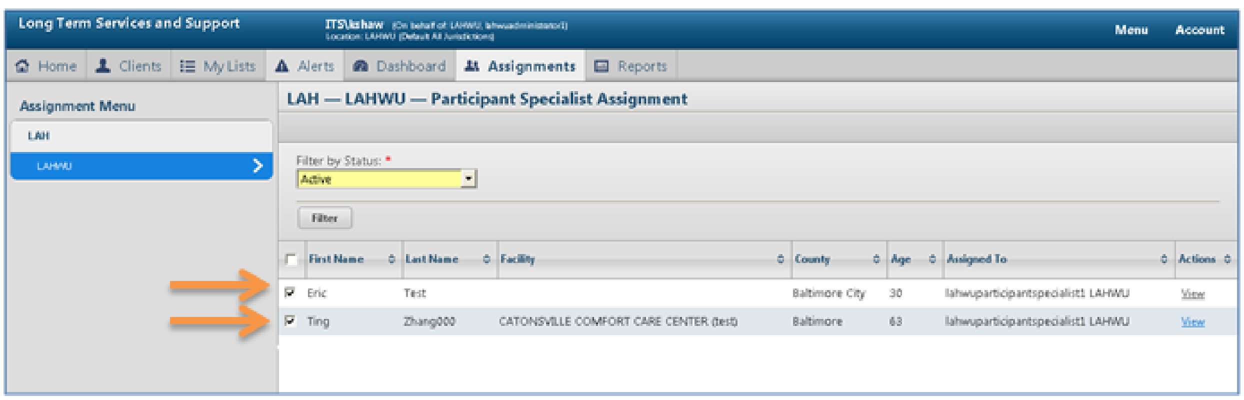
2. Select the program from the left side navigation



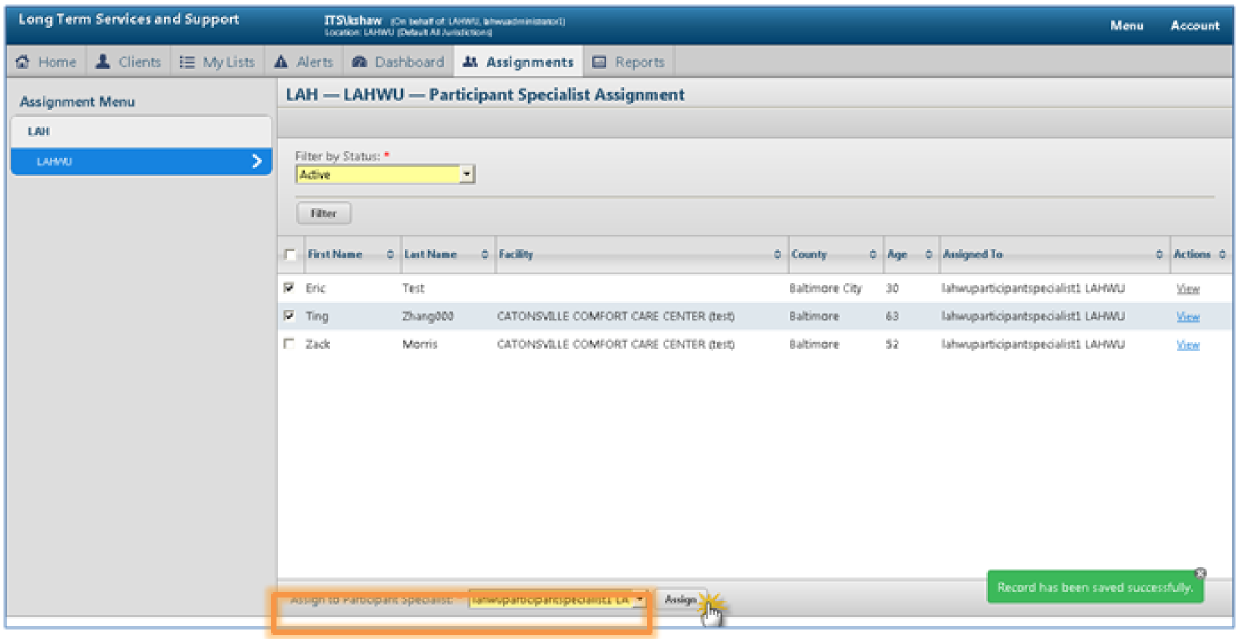
3. Select Active from the *Filter by Status* drop down list and click on the Filter button.



4. Click on the checkbox in front of the client's first name that you would like to reassign. You can re-assign multiple clients at a time, known as batch assignment, in order to save time.

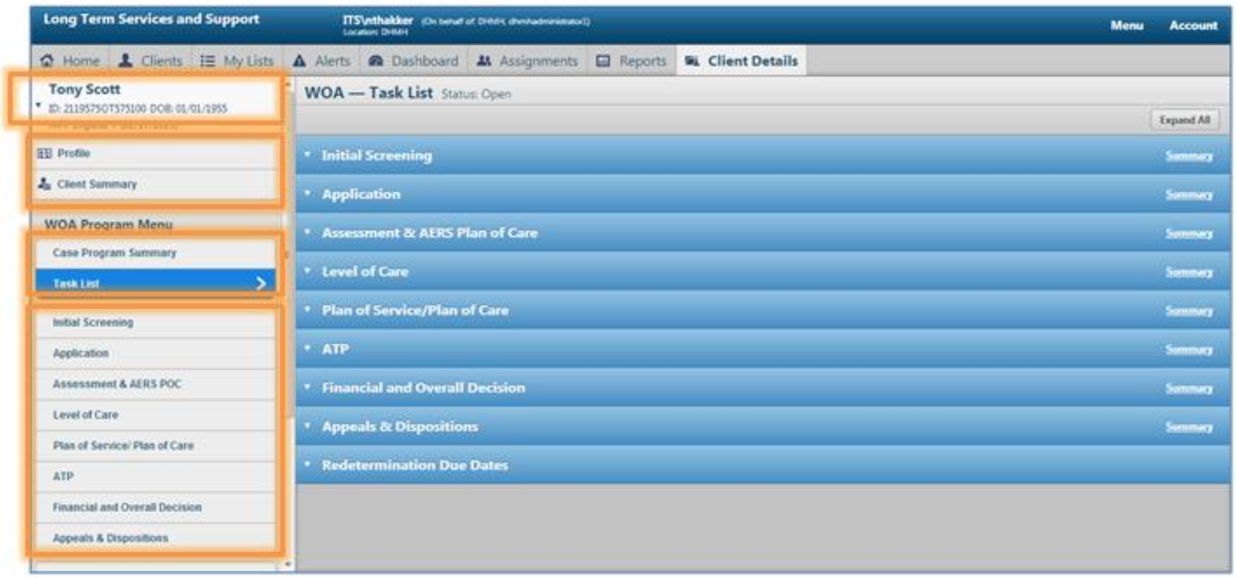


5. Select the name of the staff member you would like to reassign the client to from the *Assign* drop down list at the bottom of the page and click on the *Assign* button. A message indicating the "Record has been saved successfully" will appear in the lower right corner.



5 LTSS Left Side Navigation

The left side navigation is used most frequently, as you navigate through various forms, after selecting a client. The list of available menu items depends on the logged-in user's role as well as the current module/function being displayed. By default, the system will show the left side navigation menu fully expanded on the left side as shown below. The menu item currently selected will be highlighted with an arrow displayed on the right.

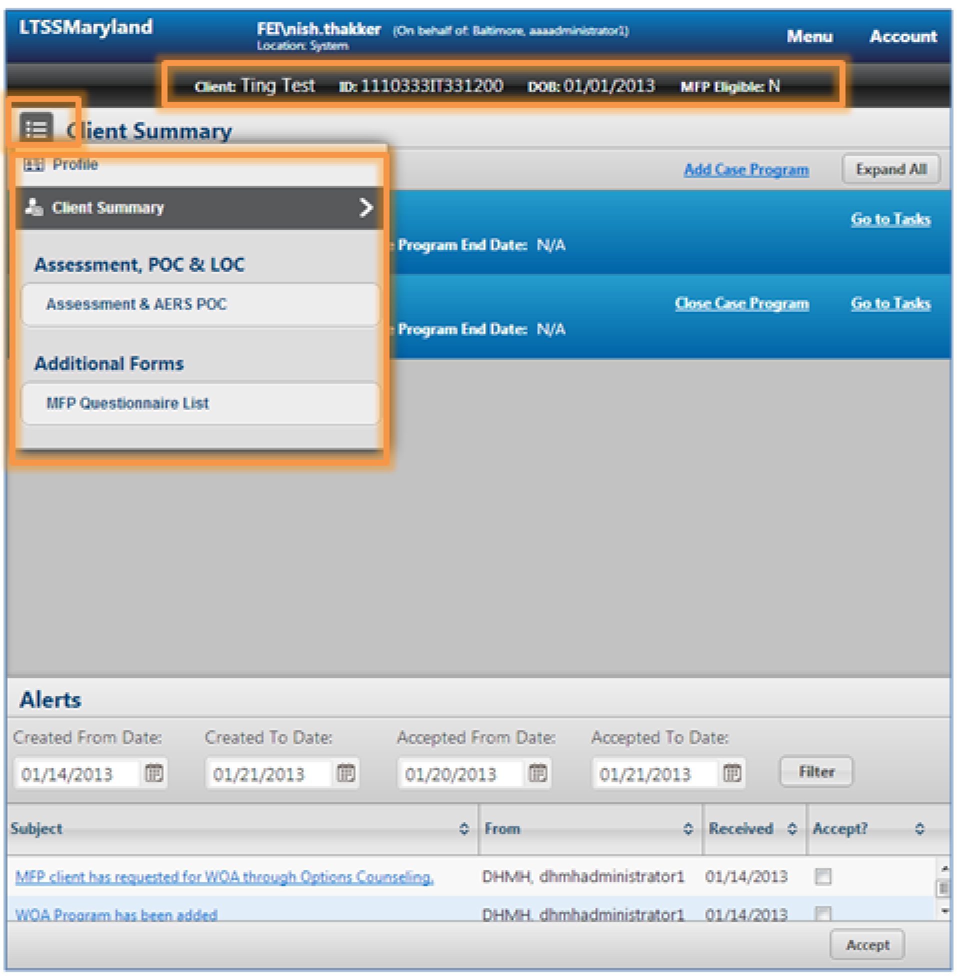


One of the most helpful aspects of this menu is that it drills into more details as you go down the list. For example:

- It starts out with most frequently used client profile information available at all times (first box in the above screenshot). If you click on the downward pointing arrow, this box expands further to provide you with more details. To minimize this expanded box (screenshot below), you can click on the little upward pointing arrow. Note: You will find information about a client's MFP eligibility in this section at all times.

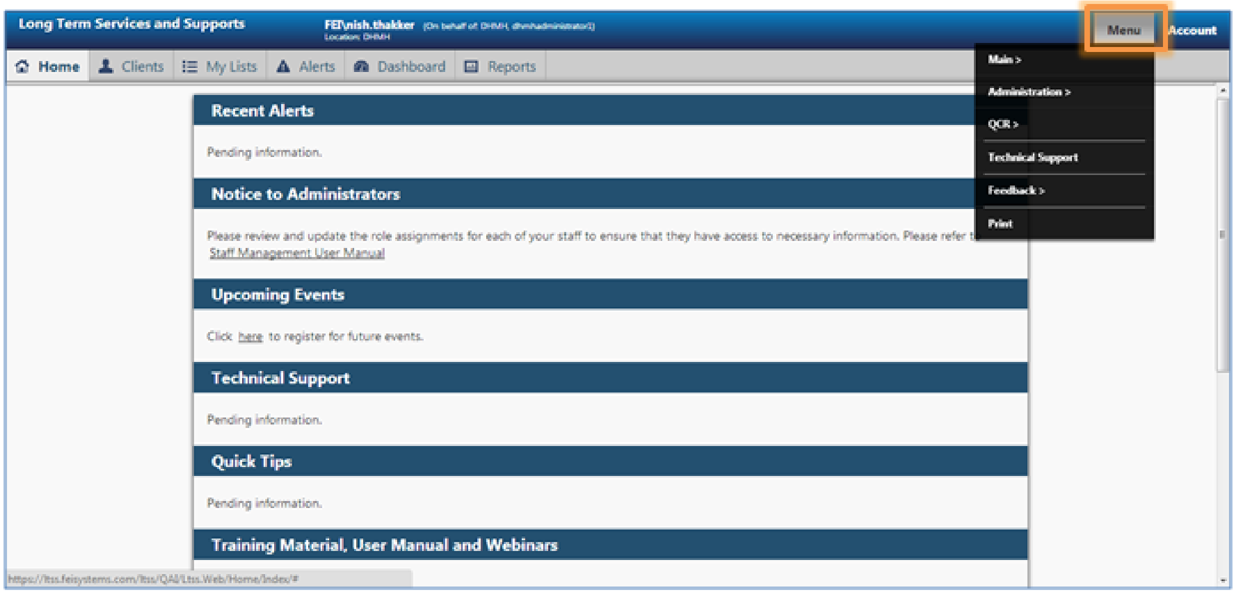
- The menu then drills into further detail by providing links to the client profile and client summary (second box in the above screenshot).
- The menu then takes you into more high-level, program-specific options such as links to the case program summary page and the task list for that case program (third box in the above screenshot). Note: In the screenshot above, since the task list is being displayed in the main workspace area, the *Task List* menu item is highlighted in blue.
- It then drills into modules within the case program (fourth box in the above screenshot). You can select the module you'd like to access from the left side navigation or the task list page by clicking on the summary link.
- Thereafter, you will see miscellaneous modules/forms in the left side navigation.

The left side navigation menu shows up in the left panel of most of the screens in the LTSS system unless the system is being accessed with a monitor with smaller resolution or narrow width (e.g. using the system on tablet in portrait mode). In this case, the left navigation menu will collapse into a small button to maximize screen usage for the workspace area.



6 Global Menu

This menu functionality is related more to global system functionality than to client or program related activities.



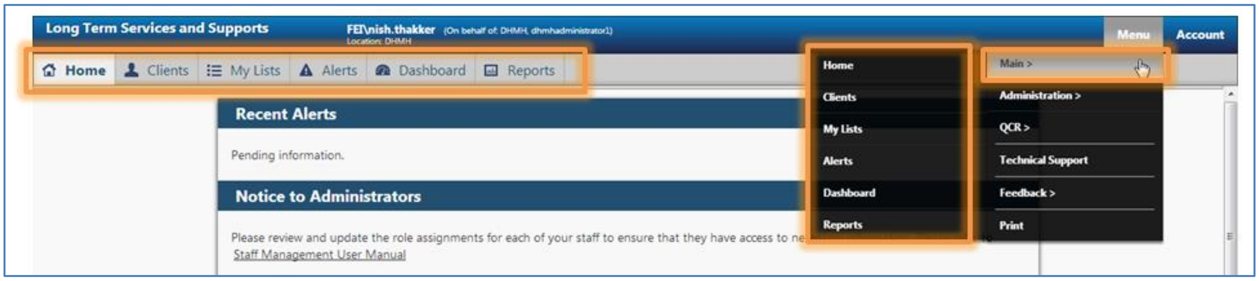
Menu has the following options. Any of the menu options with a rightward pointing arrow is in turn another menu. The menu options are available strictly based on the agency and role of the user logged in.

- Main
- Administration
- QCR
- Technical Support
- Feedback
- Print

Each of these options is explained below in detail.

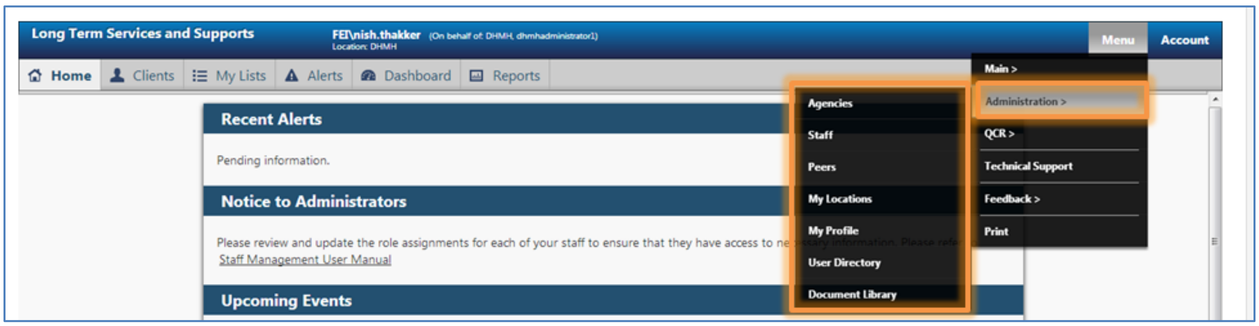
6.1 Main

Click on *Menu*, then click on *Main*, and you can see the *Main* sub-options being displayed. You may note that the *Main* sub-options are the same as the top-level navigation tabs, discussed in the sections above.



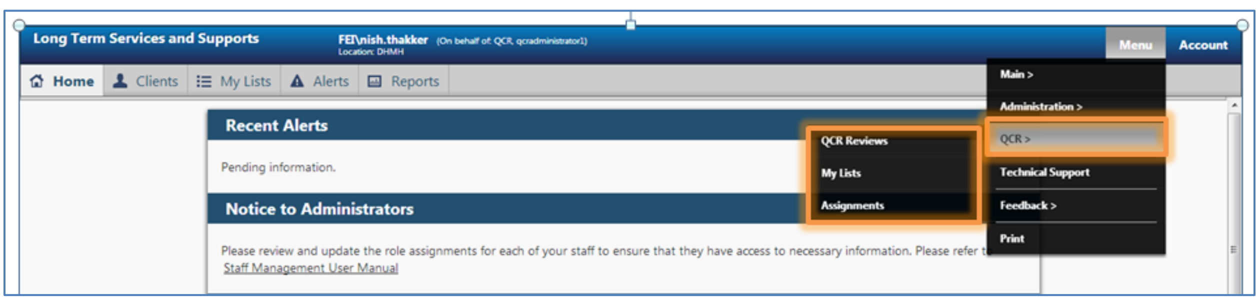
6.2 Administration

Click on *Menu*, then click on *Administration*, and you can see the *Administration* sub-options being displayed. Additional details about each of the *Administration* sub-options can be found in the Administration Manual.



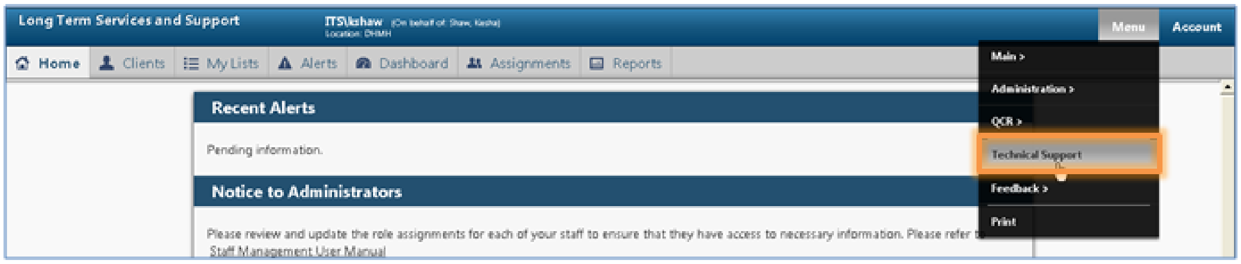
6.3 QCR

Click on *Menu*, then click on *QCR*, and you can see the *QCR* sub-options being displayed. Additional details about each of the *QCR* sub-options can be found in the QCR Manual.



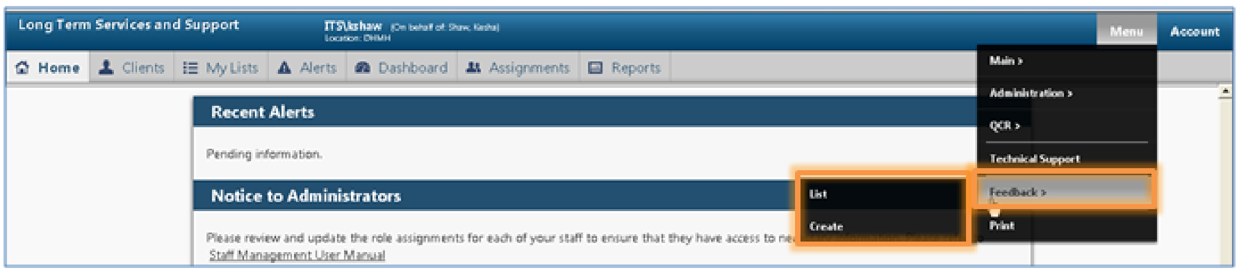
6.4 Technical support

Click on *Menu*, then click on *Technical Support*, and you can see contact information (phone, email, mailing address) for the LTSS technical support staff.



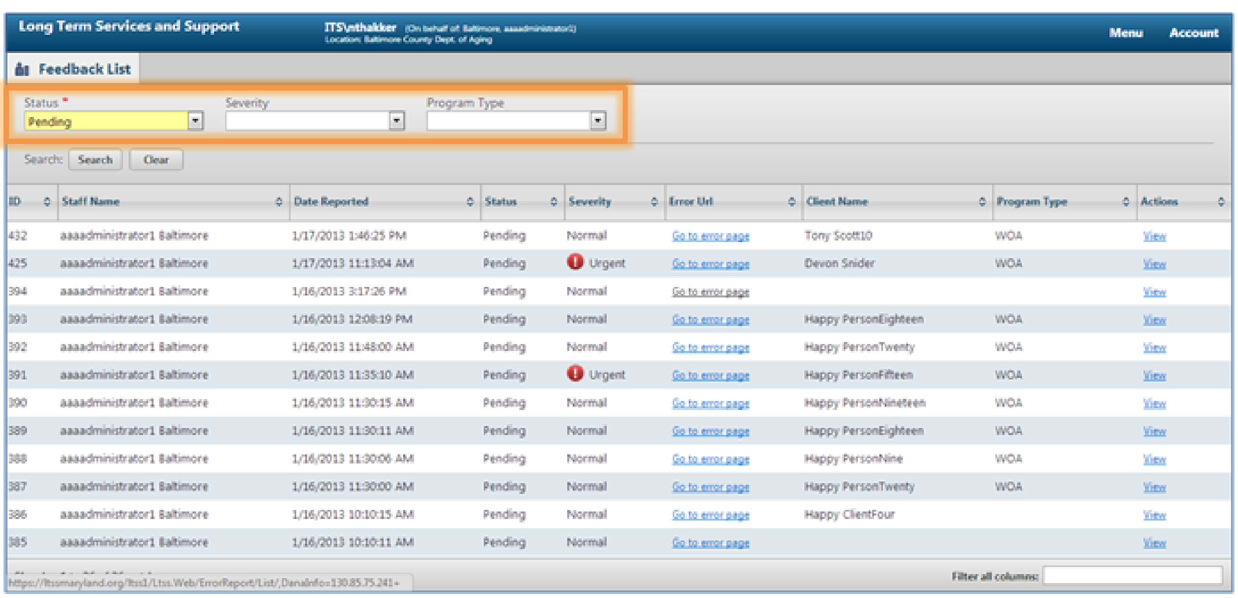
6.5 Feedback

Click on *Menu*, then click on *Feedback*, and you can see the *Feedback* sub-options being displayed. System errors or concerns can be reported and tracked via this *Feedback* link.



6.5.1 Feedback List

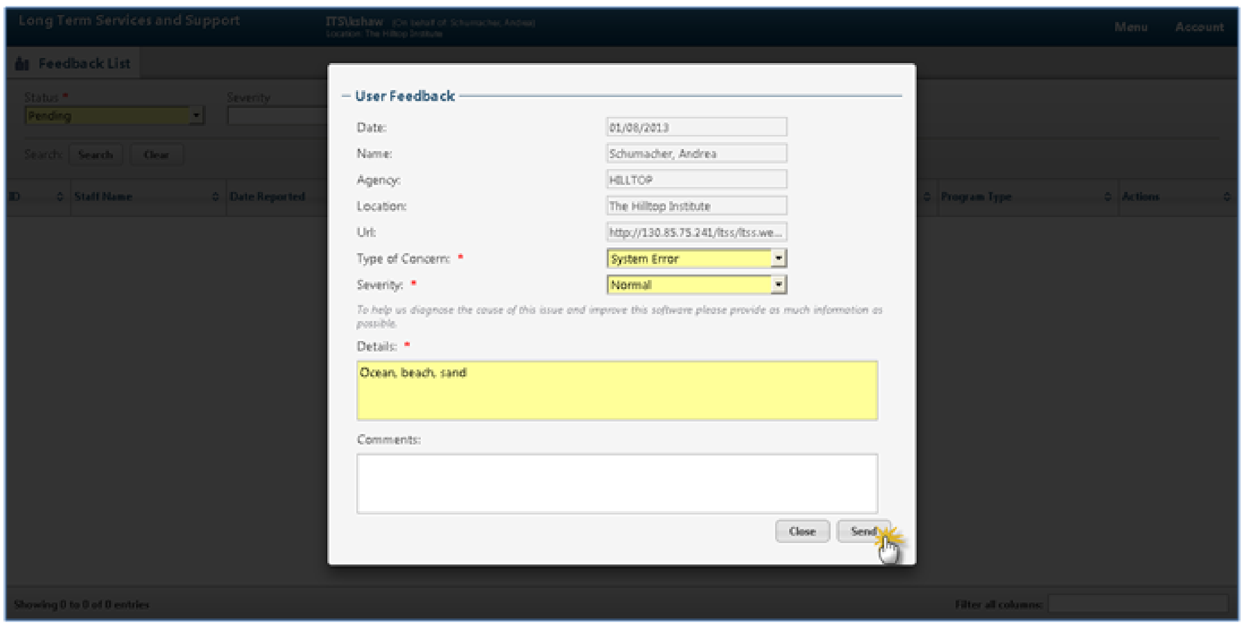
The *List* link will provide you with a list and status of the *Feedback* items you have provided. You can search this list by selecting values for Status (Pending, In-progress, Resolved), Severity (Normal, Urgent) and Program Type (MFP, LAH, WOA, ICS) drop-downs and then hitting the *Search* button.



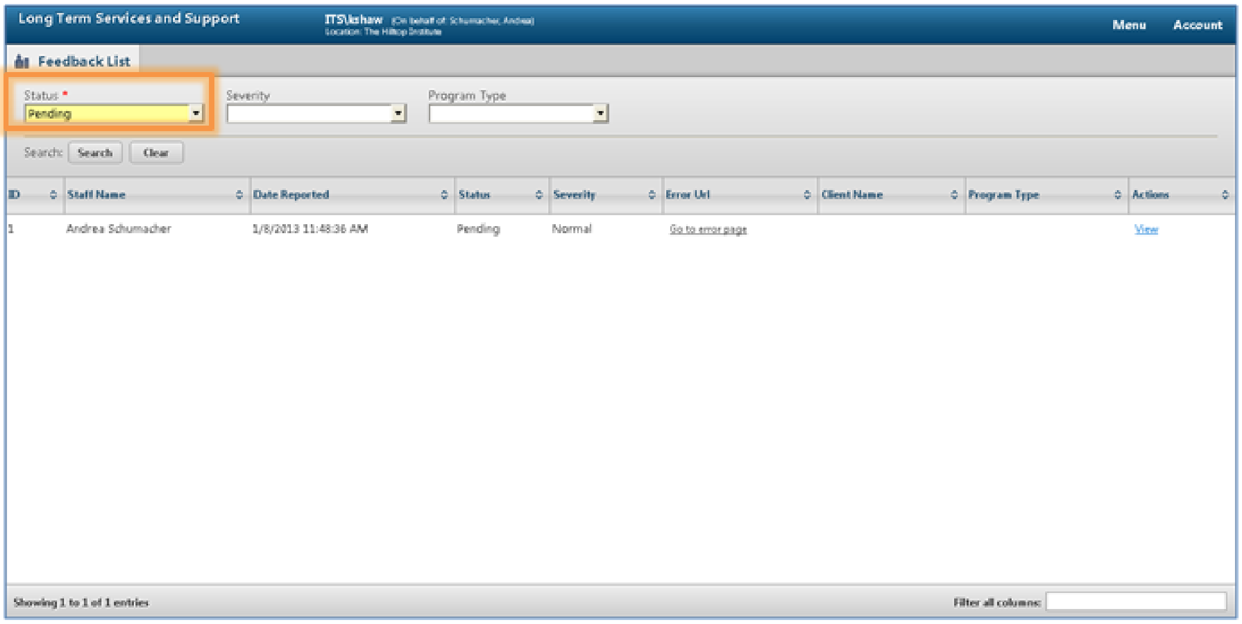
6.5.2 Create Feedback

The *Create Feedback* page can be used to report system errors, provide comments or ask a question. When submitting feedback details, it is important to click the *Feedback* link from the page that has the issue you are reporting. This will ensure the representative investigating the concern has the correct URL.

After clicking *Create,* select the Type of Concern and Severity from the dropdown list. Click in the Details and Comments text boxes and provide specific information regarding the concern. After completing the form click on the *Send* button.

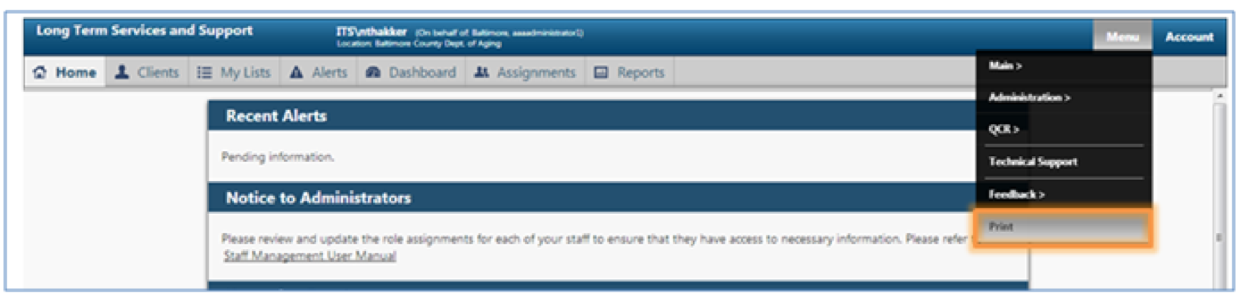


The feedback you reported will appear in the Pending Feedback list.

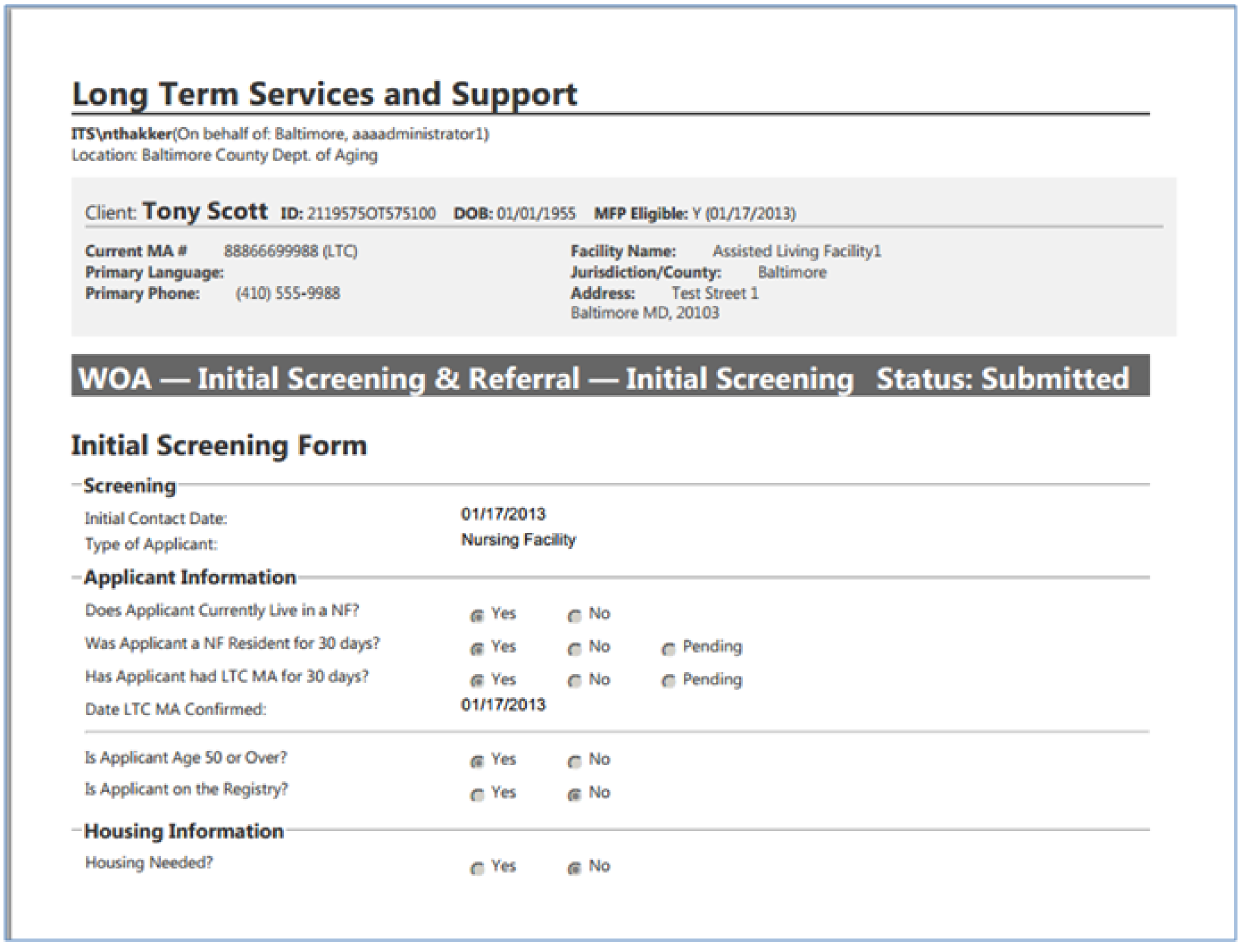


6.6 Print

Click on *Menu*, then click on *Print*, which will allow you to print the current form with the standard print output.



For example, the initial screening form, standard print view is displayed as in the screenshot below:



Long Term Services and Support

ITS\nthakker(On behalf of: Baltimore, aaaadministrator1)
Location: Baltimore County Dept. of Aging

Client: **Tony Scott** **ID:** 21195750T575100 **DOB:** 01/01/1955 **MFP Eligible:** Y (01/17/2013)

Current MA # 88866699988 (LTC)
Primary Language:
Primary Phone: (410) 555-9988
Facility Name: Assisted Living Facility1
Jurisdiction/County: Baltimore
Address: Test Street 1
Baltimore MD, 20103

WOA — Initial Screening & Referral — Initial Screening Status: Submitted

Initial Screening Form

Screening

Initial Contact Date: 01/17/2013
Type of Applicant: Nursing Facility

Applicant Information

Does Applicant Currently Live in a NF? Yes No
Was Applicant a NF Resident for 30 days? Yes No Pending
Has Applicant had LTC MA for 30 days? Yes No Pending
Date LTC MA Confirmed: 01/17/2013

Is Applicant Age 50 or Over? Yes No
Is Applicant on the Registry? Yes No

Housing Information

Housing Needed? Yes No

7 System-wide Controls

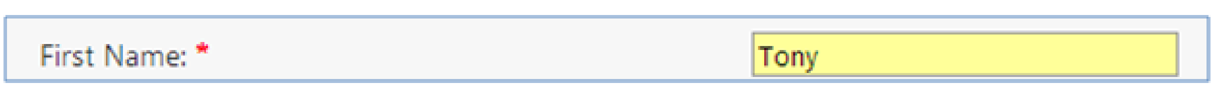
7.1 Input Fields

Entering data in various forms across LTSS uses one of the following mechanisms:

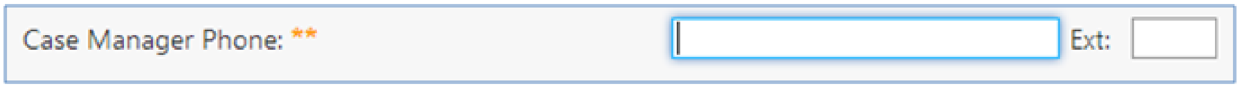
7.1.1 Text Boxes

Text boxes are used whenever free text or values must be entered. To enter text into a text box, simply click on the text box and begin typing.

Note: Some input fields are required for a form to be saved and they are highlighted in yellow and the associated labels have one red star.

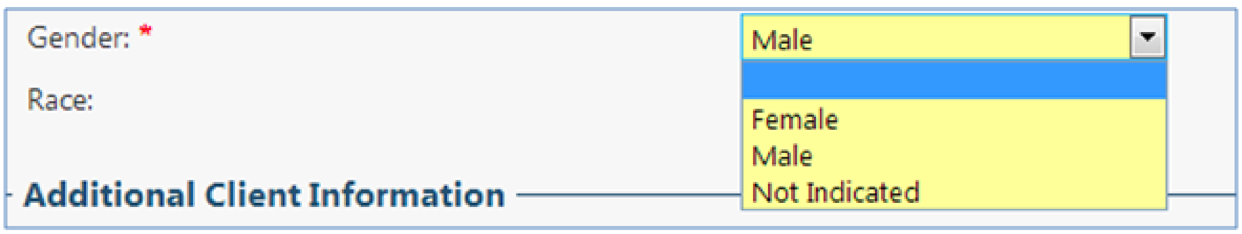


Note: Some input fields are required for a form to be submitted and the associated labels have two red stars.



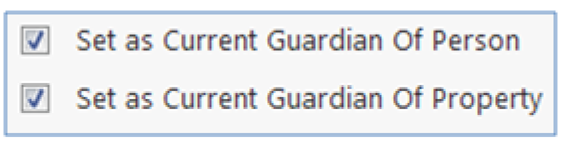
7.1.2 Drop-down Lists / Combo Boxes

Drop-down lists / *Combo boxes* are used whenever there is a list of options to choose from. To use a combo box, simply click on the arrow located to the far right of the combo box. A drop-down menu will appear. To select your response, simply click on the item from the listing.



7.1.3 Check Boxes

Check boxes are used to select one or more options from a list of available options. To activate the check box, simply click on the box next to the option or options that you would like to choose.

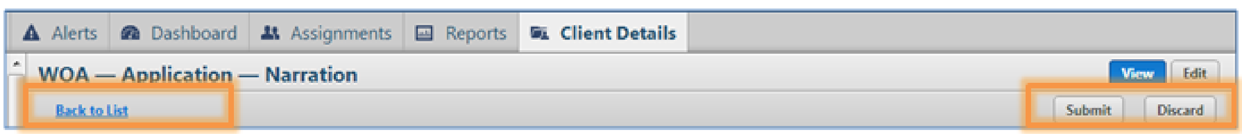


7.1.4 Radio Buttons

Radio buttons are used to select one option from a list of available options. To activate the radio button, simply click on the round button next to the option that you would like to choose.

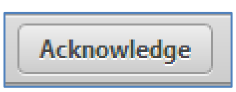
7.2 Buttons and Links

There are several buttons throughout the LTSS system. The buttons or links take the user forward are mostly on the top right of the workspace. The action buttons or links that take user back to previous screen are mostly on the top left of the workspace.



7.2.1 Acknowledge Button

This button allows a recipient to acknowledge a form that has been submitted by another LTSS user.

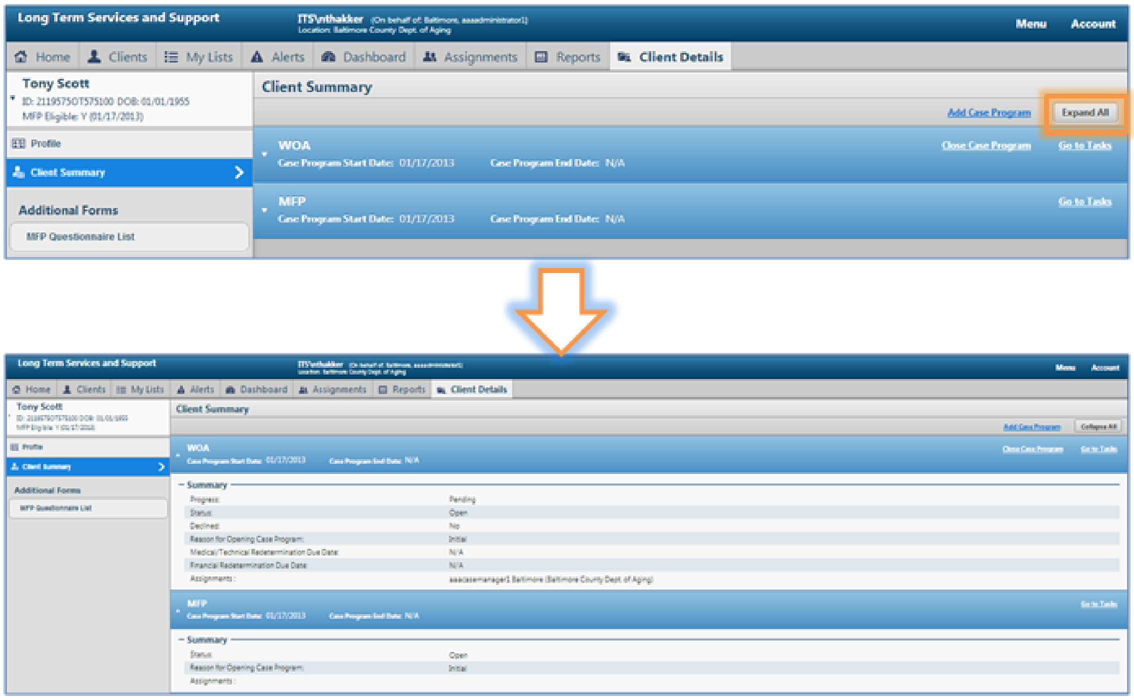


7.2.2 Discard Button

This button allows users to discard a form that was saved or submitted. A discarded form is retained in the system for tracking purpose.

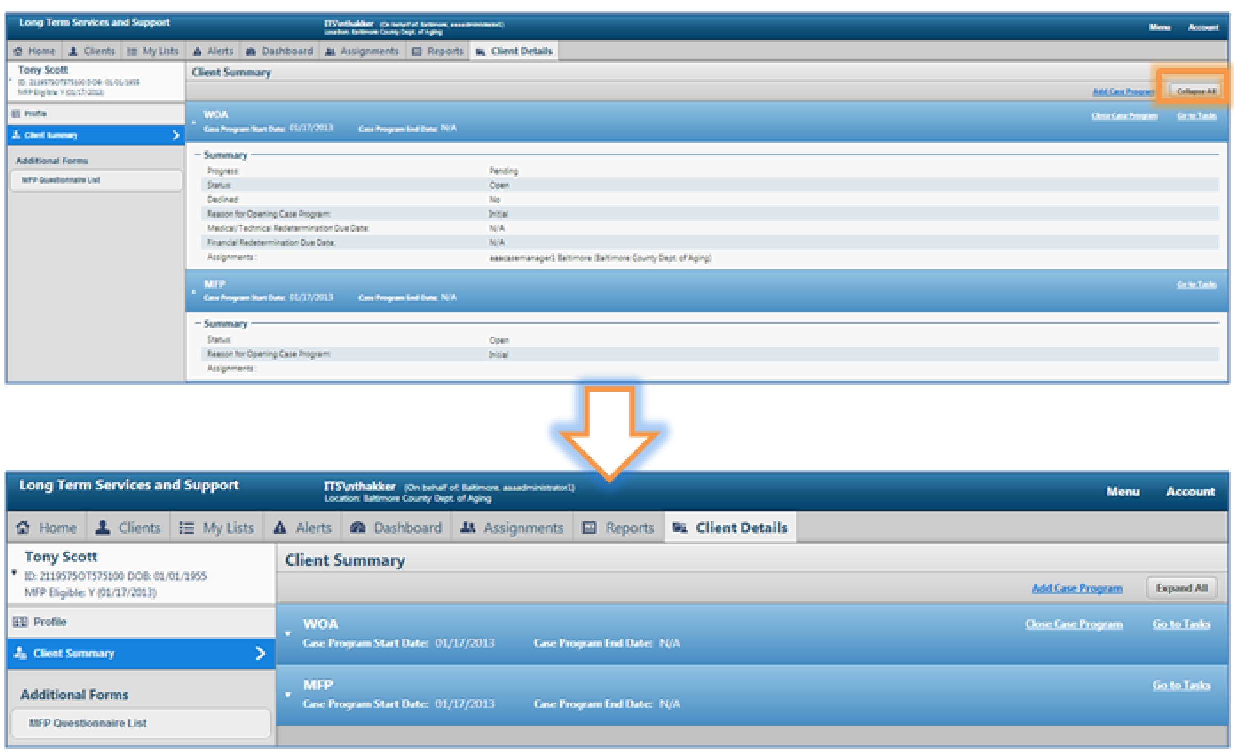
7.2.3 Expand All Button

This button allows users to expand all panels displayed on the current form (typically for a long form).



7.2.4 Collapse All Button

This button allows users to collapse all panels displayed on the current form or on the task list.



7.2.5 Edit Button

This button allows users to edit the form available in the main workspace. *Edit* is only available while the form is in *in-progress* status.

7.2.6 Search Buttons

This button allows users to initiates a search based on the criteria entered.

When there are multiple types of searches on the same search criteria, search buttons are labeled specific to the type of information returned.

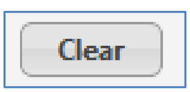
For example, on the client search page, "Cases" 

and "Profiles" 

to search specifically for case programs or client profiles.

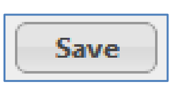
7.2.7 Clear Button

This button allows users to clear the search criteria previously entered.



7.2.8 Save Button

Allows user to save the information entered and returns to the previous page. In most instances, the form remains editable in a saved state. When you click on save, the form is stored *in-progress* status. As mentioned above, all the light-yellow fields (fields with one red star) need to be filled out in order to save a form.



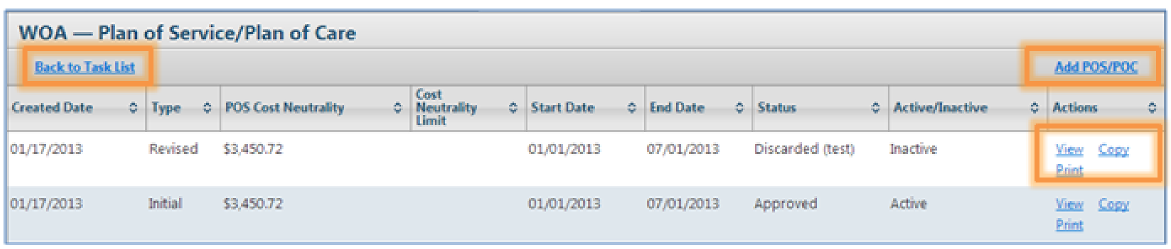
7.2.9 Submit Button

This button allows users to submit the information that was saved in the form with *in-progress* status. As mentioned above, fields marked with two orange stars need to be filled out before the form can be submitted. Once, submitted the form will no longer be editable. Alerts to other agencies/users within LTSS, may be generated only after a form is submitted.

7.3 Links

7.3.1 Table Links

These links allows users to take an action specific to the record displayed on the list. These actions usually depend on the current workflow status of the record. For example, in the screenshot below, you can see *View, Copy, Print* links available for the POS/POC table.


WOA — Plan of Service/Plan of Care

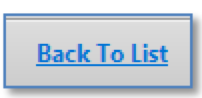
Back to Task List

Add POS/POC

Created Date	Type	POS Cost Neutrality	Cost Neutrality Limit	Start Date	End Date	Status	Active/Inactive	Actions
01/17/2013	Revised	$3,450.72		01/01/2013	07/01/2013	Discarded (test)	Inactive	View Copy Print
01/17/2013	Initial	$3,450.72		01/01/2013	07/01/2013	Approved	Active	View Copy Print

7.3.2 Back To List Link

This link allows the user to go back to the previous list screen when the current form does not have a cancel action (e.g. Task list)



7.3.3 Add or Create Link

Allows user to add/create a new form and takes user to the *Edit* version of the form.

7.3.4 Cancel Link

This link allows the user to cancel the current data entry and takes the user to the previous page without saving the information entered.

7.3.5 Print Link

Upon clicking this link, a PDF file for the selected form is displayed. The print PDF functionality is available for certain forms within LTSS. For forms that don't display this link, a global print functionality is available.