

Standardized Assessment and Level of Care User Manual

A step by step navigational process

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1 Introduction

1.1 Background

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

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

1.2 Guide to navigate through user manuals

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

1.2.1 User Manuals Descriptions

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

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- **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 Create Assessment & POC Request

To create a new Assessment & POC Request, you must have a 'Submitted' Application Packet and log in as the permitted user. The following users are permitted to Add Documentation: (Assigned) TCC Case Manager...

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

The screenshot shows the LTSS system interface for client Patricia Casarotto. The left sidebar contains navigation links: Home, Clients, My Lists, Alerts, Assignments, Reports, Client Details, Profile, Client Summary, LAH Program Menu, Case Program Summary, Task List, Initial Screening & Referral, Application, Assessment & POC (highlighted), Level of Care, and Plan of Service/Plan of Care. The main content area is titled 'LAH — Assessment & POC' and includes a 'Back to Task List' link. Below this, there is a section for 'Assessment & POC Request' with a 'Create New Request' button circled in red. The 'Evaluation Information' section shows 'No request was submitted.' Below that, the 'InterRAI HC MD' section displays a table with columns: Reference Date, Status, LOC, RUG, Submitted Date, and Actions. The 'AERS Plan of Care' section displays a table with columns: Created Date, Start Date, End Date, Last Modified Date, AERS Staff, POC Type, Status, Active, and Actions. Both tables show 'No data available in table'.

2.2 “Submit” AERS Assessment & POC Request

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

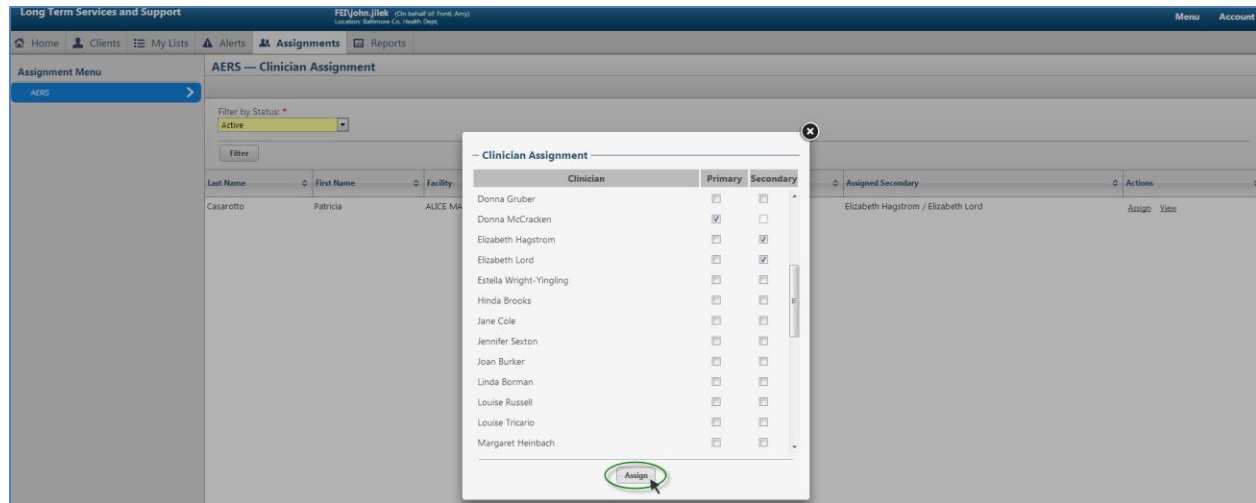
The screenshot shows the LTSS system interface with the 'interRAI HC MD Health Evaluation & POC Request Form' modal open. The modal has a title bar and a 'Cancel' button. The 'Evaluation Type' section shows 'Request Evaluation Type' with a dropdown menu set to 'Initial'. The 'Submit' button is highlighted with a red circle. The background shows the same client details as the previous screenshot, but the 'Assessment & POC' section is now titled 'LAH — interRAI HC MD Health Evaluation & POC — Request'.

2.3 Assign an AERS Clinician

To assign an AERS Clinician, the client must have a 'Submitted' Assessment & POC Request (Refer to section “Submit Assessment & POC Request”). A single 'Primary' and multiple 'Secondary' Clinicians can be assigned to a single client, not to exceed three clinicians total. The following users are permitted to assign AERS Clinician: AERS Intake, AERS Admin, AERS Supervisor...

1. Log in as permitted user
2. Click the *Assignments* tab

3. Click **AERS** menu button
4. Select client from list, click **Assign**
 - a. Clinician Assignment window is opened and displays clinician by jurisdiction
5. Select AERS Clinician from list (primary/secondary)
6. Click **Assign**



2.4 Add InterRAI HC MD Assessment

To add an InterRAI HC MD Assessment, you must have an assigned AERS Clinician (Refer to section “Assign AERS Clinician”).

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



2.5 InterRAI HC MD Summary View

The InterRAI HC MD Summary is dedicated to providing navigation, status, and section specific information. The left navigation menu permits the user to navigate to interRAI HC MD Summary,

specific interRAI HC MD sections (A-T), or Assessment & POC List view. The main workspace permits the user to navigate to specific interRAI HC MD sections. If a section has a status of 'Incomplete', the user will be required to *Start* the section. If a section has a status of 'In Progress', the user will be permitted to *Edit*, *View*, or *Check for errors*.

1. Log in as the permitted user
2. Search for client under *Clients* tab
3. Click **Client Summary** for client
4. Click **Assessment & POC** menu button
5. Select existing interRAI HC MD Assessment, click **Summary**

The screenshot displays the 'interRAI HC MD — Summary' page for client Patricia Casarotto. The page is titled 'interRAI HC MD — Summary Status: In Progress'. On the left, a sidebar lists various assessment sections (A-T) under the 'Assessment & POC' category. The main content area shows a table with columns: Section Name, Status, Last Modified By, Last Modified Date, and Actions. All sections listed (A through T) have a status of 'Incomplete' and a 'Start' button in the Actions column. The top navigation bar includes links for Home, Clients, My Lists, Alerts, Assignments, Reports, and Client Details. The user's name, FID John J. Ilek, is displayed in the top right corner.

2.6 “Start” InterRAI HC MD Assessment section

From the interRAI HC MD Summary, the user is permitted to *Start* a specific section. If a section has a status of 'Incomplete', the user will be required to *Start* the section.

HELPFUL TIP: User the [Tab] key to navigate from question to question.

1. Log in as the permitted user
2. Search for client under *Clients* tab
3. Click **Client Summary** for client
4. Click **Assessment & POC** menu button
5. Select existing interRAI HC MD Assessment, click **Summary**
6. Select interRAI HC MD section, click **Start**

Long Term Services and Support

FD/John J. Jick (21) Initial of McCarson, Dorrell
Location: Baltimore Co. Health Dept.

Menu Account

Home Clients My Lists Alerts Assignments Reports Client Details

Patricia Casarotto
ID: 104859AP86121 DOB: 10/24/1968
MPP Eligible: N

interRAI HC MD — Summary Status: In Progress

Back To List Print

Section Name	Status	Last Modified By	Last Modified Date	Actions
A. Identification Information	Incomplete			Start
B. Intake and Initial History	Incomplete			Start
C. Cognition	Incomplete			Start
D. Communication and Vision	Incomplete			Start
E. Mood and Behavior	Incomplete			Start
F. Psychosocial Well-Being	Incomplete			Start
G. Functional Status	Incomplete			Start
H. Continence	Incomplete			Start
I. Disease Diagnoses	Incomplete			Start
J. Health Conditions	Incomplete			Start
K. Oral and Nutritional Status	Incomplete			Start
L. Skin Condition	Incomplete			Start
M. Medications Section	Incomplete			Start
N. Treatments and Procedures	Incomplete			Start
O. Responsibility	Incomplete			Start
P. Social Supports	Incomplete			Start
Q. Environmental Assessment	Incomplete			Start
R. Discharge Potential and Overall Status	Incomplete			Start
T. Assessment Information	Incomplete			Start

2.7 “Previous/Next Section” InterRAI HC MD section navigation

Once in a section of the interRAI HC MD Assessment, the user is permitted to navigate to the *Previous Section* or *Next Section*. If the user has completed any questions/selections on the section, the section will be saved automatically when navigating to the previous or next section.

HELPFUL TIP: User the [Tab] key to navigate from question to question.

1. Log in as the permitted user
2. Search for client under *Clients* tab
3. Click **Client Summary** for client
4. Click **Assessment & POC** menu button
5. Select existing interRAI HC MD Assessment, click **Summary**
6. Select interRAI HC MD section, click **Start**
7. Complete the section, click **Previous Section** OR **Next Section**

Long Term Services and Support

Home Clients My Lists Alerts Assignments Reports Client Details

Patricia Casarotto
ID: 104859AP866121 DOB: 10/24/1968
MFP Eligible: N

interRAI HC MD

Back to Summary Cancel

B. Intake and Initial History

Note: Complete at Admission/First Assessment only

1. Date Case Opened (this agency)
Date: 12/19/2012

2. Ethnicity and Race

Ethnicity:

a. Hispanic or Latino ☐ 0 - No ☒ 1 - Yes

Race:

b. American Indian or Alaska Native ☒ 0 - No ☐ 1 - Yes

c. Asian ☒ 0 - No ☐ 1 - Yes

d. Black or African American ☐ 0 - No ☒ 1 - Yes

e. Native Hawaiian or other Pacific Islander ☐ 0 - No ☒ 1 - Yes

f. White ☒ 0 - No ☐ 1 - Yes

3. Primary Language

☒ 1 - English
☐ 2 - Spanish
☐ 3 - French
☐ 4 - Chinese

Previous Section Next Section Save

2.8 “Check for errors” InterRAI HC MD Assessment validation

For sections that have been saved without all required fields complete, the user will be provided an option to *Check for errors* on the interRAI HC MD Summary page. When the section is validated for errors, each missing required field will be highlighted in red.

HELPFUL TIP: User the [Tab] key to navigate from question to question.

1. Log in as the permitted user
2. Search for client under *Clients* tab
3. Click **Client Summary** for client
4. Click **Assessment & POC** menu button
5. Select existing interRAI HC MD Assessment, click **Summary**
6. Select interRAI HC MD section ‘In Progress’, click **Check for errors**

Long Term Services and Support FD/John J. Jink (On behalf of McCracken, Donna) Location: Baltimore Co. Health Dept. Menu Account

Home Clients My Lists Alerts Assignments Reports **Client Details**

Patricia Casarotto
ID: 104959AP866121 DOB: 10/24/1968
MFP Eligible N

interRAI HC MD View Edit Next Section Save

A. Identification Information

1. Name
First Name: Patricia
Middle Initial: Ann
Last Name: Casarotto
Suffix:

2. Gender
Gender: Female

3. Birthdate
Birthdate: 10/24/1968

4. Marital Status 20

- ☐ 1 - Never Married
- ☐ 2 - Married
- ☐ 3 - Partner / Significant other
- ☐ 4 - Widowed
- ☐ 5 - Separated
- ☐ 6 - Divorced

5. National Numeric Identifier

a. Social Security Number: 215-45-6589

b. Medicare Number:
Or comparable national insurance number

c. Medicaid Number: 56415641250 (Community)
(Note: "-" if pending; "N" if not a Medicaid recipient)

d. INS Number:

Level of Care

Assessment, POC & LOC

Assessment & POC
interRAI HC MD Summary
A. Identification Information
B. Intake and Initial History
C. Cognition and BARS
D. Communication and Vision
E. Mood and Behavior
F. Psychosocial Well-Being
G. Functional Status
H. Continence
I. Disease Diagnoses
J. Health Conditions
K. Oral and Nutritional Status
L. Skin Condition
M. Medications Section
N. Treatments and Procedures
O. Responsibility
P. Social Supports
Q. Environmental Assessment
R. Discharge Potential and Overall Status
T. Assessment Information

There are errors in this section that prevent submission.

2.9 “Go Offline” with InterRAI HC MD Assessment

The user is permitted to go offline, disconnecting from Wi-Fi or Internet connection, and complete the assessment.

1. Log in as the permitted user
2. Search for client under *Clients* tab
3. Click **Client Summary** for client
4. Click **Assessment & POC** menu button
5. For a new assessment, click **Prepare Offline**
6. For an existing assessment, click **Download**
7. Click **Go Offline**

Long Term Services and Support FD/John J. Jink (On behalf of McCracken, Donna) Location: Baltimore Co. Health Dept. Menu Account

Home Clients My Lists Alerts Assignments Reports **Client Details**

Patricia Casarotto
ID: 104959AP866121 DOB: 10/24/1968
MFP Eligible N

Assessment & POC Collapse All

Assessment & POC Request

Evaluation Information

Evaluation type: Initial
Last request date: 12/19/2012
Due date: 01/15/2013
Created by: Jones, Alisa

interRAI HC MD Go Offline

Reference Date	Status	LOC	RUG	Submitted Date	Actions
12/19/2012	Offline (Donna McCracken)			N/A	Cancel Offline

AERS Plan of Care

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

- a. User will be prompted that offline resources are downloading
- b. User can disconnect from Wi-Fi or Internet connect

8. From the Offline Assessments list, click Summary



- a. User is permitted to complete assessment just as if online

2.10 “Upload” Offline InterRAI HC MD Assessment

After completing the assessment offline (Refer to section “Go Offline with InterRAI HC MD Assessment”), the user must *Upload* the assessment in order to submit.

1. From the Offline Assessment Summary page, click **Offline Assessments** on left navigation
2. Select a client to upload, click **Upload**



2.11 “Save” InterRAI HC MD Assessment

There are multiple ways to save the progress of a section.

1. Log in as the permitted user
2. Search for client under *Clients* tab
3. Click **Client Summary** for client
4. Click **Assessment & POC** menu button
5. Select existing interRAI HC MD Assessment, click **Summary**
6. Navigate into a section
7. The following buttons commit a save: Section navigation, Back to Summary, Previous, Next, Save

Long Term Services and Support

Home Clients My Lists Alerts Assignments Reports Client Details

Patricia Casarotto
ID: 104859AP86121 DOB: 10/24/1968
MPP Eligible: N

interRAI HC MD

Back to Summary Cancel

B. Intake and Initial History

Note: Complete at Admission/First Assessment only

1. Date Case Opened (this agency)
Date: 11/01/2012

2. Ethnicity and Race

Ethnicity:
a. Hispanic or Latino ☐ 0 - No ☐ 1 - Yes

Race:
b. American Indian or Alaska Native ☐ 0 - No ☒ 1 - Yes
c. Asian ☐ 0 - No ☒ 1 - Yes
d. Black or African American ☐ 0 - No ☒ 1 - Yes
e. Native Hawaiian or other Pacific Islander ☐ 0 - No ☒ 1 - Yes
f. White ☐ 0 - No ☒ 1 - Yes

3. Primary Language ☒ 1 - English ☐ 2 - Spanish ☐ 3 - French ☐ 4 - Chinese

Previous Section Next Section Save

2.12 “Submit” InterRAI HC MD Assessment

Once each section of the interRAI HC MD Assessment has a status ‘Complete’, the user will be permitted to *Submit*. NOTE: If any status is ‘Incomplete’ or ‘In Progress’, the user must *Start* or *Check for errors* to complete the section. User is permitted to *Edit* and *View* sections that are ‘Complete’.

1. Navigate to the interRAI HC MD Summary page
2. Click Submit
 - a. Confirmation prompt is displayed
3. Click Yes

Long Term Services and Support

Home Clients My Lists Alerts Assignments Reports Client Details

Patricia Casarotto
ID: 104859AP86121 DOB: 10/24/1968
MPP Eligible: N

interRAI HC MD — Summary Status: In Progress

Back to List Print

Submit Discard Hold

Section Name	Status	Last Modified By	Last Modified Date	Actions
A. Identification Information	Complete	AERS, aersupervisor1	11/02/12	Edit View
B. Intake and Initial History	Complete	McCracken, Donna	12/19/12	Edit View
C. Cognition	Complete	AERS, aersupervisor1	12/06/12	Edit View
D. Communication and Vision	Complete	AERS, aersupervisor1	12/06/12	Edit View
E. Mood and Behavior	Complete	AERS, aersupervisor1	12/06/12	Edit View
F. Psychosocial Well-Being	Complete	AERS, aersupervisor1	11/02/12	Edit View
G. Functional Status	Complete	AERS, aersupervisor1	11/02/12	Edit View
H. Continence	Complete	AERS, aersupervisor1	11/02/12	Edit View
I. Disease Diagnoses	Complete	AERS, aersupervisor1	11/02/12	Edit View
J. Health Conditions	Complete	AERS, aersupervisor1	11/02/12	Edit View
K. Oral and Nutritional Status	Complete	AERS, aersupervisor1	11/02/12	Edit View
L. Skin Condition	Complete	AERS, aersupervisor1	11/02/12	Edit View
M. Medications Section	Complete	AERS, aersupervisor1	11/02/12	Edit View
N. Treatments and Procedures	Complete	AERS, aersupervisor1	11/02/12	Edit View
O. Responsibility	Complete	AERS, aersupervisor1	11/02/12	Edit View
P. Social Supports	Complete	AERS, aersupervisor1	11/02/12	Edit View
Q. Environmental Assessment	Complete	AERS, aersupervisor1	11/02/12	Edit View
R. Discharge Potential and Overall Status	Complete	AERS, aersupervisor1	11/02/12	Edit View
S. Discharge	Complete	AERS, aersupervisor1	11/02/12	Edit View
T. Assessment Information	Complete	AERS, aersupervisor1	11/02/12	Edit View

Showing 1 to 20 of 20 entries

Filter all columns

2.13 “Discard” InterRAI HC MD Assessment

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

1. Navigate to the interRAI HC MD Summary page
2. Click **Discard**

The screenshot shows the 'interRAI HC MD — Summary' page for Patricia Casarotto. The status is 'In Progress'. The 'Discard' button is highlighted with a red circle. The table below shows the assessment sections and their status.

Section Name	Status	Last Modified By	Last Modified Date	Actions
A. Identification Information	Complete	AERS, aerssupervisor1	11/02/12	Edit View
B. Intake and Initial History	Complete	McCracken, Donna	12/19/12	Edit View
C. Cognition	Complete	AERS, aerssupervisor1	12/06/12	Edit View
D. Communication and Vision	Complete	AERS, aerssupervisor1	12/06/12	Edit View
E. Mood and Behavior	Complete	AERS, aerssupervisor1	12/06/12	Edit View

2.14 “Print” InterRAI HC MD Assessment

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

1. Log in as the permitted user
2. Search for client under *Clients* tab
3. Click **Client Summary** for client
4. Click **Assessment & POC** menu button
5. Under interRAI HC MD list, click **Summary**
6. Click **Print**

The screenshot shows the 'interRAI HC MD — Summary' page for Patricia Casarotto. The status is 'Submitted'. The 'Print' button is highlighted with a red circle. The table below shows the assessment sections and their status.

Section Name	Status	Last Modified By	Last Modified Date	Actions
A. Identification Information	Complete	AERS, aerssupervisor1	11/02/12	View
B. Intake and Initial History	Complete	McCracken, Donna	12/19/12	View
C. Cognition	Complete	AERS, aerssupervisor1	12/06/12	View
D. Communication and Vision	Complete	AERS, aerssupervisor1	12/06/12	View
E. Mood and Behavior	Complete	AERS, aerssupervisor1	12/06/12	View
F. Psychosocial Well-Being	Complete	AERS, aerssupervisor1	11/02/12	View
G. Functional Status	Complete	AERS, aerssupervisor1	11/02/12	View
H. Continence	Complete	AERS, aerssupervisor1	11/02/12	View
I. Disease Diagnoses	Complete	AERS, aerssupervisor1	11/02/12	View
J. Health Conditions	Complete	AERS, aerssupervisor1	11/02/12	View
K. Oral and Nutritional Status	Complete	AERS, aerssupervisor1	11/02/12	View
L. Skin Condition	Complete	AERS, aerssupervisor1	11/02/12	View
M. Medications Section	Complete	AERS, aerssupervisor1	11/02/12	View
N. Treatments and Procedures	Complete	AERS, aerssupervisor1	11/02/12	View
O. Responsibility	Complete	AERS, aerssupervisor1	11/02/12	View
P. Social Supports	Complete	AERS, aerssupervisor1	11/02/12	View
Q. Environmental Assessment	Complete	AERS, aerssupervisor1	11/02/12	View
R. Discharge Potential and Overall Status	Complete	AERS, aerssupervisor1	11/02/12	View
S. Discharge	Complete	AERS, aerssupervisor1	11/02/12	View
T. Assessment Information	Complete	AERS, aerssupervisor1	11/02/12	View

2.15 View InterRAI HC MD Assessment Results

After submitted the interRAI HC MD Assessment, results will be generated. These assessment results are comprised of LOC Results, RUG-III Results, and Triggered CAPs.

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

3. Click **Client Summary** for client
4. Click **Assessment & POC** menu button
5. Click **Results** link

Long Term Services and Support FERJohn Jilek (On behalf of McCracken, Donnell) Menu Account

Home Clients My Lists Alerts Assignments Reports Client Details

Patricia Casarotto
ID: 1049859/AP866121 DOB: 10/24/1968
MPP Eligible Y

Profile
Client Summary
Assessment, POC & LOC
Assessment & POC
Level of Care

Assessment & POC Collapse All

Assessment & POC Request

Evaluation Information

Evaluation type: Initial
Last request date: 12/19/2012
Due date: 01/15/2013
Created by: Jones, Alisa

InterRAI HC MD Prepare Officer Add

Reference Date	Status	LOC	RUG	Submitted Date	Actions
11/01/2012	Submitted	No	BA1	12/20/2012	Summary Results

AERS Plan of Care Add

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

3 AERS Plan of Care

3.1 “Add” AERS Plan of Care

Once the interRAI HC MD Assessment has a ‘Submitted’ status, the user will be permitted to add an AERS Plan of Care.

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

The screenshot displays the 'Long Term Services and Support' web application interface. The user is logged in as 'FER John Jilek'. The sidebar on the left shows the 'Assessment & POC' menu item selected. The main content area is titled 'Assessment & POC' and shows details for client 'Patricia Casarotto'. It includes a table for 'interRAI HC MD' with columns for Reference Date, Status, LOC, RUG, Submitted Date, and Actions. The table shows one entry with a status of 'Submitted'. An 'Add' button is circled in green in the bottom right corner of the table area.

Reference Date	Status	LOC	RUG	Submitted Date	Actions
11/01/2012	Submitted	No	BA1	12/20/2012	Summary Results

3.2 “Save” AERS Plan of Care

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

The screenshot shows the 'AERS Plan of Care Form' in 'Edit' mode. The form is titled 'Assessment & Plan of Care — Plan of Care'. The left sidebar shows the 'Assessment, POC & LOC' section with 'New Plan of Care' and 'Level of Care' options. The main form area contains the following fields:

- Plan of Care Information:**
 - Last Name: Casarotto
 - First Name: Patricia
 - Middle Name: Ann
 - AERS Staff: Donna McCracken
 - Agency Name: AERS
 - Agency Location: AERS TEST COUNTY
 - POC Type: Redetermination
 - Start Date: 11/01/2012
 - End Date: 11/01/2013
- Recommended Services:**
 - Service Type: Assisted Living
 - Units: 12
 - Frequency: Daily

The 'Save' button is highlighted in the top right corner of the form.

3.3 “Submit” AERS Plan of Care

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

The screenshot shows the 'AERS Plan of Care Form' in 'View' mode. The form is titled 'Assessment & Plan of Care — Plan of Care'. The left sidebar shows the 'Assessment, POC & LOC' section with 'Plan of Care' and 'Level of Care' options. The main form area contains the following fields:

- Plan of Care Information:**
 - Last Name: Casarotto
 - First Name: Patricia
 - Middle Name: Ann
 - AERS Staff: Donna McCracken
 - Agency Name: AERS
 - Agency Location: AERS TEST COUNTY
 - POC Type: Redetermination
 - Start Date: 11/01/2012
 - End Date: 11/01/2013
- Recommended Services:**
 - Service Type: Assisted Living
 - Units: 12
 - Frequency: Daily

The 'Submit' button is highlighted in the top right corner of the form.

3.4 “Print” AERS Plan of Care

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

1. Log in as the permitted user
2. Search for client under *Clients* tab
3. Click **Client Summary** for client
4. Click **Assessment & POC** menu button
5. Under AERS Plan of Care list, click **Print** link

Long Term Services and Support | FDR John J. Link (On behalf of McCracken, Donna) | Location: Baltimore Co. Health Dept. | Menu | Account

Home | Clients | My Lists | Alerts | Assignments | Reports | Client Details

Patricia Casarotto
ID: 104953AP86122 | DOB: 10/24/1968
MFP Eligible: Y

Assessment & POC

Assessment & POC Request

Evaluation Information

Evaluation type:	Initial
Last request date:	12/19/2012
Due date:	01/15/2013
Created by:	Jones, Alisa

InterRAI HC MD | Prepare Office | Add

Reference Date	Status	LOC	RUG	Submitted Date	Actions
11/01/2012	Submitted	No	BA1	12/20/2012	Summary Results

AERS Plan of Care | Add

Created Date	Start Date	End Date	Last Modified Date	AERS Staff	POC Type	Status	Active	Actions
12/20/2012	11/01/2012	11/01/2013	12/20/2012	Donna McCracken	Redetermination	Submitted	Yes	View Print

3.5 “Discard” AERS Plan of Care

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

Long Term Services and Support | FDR John J. Link (On behalf of McCracken, Donna) | Location: Baltimore Co. Health Dept. | Menu | Account

Home | Clients | My Lists | Alerts | Assignments | Reports | Client Details

Patricia Casarotto
ID: 104953AP86122 | DOB: 10/24/1968
MFP Eligible: Y

Assessment & Plan of Care — Plan of Care

[Back to List](#)

AERS Plan of Care Form

Plan of Care Information

Last Name:	Casarotto
First Name:	Patricia
Middle Name:	Ann
AERS Staff: **	Donna McCracken
Agency Name:	AERS
Agency Location:	AERS TEST COUNTY
POC Type: **	Redetermination
Start Date: **	11/01/2012
End Date: **	11/01/2013

[Edit End Date](#)

Recommended Services **

Service Details

Service Type: **	Assisted Living
Units: **	12
Frequency: **	Daily

Additional Information:

[Discard](#)

3.6 Assessment & POC List View

The user can view the Assessment & POC Request information as well as a list of AERS Assessments, interRAI HC MD Assessments, and AERS Plan of Care forms and the status of each ('Submitted', 'In Progress', or 'Discarded'). The list of AERS Assessments will be provide a view of Assessments in the past, prior to interRAI HC MD Assessment.

Long Term Services and Support

John Jilek (On behalf of: McCracken, Doran)
Location: Baltimore Co. Health Dept.

Menu Account

Home Clients My Lists Alerts Assignments Reports Client Details

Assessment & POC

Collapse All

Assessment & POC Request

Evaluation Information

No request was submitted.

AERS Health Evaluations

Created Date	Start Date	End Date	Last Modified Date	AERS Staff	Evaluation Type	Status	Active	Actions
07/12/2012	07/12/2012	07/11/2013	07/19/2012	Rochelle Purnell	Redetermination	Submitted	Yes	View Print
07/02/2012	07/02/2012	07/01/2013	07/02/2012	Rochelle Purnell	Redetermination	Submitted	No	View Print
07/02/2012	07/02/2012	07/01/2013	07/02/2012	Rochelle Purnell	Redetermination	Submitted	No	View Print
01/30/2012	01/30/2012	01/29/2013	01/30/2012	Rochelle Purnell	Redetermination	Submitted	No	View Print
08/05/2011	08/05/2011	08/04/2012	08/05/2011	Rochelle Purnell	Initial	Submitted	No	View Print

InterRAI HC MD

Reference Date	Status	LOC	RUG	Submitted Date	Actions
12/20/2012	In Progress			N/A	Summary Download

AERS Plan of Care

Add

Created Date	Start Date	End Date	Last Modified Date	AERS Staff	POC Type	Status	Active	Actions
07/12/2012	07/12/2012	07/11/2013	07/19/2012	Rochelle Purnell	Redetermination	Submitted	Yes	View Print
07/02/2012	07/02/2012	07/01/2013	07/02/2012	Rochelle Purnell	Redetermination	Submitted	No	View Print
07/02/2012	07/02/2012	07/01/2013	07/02/2012	Rochelle Purnell	Redetermination	Submitted	No	View Print
01/30/2012	01/30/2012	01/29/2013	01/30/2012	Rochelle Purnell	Redetermination	Submitted	No	View Print
08/05/2011	08/05/2011	08/04/2012	08/05/2011	Rochelle Purnell	Initial	Submitted	No	View Print

4 Level of Care

4.1 “Submit” NEW LOC Request

Once the AERS Plan of Care has been ‘Submitted’, the authorized user is permitted to create a new Level of Care Request. Per the interRAI HC MD Assessment results, a Level of Care Request may automatically be generated.

1. Log in as the permitted user
2. Search for client under *Clients* tab
3. Click **Client Summary** for client
4. Click **Level of Care** menu button
5. Click **Create New Request**

Long Term Services and Support

FEI John Jilek (On behalf of McCracken, Donna)
Location: Baltimore Co. Health Dept.

Home Clients My Lists Alerts Assignments Reports Client Details

Patricia Casarotto
ID: 194850A986122 DOB: 10/24/1968
MPP Eligible Y

Profile
Client Summary
Assessment, POC & LOC
Assessment & POC
Level of Care

Level of Care

Level of Care Request

Level of Care Request

Last request date: 12/20/2012
Created by: McCracken, Donna
Comments:

InterRAI HC MD Assessment
Assessment Submit Date: 12/20/2012
Recommended LOC: Under Review

Level of Care List

Create Date	Start Date	End Date	Status	Active	Actions
No data available in table					

Create New Request

6. Click **Submit**

Long Term Services and Support

FEI John Jilek (On behalf of McCracken, Donna)
Location: Baltimore Co. Health Dept.

Home Clients My Lists Alerts Assignments Reports Client Details

Patricia Casarotto
ID: 194850A986122 DOB: 10/24/1968
MPP Eligible Y

Profile
Client Summary
Assessment, POC & LOC
Assessment & POC
Level of Care
New Request

Level of Care — Request

Cancel

Request Form

Comments

Comments:
Level of Care Request Comments

Submit

4.2 Assign UCA Nurse

To assign an UCA Nurse, the client must have a ‘Submitted’ LOC Request (Refer to section “Submit New LOC Request”). There are several filters for the UCA Assignment list including: Unassigned Under Consideration, Active Under Consideration, Unassigned With Automatic LOC, and Active With Automatic LOC. Those ‘Under Consideration’ did not generate a Level of Care automatically via interRAI Assessment Results, whereas, those ‘With Automatic LOC’ did generate a Level of Care. ‘Unassigned’ lists will display unassigned clients. ‘Active’ lists will display clients who have been assigned. The following users are permitted to assign a UCA Nurse: UCA Intake, UCA Admin...

1. Log in as permitted user

2. Click the *Assignments* tab
3. Click **UCA** menu button
4. Select client from list
5. Select UCA Nurse from dropdown list
6. Click **Assign**

Long Term Services and Support

FEDJohnJHek (On behalf of Florida Health)
Location: Utilization Control Agent

Menu Account

Home Clients My Lists Alerts Assignments Reports

Assignment Menu

UCA

UCA — Nurse Assignment

Filter by Status: Unassigned Under Consideration

Unassigned Under Consideration
Active Under Consideration
Unassigned With automatic LOC
Active With automatic LOC

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

Assign to UCA Nurse: Assign

4.3 “Add” Level of Care

Once the Level of Care Request has been submitted, the authorized user is permitted to add a Level of Care. You must first assign a UCA Nurse, unless admin rights have been granted (Refer to section “Assign UCA Nurse”).

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

Long Term Services and Support

FEIJohn.jilek (On behalf of Linda, Head)

Menu Account

Home Clients My Lists Alerts Assignments Reports Client Details

Patricia Casarotto
ID: 104859AP86121 DOB: 10/24/1968
MFP Eligible: N

Profile
Client Summary
Assessment, POC & LOC
Assessment & POC
Level of Care

Level of Care

Level of Care Request

Level of Care Request

Last request date: 12/20/2012
Created by: McCracken, Donna
Comments: Level of Care Request Comments

InterRAI HC MD Assessment

Assessment Submit Date: 12/20/2012
Recommended LOC: Under Review

Level of Care List

Create Date	Start Date	End Date	Status	Active	Actions
No data available in table					

Add

6. Select LOC Type from dropdown list, click **Save & Close**

Long Term Services and Support

FEIJohn.jilek (On behalf of Linda, Head)

Menu Account

Home Clients My Lists Alerts Assignments Reports Client Details

Patricia Casarotto
ID: 104859AP86121 DOB: 10/24/1968
MFP Eligible: N

Profile
Client Summary
Assessment, POC & LOC
Assessment & POC
Level of Care

Level of Care

Level of Care Request

Level of Care Request

Last request date: 12/20/2012
Created by: McCracken, Donna
Comments: Level of Care Request Comments

InterRAI HC MD Assessment

Assessment Submit Date: 12/20/2012
Recommended LOC: Under Review

Level of Care List

Create Date	Start Date	End Date	Status	Active	Actions
No data available in table					

Create LOC

Level of Care: Redetermination

LOC Type: **Redetermination**

Save & Close Cancel

4.4 Apply UCA Nurse Decision

To apply UCA Nurse Decision, you must first assign a UCA Nurse (Refer to section “Assign UCA Nurse”).

1. Log in as the permitted user
2. Search for client under *Clients* tab
3. Click **Client Summary** for client
4. Click **Level of Care** menu button
5. Under the Level of Care List, click **View**

Long Term Services and Support FERJohn Jink (On behalf of Linda, Head) Location: Utilization Control Agent Menu Account

Home Clients My Lists Alerts Assignments Reports **Client Details**

Patricia Casarotto
ID: 104859AP866121 DOB: 10/24/1968
MPP Eligible: N

Profile Client Summary **Assessment, POC & LOC**
Assessment & POC **Level of Care**

Level of Care

Level of Care Request

Level of Care Request

Last request date: 12/20/2012
Created by: McCracken, Donna
Comments: Level of Care Request Comments

InterRAI HC MD Assessment View Results

Assessment Submit Date: 12/20/2012
Recommended LOC: Under Review

Level of Care List Add

Create Date	Start Date	End Date	Status	Active	Actions
12/20/2012	N/A	N/A	In Progress	No	View Print

6. Under section II. Apply UCA Nurse Decision, click **Edit**

Long Term Services and Support FERJohn Jink (On behalf of Linda, Head) Location: Utilization Control Agent Menu Account

Home Clients My Lists Alerts Assignments Reports **Client Details**

Patricia Casarotto
ID: 104859AP866121 DOB: 10/24/1968
MPP Eligible: N

Profile Client Summary **Assessment, POC & LOC**
Assessment & POC **Level of Care**
LOC Details

Level of Care Status: In Progress View

[Back to List](#) Discard Collapse All

I. Request Level of Care Form Edit

Details

Request submit date: 12/20/2012
Requested by: McCracken, Donna
LOC Type: Initial
Comments: Level of Care Request Comments

InterRAI HC MD Assessment Assessment Results

Assessment Submit Date: 12/20/2012
Recommended LOC: Under Review

II. Apply UCA Nurse Decision Edit

Details

Initial Nurse Reviewer:
Date Paper Work Received from AERS: **
UCA Case ID:
UCA Nurse Decision: ** ☐ Approve ☐ Deny
UCA Nurse Decision Date: **
Signature ☐ Signature is captured on paper: **

4.5 “Save” UCA Nurse Decision

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

The screenshot shows the 'UCA Nurse Decision' form in the LTSSMaryland system. The form is titled 'UCA Nurse Decision' and is part of the 'Level of Care' process. It includes fields for 'Initial Nurse Reviewer' (Heidi Kimble), 'Date Paper Work Received from AERS' (12/20/2012), 'UCA Case ID' (654), 'UCA Nurse Decision' (Approve), 'UCA Nurse Decision Date' (12/20/2012), and 'Signature' (checked, 12/20/2012). The 'Save & Close' button is highlighted with a green circle and a mouse cursor.

4.6 “Submit” UCA Nurse Decision

Click **Submit** to complete the form process. This will save all previous selections and entries and direct the user to view mode. If UCA decision is “Deny”, the UCA Physician will be alerted to apply decision.

The screenshot shows the 'UCA Nurse Decision' form in the LTSSMaryland system, now in view mode. The form is titled 'UCA Nurse Decision' and is part of the 'Level of Care' process. It includes fields for 'Request submit date' (12/20/2012), 'Requested by' (McCracken, Donna), 'LOC Type' (Initial), 'Comments' (Level of Care Request Comments), 'Assessment Submit Date' (12/20/2012), 'Recommended LOC' (Under Review), 'Initial Nurse Reviewer' (Heidi Kimble), 'Date Paper Work Received from AERS' (12/20/2012), 'UCA Case ID' (654), 'UCA Nurse Decision' (Deny), 'UCA Nurse Decision Date' (12/20/2012), and 'Signature' (checked, 12/20/2012). The 'Submit' button is highlighted with a green circle and a mouse cursor.

4.7 “Discard” UCA Nurse Decision

An authorized user is permitted to discard a UCA Nurse decision that is ‘In Progress’ or ‘Submitted’.

The screenshot displays the 'Long Term Services and Support' web application interface. The user is logged in as 'FEIJohn.jilek'. The main navigation bar includes links for Home, Clients, My Lists, Alerts, Assignments, Reports, and Client Details. The left sidebar shows the client profile for Patricia Casarotto, including her ID, DOB, and MFP Eligible status. The main content area is titled 'Level of Care' and shows the status 'Denied By UCA Nurse'. A 'Discard' button is highlighted with a green circle and a mouse cursor. The 'Level of Care' section includes a 'Back to List' link and a 'View' button. Below this, there are three main sections: 'I. Request Level of Care Form', 'II. Apply UCA Nurse Decision', and 'III. Apply UCA Physician Decision'. The 'I. Request Level of Care Form' section contains details such as 'Request submit date: 12/20/2012', 'Requested by: McCracken, Donna', 'LOC Type: Initial', and 'Comments: Level of Care Request Comments'. The 'II. Apply UCA Nurse Decision' section contains 'Assessment Submit Date: 12/20/2012' and 'Recommended LOC: Under Review'. The 'III. Apply UCA Physician Decision' section contains 'UCA Physician Name: **', 'UCA Physician Decision: **' (with 'Approve' and 'Deny' radio buttons), 'UCA Physician Decision Date: **', and a 'Signature' section with a checkbox for 'Signature is captured on paper: **'.

4.8 Apply UCA Physician Decision

To apply UCA Physician Decision, UCA Nurse submits a “Denied” decision. From the Level of Care List view, the status is ‘Denied By UCA Nurse’.

1. Log in as the permitted user
2. Search for client under *Clients* tab
3. Click **Client Summary** for client
4. Click **Level of Care** menu button
5. Under the Level of Care List, click **View**

Long Term Services and Support

FEI John Jilek (On behalf of Kinetic Health)
Location Utilization Control Agent

Home Clients My Lists Alerts Assignments Reports Client Details

Patricia Casarotto
ID: 104959AP86121 DOB: 10/24/1968
MFP Eligible: N

Profile
Client Summary
Assessment, POC & LOC
Assessment & POC
Level of Care

Level of Care

Level of Care Request

Level of Care Request

Last request date: 12/20/2012
Created by: McCracken, Donna
Comments: Level of Care Request Comments

InterRAI HC MD Assessment

Assessment Submit Date: 12/20/2012
Recommended LOC: Under Review

Level of Care List

Create Date	Start Date	End Date	Status	Active	Actions
12/20/2012	N/A	N/A	Denied By UCA Nurse	No	View Edit

6. Under section III. Apply UCA Physician Decision, click **Edit**

Long Term Services and Support

FEI John Jilek (On behalf of Kinetic Health)
Location Utilization Control Agent

Home Clients My Lists Alerts Assignments Reports Client Details

Patricia Casarotto
ID: 104959AP86121 DOB: 10/24/1968
MFP Eligible: N

Profile
Client Summary
Assessment, POC & LOC
Assessment & POC
Level of Care
LOC Details

Level of Care Status: Denied By UCA Nurse

Back to List

Discard Collapse All

I. Request Level of Care Form

Details

Request submit date: 12/20/2012
Requested by: McCracken, Donna
LOC Type: Initial
Comments: Level of Care Request Comments

InterRAI HC MD Assessment

Assessment Submit Date: 12/20/2012
Recommended LOC: Under Review

II. Apply UCA Nurse Decision

III. Apply UCA Physician Decision

Details

UCA Physician Name: **
UCA Physician Decision: **
UCA Physician Decision Date: **

Signature

Signature is captured on paper: **

Edit

4.9 “Save” UCA Physician Decision

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

The screenshot shows the LTSSMaryland interface for Patricia Casarotto. The 'Level of Care' status is 'Denied By UCA Nurse'. A modal form titled 'UCA Physician Decision' is open, allowing a user to save their decision. The form includes fields for 'UCA Physician Name' (Heidi Kimble), 'UCA Physician Decision' (radio buttons for Approve and Deny, with Deny selected), 'UCA Physician Decision Date' (12/20/2012), and a signature section with a date (12/20/2012) and a checkbox for 'Signature is captured on paper'. At the bottom of the modal, there are buttons for 'Save & Close' (highlighted with a green circle and an arrow), 'Cancel', and 'View'.

4.10 “Submit” UCA Physician Decision

Click **Submit** to complete the form process. This will save all previous selections and entries and direct the user to view mode. If UCA decision is “Deny”, the DHMH Physician will be notified to apply decision.

The screenshot shows the LTSSMaryland interface for Patricia Casarotto. The 'Level of Care' status is 'Denied By UCA Nurse'. The 'UCA Physician Decision' modal form is no longer open. Instead, the 'I. Request Level of Care Form' is visible, showing details like 'Request submit date: 12/20/2012', 'Requested by: McCracken, Donna', 'LOC Type: Initial', and 'Comments: Level of Care Request Comments'. Below this, the 'InterRAI HC MID Assessment' section shows 'Assessment Submit Date: 12/20/2012' and 'Recommended LOC: Under Review'. Further down, there are sections for 'II. Apply UCA Nurse Decision' and 'III. Apply UCA Physician Decision'. In the top right corner, the 'Submit' button is highlighted with a green circle and an arrow, along with 'Discard' and 'Collapse All' buttons.

4.11 Apply DHMH Physician Decision

To apply DHMH Physician Decision, UCA Physician submits a “Denied” decision. From the Level of Care List view, the status is ‘Denied By UCA Physician’.

1. Log in as the permitted user
2. Search for client under *Clients* tab
3. Click **Client Summary** for client
4. Click **Level of Care** menu button
5. Under the Level of Care List, click **View**

Long Term Services and Support

Patricia Casarotto
ID: 104959AP866121 DOB: 10/24/1968
MFP Eligible: N

Level of Care

Level of Care Request

Level of Care Request

Last request date: 12/20/2012
Created by: McCracken, Donna
Comments: Level of Care Request Comments

InterRAI HC MD Assessment

Assessment Submit Date: 12/20/2012
Recommended LOC: Under Review

Level of Care List

Create Date	Start Date	End Date	Status	Active	Actions
12/20/2012	N/A	N/A	Denied By UCA Physician	Yes	View Print

6. Under section IV. Apply DHMH Physician Decision, click **Edit**

Long Term Services and Support

Patricia Casarotto
ID: 104959AP866121 DOB: 10/24/1968
MFP Eligible: N

Level of Care Status: Denied By UCA Physician

Back to List

Level of Care

I. Request Level of Care Form

Details

Request submit date: 12/20/2012
Requested by: McCracken, Donna
LOC Type: Initial
Comments: Level of Care Request Comments

InterRAI HC MD Assessment

Assessment Submit Date: 12/20/2012
Recommended LOC: Under Review

II. Apply UCA Nurse Decision

III. Apply UCA Physician Decision

IV. Apply DHMH Physician Decision

Details

DHMH Physician Decision: ☒ Approve ☐ Deny
DHMH Physician Decision Date:

Signature

☐ Signature is captured on paper: **

Comments: **

4.12 “Save” DHMH Physician Decision

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

The screenshot shows the 'Long Term Services and Support' interface for Patricia Casarotto. The 'Level of Care' status is 'Denied By UCA Physician'. A modal window titled 'DHMH Physician Decision' is open, showing fields for 'DHMH Physician Decision' (radio buttons for Approve and Deny), 'DHMH Physician Decision Date' (12/20/2012), 'Signature' (checkbox for 'Signature is captured on paper'), and 'Comments' (DHMH has approved this test client.). The 'Save & Close' button is circled in green.

4.13 “Submit” DHMH Physician Decision

Click **Submit** to complete the form process. This will save all previous selections and entries and direct the user to view mode. Once the UCA Nurse, UCA Physician, or DHMH Physician has applied an ‘Approve’ decision, the Approval Affirmation section will display. Complete the Approval Affirmation section and submit the Level of Care.

The screenshot shows the 'Long Term Services and Support' interface for Patricia Casarotto. The 'Level of Care' status is 'Denied By UCA Physician'. The 'DHMH Physician Decision' modal is open, showing fields for 'UCA Physician Name' (Heidi Kimble), 'UCA Physician Decision' (radio buttons for Approve and Deny), 'UCA Physician Decision Date' (12/20/2012), 'Signature' (checkbox for 'Signature is captured on paper'), and 'Comments' (DHMH has approved this test client.). The 'Submit' button is circled in green.

4.14 “Discard” DHMH Physician Decision

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

4.15 “Print” Level of Care

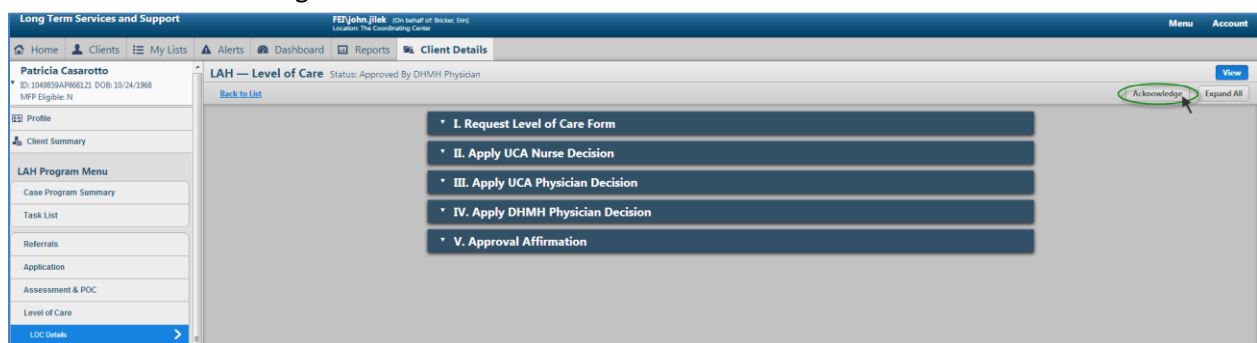
The user is permitted to view the Level of Care in print view (PDF format displayed in a separate window/tab).

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

4.16 “Acknowledge” Level of Care

To Acknowledge the Level of Care, the Level of Care Decision and Affirmation must be ‘Submitted’ and you must be logged in with the permitted user. The following are permitted to acknowledge the Assessment Packet: (Assigned) TCC Case Manager...

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





5 Appendix A: Bookmarks and Favorites

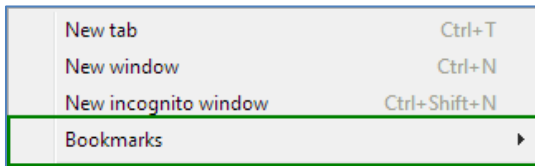
5.1 Creating and Using Bookmarks (Google Chrome)

Prior to going out of connectivity or “Offline”, it is important to save the Offline Assessment location by bookmarking the URL. This *bookmark* will allow you to access the Offline Assessment list without connectivity. “Bookmarks” are used in the Google Chrome web browser.

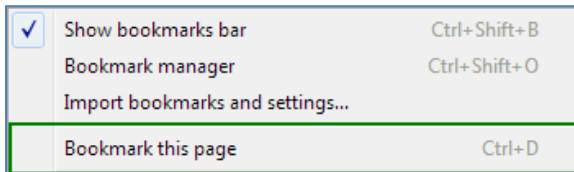
5.1.1 Adding Bookmark via menu dropdown (Example 1)

1. Launch Google Chrome web browser  Google Chrome
2. Navigate to the Offline Assessment view (Refer to “Go Offline’ with InterRAI HC MD Assessment”)


3. Click the control dropdown in the top right corner 
4. Click **Bookmarks**



5. Click **Bookmark this page**



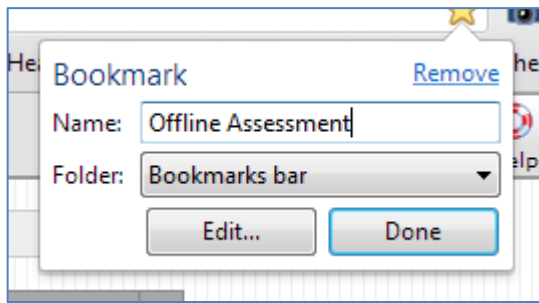
5.1.2 Adding Bookmark via “star” icon (Example 2)

1. Launch Google Chrome web browser  Google Chrome
2. Navigate to the Offline Assessment view (Refer to “Go Offline’ with InterRAI HC MD Assessment”)


3. Click the star icon  located on the Address Bar

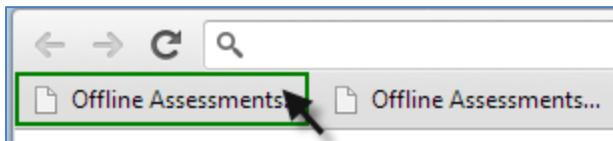


4. Name the Bookmark and click **Done**



5.1.3 Launching a Bookmark

1. Launch Google Chrome web browser  Google Chrome
2. Locate the Bookmark (previously created) on the top of the browser window




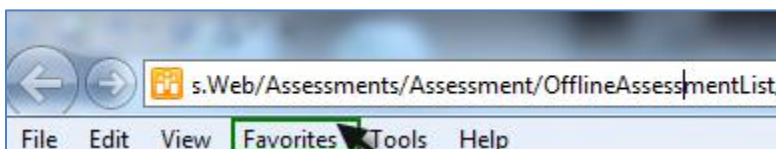
3. Click the Bookmark

5.2 Creating and Using Favorites (Internet Explorer)

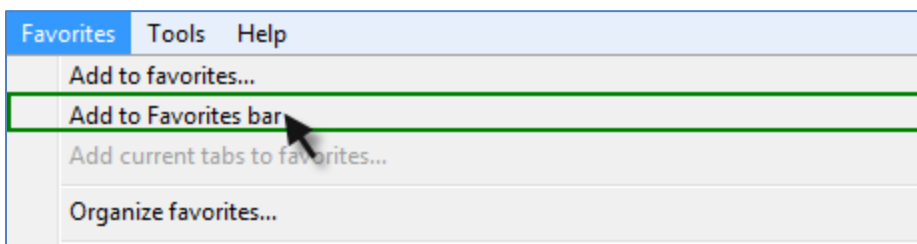
Prior to going out of connectivity or “Offline”, it is important to save the Offline Assessment URL Favorites Bar. The *Favorites Bar* will allow you to access the Offline Assessment list without connectivity. “Favorites” are used in the Internet Explorer web browser.

5.2.1 Adding Favorites Bar via menu dropdown (Example 1)


1. Launch Internet Explorer web browser  Internet Explorer
2. Navigate to the Offline Assessment view (Refer to “Go Offline’ with InterRAI HC MD Assessment”)
3. Click the **Favorites** menu option

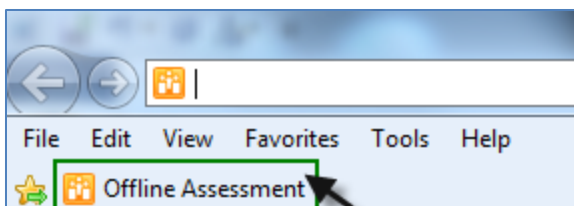


4. Click **Add to Favorites bar**



5.2.2 Launching a URL from Favorites Bar

1. Launch Internet Explorer web browser  Internet Explorer
2. Locate the Favorites Bar at the top of the browser window



3. Click the Favorite