LHD Process in LTSS

A step by step navigational process

March 2013

Prepared by: FEi Systems

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1 Introduction

1.1 Background

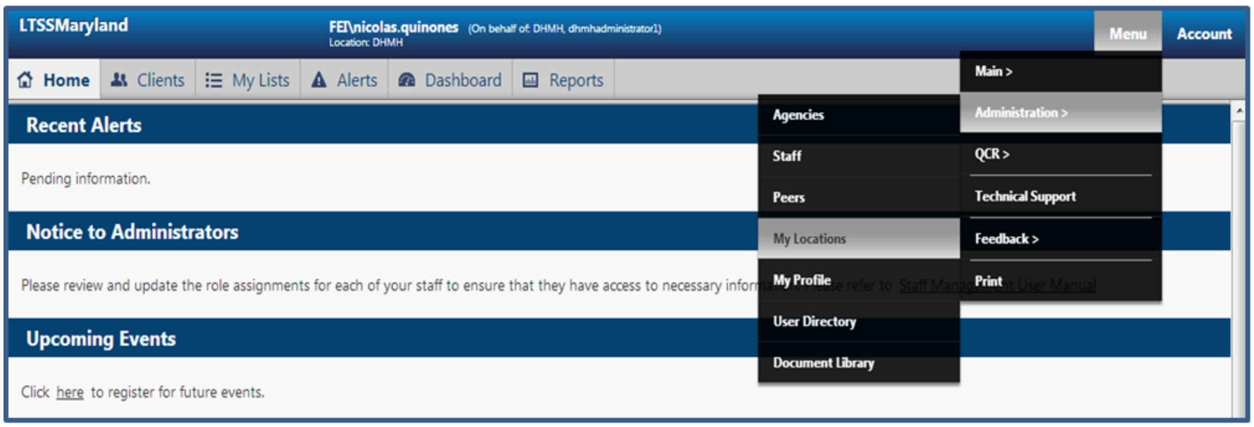
Maryland is currently embarking on a transformation and rebalancing of its long-term services and supports (LTSS). As programs change and evolve, the need for flexible, responsive technology to manage large volumes of data related to participant application, enrollment, and participation in LTSS is vital 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).

2 Getting Started

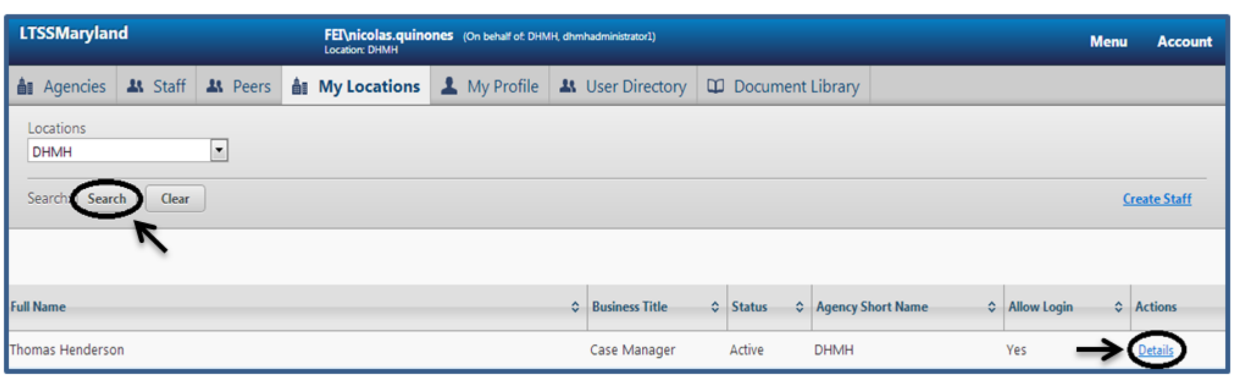
2.1 My Location Tutorial

To navigate to the My Locations section of LTSS, the user will go to Menu, Administration and click on the My Locations option as seen in the figure below. My Locations in LTSS is used by Agency Administrators (LHD Nurse Coordinator) to manage the staff for the Agency Locations they oversee.



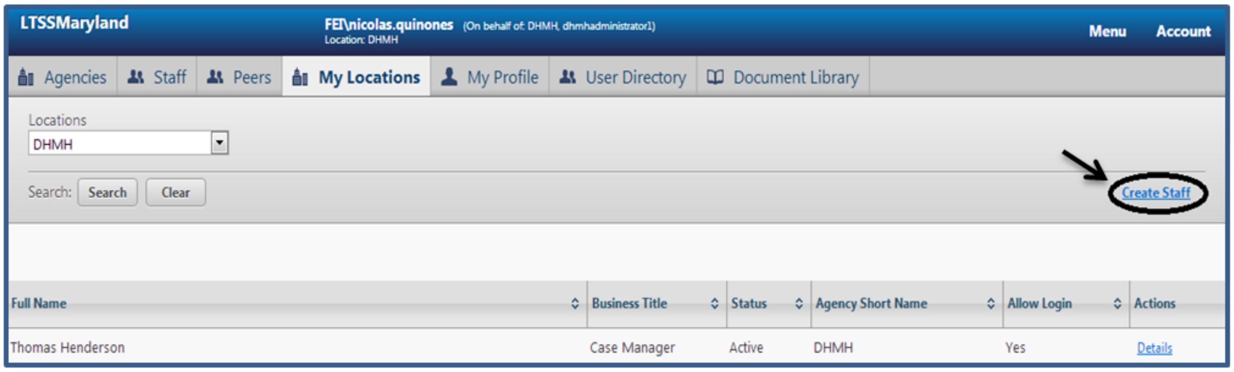
2.1.1 My Locations Search

After navigating to My Locations through Administration the actor will have the ability to search for Staff Profiles by specifying a Location. The options available within the Locations dropdown will be driving by the logged in user. As the Agency Administrator, the user will see all Locations that they are related to in their individual staff profile and will have the ability to manage the staff profiles of any staff associated to those locations. After selecting a Location click the **Search button** as seen in the figure below to see the Staff associated to the specified Location. After searching, if the user finds a Staff they would like to work with they can view the Staff Profile by clicking the **Details link** as seen in the figure below.

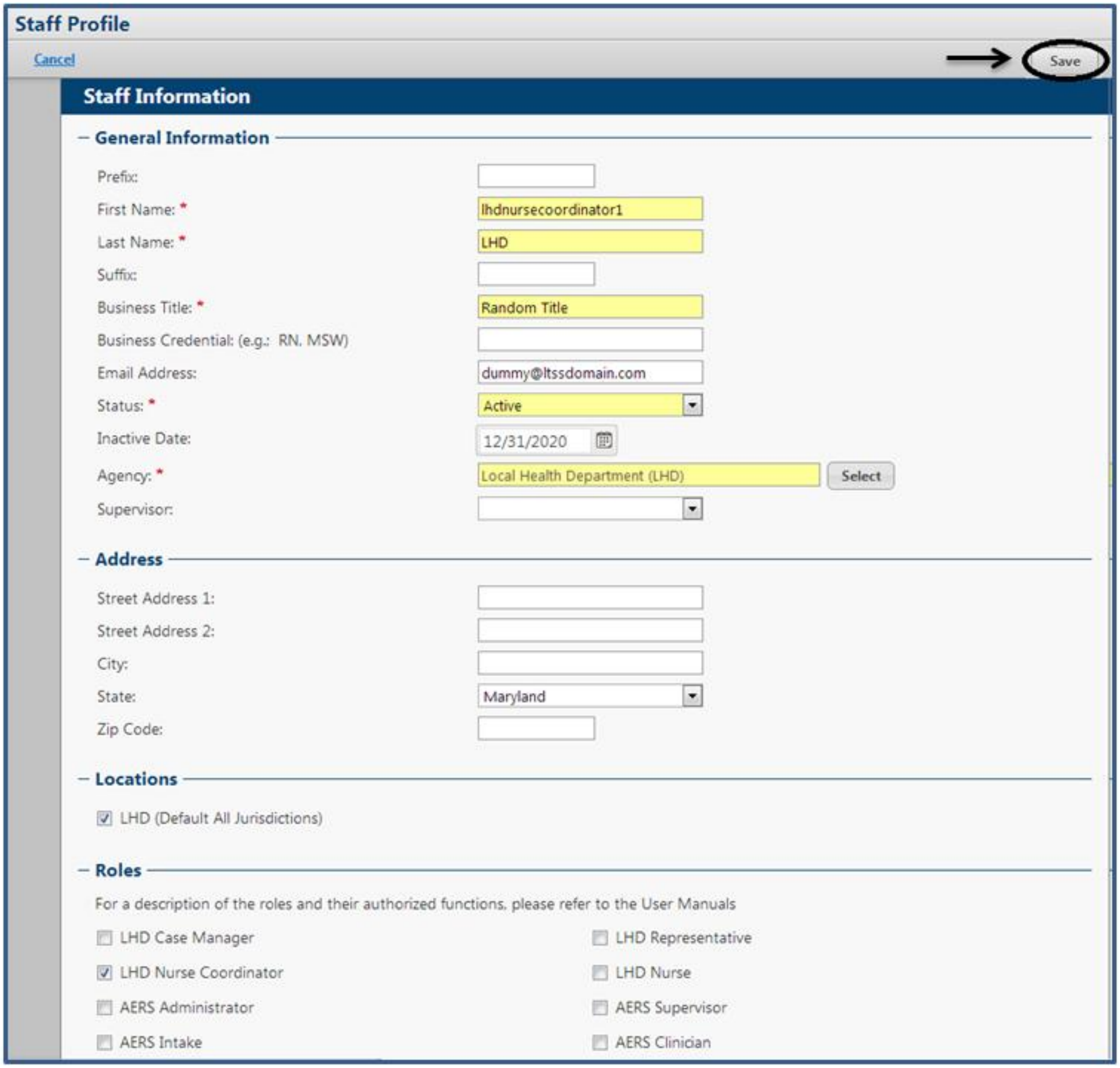


2.1.2 Create Staff

Agency Administrator will also have the ability to create new staff profile by clicking the Create Staff link as seen in the figure below. As Agency Administrators, when creating new Staff through My Locations the user will only be able to associate new and existing staff to Agencies and Locations that the Agency Administrator is associated to.



On the Staff Profile, the user will enter detailed information about the Staff members and associate them to the Local Health Department. The Agency Administrator can then specify which roles to give to the Staff member they are creating. The Agency Administrator will also have the ability to manage whether or not the Staff member has the ability to log into LTSS using the Allow Login checkbox. If allowing the staff member to log in the Agency Administrator will need to enter the staff members Login Name, which the staff member will obtain through Hilltop using the How to Request a Login Form located on the Home page of LTSS.


Staff Profile
Cancel
Save
Staff Information
General Information
Prefix:
First Name: *
lhdnursecoordinator1
Last Name: *
LHD
Suffix:
Business Title: *
Random Title
Business Credential: (e.g.: RN, MSW)
Email Address:
dummy@ltssdomain.com
Status: *
Active
Inactive Date:
12/31/2020
Agency: *
Local Health Department (LHD)
Select
Supervisor:
Address
Street Address 1:
Street Address 2:
City:
State:
Maryland
Zip Code:
Locations
LHD (Default All Jurisdictions)
Roles
For a description of the roles and their authorized functions, please refer to the User Manuals
LHD Case Manager
LHD Representative
LHD Nurse Coordinator
LHD Nurse
AERS Administrator
AERS Supervisor
AERS Intake
AERS Clinician

Below is a breakdown of the permissions given to each LDH role. An X designates that the user role is able to perform the task specified.

Module	Roles	LHD Nurse	LHD Nurse Coordinator
Client (in user's own jurisdictions)	Create new client profile	X	X
	Edit existing client profile	X	X
	View existing clients	X	X
	List existing clients	X	X
Std. Assessment (interRAI)	Assign Nurse/Clinician(s) for Assessment		X
	Create/Edit Standardized Assessment (without assignments – this is different from AERS Nurse permission who can create interRAI after client is assigned)	X	X
	Prepare for Offline Standardized Assessment	X	X
	Upload Offline Assessment	X	X
	Submit Standardized Assessment	X	X
	View Standardized Assessment Results (assign view role)	X	X
	List Standardized Assessment (assign list role)	X	X
	View Standardized Assessment Results (assign view role)	X	X
AERS Health Evaluation	Add Health Evaluation	-	-
	Edit existing Health Evaluation	-	-
	View existing Health Evaluation	-	-
	List existing Health Evaluations	-	-
AERS POC	Add AERS POC	-	-
	Edit existing AERS POC	-	-
	View existing AERS POC	X	X
	List existing AERS POC	X	X

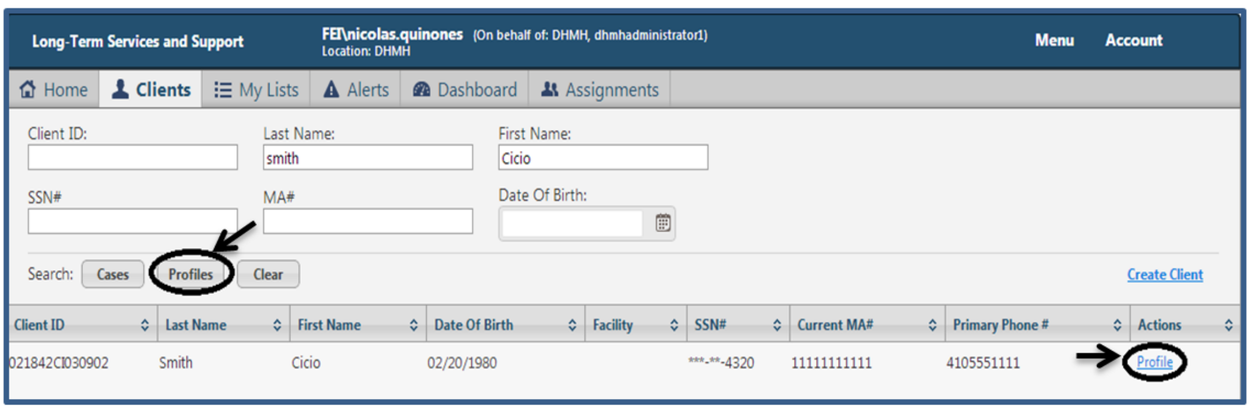
2.2 Client Profile

The centralized client record, referred to as Client Profile, 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. Client profile has information about the specific client, regardless of the program. For example, demographic information, Medicaid number and eligibility, contact information, representative information, etc.

Certain fields in the client profile will get updated regularly from Maryland's MMIS with the latest information. Note: It is **extremely important** to keep the client profile up-to-date since all agencies across all programs will view the same client profile. Also, forms across the system will reference the client profile for client related information. In order for the forms to have the latest, correct information it is critical to have the profile completed.

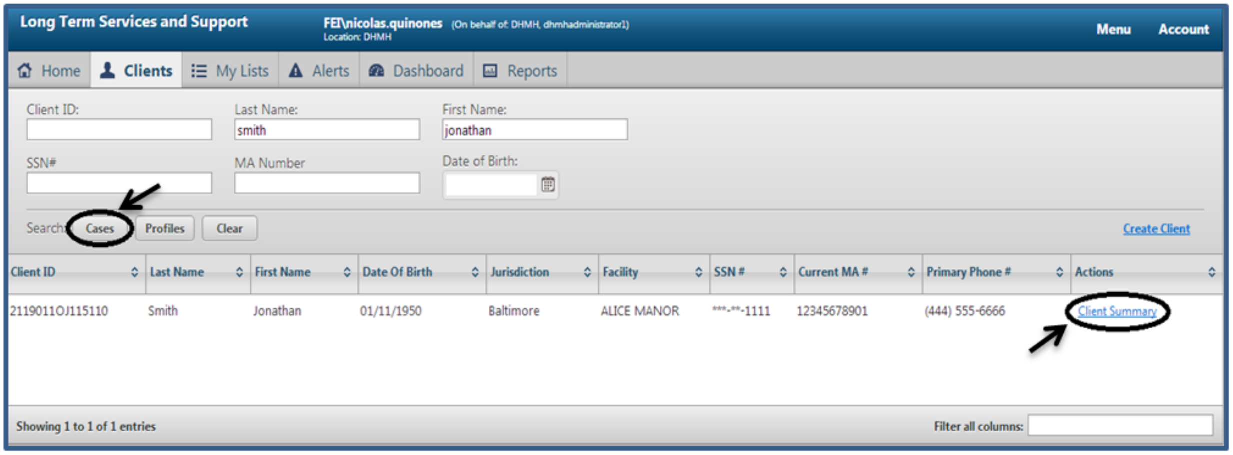
2.2.1 Client Profile Search

The **search** feature can be used to locate clients based on Client ID, Last Name, first name, SSN#, MA# and Date of Birth. The search function can be used by entering any one of these items individually or by using a combination. Note: Client ID here is a system-generated, unique number for each client.

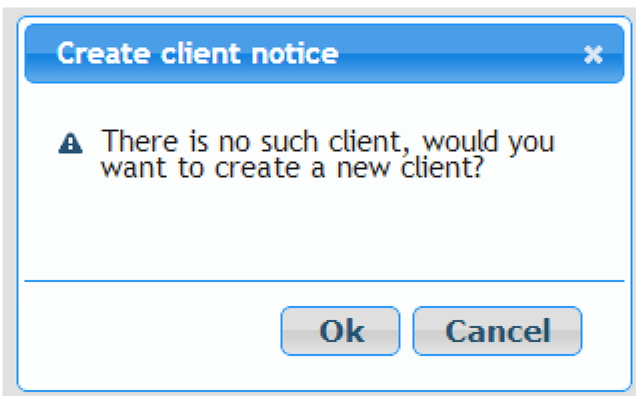


If you want to review the client profile, you can enter the search criteria and hit the *profiles* button (as shown in the screenshot above); this will show you a list of clients, with the action link *Profile.*

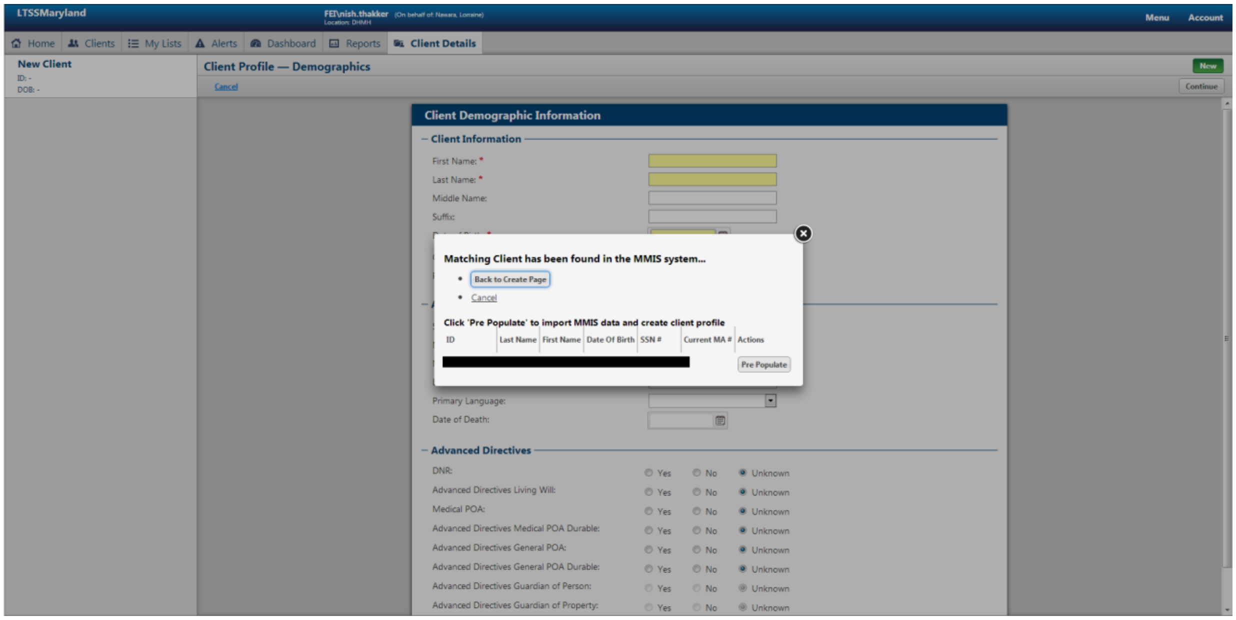
If you want to review program-related information for a client, you can enter the search criteria and hit the *Cases* button (as shown in the screenshot below), this will show you a list of clients, with the action link *Client Summary.*



When you enter client information, in the search criteria, if the client is not present within LTSS, the system will show you the following message:

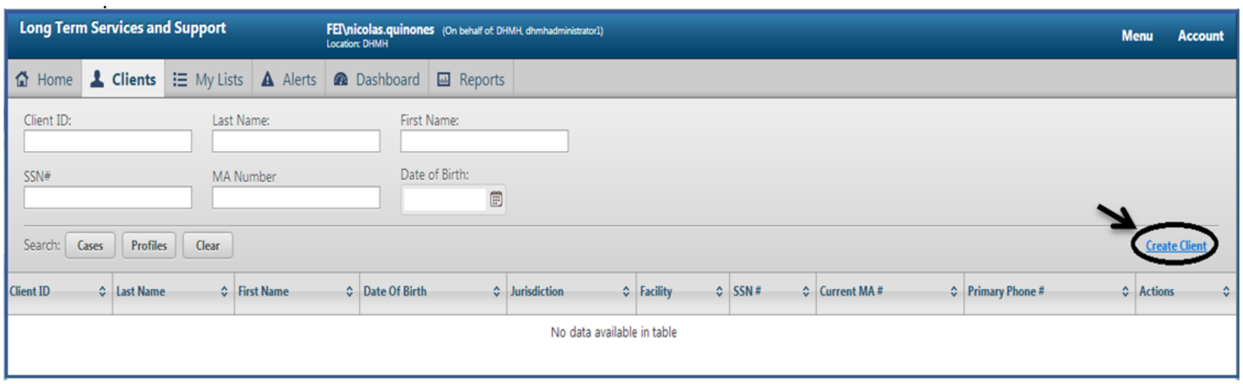


When you click Ok, the LTSS system automatically searches the MMIS system. If the client is present in MMIS, you will see the following message. If you find the client in the list in the pop-up, you can click on the *pre-populate* button and the client profile will be system-populated by importing information from MMIS. If you don’t find your client in the list, you can click on the *Back to Create Page* button and start entering the information, as described in the sections below.

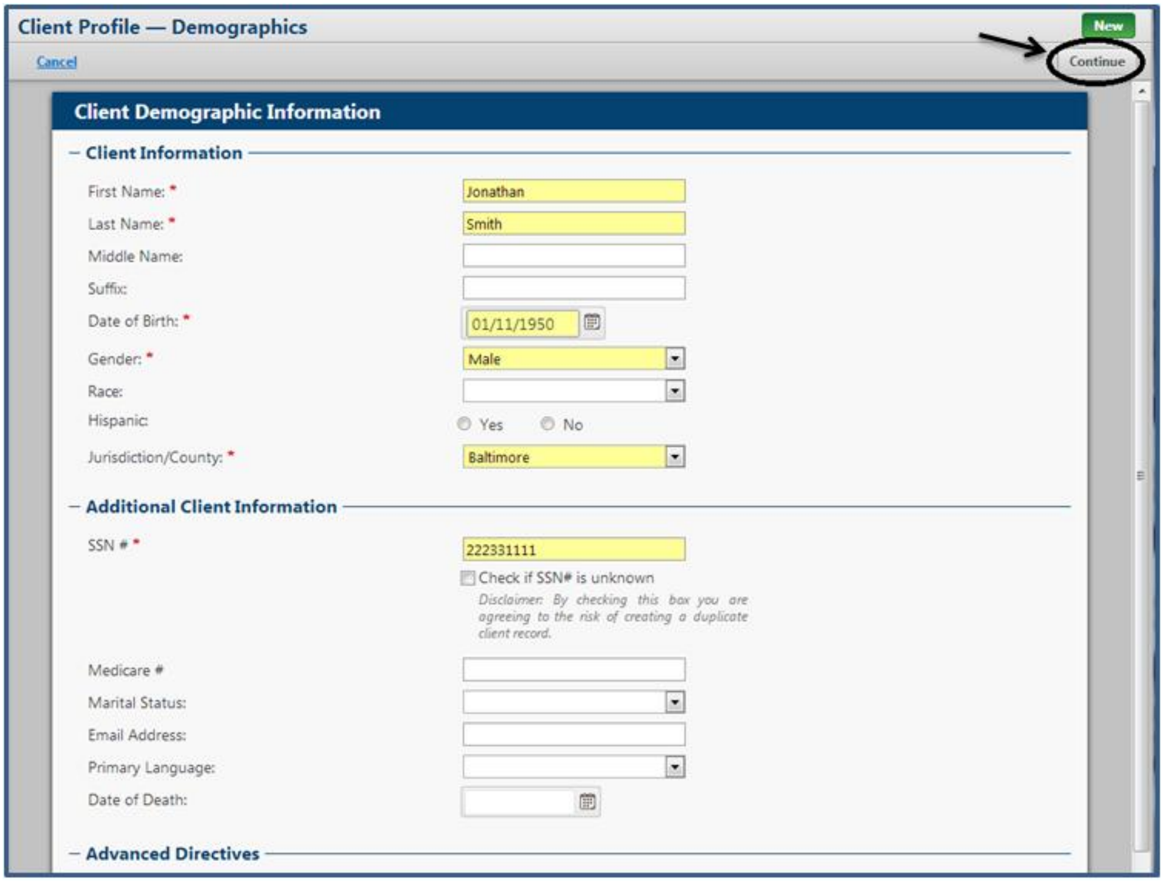


2.2.2 Client Profile Creation

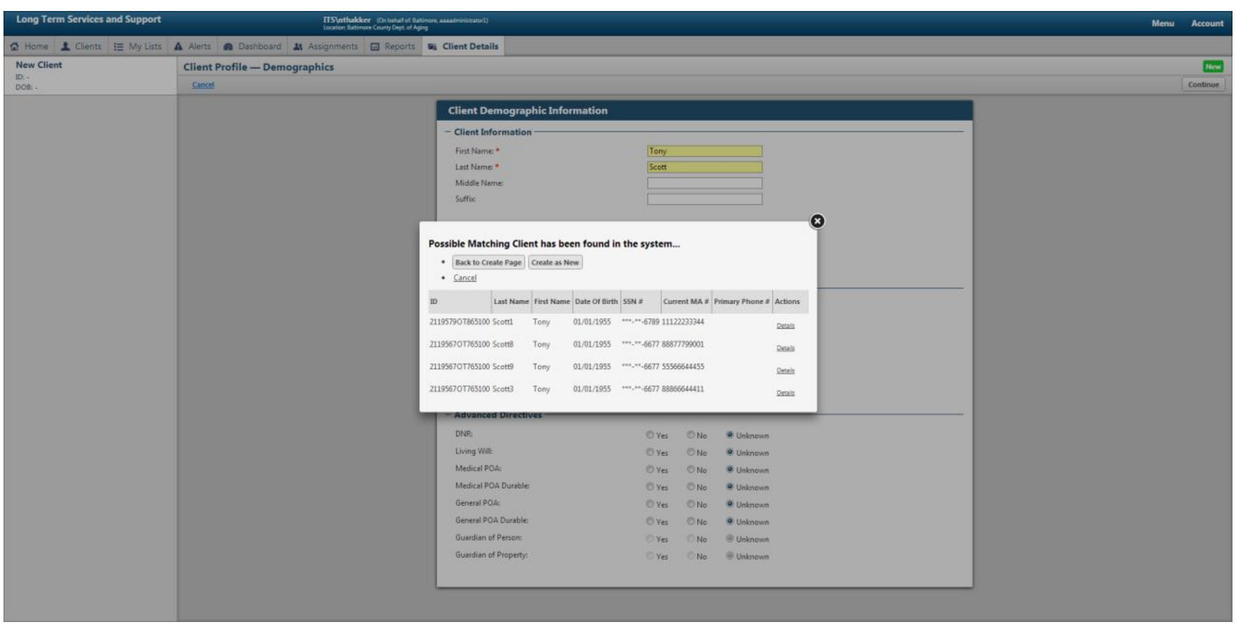
For a first-time client the user would click the ***Create Client*** link located on the right side of the screen.



This link will direct the user to the *Client Profile—Demographics* section of the Client Profile. The user will be prompted to enter required information to create the client profile. After entering the client demographic information click the **Continue** button.



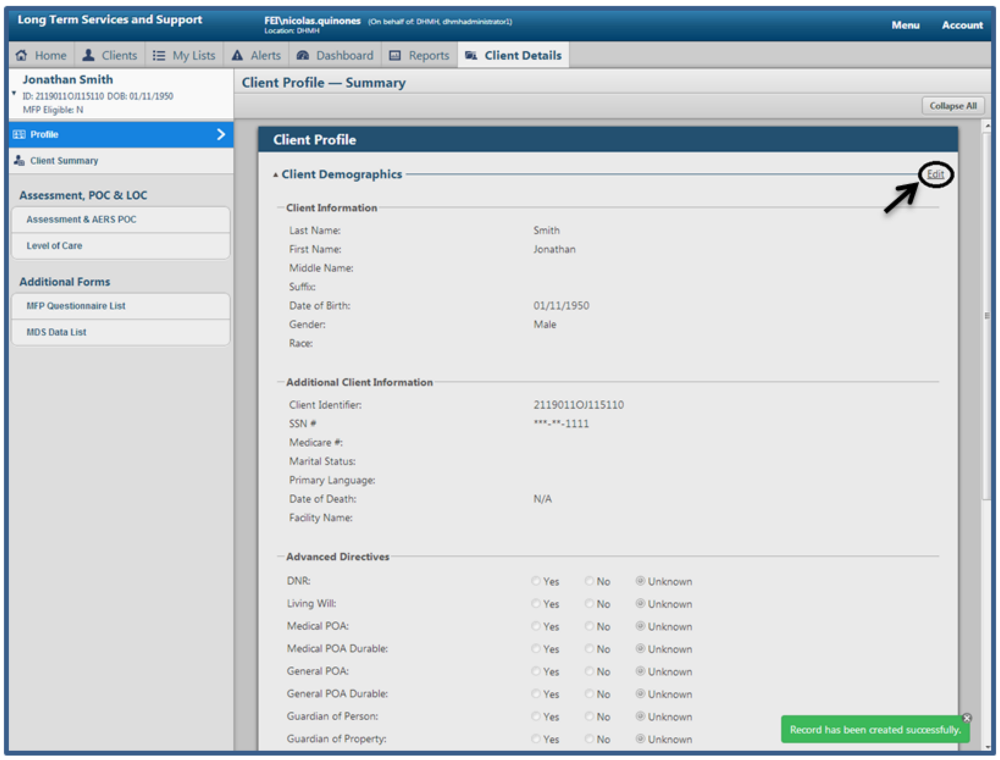
After clicking the Continue button in the figure above, if you have entered information for a client that already exists in LTSS, you will get a message notifying you about the possible replicated clients.



If there is no other possible duplicate client, the user would then be directed to the *Client Profile* page where they would take the following steps in completing the client profile. The user would add a client Medicaid number, phone number, current address and representatives. What follows is a section by section breakdown of how this information is added and edited.

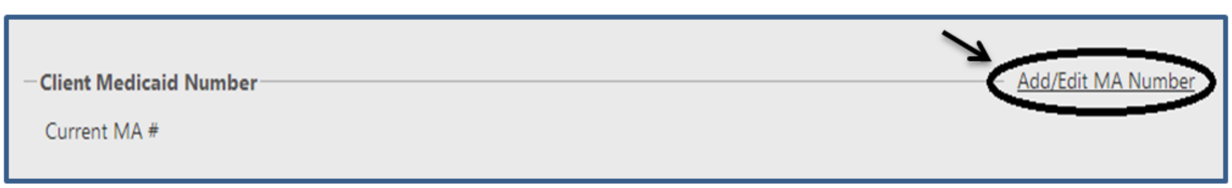
2.2.3 Demographic Data

The first section of the Client Profile page gives the user the option to edit *Demographic Data* about the client. To perform this function, click the ***Edit*** link as seen in the figure below. To edit information, click any field, make the necessary changes and click the **Save** button. After saving the user is returned to the Client Profile- Summary page.



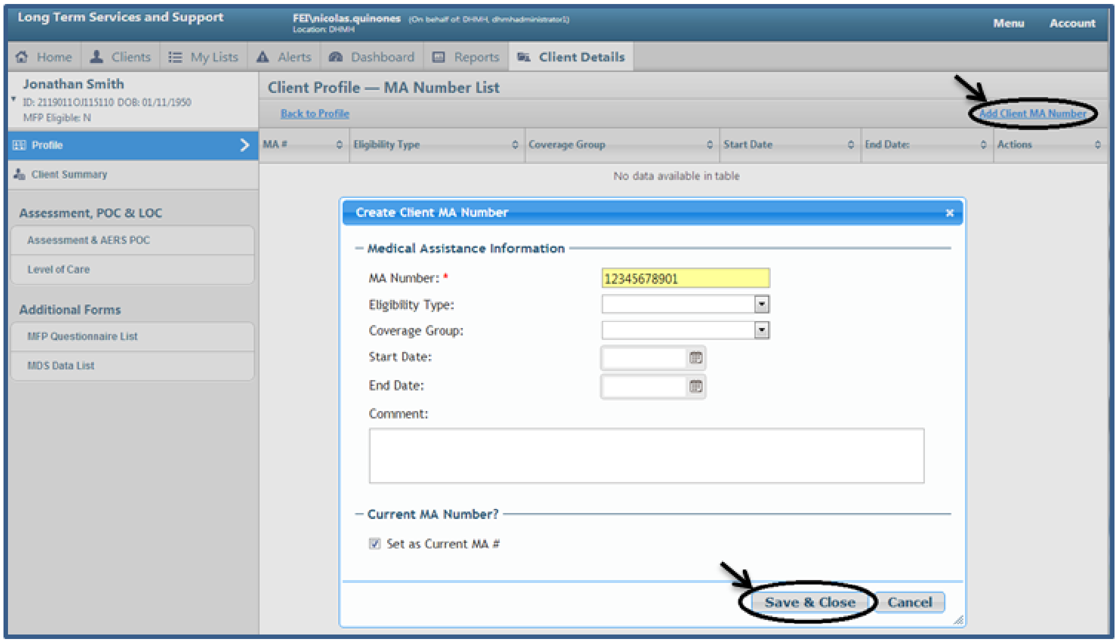
2.2.4 Client Medicaid Number

The next section of the Client Profile is the *Client Medicaid Number*. To manage this section of the Client Profile the user must click the ***Add/Edit MA#*** link.

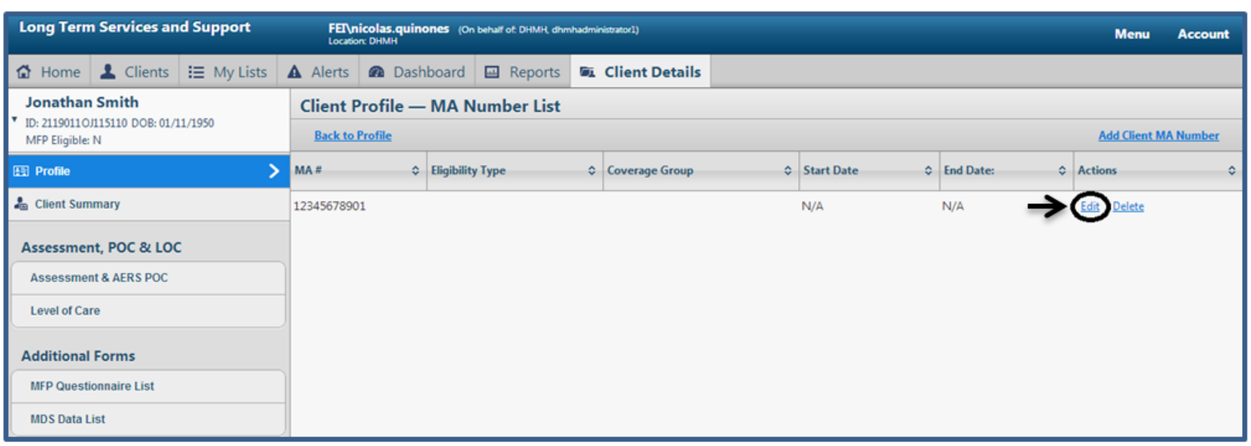


After clicking the Add/Edit MA# link the user will be directed to the *Client MA Number List*. To add a MA#, click the ***Add Client MA Number*** link. A pop-up window will appear as seen in the figure below.

The user can then add a *MA#, Eligibility Type, Coverage Group, Start Date, End Date and identify if the MA# will be Set as Current MA#*. All boxes highlighted in yellow (labels with one red star) are required to save the Client MA#. A client can have multiple MA#'s, but only one can be active as the current MA# at a time. By clicking the checkbox the user sets the new MA# as the current MA#. After entering the required information the actor can click the ***Save & Close*** button. The **Cancel** button will erase any information entered and return the user to the Client MA Number List.

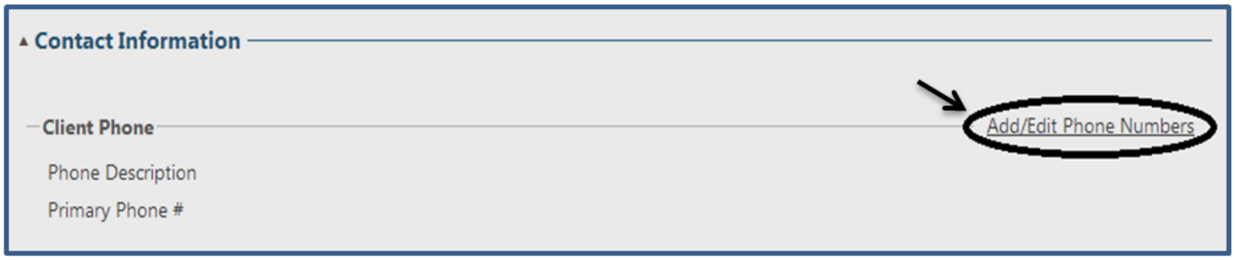


The Client MA# can be edited at any time by clicking the ***Edit*** link as shown in the figure below. The Edit button also allows the user to modify which MA# is set as the Current MA#. If for any reason any of the clients MA#'s need to be deleted the actor can use the ***Delete*** function as seen in the figure below. By clicking the ***Back to Profile*** link the user is returned to the Client Profile page.



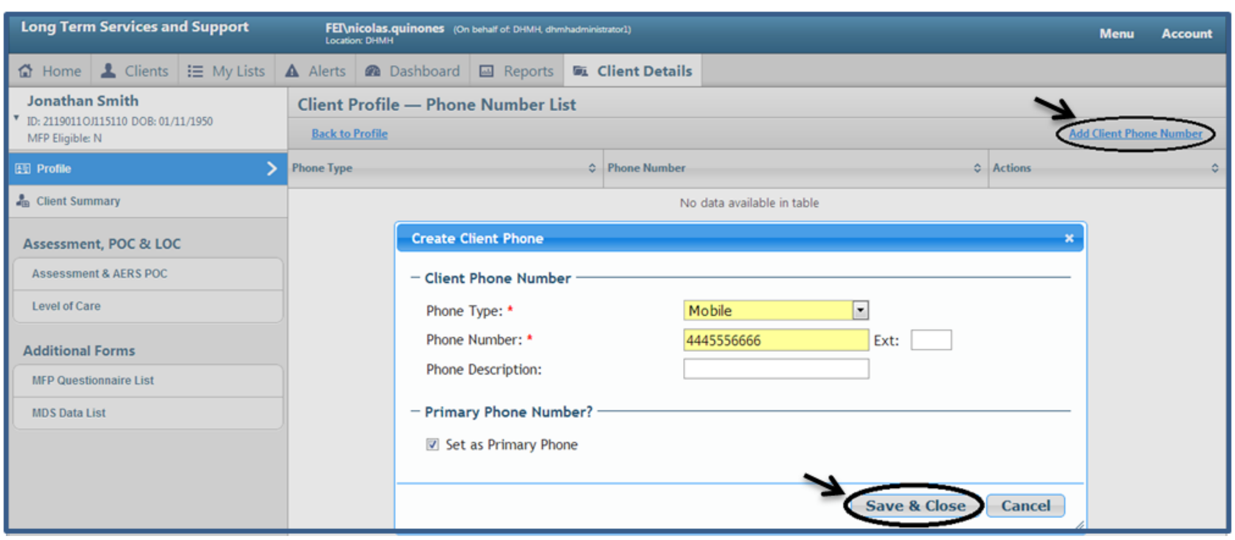
2.2.5 Contact Information

The next part of the Client Profile page is the Contact Information. This is broken down into two sections: *Client Phone* and *Current Address*. To manage the *Client Phone* section of Contact Information section the user must click the ***Add/Edit Phone Numbers*** link.

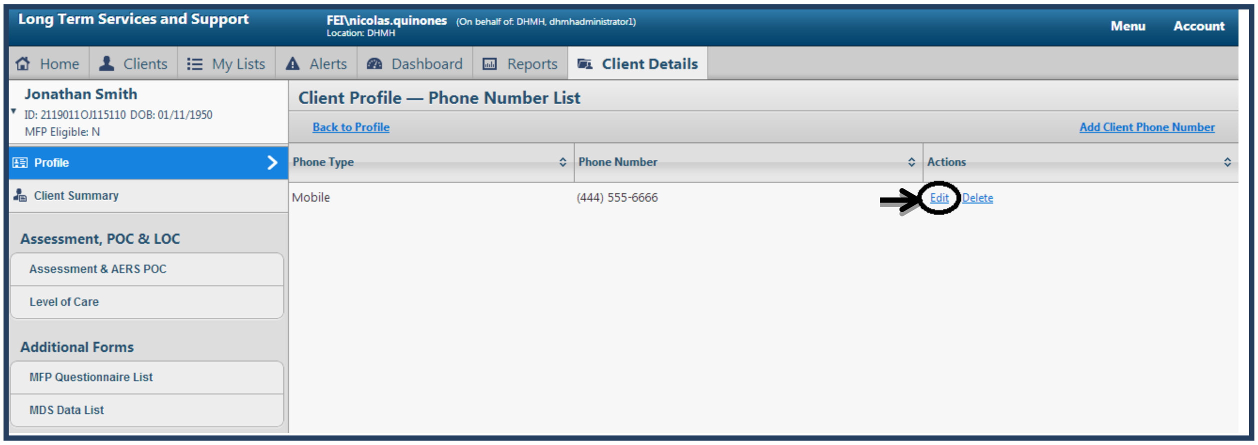


Client Phone

After clicking the ***Add/Edit Phone Numbers*** link the user will be directed to the *Client Profile-- Phone Number List*. To add a phone number, click the ***Add Client Phone*** link. A pop-up window will appear as seen in the figure below. The user can then select a *phone type from the drop down menu and enter a phone number*. All boxes highlighted in yellow are required to save the Client Phone. The user also has the ability to decide if they want to set this as the *Primary Phone*. A client can have multiple phone numbers, but only one can be active as the primary phone at a time. By clicking the checkbox the user sets the new Phone as the Primary Phone. After entering the required information the actor can click the ***Save & Close*** button. The **Cancel** button will erase any information entered and return the user to the Client Phone Number List.



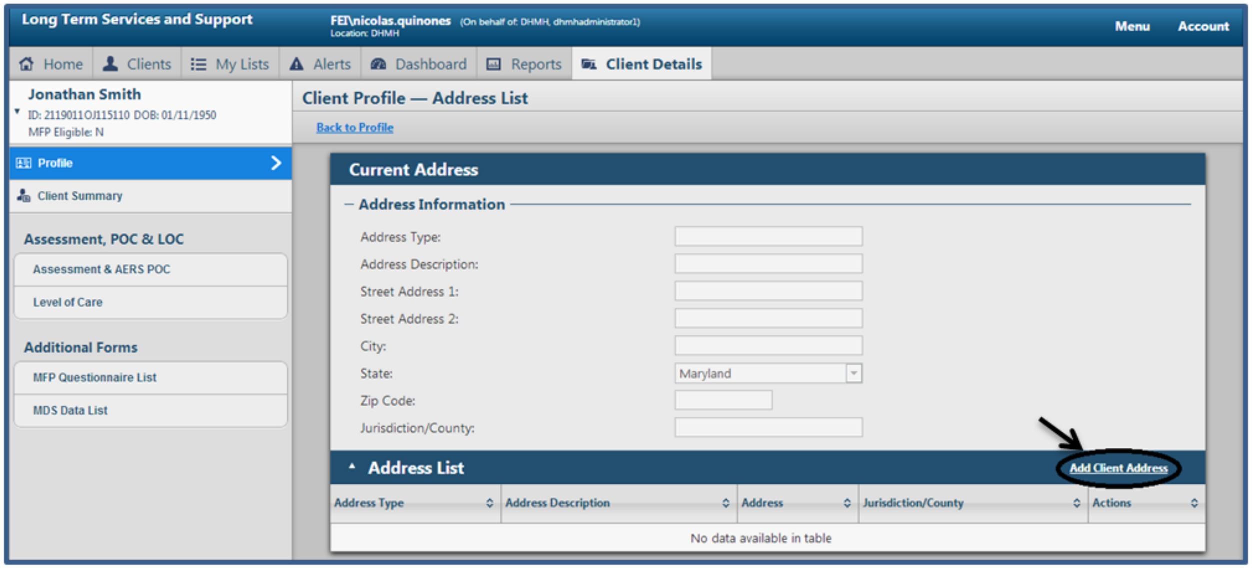
The Client Phone can be edited at any time by clicking the ***Edit*** link as shown in the figure below. The Edit button also allows the user to modify which Phone Number is set as the Primary Phone. If for any reason any of the clients phone numbers need to be deleted the actor can use the ***Delete*** function as seen in the figure below. By clicking the ***Back to Profile*** link the user is returned to the Client Profile page.



Current Address

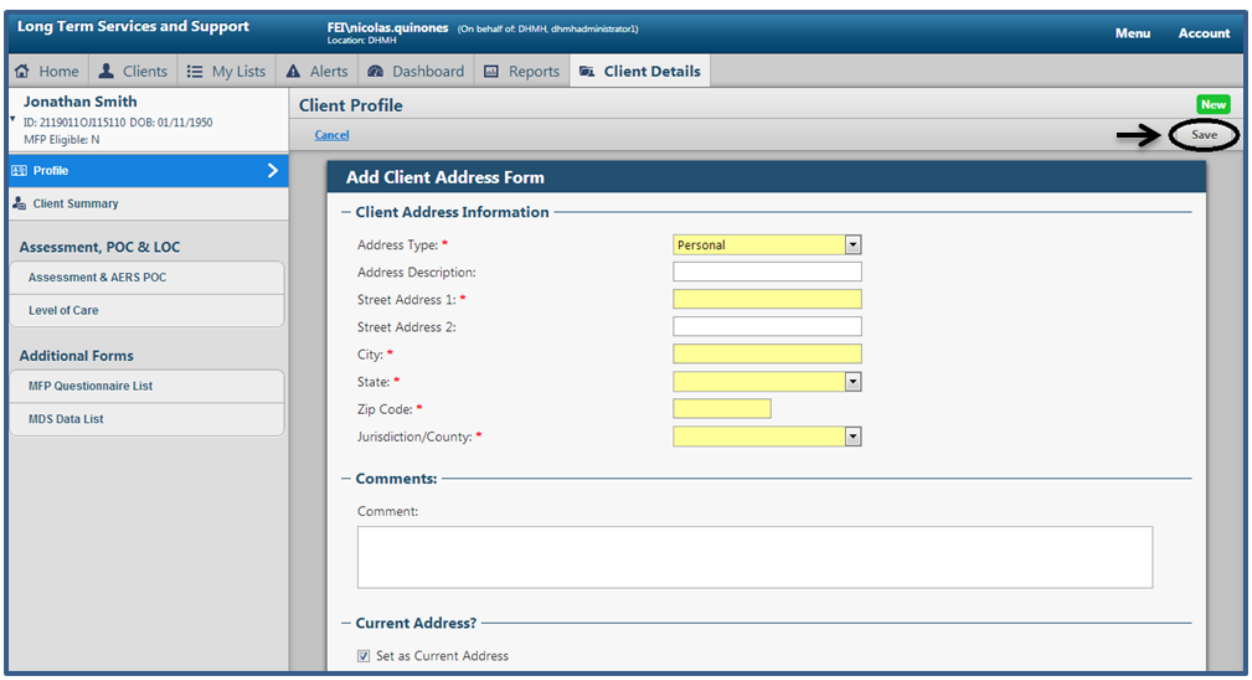
To manage the *Current Address* section of Contact Information the user must click the ***Add/Edit Addresses*** link.

The user can add a client address by clicking the ***Add Client Address*** link, which will take them to a new page where they can input information for a New Client Address.



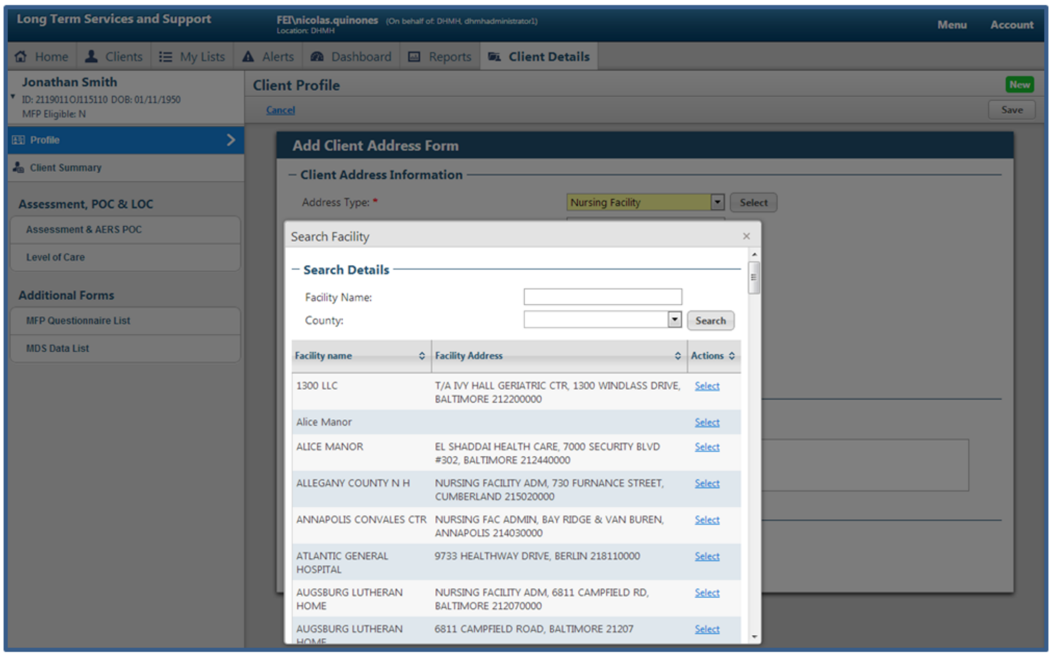
Add Client Address

If the actor chooses *Personal, Long Term Care Facility or Other* from the *Address Type* field dropdown, they will continue by entering the rest of the ***required*** information, which will either be ***highlighted yellow*** or marked with an ***asterisk***. By clicking ***Save*** button the Address is saved under the Client Profile—Address List.

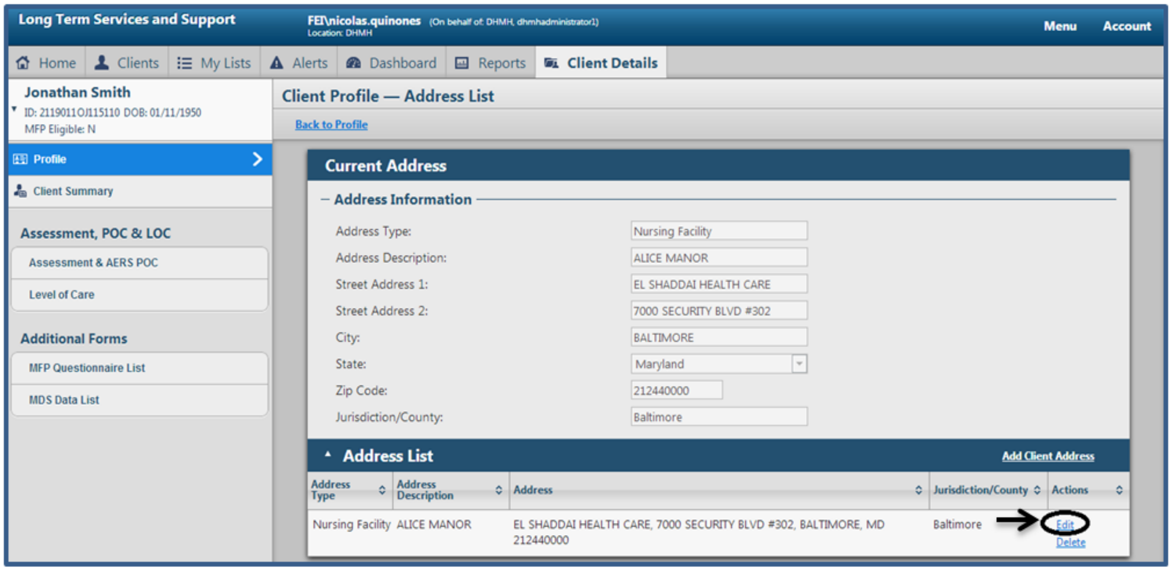


Find Facility

If the actor chooses *Nursing Facility or Assisted Living Facility* from the *Address Type* field dropdown, a Search button will appear where the client can search through a list of facilities using the pop-up window displayed in the figure below. By clicking the Select link for a Facility, their address information will be populated into the required fields in the Client Address Information screen. By clicking ***Save*** button the Address is saved under the Client Profile—Address List.

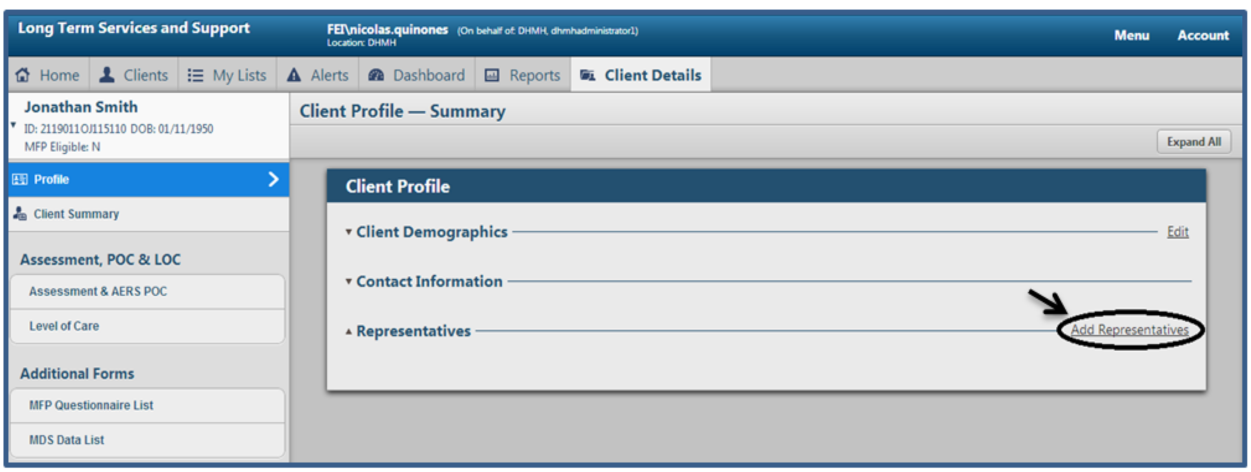


After adding addresses to the Address List the user would then have the option to edit any of the addresses or switch between which address is actively being used as the *Current Address* by clicking the ***Edit link*** as seen in the figure below. Below is a sample of a Client Address List and where to go to edit addresses and/or change current addresses. The actor also has the ability to delete addresses from the client profile by using the ***Delete*** function as seen in the figure below. Click the ***Back to Profile*** button at the top to return to the Client Profile page.

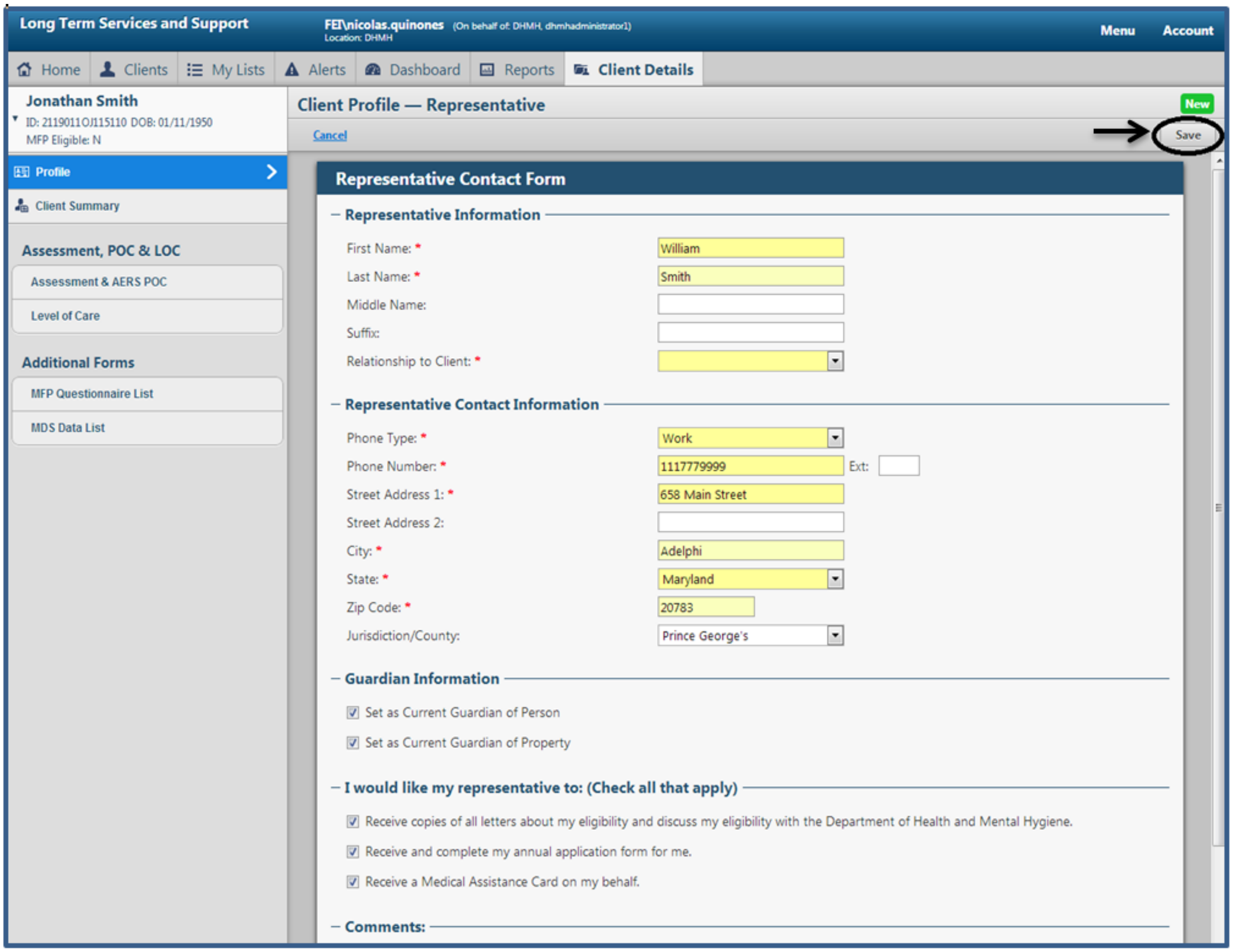


2.2.6 Representatives

The final portion of the Client Profile is the *Representatives* section. To manage this section the user must click the ***Add Representatives*** link.

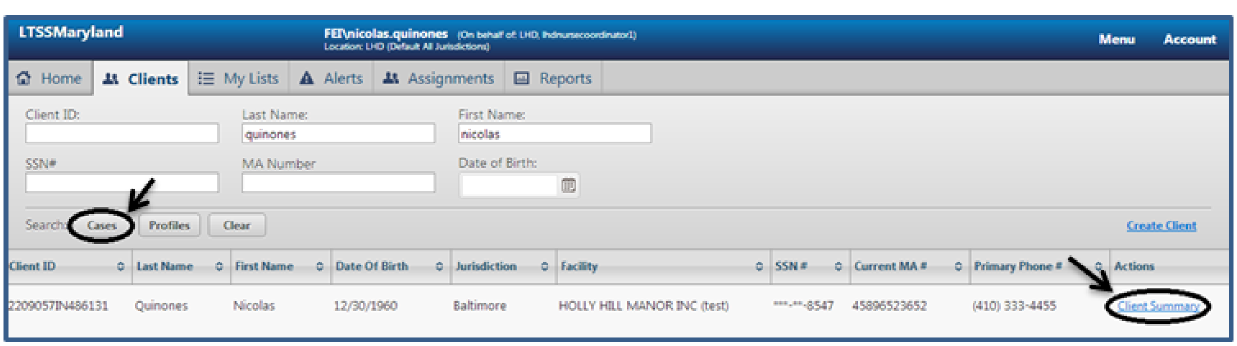


After clicking the ***Add Representatives*** link the user will be directed to the *Representative Contact Form*. The user will then enter information about the client representative. The fields highlighted in yellow or marked with an asterisk are required to save. The user also has the option to click the *Set as Current Guardian of Person* checkbox and the *Set as Current Guardian of Property* checkbox. The user would then click the ***Save*** button, which would return them to the Client Profile page. If the user decides that they no longer want to create a new client representative then click the ***Cancel*** link to return to the Client Profile page.

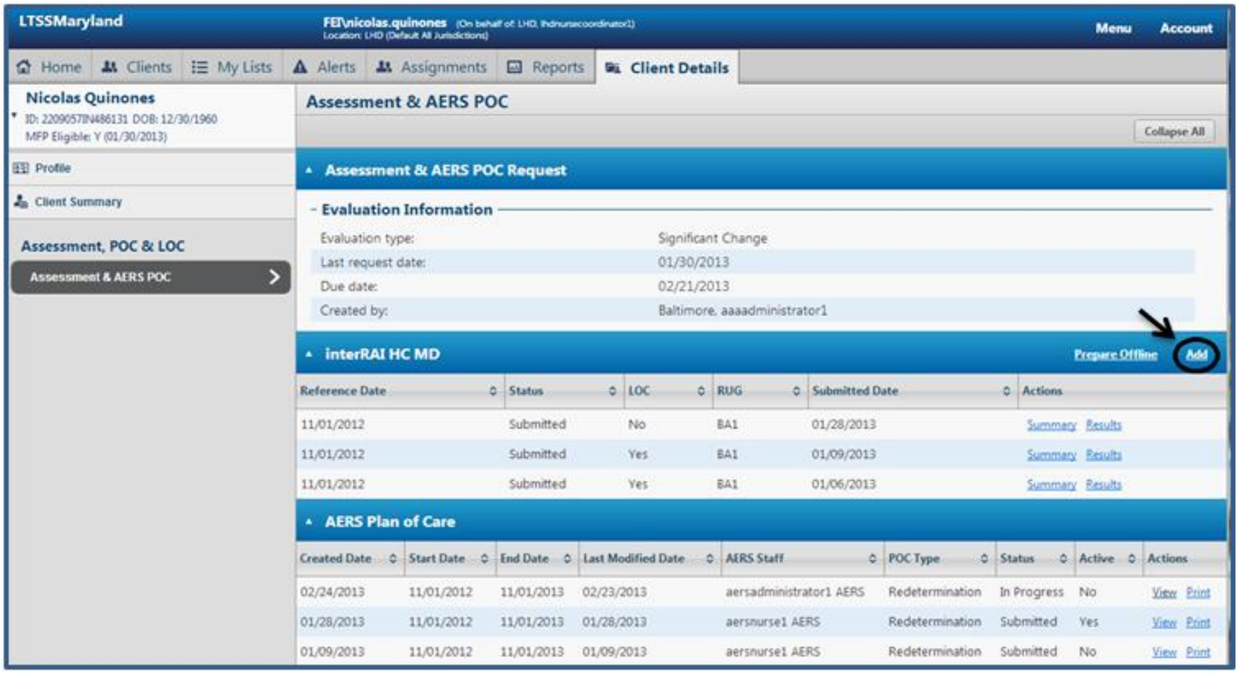


2.3 Add InterRAI HC MD Assessment

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



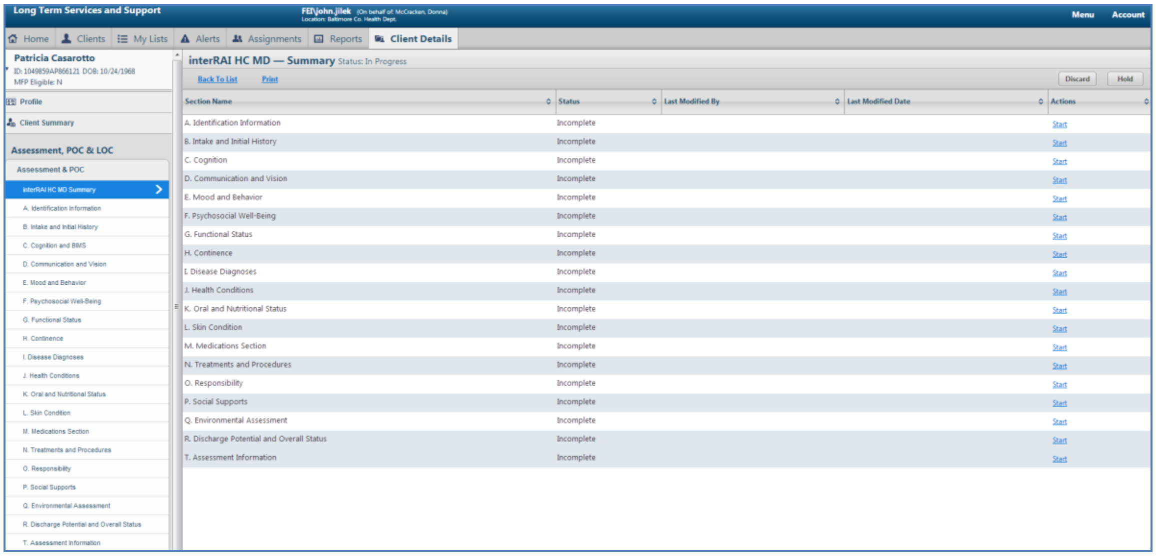
4. Click **Assessment & POC** menu button
5. Click **Add**



2.4 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**



2.5 "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**