

Client & Case Management User Manual

A step by step navigational process

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Client & Case Management User Manual

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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.
- **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 Client Profile

As mentioned above, 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.

2.1.1 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.

Long-Term Services and Support FEI\nicolas.quinones (On behalf of: DHMH, dhmadministrator1) Menu Account

Home Clients My Lists Alerts Dashboard Assignments

Client ID: Last Name: smith First Name: Cicio

SSN# MA# Date Of Birth:

Search: Cases **Profiles** Clear [Create Client](#)

| Client ID | Last Name | First Name | Date Of Birth | Facility | SSN# | Current MA# | Primary Phone # | Actions |
|----------------|-----------|------------|---------------|----------|-------------|-------------|-----------------|-------------------------|
| 021842C1030902 | Smith | Cicio | 02/20/1980 | | ***-**-4320 | 11111111111 | 4105551111 | Profile |

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*.

Long-Term Services and Support FEI\nicolas.quinones (On behalf of: DHMH, dhmadministrator1) Menu Account

Home Clients My Lists Alerts Dashboard Reports

Client ID: Last Name: smith First Name: jonathan

SSN# MA Number Date of Birth:

Search: **Cases** Profiles Clear [Create Client](#)

| Client ID | Last Name | First Name | Date Of Birth | Jurisdiction | Facility | SSN # | Current MA # | Primary Phone # | Actions |
|------------------|-----------|------------|---------------|--------------|-------------|-------------|--------------|-----------------|--------------------------------|
| 21190110/J115110 | Smith | Jonathan | 01/11/1950 | Baltimore | ALICE MANOR | ***-**-1111 | 12345678901 | (444) 555-6666 | Client Summary |

Showing 1 to 1 of 1 entries Filter all columns:

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:

Create client notice

⚠ There is no such client, would you want to create a new client?

Ok Cancel

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.

2.1.2 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.

Client Profile — Demographics

[Cancel](#) [New](#) [Continue](#)

Client Demographic Information

— Client Information —

First Name: *

Last Name: *

Middle Name:

Suffix:

Date of Birth: *

Gender: *

Race:

— Additional Client Information —

SSN # *

Medicare #:

Marital Status:

Email Address:

Primary Language:

Date of Death:

— Advanced Directives —

| | | | |
|-----------------------|---------------------------|--------------------------|--|
| DNR: | <input type="radio"/> Yes | <input type="radio"/> No | <input checked="" type="radio"/> Unknown |
| Living Will: | <input type="radio"/> Yes | <input type="radio"/> No | <input checked="" type="radio"/> Unknown |
| Medical POA: | <input type="radio"/> Yes | <input type="radio"/> No | <input checked="" type="radio"/> Unknown |
| Medical POA Durable: | <input type="radio"/> Yes | <input type="radio"/> No | <input checked="" type="radio"/> Unknown |
| General POA: | <input type="radio"/> Yes | <input type="radio"/> No | <input checked="" type="radio"/> Unknown |
| General POA Durable: | <input type="radio"/> Yes | <input type="radio"/> No | <input checked="" type="radio"/> Unknown |
| Guardian of Person: | <input type="radio"/> Yes | <input type="radio"/> No | <input checked="" type="radio"/> Unknown |
| Guardian of Property: | <input type="radio"/> Yes | <input type="radio"/> No | <input checked="" type="radio"/> Unknown |

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.

Client Demographic Information

Client Information

First Name:

Last Name:

Middle Name:

Suffix:

Possible Matching Client has been found in the system...

[Back to Create Page](#) [Create as New](#)

[Cancel](#)

| ID | Last Name | First Name | Date Of Birth | SSN # | Current MA # | Primary Phone # | Actions |
|-----------------|-----------|------------|---------------|-------------|--------------|-----------------|-------------------------|
| Z1195790785100 | Scott1 | Tony | 01/01/1955 | ***-**-6789 | 11122233344 | | Details |
| Z11956707785100 | Scott6 | Tony | 01/01/1955 | ***-**-6677 | 88677799001 | | Details |
| Z11956707785100 | Scott9 | Tony | 01/01/1955 | ***-**-6677 | 55566644435 | | Details |
| Z11956707785100 | Scott3 | Tony | 01/01/1955 | ***-**-6677 | 88866644411 | | Details |

Advanced Directives

DNR: ☐ Yes ☐ No ☒ Unknown

Living Will: ☐ Yes ☐ No ☒ Unknown

Medical POA: ☐ Yes ☐ No ☒ Unknown

Medical POA Durable: ☐ Yes ☐ No ☒ Unknown

General POA: ☐ Yes ☐ No ☒ Unknown

General POA Durable: ☐ Yes ☐ No ☒ Unknown

Guardian of Person: ☐ Yes ☐ No ☒ Unknown

Guardian of Property: ☐ Yes ☐ No ☒ Unknown

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.

2.1.3 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.

Long Term Services and Support

FELVICOLAS, guinones (On behalf of DTHM, dthmadministrator@)

Location: DTHM

Menu Account

Home Clients My Lists Alerts Dashboard Reports Client Details

Jonathan Smith
ID: 21190110115110 DOB: 01/11/1950
MFP Eligible: N

Client Profile — Summary

Client Profile

Client Demographics

Client Information

Last Name: Smith
First Name: Jonathan
Middle Name:
Suffix:
Date of Birth: 01/11/1950
Gender: Male
Race:

Additional Client Information

Client Identifier: 21190110115110
SSN #: ***-**-1111
Medicare #:
Marital Status:
Primary Language:
Date of Death:
Facility Name:

Advanced Directives

DNR: ☐ Yes ☐ No ☒ Unknown
Living Will: ☐ Yes ☐ No ☒ Unknown
Medical POA: ☐ Yes ☐ No ☒ Unknown
Medical POA Durable: ☐ Yes ☐ No ☒ Unknown
General POA: ☐ Yes ☐ No ☒ Unknown
General POA Durable: ☐ Yes ☐ No ☒ Unknown
Guardian of Person: ☐ Yes ☐ No ☒ Unknown
Guardian of Property: ☐ Yes ☐ No ☒ Unknown

Record has been created successfully.

2.1.4 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.

Client Medicaid Number

Current MA #

Add/Edit MA Number

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.

Long Term Services and Support FE\nicolas.quinones (On behalf of: DHMH, dhmhadministrator1) Location: DHMH Menu Account

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

Jonathan Smith
ID: 21190110J115110 DOB: 01/11/1950
MFP Eligible: N

Client Profile — MA Number List
[Back to Profile](#) [Add Client MA Number](#)

| MA # | Eligibility Type | Coverage Group | Start Date | End Date | Actions |
|----------------------------|------------------|----------------|------------|----------|---------|
| No data available in table | | | | | |

Create Client MA Number

— Medical Assistance Information —

MA Number: * 12345678901

Eligibility Type:

Coverage Group:

Start Date:

End Date:

Comment:

— Current MA Number? —

☒ Set as Current MA #

Save & Close **Cancel**

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.

Long Term Services and Support FE\nicolas.quinones (On behalf of: DHMH, dhmhadministrator1) Location: DHMH Menu Account

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

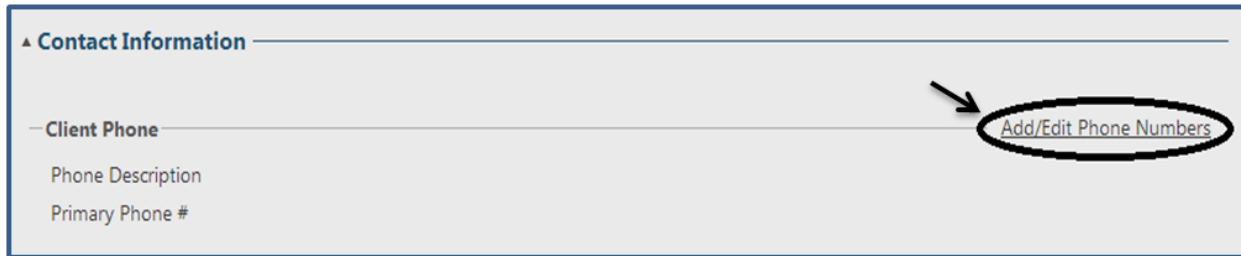
Jonathan Smith
ID: 21190110J115110 DOB: 01/11/1950
MFP Eligible: N

Client Profile — MA Number List
[Back to Profile](#) [Add Client MA Number](#)

| MA # | Eligibility Type | Coverage Group | Start Date | End Date | Actions |
|-------------|------------------|----------------|------------|----------|---|
| 12345678901 | N/A | N/A | | | Edit Delete |

2.1.5 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.



▲ **Contact Information**

— **Client Phone**

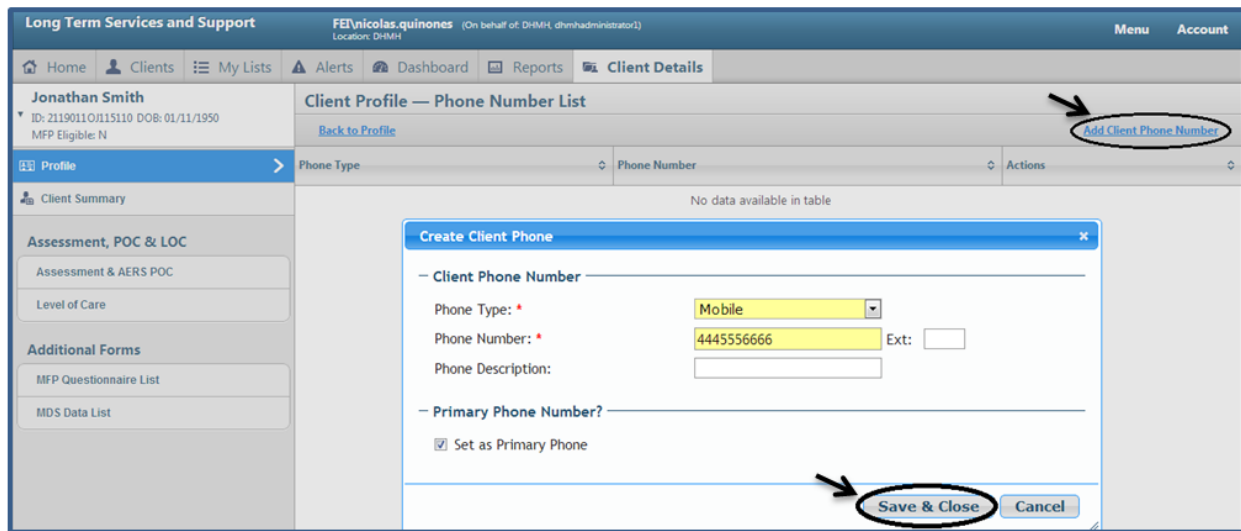
Phone Description

Primary Phone #

[Add/Edit Phone Numbers](#)

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.



Long Term Services and Support

FEI/nicolas.quinones (On behalf of DHMH, dhmhadministrator1)

Location: DHMH

Menu Account

Home Clients My Lists Alerts Dashboard Reports Client Details

Jonathan Smith

ID: 21190110J115110 DOB: 01/11/1950
MFP Eligible: N

Client Profile — Phone Number List

[Back to Profile](#)

[Add Client Phone Numbers](#)

Phone Type Phone Number Actions

No data available in table

Create Client Phone

— Client Phone Number

Phone Type: * Mobile

Phone Number: * 4445556666 Ext:

Phone Description:

— Primary Phone Number?

☒ Set as Primary Phone

Save & Close Cancel

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.

Long Term Services and Support

FE\nicolas quinones (On behalf of DHMH, dhmhadministrator1)

Menu Account

Home Clients My Lists Alerts Dashboard Reports Client Details

Jonathan Smith
ID: 21190110115110 DOB: 01/11/1950
MFP Eligible: N

Client Profile — Phone Number List

[Back to Profile](#) [Add Client Phone Number](#)

| Phone Type | Phone Number | Actions |
|------------|----------------|---|
| Mobile | (444) 555-6666 | Edit Delete |

Profile

Client Summary

Assessment, POC & LOC

Assessment & AERS POC

Level of Care

Additional Forms

MFP Questionnaire List

MDS Data List

Current Address

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

▲ Contact Information

Client Phone [Add/Edit Phone Numbers](#)

Phone Description

Primary Phone # (444) 555-6666

Current Address [Add/Edit Addresses](#)

Address Type:

Address Description:

Address:

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.

Long Term Services and Support

FEI\nicolas.quinones (On behalf of: DHMH, dhmhadministrator1)

Location: DHMH

Menu Account

Home Clients My Lists Alerts Dashboard Reports Client Details

Jonathan Smith
ID: 21190110J115110 DOB: 01/11/1950
MFP Eligible: N

Profile

Client Summary

Assessment, POC & LOC

Assessment & AERS POC

Level of Care

Additional Forms

MFP Questionnaire List

MDS Data List

Client Profile — Address List

Back to Profile

Current Address

Address Information

Address Type:

Address Description:

Street Address 1:

Street Address 2:

City:

State:

Zip Code:

Jurisdiction/County:

Address List

Add Client Address

| Address Type | Address Description | Address | Jurisdiction/County | Actions |
|----------------------------|---------------------|---------|---------------------|---------|
| No data available in table | | | | |

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.

Long Term Services and Support

FEI\nicolas.quinones (On behalf of: DHMH, dhmhadministrator1)

Location: DHMH

Menu Account

Home Clients My Lists Alerts Dashboard Reports Client Details

Jonathan Smith
ID: 21190110J115110 DOB: 01/11/1950
MFP Eligible: N

Profile

Client Summary

Assessment, POC & LOC

Assessment & AERS POC

Level of Care

Additional Forms

MFP Questionnaire List

MDS Data List

Client Profile

Cancel

Add Client Address Form

Client Address Information

Address Type:

Address Description:

Street Address 1:

Street Address 2:

City:

State:

Zip Code:

Jurisdiction/County:

Comments:

Comment:

Current Address?

☒ Set as Current Address

New Save

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.

The screenshot shows the 'Long Term Services and Support' interface. The main page is the 'Client Profile' for Jonathan Smith. A pop-up window titled 'Add Client Address Form' is open, showing the 'Client Address Information' section. The 'Address Type' dropdown is set to 'Nursing Facility'. A 'Search Facility' pop-up window is also open, displaying a table of facilities with columns for Facility name, Facility Address, and Actions. Each row has a 'Select' link in the Actions column.

| Facility name | Facility Address | Actions |
|---------------------------|--|---------|
| 1300 LLC | T/A IVY HALL GERIATRIC CTR, 1300 WINDLASS DRIVE, BALTIMORE 212200000 | Select |
| Alice Manor | EL SHADDAI HEALTH CARE, 7000 SECURITY BLVD #302, BALTIMORE 212440000 | Select |
| ALLEGANY COUNTY N H | NURSING FACILITY ADM, 730 FURNANCE STREET, CUMBERLAND 215020000 | Select |
| ANNAPOLIS CONVALES CTR | NURSING FAC ADMIN, BAY RIDGE & VAN BUREN, ANNAPOLIS 214030000 | Select |
| ATLANTIC GENERAL HOSPITAL | 9733 HEALTHWAY DRIVE, BERLIN 218110000 | Select |
| AUGSBURG LUTHERAN HOME | NURSING FACILITY ADM, 6811 CAMPFIELD RD, BALTIMORE 212070000 | Select |
| AUGSBURG LUTHERAN HOME | 6811 CAMPFIELD ROAD, BALTIMORE 21207 | Select |

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.

Long Term Services and Support FE\nicolas.quinones (On behalf of: DHMH, dhmhadministrator1) Location: DHMH Menu Account

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

Jonathan Smith
ID: 21190110115110 DOB: 01/11/1950
MFP Eligible: N

Client Profile — Address List
[Back to Profile](#)

Current Address

Address Information

Address Type: Nursing Facility
Address Description: ALICE MANOR
Street Address 1: EL SHADDAI HEALTH CARE
Street Address 2: 7000 SECURITY BLVD #302
City: BALTIMORE
State: Maryland
Zip Code: 212440000
Jurisdiction/County: Baltimore

Address List [Add Client Address](#)

| Address Type | Address Description | Address | Jurisdiction/County | Actions |
|------------------|---------------------|--|---------------------|--|
| Nursing Facility | ALICE MANOR | EL SHADDAI HEALTH CARE, 7000 SECURITY BLVD #302, BALTIMORE, MD 212440000 | Baltimore | Edit Delete |

2.1.6 Representatives

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

Long Term Services and Support FE\nicolas.quinones (On behalf of: DHMH, dhmhadministrator1) Location: DHMH Menu Account

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

Jonathan Smith
ID: 21190110115110 DOB: 01/11/1950
MFP Eligible: N

Client Profile — Summary [Expand All](#)

Client Profile

Client Demographics [Edit](#)

Contact Information

Representatives [Add Representatives](#)

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.

Long Term Services and Support FEI/nicolas.quinones (On behalf of: DHMH, dhmhadministrator1) Menu Account

Home Clients My Lists Alerts Dashboard Reports Client Details

Jonathan Smith ID: 21190110/J115110 DOB: 01/11/1950 MFP Eligible: N

Client Profile — Representative Cancel

Save

Representative Contact Form

— Representative Information —

First Name: * William

Last Name: * Smith

Middle Name: *

Suffix: *

Relationship to Client: * *

— Representative Contact Information —

Phone Type: * Work

Phone Number: * 1117779999 Ext: *

Street Address 1: * 658 Main Street

Street Address 2: *

City: * Adelphi

State: * Maryland

Zip Code: * 20783

Jurisdiction/County: * Prince George's

— Guardian Information —

☒ Set as Current Guardian of Person

☒ Set as Current Guardian of Property

— I would like my representative to: (Check all that apply) —

☒ Receive copies of all letters about my eligibility and discuss my eligibility with the Department of Health and Mental Hygiene.

☒ Receive and complete my annual application form for me.

☒ Receive a Medical Assistance Card on my behalf.

— Comments: —

2.2 Case Program Management Tutorials

This section of the manual provides 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. walks you through the necessary steps to search for an existing client's Client Summary and add case programs to the client.

2.2.1 Client Case 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. After entering search criteria, click the **Cases button** as seen in the figure below. Click the **Client Summary link** to navigate to a client’s Client Summary page.

Long Term Services and Support

FEI\nicolas.quinones (On behalf of DHMH, dhmhadministrator1)
Location: DHMH

Menu Account

Home Clients My Lists Alerts Dashboard Reports

Client ID: Last Name: First Name:
SSN# MA Number Date of Birth:

Search: **Cases** Profiles Clear [Create Client](#)

| Client ID | Last Name | First Name | Date Of Birth | Jurisdiction | Facility | SSN # | Current MA # | Primary Phone # | Actions |
|------------------|-----------|------------|---------------|--------------|-------------|-------------|--------------|-----------------|--------------------------------|
| 21190110/J115110 | Smith | Jonathan | 01/11/1950 | Baltimore | ALICE MANOR | ***-**-1111 | 12345678901 | (444) 555-6666 | Client Summary |

Showing 1 to 1 of 1 entries

Filter all columns:

2.2.2 Client Summary Page

The client summary page will provide users with a quick snapshot of the Medicaid programs the client has applied for or is enrolled in. For example, in January 2013 the client John Smith applies for and gets enrolled in the LAH program, 6 years later he applies for the WOA program. At this point, users will be able to see a historical record of the LAH case programs the client was enrolled in and the new WOA case program that the client has applied for. To review details within the case program you can click on the action link *Go to Tasks*

Long Term Services and Support

ITS\tythukker (On behalf of DHMH, dhmhadministrator1)
Location: DHMH

Menu Account

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

Tony Scott
ID: 211957507575100 DOB: 01/01/1955
MFP Eligible: Y (01/17/2013)

Profile

Client Summary

Assessment, POC & LOC
Assessment & AERS POC
Level of Care

Additional Forms
MFP Questionnaire List
MDS Data List

Client Summary

[Add Case Program](#) [Expand All](#)

| | |
|--|--|
| WOA Case Program Start Date: 01/17/2013 Case Program End Date: N/A | Close Case Program Go to Tasks |
| MFP Case Program Start Date: 01/17/2013 Case Program End Date: N/A | Close Case Program Go to Tasks |

Alerts

Created From Date: Created To Date: Accepted From Date: Accepted To Date:
01/16/2013 01/23/2013 01/22/2013 01/23/2013 [Filter](#)

| Subject | From | Received | Accepted? |
|----------------------------|------|----------|-----------|
| No data available in table | | | |

If you click on the blue collapsible panel, you will be able to view summary information about each case program. Also, you can see the assigned staff members for the particular case programs.

The screenshot displays the 'Client Summary' page for a user named Tony Scott. The page includes a navigation bar at the top with options like Home, Clients, My Lists, Alerts, Dashboard, Assignments, Reports, and Client Details. The main content area is divided into sections: 'Client Summary' (with a blue 'Add Case Program' button), 'WOA' (with Case Program Start and End Dates), 'Summary' (a table with fields like Progress, Status, Declined, Reason for Opening Case Program, Medical/Technical Redetermination Due Date, Financial Redetermination Due Date, and Assignments), and 'MFP' (with Case Program Start and End Dates). At the bottom, there is an 'Alerts' section with filters for Created From Date, Created To Date, Accepted From Date, and Accepted To Date.

At the bottom of the Client Summary page, the logged-in user will be able to view their own alerts for this specific client. The alerts functionality is described in further detail in the common functions manual.

2.2.3 Add Case Programs

Case programs for various Medicaid programs may be added when the first interaction with the client regarding programs takes place. Some of this will also be based on your agencies 'business processes and is also dependent on the program type. For example, an MFP case program may be added after meeting with the NF resident or automatically through an MMIS import.

Manually Add Case Programs

By clicking the **Add Program** link at the top of the page the actor can add a case program to the client as seen in the figure below. After clicking the Add Program link the Create Case Program pop-up window will appear as seen in the figure below. The actor will choose a program from the Case Program Name dropdown and then enter other required and optional information before saving. The specific programs that are available to be added are dependent on the authorized user.

The screenshot shows the 'Create Case Program' pop-up window. It has a title bar with a close button. The form is titled 'Case Program Information' and includes the following fields: 'Case Program Name' (a dropdown menu), 'Case Program Start Date' (a date field showing 12/31/2012), 'Reasons for Opening Case Program' (a dropdown menu), and 'Comments' (a text area). At the bottom of the form, there are two buttons: 'Save & Close' and 'Cancel'. The 'Save & Close' button is circled in red, and a red arrow points to it.

Upon saving, that case program will be added to the Client Summary page in its own collapsible panel.

Long Term Services and Support FE\nicolas.quinones (On behalf of: DHMH, dhmhadministrator1) Location: DHMH Menu Account

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

Jonathan Smith
ID: 21190110J15110 DOB: 01/11/1950
MFP Eligible: N

Profile

Client Summary

Assessment, POC & LOC
Assessment & AERS POC
Level of Care

Additional Forms
MFP Questionnaire List
MDS Data List

Client Summary

[Add Case Program](#) [Collapse All](#)

MFP
Case Program Start Date: 01/02/2013 Case Program End Date: N/A
[Close Case Program](#) [Go to Tasks](#)

Summary

| | |
|----------------------------------|-------|
| Status: | Open |
| Declined: | No |
| Reason for Opening Case Program: | Other |
| Assignments : | |

Add Case Programs through Forms

- An MFP case program is automatically added to the Client Summary for a specific client by Submitting a MFP Questionnaire. If a MFP case program does not already exist in an “Open” Status on the Client Summary for a client and a MFP Questionnaire is submitted for that client, a MFP case program will be added to the client’s Client Summary page.

Long Term Services and Support FE\nicolas.quinones (On behalf of: DHMH, dhmhadministrator1) Location: DHMH Menu Account

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

Jonathan Smith
ID: 21190110J15110 DOB: 01/11/1950
MFP Eligible: N

Profile

Client Summary

Assessment, POC & LOC
Assessment & AERS POC
Level of Care

Additional Forms
MFP Questionnaire List
Questionnaire Form Details
MDS Data List

MFP — Questionnaire Status: In Progress
[Back to List](#) [View](#) [Edit](#) [Submit](#) [Discard](#)

Money Follows the Person Questionnaire Form

Questionnaire

Has the applicant resided in a nursing facility for at least 90 continuous days? ** ☒ Yes ☐ No

Is the individual moving to: **

☒ A home owned or leased by the individual or the individual's family member.

☐ An apartment with an individual lease, with lockable access and egress, and which includes living, sleeping, bathing, and cooking areas over which the individual or the individual's family has domain and control.

☐ An assisted living facility licensed to serve 4 or fewer unrelated individuals.

☐ An assisted living facility licensed to serve 5 or more unrelated individuals.

Anticipated Discharge Date: **
Note: A discharge date within the next 30 days will trigger an MFP Quality of Life survey to be completed.

Consent Form Signed: ** ☒ Yes ☐ No

Consent Form Date: **

- A LAH or WOA case program is automatically added for a specific client by Submitting an Options Counseling Application Assistance Form in MFP that has application assistance was provided for Living at Home or Waiver for Older Adults. Regardless of whether the actor chooses Yes or No for Technical Eligibility, upon submitting the Options Counseling Application Assistance, if the client does not have an “Open” Status case program for the corresponding case program the system will create one and add it to their Client Summary.

Long Term Services and Support FE\nicolas.quinones (On behalf of: Baltimore, aaadministrator1)
Location: Baltimore County Dept. of Aging

Home Clients My Lists Alerts Dashboard Assignments Reports **Client Details** Menu Account

Jonathan Smith
ID: 21190110/115110 DOB: 01/11/1950
MFP Eligible: Y (01/02/2013)

MFP — Options Counseling — Application Assistance Status: In Progress

[Back to Summary](#) [View](#) [Edit](#) [Submit](#) [Discard](#)

Application Assistance Form

I. Application Assistance

Note: The data can no longer be edited once you submit the date application mailed to DEWS.

Application Assistance Date: ** 12/19/2012

Date Application Mailed to DEWS: ** 12/22/2012

Application Assistance Provided **

☒ Living at Home ☐ Yes ☐ No

☒ Waiver for Older Adults ☐ Yes ☐ No

Obtained any Supporting Documentation: ** ☐ Yes ☐ No

2.2.4 Close Case Programs

A case program can be closed by an authorized actor at any time while it is in a Status of “Open.” The case program may be closed for various reasons such as the death of client or loss of eligibility, or the client declines to participate in the program. Once closed, forms within case programs may not be editable.

Long Term Services and Support FE\nicolas.quinones (On behalf of: DHMH, dhmhadministrator1)
Location: DHMH

Home Clients My Lists Alerts Dashboard Reports **Client Details** Menu Account

Jonathan Smith
ID: 21190440/445110 DOB: 01/11/1950
MFP Eligible: N

Client Summary

[Add Case Program](#) [Collapse All](#)

MFP
Case Program Start Date: 01/02/2013 Case Program End Date: N/A

[Close Case Program](#) [Go to Tasks](#)

Summary

| | |
|----------------------------------|-------|
| Status: | Open |
| Declined: | No |
| Reason for Opening Case Program: | Other |
| Assignments : | |

Assessment, POC & LOC

Assessment & AERS POC

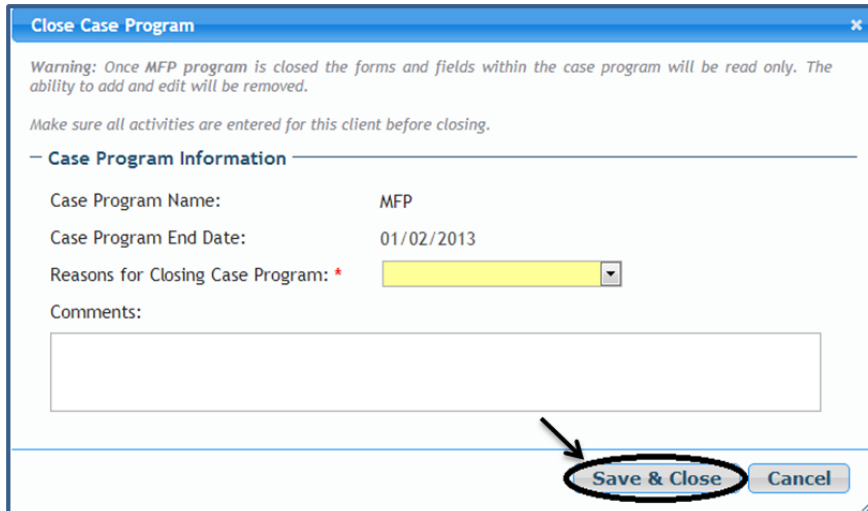
Level of Care

Additional Forms

MFP Questionnaire List

MDS Data List

To close a case program click the **Close Program link** as seen in the figure below. After clicking the Close Program link the Close Case Program pop-up window will appear. The Program Name will be pre-populated and not-editable with the case program that the actor has clicked close for. Enter a *Reason for Closing Case* and comments can be optionally entered. Click the **Save & Close button** to close the case program.

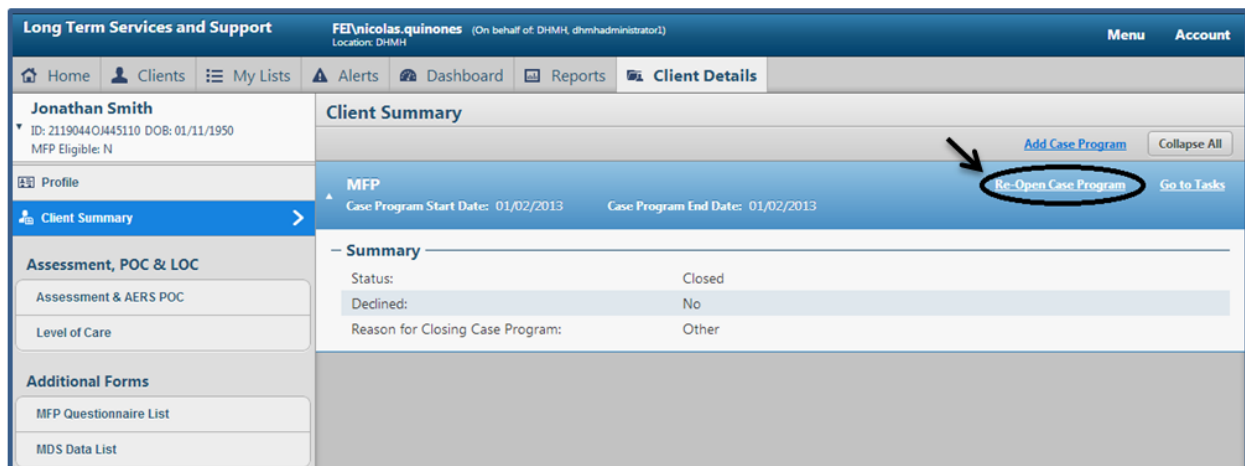


The image shows a 'Close Case Program' pop-up window. At the top, there is a warning: 'Warning: Once MFP program is closed the forms and fields within the case program will be read only. The ability to add and edit will be removed.' Below this is a note: 'Make sure all activities are entered for this client before closing.' The window is divided into sections. The 'Case Program Information' section contains: 'Case Program Name: MFP', 'Case Program End Date: 01/02/2013', 'Reasons for Closing Case Program: *' with a dropdown menu, and 'Comments:' with a text area. At the bottom right, there are two buttons: 'Save & Close' (circled with an arrow) and 'Cancel'.

2.2.5 Reopen Case Programs

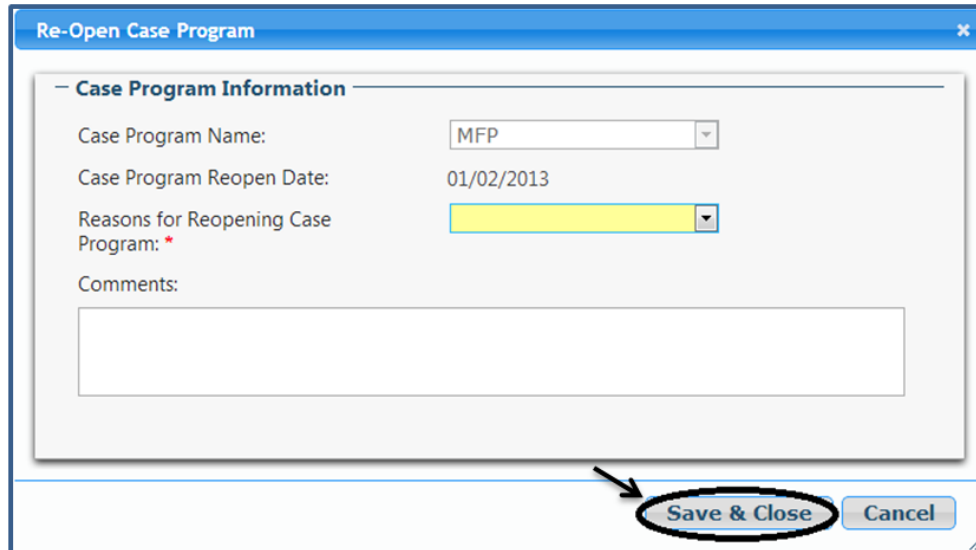
After closing a case program, the actor will have the option to re-open the case program as long as the client does not have case program of the same type in an "Open" Status. This may be done for scenarios where most of the forms for the client remain the same generally but the eligibility changes or if you hit the close link by mistake.

Click the **Re-Open Case Program link** as seen in the figure below to re-open the case program.



The image shows the 'Client Summary' page for Jonathan Smith. The page has a sidebar on the left with links like 'Home', 'Clients', 'My Lists', 'Alerts', 'Dashboard', 'Reports', and 'Client Details'. The main content area shows the client's summary, including 'MFP' status, 'Case Program Start Date: 01/02/2013', and 'Case Program End Date: 01/02/2013'. A 'Summary' section shows 'Status: Closed', 'Declined: No', and 'Reason for Closing Case Program: Other'. In the top right corner of the main content area, there is a 'Re-Open Case Program' link (circled with an arrow) and a 'Go to Tasks' link. There are also 'Add Case Program' and 'Collapse All' links in the top right corner.

After clicking the Re-Open link the Re-Open Case Program pop-up window will appear. The Program Name will be pre-populated and not-editable with the case program that the actor has clicked re-open for. Enter a *Reason for Reopening Case* and comments can be optionally entered. Click the **Save & Close** button to Re-open the case program.



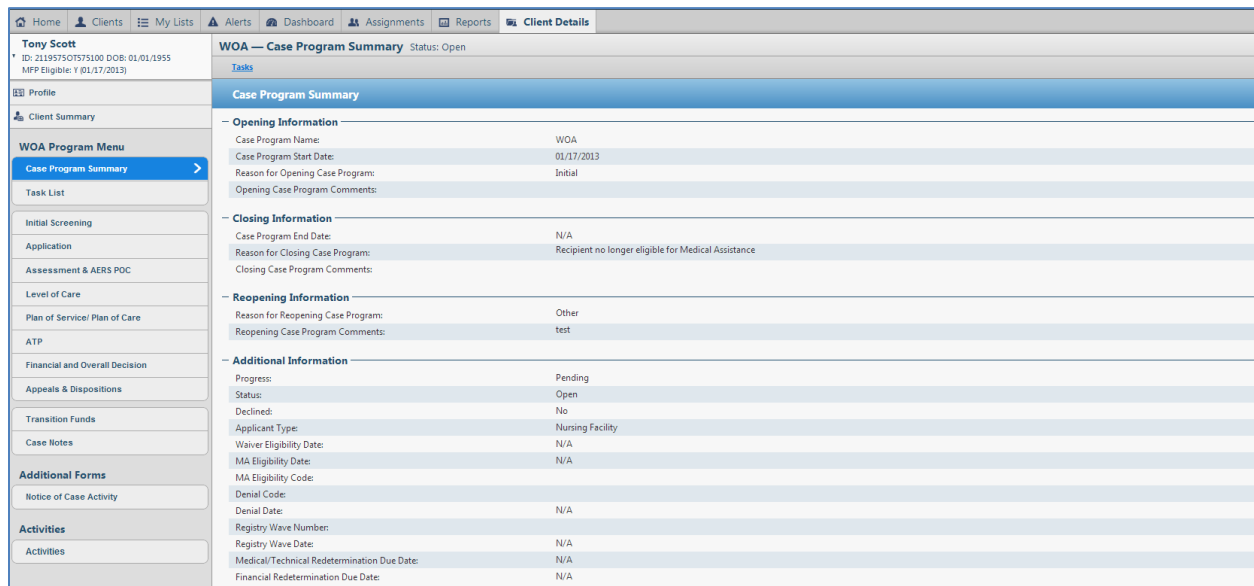
The image shows a 'Re-Open Case Program' pop-up window. It contains a 'Case Program Information' section with the following fields:

- Case Program Name: MFP (dropdown menu)
- Case Program Reopen Date: 01/02/2013
- Reasons for Reopening Case Program: * (dropdown menu)
- Comments: (text area)

At the bottom right, there are two buttons: 'Save & Close' (circled with an arrow pointing to it) and 'Cancel'.

2.3 Case program summary

For each case program entered, there is a summary page to provide you with key dates and fields from within the case program. This will be helpful for various agencies working with the client to be on the same page.



The image shows the 'WOA — Case Program Summary' page for a client named Tony Scott. The page is divided into a left sidebar and a main content area.

Left Sidebar:

- Home, Clients, My Lists, Alerts, Dashboard, Assignments, Reports, Client Details
- Tony Scott (ID: 211957507575100 DOB: 01/01/1955 MFP Eligible: Y (01/17/2013))
- Profile
- Client Summary
- WOA Program Menu
 - Case Program Summary (selected)
 - Task List
- Initial Screening
- Application
- Assessment & AERS POC
- Level of Care
- Plan of Service/ Plan of Care
- ATP
- Financial and Overall Decision
- Appeals & Dispositions
- Transition Funds
- Case Notes
- Additional Forms
 - Notice of Case Activity
- Activities
 - Activities

Main Content Area:

WOA — Case Program Summary Status: Open

Tasks

Case Program Summary

- Opening Information**
 - Case Program Name: WOA
 - Case Program Start Date: 01/17/2013
 - Reason for Opening Case Program: Initial
 - Opening Case Program Comments:
- Closing Information**
 - Case Program End Date: N/A
 - Reason for Closing Case Program: Recipient no longer eligible for Medical Assistance
 - Closing Case Program Comments:
- Reopening Information**
 - Reason for Reopening Case Program: Other
 - Reopening Case Program Comments: test
- Additional Information**
 - Progress: Pending
 - Status: Open
 - Declined: No
 - Applicant Type: Nursing Facility
 - Waiver Eligibility Date: N/A
 - MA Eligibility Date: N/A
 - MA Eligibility Code:
 - Denial Code:
 - Denial Date: N/A
 - Registry Wave Number:
 - Registry Wave Date: N/A
 - Medical/Technical Redetermination Due Date: N/A
 - Financial Redetermination Due Date: N/A