Financial and Overall Eligibility Determination User Manual

A step by step navigational process

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Contents

1 Introduction

1.1 Background

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

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

1.2 Guide to navigate through user manuals

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

1.2.1 User Manuals Descriptions

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

plans of service/care, etc. Information regarding adding/closing/reopening these case programs will be provided in this manual.

- **Administration** – This manual will provide information about various administration functions in the LTSS system, a major focus being agency and staff management. Note: This is mainly related to the LTSS system administration and not the actual day-to-day administration functions. Agency management module contains information about the agency, multiple locations (if any), programs that the agency works with, type of agency (contractor/government agency, etc.). Staff Management module contains information about each agencies' staff, how to create/edit staff profiles when a new staff member joins your agency, staff contact information, etc. This is critical because the roles and permissions given to a user will determine functionality they will see within LTSS.
- **Money Follows the Person** – This manual will provide information about how to complete various steps involved in the MFP process such as the Resident Contact Sheet, Ongoing Peer Support, Options Counseling, Peer Mentoring, Housing Assistance, Quality of Life, etc. The manual will give details about the necessary steps to complete each module, as well as information about the interaction between MFP and the waiver programs in LTSS. The manual is catered to all agencies associated with the MFP process.
- **Waiver Programs** – This manual will take you through the entire application process from the time a person chooses to apply for LAH/WOA/ICS, through the various eligibility determinations, until the enrollment eligibility determination. Instructions on how to add/edit/discard program-related forms will be provided here. The manual is catered to case management agencies and state oversight agencies.
- **Standardized Assessment and Level of Care** – This manual will provide information about how to complete an assessment, recommended plan of care, level of care determination in LTSS. The manual is catered to staff from Adult Evaluation and Review Services (AERS) and Utilization Control Agent (UCA).
- **Financial and Overall Eligibility Determination** – This manual will provide information about various forms and letters involved in determining financial and overall eligibility for programs such as LAH/WOA/ICS. The manual is catered to Division of Eligibility for Waiver Services (DEWS) staff members.
- **Appeals –** This manual will provide information regarding the appeals process in case a client chooses to appeal. The manual is catered to the appeals staff at DHMH and other users that may have permissions/role to view appeals
- **Quality Care Review**– This manual will walk the user through the steps necessary for completing a Quality Care Review (QCR) Worksheet for a client. The QCR Worksheet is used to perform a review of services given to a client through a specific waiver program the client was enrolled in. The manual is broken down into sections, including: adding QCR Review Periods, selecting potential clients to review, assignments and the three levels of review performed by QCR staff. The manual is catered to DHMH staff members.

1.2.2 Recommended approach

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

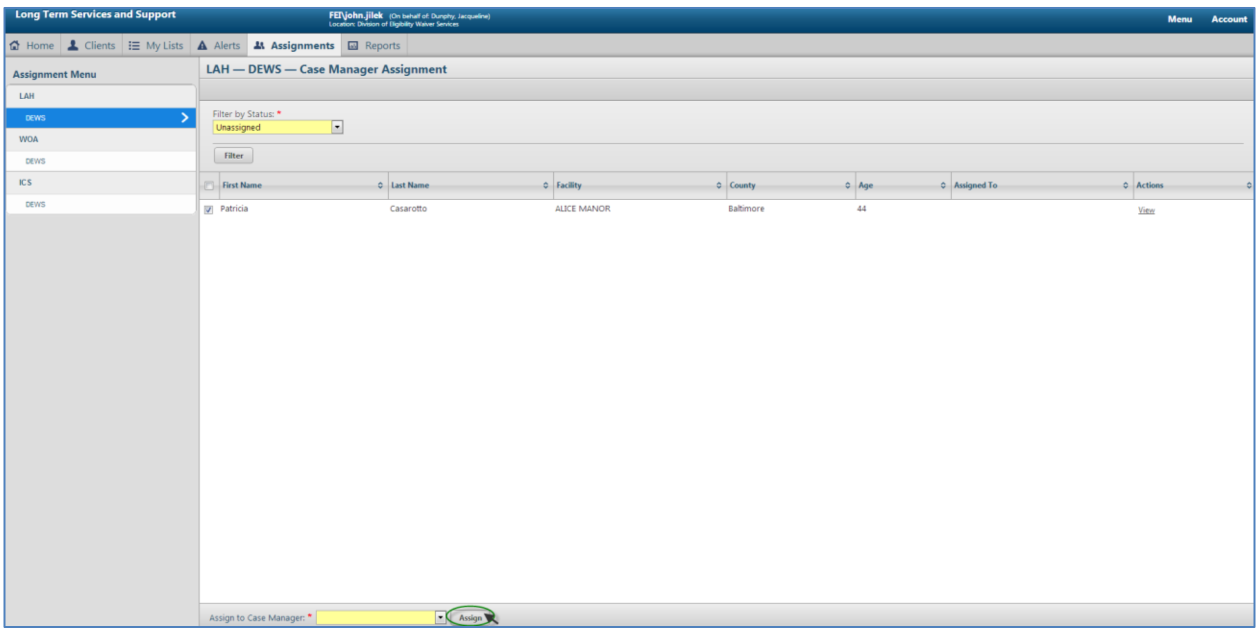
- Every new LTSS user may want to start with the common functions manual to get familiar with overall look and feel and system navigation.
- You then continue with the client and case management user manual.
- From an administration standpoint, you may then want to continue on to the administration functions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

2 Getting Started

2.1 Assign DEWS Case Manager

To assign DEWS Case Manager, an ATP form must be ‘Submitted’ (Refer to section “Submit ATP Questionnaire” in ICS, LAH, WOA User Manual).

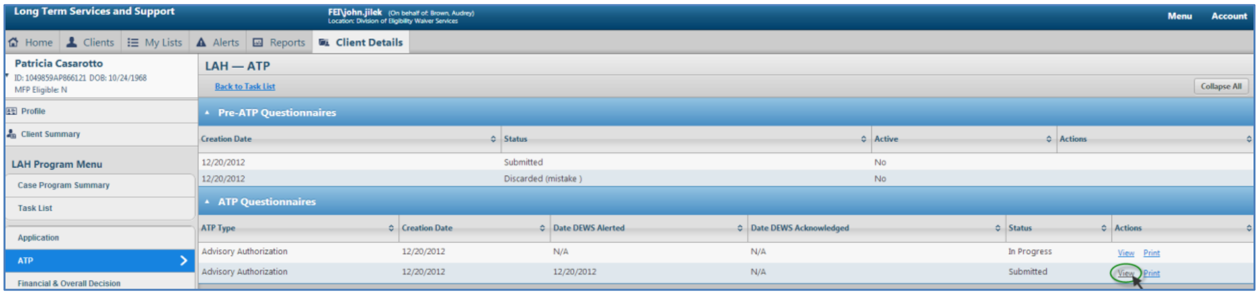
1. Log in as permitted user
2. Click the *Assignments* tab
3. Click **DEWS** menu button
4. Select client from list
5. Select DEWS Case Manager from dropdown list
6. Click **Assign**



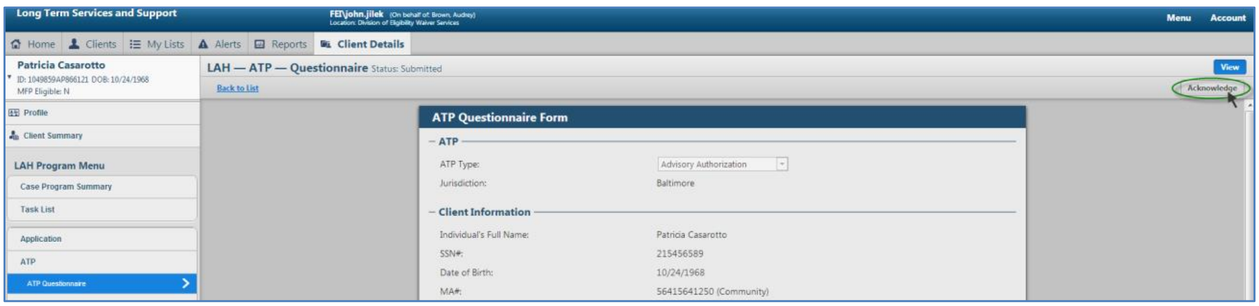
2.2 “Acknowledge” ATP Questionnaire

To “Acknowledge” an ATP Questionnaire, the ATP Questionnaire must be ‘Submitted’, DEWS Case Manager must be assigned (Refer to section “Assign DEWS Case Manger”), and you must log in as a permitted user.

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 **ATP** menu button OR click **Summary** from Task List
6. Select Submitted ATP Questionnaire, click **View**



7. Click **Acknowledge**

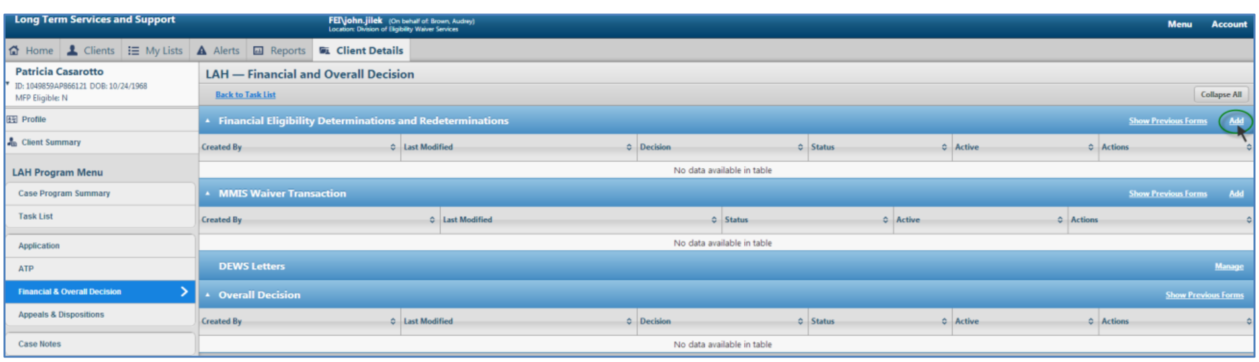


2.3 Financial Eligibility Determination/Redetermination

2.3.1 "Add" Financial Eligibility Determination/Redetermination

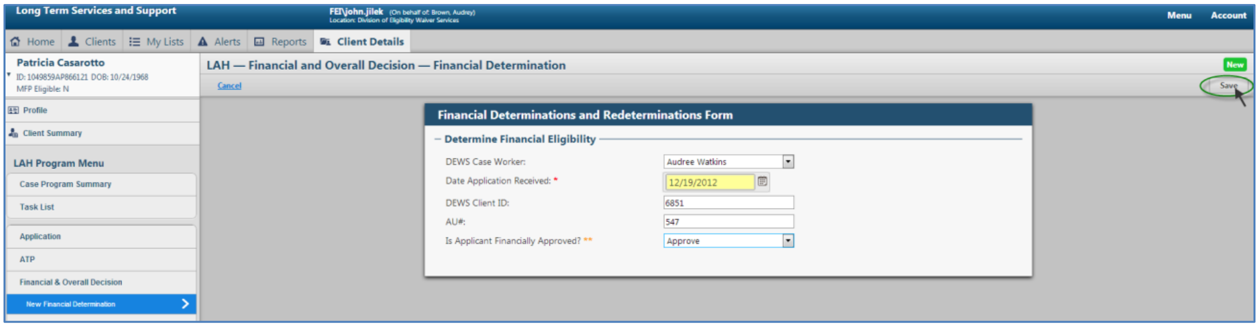
To add a Financial Eligibility Determination/Redetermination, you must log in as the permitted user.

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 **Financial & Overall Decision** menu button OR click **Summary** from Task List
6. Under Financial Eligibility Determinations and Redeterminations section, click **Add**



2.3.2 "Save" Financial Eligibility Determination

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



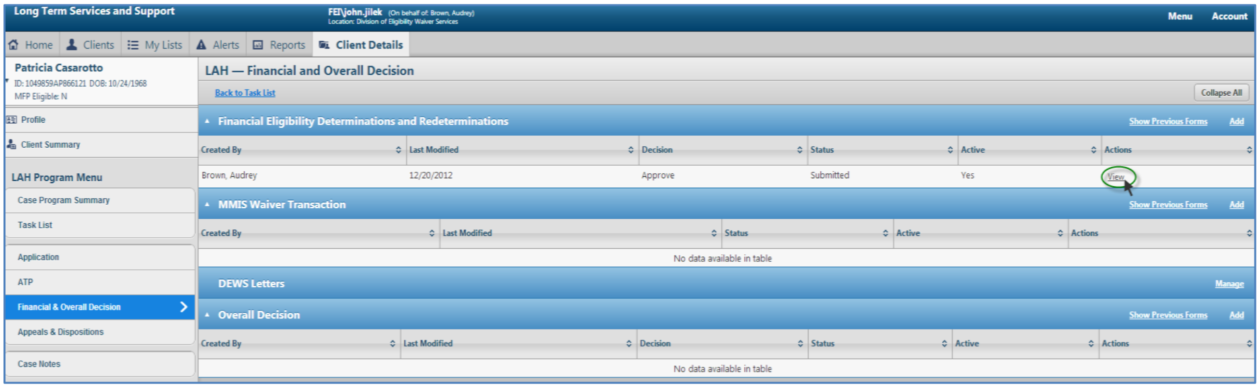
2.3.3 "Submit" Financial Eligibility Determination

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

2.3.4 "Reverse" Financial Eligibility Determination

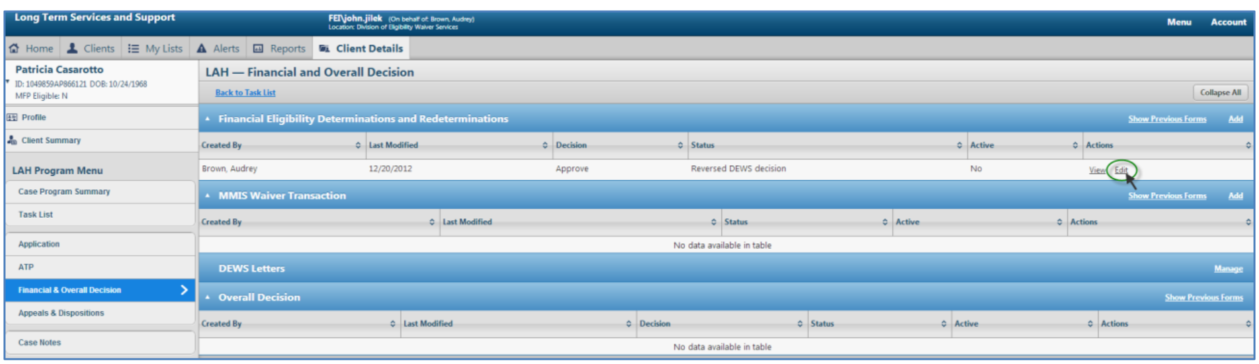
A Financial Eligibility Determination can be "Reversed" at any time after a decision has been applied. After the Financial Eligibility Determination is reversed, the user is permitted to *Edit* from list view and then *Save/Submit* the modified form.

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 **Financial & Overall Decision** menu button OR click **Summary** from Task List
6. Under Financial Eligibility Determinations and Redeterminations section, click **View**



7. Click **Reverse**

8. From the Financial Eligibility Determinations and Redeterminations list view, click **Edit**



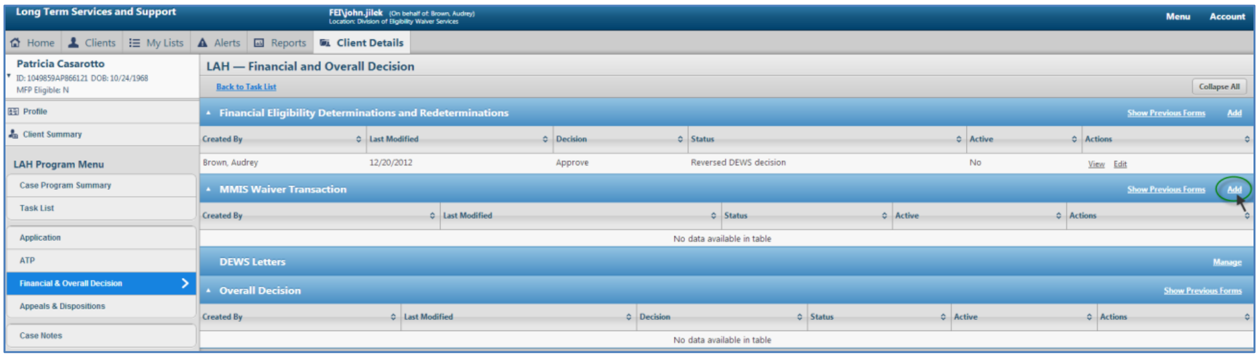
9. Modify the form, click **Save**
10. Click **Submit**

2.4 MMIS Waiver Transaction

2.4.1 "Add" MMIS Waiver Transaction

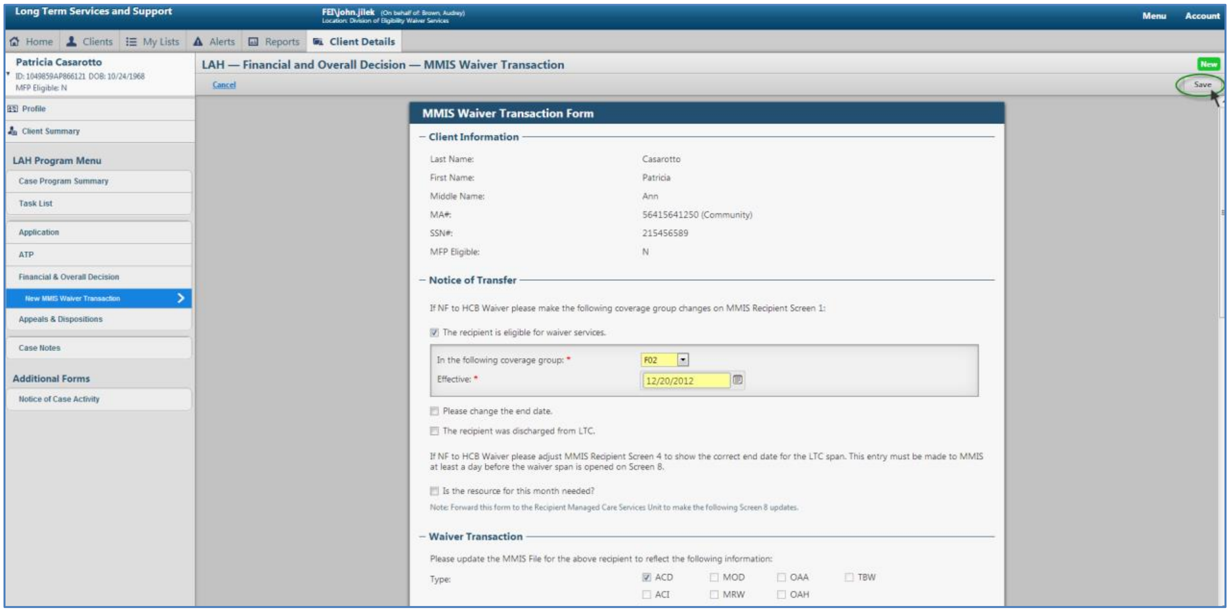
To add a MMIS Waiver Transaction, you must log in as the permitted user.

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 **Financial & Overall Decision** menu button OR click **Summary** from Task List
6. Under MMIS Waiver Transaction section, click **Add**



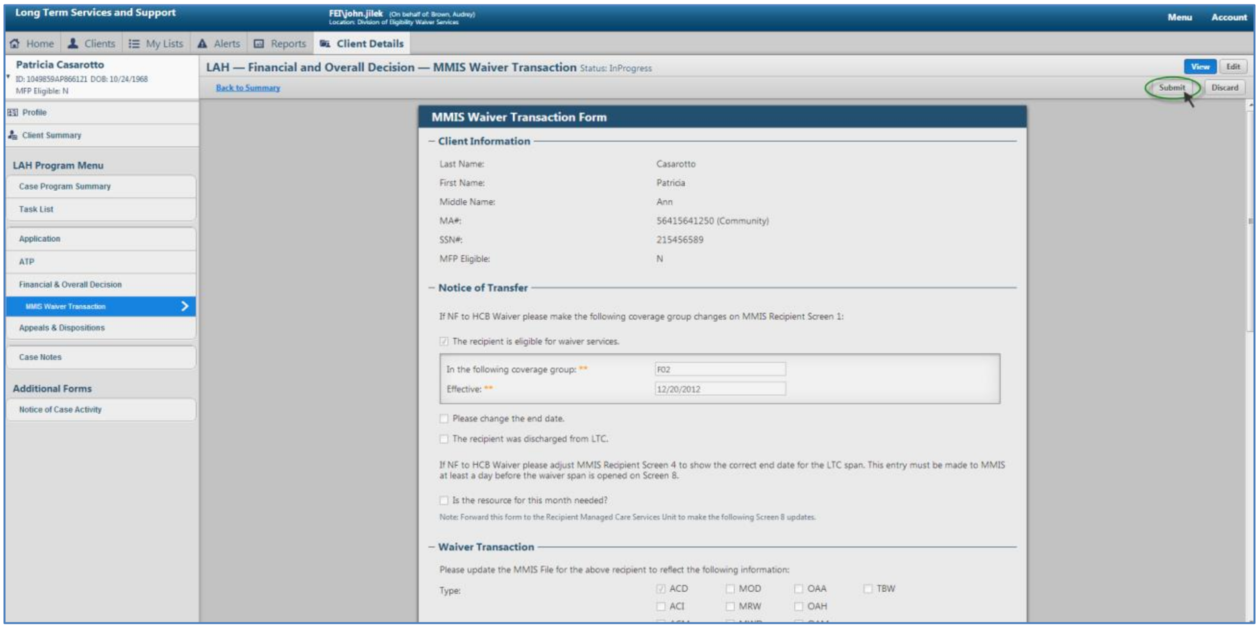
2.4.2 "Save" MMIS Waiver Transaction

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



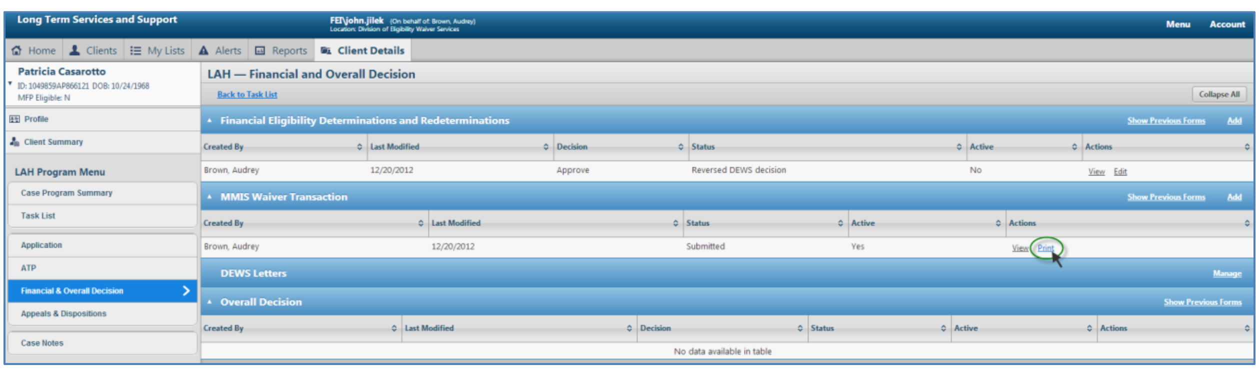
2.4.3 "Submit" MMIS Waiver Transaction

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



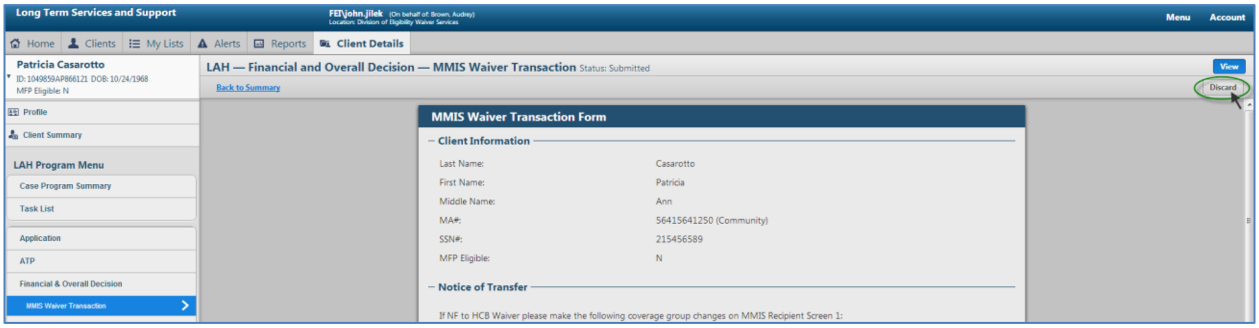
2.4.4 "Print" MMIS Waiver Transaction

The user is permitted to view form in print view (PDF format displayed in a separate window/tab).



2.4.5 "Discard" MMIS Waiver Transaction

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

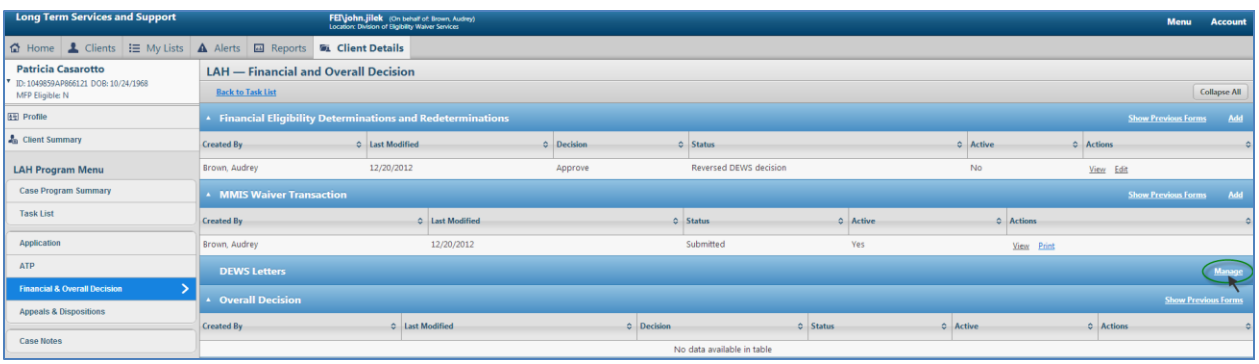


2.5 DEWS Letters

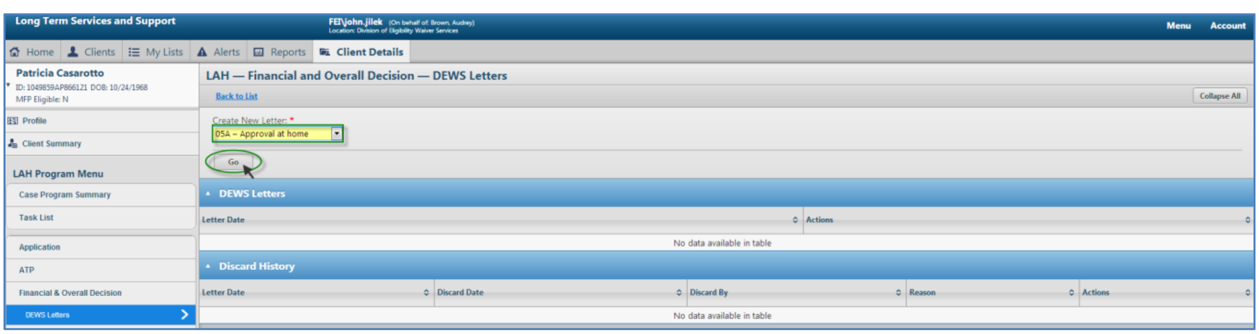
2.5.1 Add DEWS Letter

To add a DEWS Letters, you must log in as the permitted user.

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 **Financial & Overall Decision** menu button OR click **Summary** from Task List
6. Under DEWS Letters section, click **Manage**

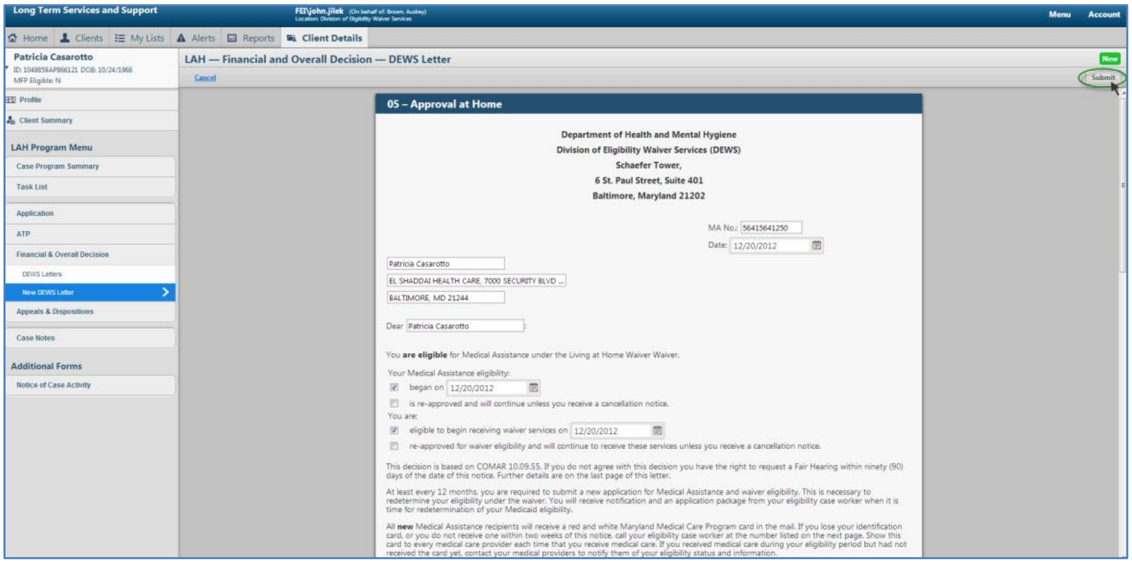


7. Select a letter format from 'Create New Letter' dropdown
8. Click **Go**



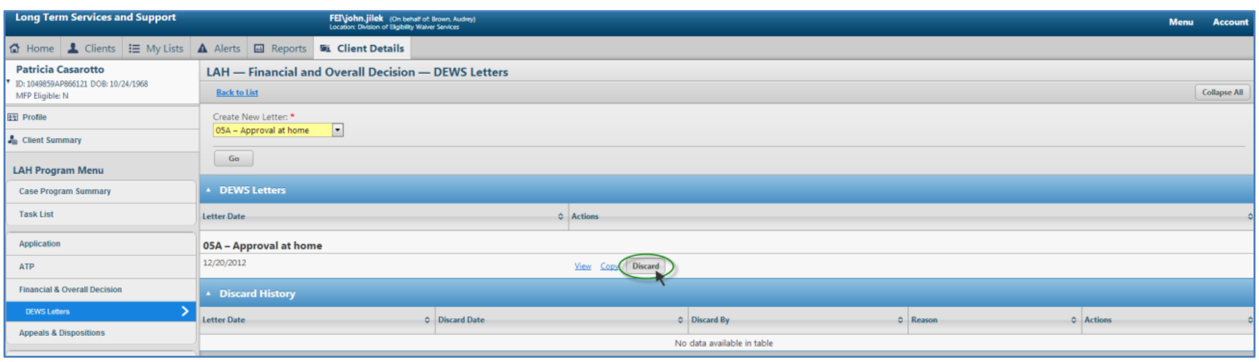
2.5.2 "Submit" DEWS Letter (Example)

Once you have selected a DEWS Letter and clicked *Go* (Refer to "Add DEWS Letter"), click **Submit** to complete the form process. This will save all previous selections and entries and direct the user to view mode.



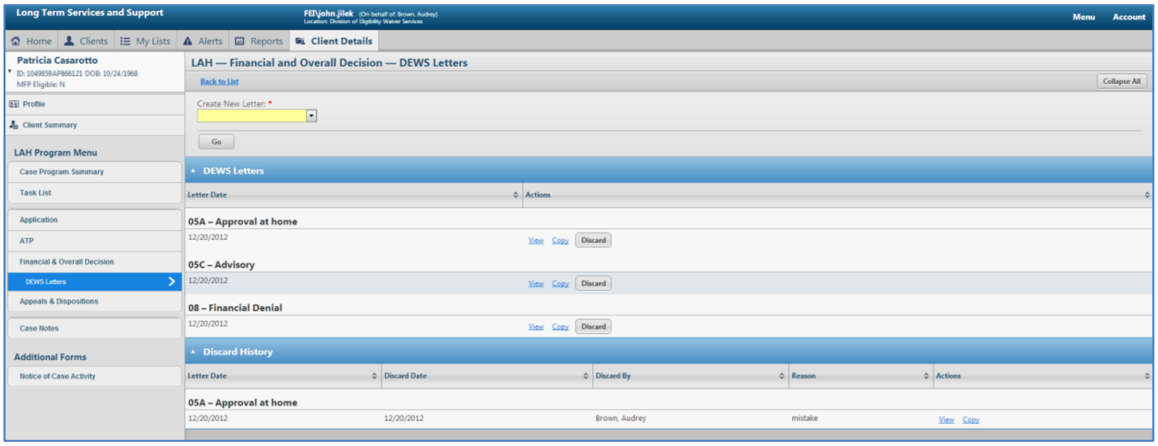
2.5.3 "Discard" DEWS Letter

The user is permitted to discard a DEWS Letter that has been submitted.



2.5.4 DEWS Letters List View

The user can view a list of DEWS Letters and the status of each ('Submitted', 'Discarded').

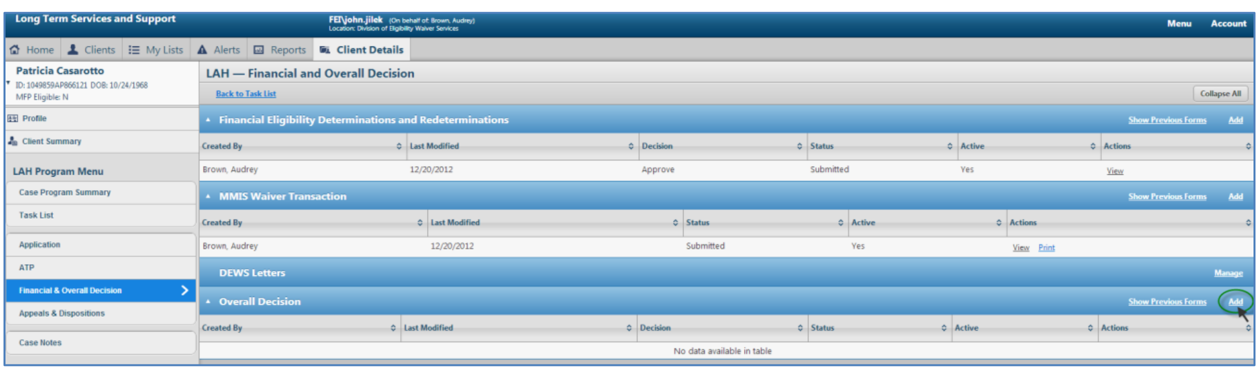


2.6 Overall Decision

2.6.1 "Add" Overall Decision

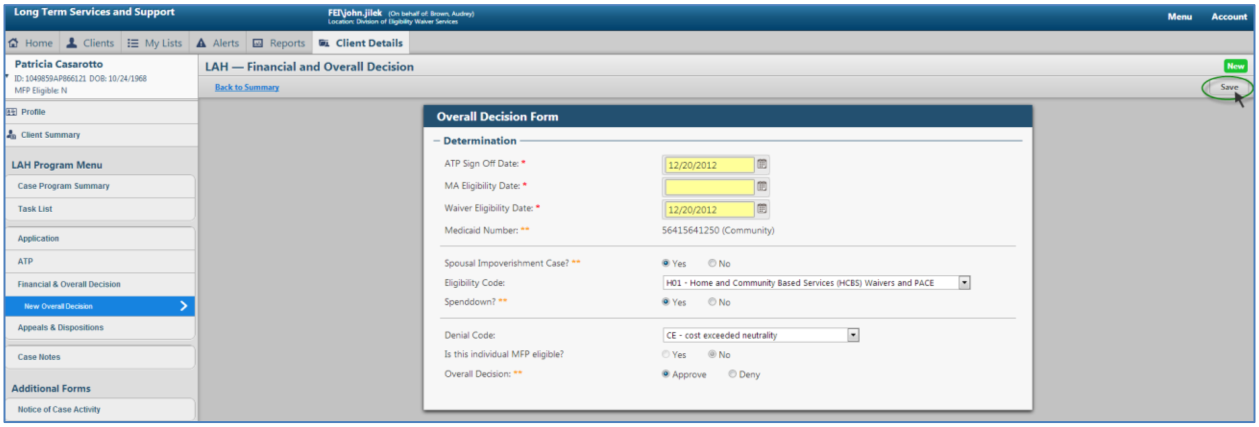
To add a DEWS Overall Decision, a decision must be 'Submitted' and you must log in as the permitted user. The following users are permitted to complete DEWS Overall Decision: (Assigned) DEWS Case Manager, DEWS Admin, DEWS Supervisor…

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 **Financial & Overall Decision** menu button OR click **Summary** from Task List
6. Under Overall Decision section, click **Add**



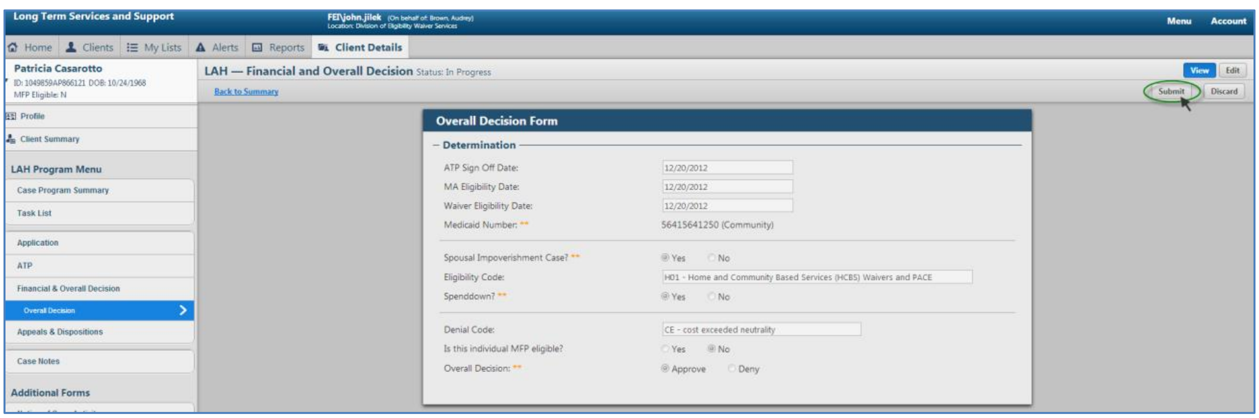
2.6.2 "Save" Overall Decision

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



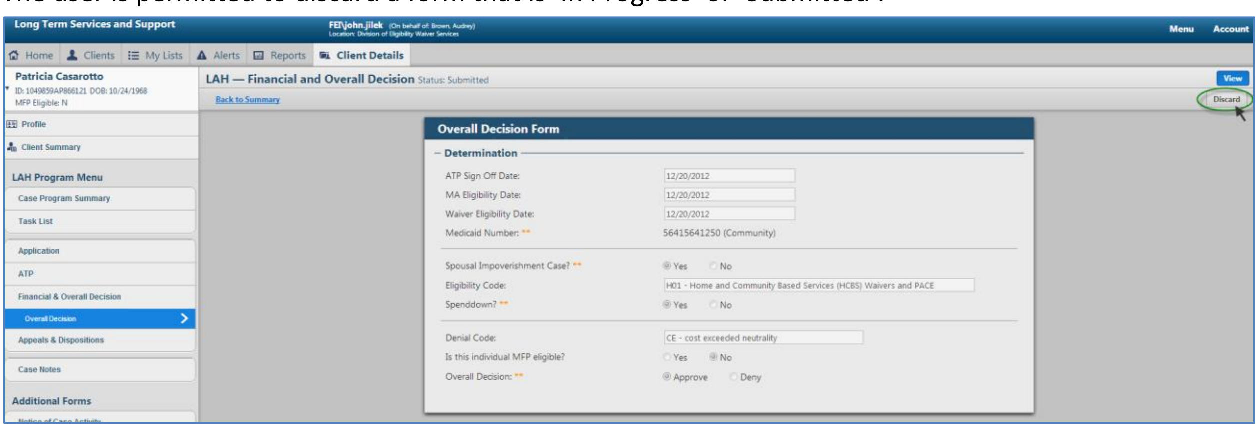
2.6.3 "Submit" Overall Decision

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



2.6.4 "Discard" Overall Decision

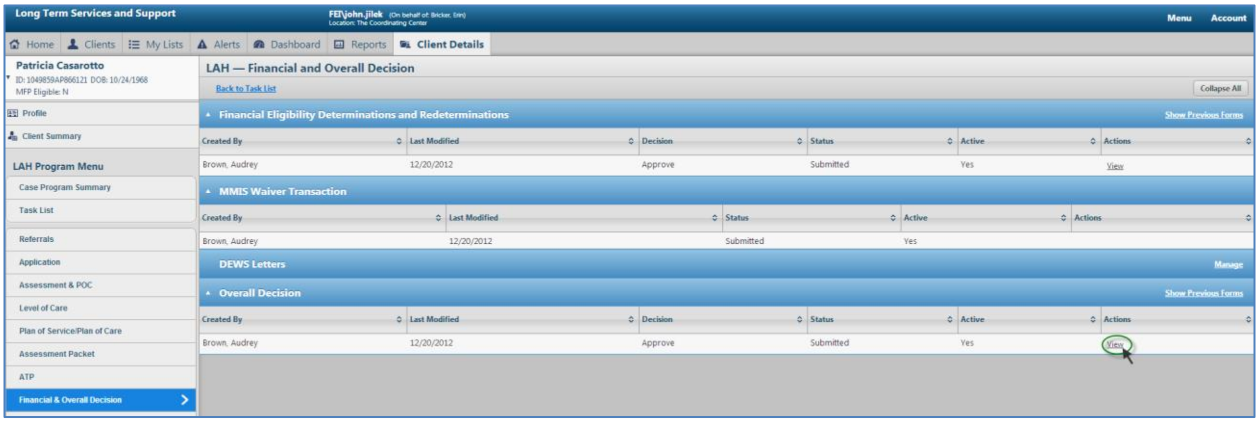
The user is permitted to discard a form that is 'In Progress' or 'Submitted'.



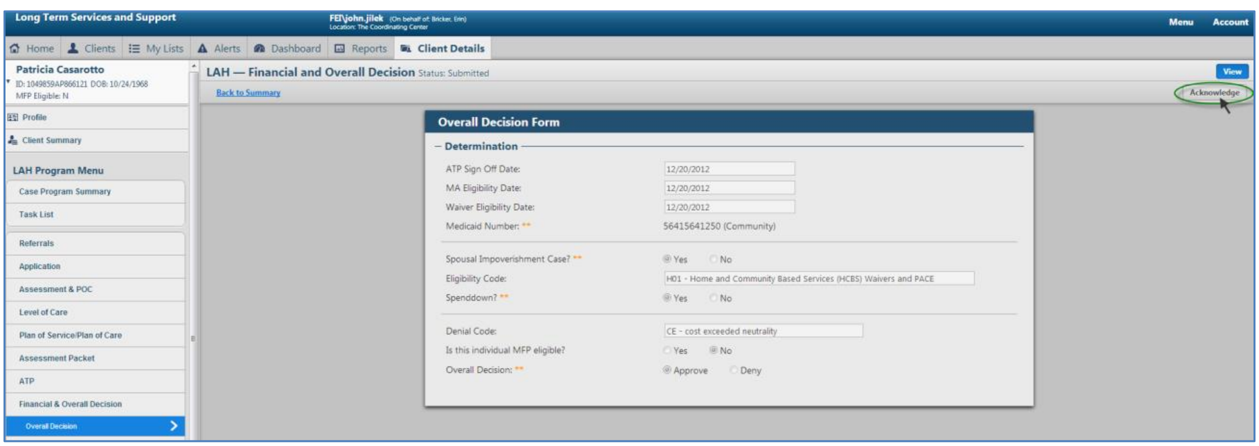
2.6.5 "Acknowledge" Overall Decision

To "Acknowledge" a DEWS Overall Decision, the Overall Decision must be 'Submitted' and you must log in as a permitted user. The following are permitted to acknowledge the form: (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 **Financial & Overall Decision** menu button OR click **Summary** from Task List
6. Under Overall Decision section, click **View**



7. Click **Acknowledge**



2.7 DEWS List View

The user can view a list of DEWS forms and the status of each ("Acknowledged", 'Submitted', 'In Progress', or 'Discarded').