
Financial and Overall Eligibility Determination 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.

- **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**

Long Term Services and Support

FEDJohnJ.Hick (Do not edit if changed, incorrect)

Location: Division of Eligibility Waiver Services

Menu Account

Home Clients My Lists Alerts Assignments Reports

Assignment Menu

LAH

DEWS

WOA

DEWS

ICS

DEWS

LAH — DEWS — Case Manager Assignment

Filter by Status: *

Unassigned

Filter

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

Assign to Case Manager: *

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 Manager"), 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**

Long Term Services and Support FER/john.jilek (On behalf of Brown, Audley) Location: Division of Eligibility Waiver Services Menu Account

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

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

LAH — ATP
[Back to Task List](#) Collapse All

Pre-ATP Questionnaires

Creation Date	Status	Active	Actions
12/20/2012	Submitted	No	
12/20/2012	Discarded (mistake)	No	

ATP Questionnaires

ATP Type	Creation Date	Date DEWS Alerted	Date DEWS Acknowledged	Status	Actions
Advisory Authorization	12/20/2012	N/A	N/A	In Progress	View Print
Advisory Authorization	12/20/2012	12/20/2012	N/A	Submitted	View Print

ATP Financial & Overall Decision

7. Click Acknowledge

Long Term Services and Support FER/john.jilek (On behalf of Brown, Audley) Location: Division of Eligibility Waiver Services Menu Account

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

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

LAH — ATP — Questionnaire Status: Submitted
[Back to List](#) View

ATP Questionnaire Form

ATP

ATP Type: Advisory Authorization
Jurisdiction: Baltimore

Client Information

Individual's Full Name: Patricia Casarotto
SSN#: 215456589
Date of Birth: 10/24/1968
MA#: 56415641250 (Community)

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**

Long Term Services and Support FER/john.jilek (On behalf of Brown, Audley) Location: Division of Eligibility Waiver Services Menu Account

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

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

LAH — Financial and Overall Decision
[Back to Task List](#) Collapse All

Financial Eligibility Determinations and Redeterminations Show Previous Forms **Add**

Created By	Last Modified	Decision	Status	Active	Actions
No data available in table					

MMIS Waiver Transaction Show Previous Forms **Add**

Created By	Last Modified	Status	Active	Actions
No data available in table				

DEWS Letters Manage

Overall Decision Show Previous Forms

Created By	Last Modified	Decision	Status	Active	Actions
No data available in table					

Appeals & Dispositions
Case Notes

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.

The screenshot shows the 'Financial Determinations and Redeterminations Form' for Patricia Casarotto. The form includes fields for 'DEWS Case Worker' (Audree Watkins), 'Date Application Received' (12/19/2012), 'DEWS Client ID' (6851), 'AU#' (547), and 'Is Applicant Financially Approved?' (Approve). The 'Save' button is highlighted in the top right corner of the form area.

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.

The screenshot shows the same 'Financial Determinations and Redeterminations Form' as in the previous image. The 'Submit' button is highlighted in the top right corner of the form area. The status of the determination is shown as 'In Progress'.

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**

Long Term Services and Support FED/John Jilek (On behalf of Brown, Audrey) Location: Division of Eligibility Waiver Services Menu Account

Home Clients My Lists Alerts Reports Client Details

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

LAH — Financial and Overall Decision Back to Task List Collapse All

Profile

Client Summary

LAH Program Menu

Case Program Summary

Task List

Application

ATP

Financial & Overall Decision

Appeals & Dispositions

Case Notes

Financial Eligibility Determinations and Redeterminations Show Previous Forms Add

Created By	Last Modified	Decision	Status	Active	Actions
Brown, Audrey	12/20/2012	Approve	Submitted	Yes	View

MMIS Waiver Transaction Show Previous Forms Add

Created By	Last Modified	Status	Active	Actions
No data available in table				

DEWS Letters Manage

Overall Decision Show Previous Forms Add

Created By	Last Modified	Decision	Status	Active	Actions
No data available in table					

7. Click **Reverse**

Long Term Services and Support FED/John Jilek (On behalf of Brown, Audrey) Location: Division of Eligibility Waiver Services Menu Account

Home Clients My Lists Alerts Reports Client Details

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

LAH — Financial and Overall Decision — Financial Determination Status: Submitted View Reverse

Back to Summary

Financial Determinations and Redeterminations Form

Determine Financial Eligibility

Case Worker: Audree Watkins

Date Application Received: 12/19/2012

DEWS Client ID: 6851

AUM: 547

Is Applicant Financially Approved? ** Approve

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

Long Term Services and Support FED/John Jilek (On behalf of Brown, Audrey) Location: Division of Eligibility Waiver Services Menu Account

Home Clients My Lists Alerts Reports Client Details

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

LAH — Financial and Overall Decision Back to Task List Collapse All

Profile

Client Summary

LAH Program Menu

Case Program Summary

Task List

Application

ATP

Financial & Overall Decision

Appeals & Dispositions

Case Notes

Financial Eligibility Determinations and Redeterminations Show Previous Forms Add

Created By	Last Modified	Decision	Status	Active	Actions
Brown, Audrey	12/20/2012	Approve	Reversed DEWS decision	No	View Edit

MMIS Waiver Transaction Show Previous Forms Add

Created By	Last Modified	Status	Active	Actions
No data available in table				

DEWS Letters Manage

Overall Decision Show Previous Forms

Created By	Last Modified	Decision	Status	Active	Actions
No data available in table					

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**

The screenshot shows the 'Long Term Services and Support' interface for user 'FEI John Jilek'. The left sidebar contains a 'Client Summary' for Patricia Casarotto. The main area is titled 'LAH — Financial and Overall Decision'. Under the 'Financial Eligibility Determinations and Redeterminations' section, there is a table with columns: Created By, Last Modified, Decision, Status, Active, and Actions. The first row shows 'Brown, Audrey' with a 'Reversed DEWS decision' status. Below this table, there is a section for 'MMIS Waiver Transaction' with an 'Add' button circled in red. Other sections include 'DEWS Letters' and 'Overall Decision'.

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.

The screenshot shows the 'MMIS Waiver Transaction Form' in the LTSSMaryland system. The form is titled 'LAH — Financial and Overall Decision — MMIS Waiver Transaction'. It contains several sections: 'Client Information' (Last Name: Casarotto, First Name: Patricia, Middle Name: Ann, MA#: 56415641250, SSN#: 215456589, MFP Eligible: N), 'Notice of Transfer' (with a checkbox for 'The recipient is eligible for waiver services' and a date field for 'Effective' set to 12/20/2012), and 'Waiver Transaction' (with checkboxes for 'ACD', 'MOD', 'OAA', 'TBW', 'ACI', 'MRW', and 'OAH'). A 'Save' button is circled in red in the top right corner of the form area.

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.

Long Term Services and Support FEIJohn Jilek (On behalf of Brown, Audrey) Location: Division of Eligibility Waiver Services Menu Account

Home Clients My Lists Alerts Reports Client Details

Patricia Casarotto
ID: 104939AP866121 DOB: 10/24/1968
MFP Eligible: N

LAH — Financial and Overall Decision — MMIS Waiver Transaction Status: InProgress

Back to Summary

MMIS Waiver Transaction Form

Client Information

Last Name: Casarotto
First Name: Patricia
Middle Name: Ann
MA#: 56415641250 (Community)
SSN#: 215456589
MFP Eligible: N

Notice of Transfer

If NF to HCB Waiver please make the following coverage group changes on MMIS Recipient Screen 1:

☒ The recipient is eligible for waiver services.

In the following coverage group: ** P02
Effective: ** 12/20/2012

☐ Please change the end date.
☐ The recipient was discharged from LTC.

If NF to HCB Waiver please adjust MMIS Recipient Screen 4 to show the correct end date for the LTC span. This entry must be made to MMIS at least a day before the waiver span is opened on Screen 6.

☐ Is the resource for this month needed?

Note: Forward this form to the Recipient Managed Care Services Unit to make the following Screen 8 updates.

Waiver Transaction

Please update the MMIS File for the above recipient to reflect the following information:

Type: ☒ ACD ☐ MOD ☐ OAA ☐ TBW
☐ ACI ☐ MRW ☐ OAH

View Edit

Submit Discard

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).

Long Term Services and Support FEIJohn Jilek (On behalf of Brown, Audrey) Location: Division of Eligibility Waiver Services Menu Account

Home Clients My Lists Alerts Reports Client Details

Patricia Casarotto
ID: 104939AP866121 DOB: 10/24/1968
MFP Eligible: N

LAH — Financial and Overall Decision

Back to Task List

Financial Eligibility Determinations and Redeterminations Show Previous Forms Add

Created By	Last Modified	Decision	Status	Active	Actions
Brown, Audrey	12/20/2012	Approve	Reversed DEWS decision	No	View Edit

MMIS Waiver Transaction Show Previous Forms Add

Created By	Last Modified	Status	Active	Actions
Brown, Audrey	12/20/2012	Submitted	Yes	View Print

DEWS Letters Manage

Overall Decision Show Previous Forms

Created By	Last Modified	Decision	Status	Active	Actions
No data available in table					

2.4.5 “Discard” MMIS Waiver Transaction

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

Long Term Services and Support

Patricia Casarotto
ID: 104859APR66121 DOB: 10/24/1968
MFP Eligible: N

LAH — Financial and Overall Decision — MMIS Waiver Transaction Status: Submitted

MMIS Waiver Transaction Form

Client Information

Last Name: Casarotto
First Name: Patricia
Middle Name: Ann
MA#: 56415641250 (Community)
SSN#: 215456589
MFP Eligible: N

Notice of Transfer

If NF to HCB Waiver please make the following coverage group changes on MMIS Recipient Screen 1:

View

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**

Long Term Services and Support

Patricia Casarotto
ID: 104859APR66121 DOB: 10/24/1968
MFP Eligible: N

LAH — Financial and Overall Decision

Financial Eligibility Determinations and Redeterminations

Created By	Last Modified	Decision	Status	Active	Actions
Brown, Audrey	12/20/2012	Approve	Reversed DEWS decision	No	View Edit

MMIS Waiver Transaction

Created By	Last Modified	Status	Active	Actions
Brown, Audrey	12/20/2012	Submitted	Yes	View Print

DEWS Letters

Overall Decision

Created By	Last Modified	Decision	Status	Active	Actions
No data available in table					

Manage

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

Long Term Services and Support

Patricia Casarotto
ID: 104859APR66121 DOB: 10/24/1968
MFP Eligible: N

LAH — Financial and Overall Decision — DEWS Letters

Create New Letter: *
DSA - Approval at home

Go

DEWS Letters

Letter Date	Discard Date	Discard By	Reason	Actions
No data available in table				

Discard History

Letter Date	Discard Date	Discard By	Reason	Actions
No data available in table				

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.

Long Term Services and Support

FER John J. Jirik (On behalf of Brown, Audette)
Location: Division of Eligibility Waiver Services

Home Clients My Lists Alerts Reports Client Details

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

Profile
Client Summary
LAH Program Menu
Case Program Summary
Task List
Application
ATP
Financial & Overall Decision
DEWS Letters
New DEWS Letter
Appeals & Dispositions
Case Notes
Additional Forms
Notice of Case Activity

LAH — Financial and Overall Decision — DEWS Letter

05 - Approval at Home

Department of Health and Mental Hygiene
Division of Eligibility Waiver Services (DEWS)
Schaefer Tower,
6 St. Paul Street, Suite 401
Baltimore, Maryland 21202

MA No.: 96415641250
Date: 12/20/2012

Patricia Casarotto
EL SHADDAD HEALTH CARE, 7000 SECURITY BLVD.
BALTIMORE, MD 21244

Dear Patricia Casarotto:

You are **eligible** for Medical Assistance under the Living at Home Waiver Waiver.

Your Medical Assistance eligibility:

☒ began on 12/20/2012
☐ is re-approved and will continue unless you receive a cancellation notice.

You are:

☒ eligible to begin receiving waiver services on 12/20/2012
☐ re-approved for waiver eligibility and will continue to receive these services unless you receive a cancellation notice.

This decision is based on COMAR 10.09.55. If you do not agree with this decision you have the right to request a Fair Hearing within ninety (90) days of the date of this notice. Further details are on the last page of this letter.

At least every 12 months you are required to submit a new application for Medical Assistance and waiver eligibility. This is necessary to re-determine your eligibility under the waiver. You will receive notification and an application package from your eligibility case worker when it is time for re-determination of your Medicaid eligibility.

All new Medical Assistance recipients will receive a red and white Maryland Medical Care Program card in the mail. If you lose your identification card, or you do not receive one within two weeks of this notice, call your eligibility case worker at the number listed on the next page. Show this card to every medical care provider each time that you receive medical care. If you received medical care during your eligibility period but had not received the card yet, contact your medical providers to notify them of your eligibility status and information.

Submit

2.5.3 “Discard” DEWS Letter

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

Long Term Services and Support

FER John J. Jirik (On behalf of Brown, Audette)
Location: Division of Eligibility Waiver Services

Home Clients My Lists Alerts Reports Client Details

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

Profile
Client Summary
LAH Program Menu
Case Program Summary
Task List
Application
ATP
Financial & Overall Decision
DEWS Letters
Appeals & Dispositions

LAH — Financial and Overall Decision — DEWS Letters

Back to List

Create New Letter: *
05A - Approval at home

Go

DEWS Letters

Letter Date	Actions
12/20/2012	View Cancel Discard

Discard History

Letter Date	Discard Date	Discard By	Reason	Actions
No data available in table				

2.5.4 DEWS Letters List View

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

Long Term Services and Support FD/John J. (On behalf of Brown, Audrey) Location: Division of Eligibility Waiver Services Menu Account

Home Clients My Lists Alerts Reports Client Details

Patricia Casarotto
ID: 104859APR66121 DOB: 10/24/1968
MPP Eligible N

LAH — Financial and Overall Decision — DEWS Letters
[Back to List](#) [Collapse All](#)

Create New Letter:

DEWS Letters

Letter Date	Actions
05A – Approval at home 12/20/2012	View Copy Discard
05C – Advisory 12/20/2012	View Copy Discard
08 – Financial Denial 12/20/2012	View Copy Discard

Discard History

Letter Date	Discard Date	Discard By	Reason	Actions
05A – Approval at home 12/20/2012	12/20/2012	Brown, Audrey	mistake	View Copy

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**

Long Term Services and Support FD/John J. (On behalf of Brown, Audrey) Location: Division of Eligibility Waiver Services Menu Account

Home Clients My Lists Alerts Reports Client Details

Patricia Casarotto
ID: 104859APR66121 DOB: 10/24/1968
MPP Eligible N

LAH — Financial and Overall Decision
[Back to Task List](#) [Collapse All](#)

Financial Eligibility Determinations and Redeterminations [Show Previous Forms](#) [Add](#)

Created By	Last Modified	Decision	Status	Active	Actions
Brown, Audrey	12/20/2012	Approve	Submitted	Yes	View

MMIS Waiver Transaction [Show Previous Forms](#) [Add](#)

Created By	Last Modified	Status	Active	Actions
Brown, Audrey	12/20/2012	Submitted	Yes	View Print

DEWS Letters [Manage](#)

Overall Decision [Show Previous Forms](#) [Add](#)

Created By	Last Modified	Decision	Status	Active	Actions
No data available in table					

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.

Long Term Services and Support

Patricia Casarotto
ID: 104059AP86121 DOB: 10/24/1968
MFP Eligible N

LAH — Financial and Overall Decision

Overall Decision Form

Determination

ATP Sign Off Date: 12/20/2012

MA Eligibility Date: 12/20/2012

Waiver Eligibility Date: 12/20/2012

Medicaid Number: 56415641250 (Community)

Spousal Impoverishment Case? ☒ Yes ☐ No

Eligibility Code: H01 - Home and Community Based Services (HCBS) Waivers and PACE

Spenddown? ☒ Yes ☐ No

Denial Code: CE - cost exceeded neutrality

Is this individual MFP eligible? ☐ Yes ☒ No

Overall Decision: ☒ Approve ☐ Deny

Save

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.

Long Term Services and Support

Patricia Casarotto
ID: 104059AP86121 DOB: 10/24/1968
MFP Eligible N

LAH — Financial and Overall Decision Status: In Progress

Overall Decision Form

Determination

ATP Sign Off Date: 12/20/2012

MA Eligibility Date: 12/20/2012

Waiver Eligibility Date: 12/20/2012

Medicaid Number: 56415641250 (Community)

Spousal Impoverishment Case? ☒ Yes ☐ No

Eligibility Code: H01 - Home and Community Based Services (HCBS) Waivers and PACE

Spenddown? ☒ Yes ☐ No

Denial Code: CE - cost exceeded neutrality

Is this individual MFP eligible? ☐ Yes ☒ No

Overall Decision: ☒ Approve ☐ Deny

Submit

2.6.4 “Discard” Overall Decision

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

Long Term Services and Support

Patricia Casarotto
ID: 104059AP86121 DOB: 10/24/1968
MFP Eligible N

LAH — Financial and Overall Decision Status: Submitted

Overall Decision Form

Determination

ATP Sign Off Date: 12/20/2012

MA Eligibility Date: 12/20/2012

Waiver Eligibility Date: 12/20/2012

Medicaid Number: 56415641250 (Community)

Spousal Impoverishment Case? ☒ Yes ☐ No

Eligibility Code: H01 - Home and Community Based Services (HCBS) Waivers and PACE

Spenddown? ☒ Yes ☐ No

Denial Code: CE - cost exceeded neutrality

Is this individual MFP eligible? ☐ Yes ☒ No

Overall Decision: ☒ Approve ☐ Deny

Discard

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**

The screenshot shows the 'Long Term Services and Support' interface. The user is logged in as FDR John J. Rick. The left sidebar shows the 'Financial & Overall Decision' menu item selected. The main content area displays the 'LAH — Financial and Overall Decision' section for Patricia Casarotto. Under the 'Overall Decision' heading, there is a table with columns: Created By, Last Modified, Decision, Status, Active, and Actions. The table contains one row with the following data: Created By: Brown, Audrey; Last Modified: 12/20/2012; Decision: Approve; Status: Submitted; Active: Yes; Actions: View. The 'View' button in the Actions column is circled in green.

7. Click Acknowledge

The screenshot shows the 'Long Term Services and Support' interface. The user is logged in as FDR John J. Rick. The left sidebar shows the 'Overall Decision' menu item selected. The main content area displays the 'LAH — Financial and Overall Decision' section for Patricia Casarotto. The 'Overall Decision Form' is shown, with fields for ATP Sign Off Date, MA Eligibility Date, Waiver Eligibility Date, Medicaid Number, Spousal Impoverishment Case?, Eligibility Code, Spenddown?, Denial Code, Is this individual MFP eligible?, and Overall Decision. The 'Acknowledge' button in the top right corner is circled in green.

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’).

Long Term Services and Support		FED/John J. Jick (On behalf of Brown, Audrey) Location: Division of Eligibility Waiver Services		Menu Account			
Home Clients My Lists Alerts Reports Client Details							
Patricia Casarotto ID: 104859AP866121 DOB: 10/24/1968 MFP Eligible: N		LAH — Financial and Overall Decision Back to Task List Collapse All					
Profile		Financial Eligibility Determinations and Redeterminations Show Previous Forms Add					
Client Summary		Created By	Last Modified	Decision	Status	Active	Actions
LAH Program Menu		Brown, Audrey	12/20/2012	Approve	Submitted	Yes	View
Case Program Summary		Brown, Audrey	12/20/2012	Approve	In Progress	No	View Edit
Task List		MMIS Waiver Transaction Show Previous Forms Add					
Application		Created By	Last Modified	Status	Active	Actions	
ATP		Brown, Audrey	12/20/2012	Submitted	Yes	View Print	
Financial & Overall Decision		Brown, Audrey	12/20/2012	In Progress	No	View Edit Print	
Appeals & Dispositions		DEWS Letters Manage					
Case Notes		Overall Decision Show Previous Forms Add					
Additional Forms		Created By	Last Modified	Decision	Status	Active	Actions
Notice of Case Activity		Brown, Audrey	12/20/2012	Approve	Acknowledged	Yes	View