

● WO-349: Client Profile Enhancements Quick Guide

Enhancements have been made to certain sections of the Client Profile in *LTSSMaryland* as a way of capturing whether a client has special communication needs so that the information can be used by users in the system to determine the special needs of the client to establish clear channels for communication.

In addition, the current section in the Client Profile that captures Advanced Directives information previously did not connect that information to a current Representative in the Client Profile. It only indicated whether the client had one without any indication to who it was. These fields have been moved to the Representative section of the Client Profile so that users are able to identify and connect a representative to an advanced directive, when applicable.

A Communication Supports field has been added to the client's profile.

Navigate to Client -> Profile -> Client Demographics-> below the existing Primary Language Field:

The screenshot shows the 'Client Profile — Demographics' form. The 'Communication Supports' field is highlighted in yellow, showing a dropdown menu with the text 'Select options'. Other fields visible include Client Identifier (21190POASKB5100), SSN (#000000000), Medicare #, Marital Status, Email Address, Primary Language, and Date of Death. A checkbox for 'Check if SSN# is unknown' is also present with a disclaimer.

This is an optional, multi-select field. If applicable, the user must choose the option that relates closely to the client's communication needs. If the client's communication need is not reflected in the list, the user may select "other" and manually enter in the information:

The screenshot shows the 'Select options' dropdown menu. It includes a 'Check all' button and an 'Uncheck all' button. The options listed are: American Sign Language (ASL) Interpreter, Certified Deaf Interpreter (CDI), Communication Access Real Time (CART), Computer Braille Display, ProTactile (PT) Sign Language Interpreter, Screen Magnifier, and Other. The 'Other' option is currently selected.

Note that this field will also display in the left navigation menu under the Client Summary Panel:

LTSSMaryland

Home Clients My Lists

Sample Test

ID: 21190POASKB5100 DOB: 01/01/2010
MFP Eligible: Y (07/21/2020)

MA #

Primary Language:

Communication Supports:
Communication Access Real Time (CART), Screen Magnifier

Phone #:

Facility Name:

Jurisdiction/County:
Baltimore City

1. A new Power of Attorney section has been added Client Profile.

Navigate to Client Profile, navigate to the representatives section, select the Add Representatives button on the Representatives panel. A new "Power of Attorney Information" section has been added below the Guardian Information section with the following fields:

Client Profile — Representative

[Cancel](#)

Power of Attorney Information

- ☒ Set as Current Medical POA (Advance Directive) ⓘ
- ☐ Set as Current General POA Non-Durable ⓘ
- ☐ Set as Current General POA Durable ⓘ
- ☐ Set as Current Limited Durable POA ⓘ
- ☐ Set as Current Limited Non-Durable POA ⓘ

Informational icons are now visible next to the above options which upon hovering should display the below text:

Set as Current Medical POA - A medical power of attorney (also known as an advance directive or durable medical power of attorney) authorizes healthcare decisions, including mental health treatment, to be made on the principal's behalf by a designated health care agent, go into effect immediately.

Set as Current Medical POA Durable - A medical power of attorney that authorizes healthcare decisions, including mental health treatment, to be made on the principal's

behalf by a designated health care agent when the person is no longer competent to make informed decisions about their health care.

Set as Current General POA - A general power of attorney gives a person (agent) designated by the principal the power and authority to act for the principal in regard to the principal's property, including financial transactions and obtaining government benefits. Note: Powers should be as specifically defined as possible. Authority terminates upon the principal's disability or incapacitation.

Set as Current General POA Durable - A general power of attorney gives a person (agent) designated by the principal the power and authority to act for the principal in regard to the principal's property, including financial transactions and obtaining government benefits. The agent's authority under the POA continues after the person becomes disabled or incapacitated, unless the terms specifically state otherwise. If a guardian is appointed by a court, then the agent is accountable to the guardian.

Set as Current Limited Durable POA - This is a power of attorney that specifically limits the agent's authority to act on behalf of the principal in regard to the principal's assets. Assets include, but are not limited to: bank accounts, retirement accounts, taxes, investments, physical properties and insurance policies.

Set as Current Limited Non-Durable POA - This is a power of attorney that specifically limits the agent's authority to act on behalf of the principal in regard to the principal's assets. This limited power of attorney terminates upon the principal's disability or incapacitation. Assets include, but are not limited to: bank accounts, retirement accounts, taxes, investments, physical properties and insurance policies.

When a user selects any of the above options and clicks on Save, a popup warning message now appears: 'Please upload documentation to 'Attachments' section of that Representative supporting the participants status.' This warning message will only be displayed if the POA field value has changed from No to Yes. Note that only one Representative can be "Set as ..." for any of the above options for each client. If another representative is Set as, the setting then flips to the latest representative selected. For instance, a client has a rep- Rep A with Current Medical POA selected. Upon adding a new Rep- Rep B, selecting Current Medical POA option and then saving, Rep A is cleared of Current Medical POA selection.

The Power of Attorney selections are viewable on the Representatives list/view page. If a user navigates to Client Profile, then expands the Representatives panel, a column should display Medical POA, Medical POA Durable, etc., based on whichever option was selected for the representative.

Representatives						Add Representatives
Representative Name	Date of Birth	Relationship	Guardian of	Power of Attorney over	CFC Representative	Actions
Bob Test		Uncle	Person	Medical POA (Advance Directive)	☒	View
Betty Test		Aunt	Estate (Property)		☒	View

2. **Updates have been made to the Guardian Information Section.** Within the Representatives module of the client profile, the Guardian Information section is now updated to include informational messages.

Client Profile — Representative

Cancel

Guardian Information

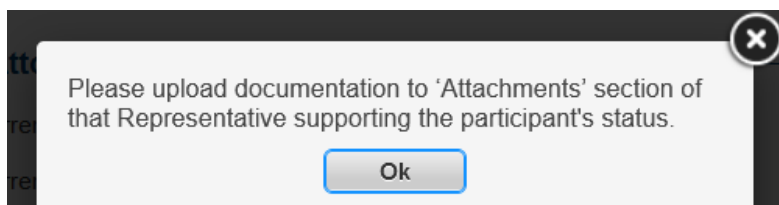
☐ Set as Current Guardian of Person ⓘ
 ☒ Set as Current Guardian of Estate (Property) ⓘ

When a user navigates to Client Profile, when they click Add Representatives button on the Representatives panel, display info icon next to the below options which upon hovering should display the following text:

Set as Current Guardian of Person - A guardian of the person is authorized by the court to make decisions for the disabled person about their health care, shelter, or other daily needs. This is a legal procedure determined by the court.

Set as Current Guardian of Property - A guardian of the property is a person or agency appointed by the court to manage the assets of a disabled person. A public agency may not be the guardian of the property. This is a legal procedure determined by the court.

When any of the above options are selected the user saves the form, the system will display a popup warning message:



Note that the warning message will only be displayed if the Guardianship field value has changed from No to Yes.

For DDA users only: The following three fields are no longer available in the Guardian information of the client representative page:

Guardian Information

- ☐ Set as Current Guardian of Person ⓘ
- ☐ Set as Current Guardian of Property ⓘ
- ☐ Set as Representative Payee
- ☐ Set as Power of Attorney (for Medical Decisions) 
- ☐ Set as Power of Attorney
- ☐ Set as Power of Attorney (other)

In the **Provider Portal**, updates have also been made to the corresponding Guardianship fields. Users will notice that the “Power of Attorney Over” column has been updated accordingly:

CLIENT PROFILE								
> CLIENT DEMOGRAPHIC OVERVIEW > ADDRESS TO RECEIVE SERVICES > WAIVER/PROGRAM ENROLLMENT STATUS > CURRENT ASSIGNMENTS > CLIENT OTP > REPRESENTATIVES								
Representative Name	Date of Birth	Relationship	Guardian of	Power of Attorney Over	Representative Payee	Primary Caregiver	CFC R	
Caroline Test		Daughter	Person	General POA Durable	No	No	Yes	
Test Test		Niece		Limited Durable POA, Limited Non-Durable POA	No	No	No	

3. **An Attachments panel has been added within the Representatives section of the Client Profile.** When a user navigates to Representative View/Summary page and clicks to expand the Attachments panel:

Client Profile — Representative

[Back to Summary](#)

- Representative Contact Form Edit
- CFC Representative Form Add
- Attachments** Add

File Name	Description	Created By	Date Created	Action
No data available in table				

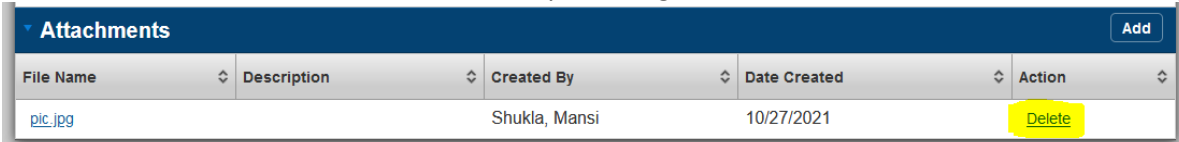
- a. File Name: Uploaded file name
- b. Description: Populated from the pop up
- c. Created By: User uploading the document
- d. Date Created: Current System Date

-
- e. Action: Delete option available

To add an attachment, click on Add in the blue banner.



Once added, an attachment can be deleted by selecting the delete button on the attachments list page:



File Name	Description	Created By	Date Created	Action
pic.jpg		Shukla, Mansi	10/27/2021	Delete

Note: This new panel resembles existing Attachments panels in other areas of *LTSSMaryland*.

4. **For DDA, the POA selections have been mapped from the Guardian Info section to the Power of Attorney information section.** Representatives within a client profile that have a 'Yes' value set for any one of the POA fields within Guardian Info section, will have the corresponding field within POA Info section marked as yes based on the mapping below:
- Set as Power of Attorney (for Medical Decision) = Set as Current Medical POA (Advance Directive)
 - Set as Power of Attorney = Set as Current General POA Non-Durable
 - Set as Power of Attorney (other) = Data has been cleared so that it can be updated to one of the two above fields

Additional Updates:

1. A data patch has been included so that when an authorized user navigates to Client Demographics section of the Client Profile, then the following options under Advanced Directives have been set to 'Unknown' for all clients in *LTSSMaryland* as of the November 2021 release:
 - a. Set as Current Medical POA
 - b. Set as Current Medical POA Durable

- c. Set as Current General POA
- d. Set as Current General POA Durable

Client Profile — Demographics

Cancel

Marital Status:

Email Address:

Primary Language:

Communication Supports:

Select options

Date of Death:

Advanced Directives

DNR:

☐ Yes
☐ No
☒ Unknown

Living Will:

☐ Yes
☐ No
☒ Unknown

Medical POA:

☐ Yes
☐ No
☒ Unknown

General POA Non-Durable:

☐ Yes
☐ No
☒ Unknown

General POA Durable:

☐ Yes
☐ No
☒ Unknown

Limited Durable POA:

☐ Yes
☐ No
☒ Unknown

Limited Non-Durable POA:

☐ Yes
☐ No
☒ Unknown

Guardian of Person:

☐ Yes
☐ No
☒ Unknown

Guardian of Estate (Property):

☐ Yes
☐ No
☒ Unknown

Emancipated Minor:

☐ Yes
☐ No
☒ Unknown

2. In the Advanced Directives section of the Client Profile Demographics section, the selection “Medical POA Durable” has been removed. Additionally, the following text updates have been made:

- “General POA” to “General POA Non-Durable”
- “Guardian of Property” to “Guardian of Estate (Property)”

3. In the Power of Attorney section of the client profile, the following text updates have been made:

- “Set as Current Medical POA Durable” to “Set as Current Medical POA (Advance Directive)”
- “Set as Current General POA” to “Set as Current General POA Non–Durable”
- “Set as Current Guardian of Property” to “Set as Current Guardian of Estate (Property)”