### **CR-515916: SPA Reporting Updates Quick Guide**

The guide was created to outline the changes being implemented, as of March 2022, to the reports and My Lists that effect Supports Planning Agencies.

### 1. SPA Capacity Detail Report: New Output Columns

New output columns have been added to the detail level of the SPA Capacity Report for the following user roles:

| User Roles              | View Access                                                   |
|-------------------------|---------------------------------------------------------------|
| MDH Auditor (View Only) | can view all clients                                          |
| MDH Provider Super User | can view all clients                                          |
| MDH SPA Super User      | can view all clients                                          |
| MDH Administrator       | can view all clients                                          |
| OHCQ (View Only)        | can view all clients                                          |
| SPA Administrator       | can only view clients associated with their assigned location |

The system willdisplay the following new output columns.

- A. **Assigned Support Planner** Displays the currently assigned SPA Support Planner from the Client Summary. If a Support Planner has not been assigned, this field will be blank.
- B. **Program Enrollment Status** This field is populated with the program status (Pending, Enrolled, Disenrolled, Denied) of the programs in which the client is enrolled. Note that this information is pulled from the Program Snapshot and only displays the most recent program status.

|                                                                                 |              |             |                | SPA                         | Capacity De    | tail Rep      | ort              |            |           |                        |                             |
|---------------------------------------------------------------------------------|--------------|-------------|----------------|-----------------------------|----------------|---------------|------------------|------------|-----------|------------------------|-----------------------------|
| rch Criteria:<br>ort Date: 3/2/2022<br>isdiction: Baltimor<br>oport Planning Ag | e            |             |                |                             |                |               |                  |            |           |                        |                             |
| int: 897                                                                        |              |             |                |                             |                |               |                  |            |           |                        |                             |
| Client ID 🛊                                                                     | First Name 🛊 | Last Name 😫 | Jurisdiction 🖨 | Program Enrollment Status 🗧 | Initiated By ‡ | Create Date 🛊 | Effective Date 😂 | Expiration | Status \$ | Reason for Selection # | Assigned Support<br>Planner |

### 2. Current Assignments Report: New Output Columns

## The following users willbe able to view new output columns when viewing the current assignments report:

| Role Name                        | Program Name     |                                                 |
|----------------------------------|------------------|-------------------------------------------------|
| BI Provider Admin                | BI               | can view all clients assigned to their location |
| BI Provider Staff                | BI               | can view <b>only</b> clients assigned to them   |
| BI Provider Supervisor           | BI               | can view all clients assigned to their location |
| CCS Coordinator                  | DDA State Funded | can view only clients assigned to them          |
| CCS Supervisor                   | DDA State Funded | can view all clients assigned to their location |
| CCS Agency primary administrator | DDA State Funded | can view all clients assigned to their location |
| CCS agency administrator - OS    | DDA State Funded | can view all clients assigned to their location |
| CCS Agency waiver administrator  | DDA State Funded | can view all clients assigned to their location |
| CCS Agency administrator -CA     | DDA State Funded | can view all clients assigned to their location |
| CMA Rem Admin                    | REM              | can view all clients assigned to their location |
| CMA REM Case Manager             | REM              | can view only clients assigned to them          |
| CMA REM Intake Specialist        | REM              | can view all clients assigned to their location |
| CMA REM Provider Relations Rep   | REM              | can view all clients assigned to their location |
| CMA REM Supervisor               | REM              | can view all clients assigned to their location |
| FMCS Admin                       | СР               | can view all clients assigned to their location |
| FMCS Staff                       | СР               | can view all clients assigned to their location |
| MDC Provider Admin               | MDC              | can view all clients assigned to their location |
| MDC Provider Intake              | MDC              | can view all clients assigned to their location |
| MDC Provider Nurse               | MDC              | can view all clients assigned to their location |
| MDC Provider Staff               | MDC              | can view only clients assigned to them          |
| SPA Admin                        | СО               | can view all clients assigned to their location |
| SPA Billing Staff                | СО               | can view all clients assigned to their location |
| SPA Intake                       | СО               | can view all clients assigned to their location |
| SPA Supervisor                   | СО               | can view all clients assigned to their location |
| SPA Support Planner              | СО               | can view only clients assigned to them          |

The system willdisplay the following new output columns, in addition to existing columns:

- A. Jurisdiction Populated with the client's jurisdiction within Client Profile
- B. Program Enrollment Status- Populated with the programs that the client is associated with including CO, ICS, CFC, CPAS, CP, CS, FS, BI, MDC and REM Program Status (Pending or Enrolled). This information is populated from the Program Snapshot and only displays the most recent program status. Note that denied or disenrolled programs will not display.

| Date Created: 3/2/2022 | 10:29:53 AM         |                    |                   |                  |                |                             |
|------------------------|---------------------|--------------------|-------------------|------------------|----------------|-----------------------------|
|                        |                     |                    | <b>Current As</b> | signments Report |                |                             |
| Total Records:         | 4093                |                    |                   | - · ·            |                |                             |
| LTSS Client ID 🗧       | Client First Name = | Client Last Name 🗧 | MA Number 🕏       | Assigned Staff = | Jurisdiction 🗧 | Program Enrollment Status 🗧 |

### 3. Assessment Request My List- Add SPA Agency Access

Supports Planning Agencies will now have access to the Assessment Request My List in order to view clients with requested Assessments & POC Requests. The following roles will have access to the My List, in addition to users who currently have access:

| SPA Admin           | can view all clients assigned to their location |
|---------------------|-------------------------------------------------|
| SPA Intake          | can view all clients assigned to their location |
| SPA Supervisor      | can view all clients assigned to their location |
| SPA Support Planner | can view <b>only</b> clients assigned to them   |

The following My List options will now display for SPA Users when navigating to My List, My Client List, and after selecting the Assessments list. Users should be able to view and select the following:

- A. All Requested Assessments & POC- Available for SPA Admin, SPA Intake, SPA Supervisor
  - a. Will show the user a listing of any clients assigned to their Provider Location as the SPA where the client has an Active Assessment & POC Request

| LTSSM                         | aryland           |             |              | <b>jen</b> i<br>Loc | n <b>ifer.reitz</b> (C<br>ation: Allega | n behalf of:<br>ny County A | : Admin, S<br>Area Ager | SPA)<br>ncy on Agir | ng      |            |     |             |          |          |                |   |       |                        |               |   |               |     |     | Menu          | Acc  | count |
|-------------------------------|-------------------|-------------|--------------|---------------------|-----------------------------------------|-----------------------------|-------------------------|---------------------|---------|------------|-----|-------------|----------|----------|----------------|---|-------|------------------------|---------------|---|---------------|-----|-----|---------------|------|-------|
| 🔂 Home                        | L Clients         | i≣ My Lists | Alerts       | 🙆 Dashboa           | rd 👪 As                                 | signments                   | s 🔜 R                   | Reports             |         |            |     |             |          |          |                |   |       |                        |               |   |               |     |     |               |      |       |
| <ul> <li>My Client</li> </ul> | t List            |             | Asse         | ssments Li          | st                                      |                             |                         |                     |         |            |     |             |          |          |                |   |       |                        |               |   |               |     |     |               |      |       |
| Application                   | ns                |             |              |                     |                                         |                             |                         |                     |         |            |     |             |          |          |                |   |       |                        |               |   |               |     |     |               |      |       |
| Assessme                      | nts               |             | Show r       | ne*                 |                                         |                             |                         | Request Ty          | /De:    |            |     | Assess      | ments D  | ue:      |                |   | Juris | sdiction:              |               |   |               |     |     |               |      |       |
| Nurse Mor                     | nitoring          |             |              | quested Assess      | ments & PC                              | ю                           |                         | All                 |         |            | ~   | All         |          |          |                |   | All   |                        | ```           |   |               |     |     |               |      |       |
| LOC<br>POS                    |                   |             | _            |                     |                                         |                             |                         |                     |         |            |     |             |          |          |                |   |       |                        |               |   |               |     |     |               |      |       |
| ATP                           |                   |             | Fil          | ter                 |                                         |                             |                         |                     |         |            |     |             |          |          |                |   |       |                        |               |   |               |     |     |               |      |       |
| MDC                           |                   |             | 011          | 1                   | First                                   |                             |                         | Ortotal             |         | -          |     |             |          | _        |                |   |       |                        |               |   | Annta         |     |     |               |      |       |
| Community                     | y Settings Que    | stionnaire  | Client<br>ID | Last<br>Name        | First<br>Name                           | ≎ Age ≎ d                   | County ¢                | Original<br>Date    | Request | ≎ Tr<br>Da | ate | Req<br>Date | uest Due | •        | Reque:<br>Type | я | ŶĂ    | tegistry<br>pplicant 😗 | \$<br>Assigne | a | Assig<br>Date | nea | ° 0 | ays<br>verdue | ≎ Ac | tions |
| EDD Lette                     | rs                |             |              |                     |                                         |                             |                         |                     |         |            |     | N           | o data a | vailable | e in table     |   |       |                        |               |   |               |     |     |               |      |       |
| Appeals an                    | nd Eligibility Ch | ange        |              |                     |                                         |                             |                         |                     |         |            |     |             |          |          |                |   |       |                        |               |   |               |     |     |               |      |       |
| Redetermi                     |                   |             |              |                     |                                         |                             |                         |                     |         |            |     |             |          |          |                |   |       |                        |               |   |               |     |     |               |      |       |
| Reportable                    |                   |             |              |                     |                                         |                             |                         |                     |         |            |     |             |          |          |                |   |       |                        |               |   |               |     |     |               |      |       |
|                               | Group Change      | S           |              |                     |                                         |                             |                         |                     |         |            |     |             |          |          |                |   |       |                        |               |   |               |     |     |               |      |       |
| MyLTSS I                      | List              |             |              |                     |                                         |                             |                         |                     |         |            |     |             |          |          |                |   |       |                        |               |   |               |     |     |               |      |       |

- B. My Requested Assessments & POC- only available for SPA Support Planner
  - a. Will show the user a listing of any clients assigned to their Provider Location as the SPA where they are the clients assigned Supports Planner and the client has an Active Assessment & POC Request

|             | ,                 |             |        | LO               | cation, beatrice t | oving mean   |                                                   |               |   |                   |          |      |                          |                    |   |                  |                   |         |
|-------------|-------------------|-------------|--------|------------------|--------------------|--------------|---------------------------------------------------|---------------|---|-------------------|----------|------|--------------------------|--------------------|---|------------------|-------------------|---------|
| 🔂 Home      | L Clients         | i≣ My Lists | A Aler | ts 🛛 🕿 Dashbo    | ard 🔜 Repo         | ts           |                                                   |               |   |                   |          |      |                          |                    |   |                  |                   |         |
| * My Client | List              |             | A      | ssessments L     | ist                |              |                                                   |               |   |                   |          |      |                          |                    |   |                  |                   |         |
| My Clients  |                   |             |        |                  |                    |              |                                                   |               |   |                   |          |      |                          |                    |   |                  |                   |         |
| Application | 15                |             | Sh     | ow me*           |                    |              | Request Type:                                     | Request Type: |   |                   |          | . de | urisdiction:             |                    |   |                  |                   |         |
| Assessmen   | nts               |             |        | y Requested Asse | sments & POC       | ~            | All                                               |               |   | Assessments Due:  |          |      |                          | ~                  |   |                  |                   |         |
| Nurse Mor   | nitoring          |             |        | ,                |                    |              |                                                   |               |   |                   |          |      |                          |                    |   |                  |                   |         |
| LOC         |                   |             |        | Filter           |                    |              |                                                   |               |   |                   |          |      |                          |                    |   |                  |                   |         |
| POS         |                   |             |        |                  |                    |              |                                                   |               |   |                   |          |      |                          |                    |   |                  |                   |         |
| ATP         |                   |             | Clie   | nt Last ,        | First \$ J         | ge ≎ County  | <ul> <li>Original Reques</li> <li>Date</li> </ul> | t<br>Date     | 0 | Request Due       | Request  | ô    | Registry<br>Applicant () | Assigned           | 0 | Assigned<br>Date | ≎ Days<br>Overdue | Actions |
| MDC         |                   |             | ID     | Name Y           | Name V             | ige v County | Date                                              | * Date        | Ň | Date              | Туре     | Ý    | Applicant ()             | Assigned<br>Agency | Ť | Date             | * Overdue         | Actions |
| Community   | y Settings Que    | stionnaire  |        |                  |                    |              |                                                   |               |   | No data available | in table |      |                          |                    |   |                  |                   |         |
| EDD Lette   | rs                |             |        |                  |                    |              |                                                   |               |   |                   |          |      |                          |                    |   |                  |                   |         |
| Appeals an  | nd Eligibility Ch | ange        |        |                  |                    |              |                                                   |               |   |                   |          |      |                          |                    |   |                  |                   |         |
| Redetermi   | nations           |             |        |                  |                    |              |                                                   |               |   |                   |          |      |                          |                    |   |                  |                   |         |
| Reportable  | e Events          |             |        |                  |                    |              |                                                   |               |   |                   |          |      |                          |                    |   |                  |                   |         |
| Coverage    | Group Change      | s           |        |                  |                    |              |                                                   |               |   |                   |          |      |                          |                    |   |                  |                   |         |
| MyLTSS      | List              |             |        |                  |                    |              |                                                   |               |   |                   |          |      |                          |                    |   |                  |                   |         |

After clicking "filter," the following option is available in the Actions column:

• View- User is redirected to Assessment & POC list for the corresponding client

# 4. LOC My List- New Show Me category "All Clients with LOCs Due or Overdue"

Authorized users of the LOC My List will now have access to a new show me option "All Clients with LOCs Due or Overdue." This change will affect users with the following user roles:

- MDH Admin Access to All clients
- SPA Admin Access only clients assigned to their provider location
- SPA Supervisor Access only clients assigned to their provider location

Navigate to My List>My Client List, and select the option for LOC. Select the new show me option "All Clients with LOCs Due or Overdue"

| LTSSM       | aryland        |             |                            |        | jennifer<br>Locatior | reitz (On behalf of: /<br>: Maryland Departme | Armstrong, Patri<br>ent of Health |               |                   | Menu           | Account      |                             |   |         |
|-------------|----------------|-------------|----------------------------|--------|----------------------|-----------------------------------------------|-----------------------------------|---------------|-------------------|----------------|--------------|-----------------------------|---|---------|
| 🔂 Home      | L Clients      | i⊟ My Lists | A Alert                    | Da     | shboard              | Assignments                                   | Reports                           | I≡ Wait Lists | & Registries      |                |              |                             |   |         |
| My Client   | List           |             | ^ LC                       | C List |                      |                                               |                                   |               |                   |                |              |                             |   |         |
| Application | ıs             |             |                            |        |                      |                                               |                                   |               |                   |                |              |                             |   |         |
| Nurse Mor   | nitoring       |             | She                        | w me*  |                      |                                               | Due Wit                           | hin *         |                   |                |              |                             |   |         |
| LOC         |                |             |                            |        | h LOCs Due           | or Overdue                                    |                                   | and Overdue   | ~                 |                |              |                             |   |         |
| POS         |                |             |                            |        |                      |                                               |                                   |               |                   |                |              |                             |   |         |
| ATP         |                |             |                            | Filter |                      |                                               |                                   |               |                   |                |              |                             |   |         |
| MDC         |                |             |                            |        |                      |                                               |                                   |               |                   |                |              |                             |   |         |
| Community   | y Settings Que | tionnaire   | Clier                      | tID ≎  | Last Name            | First Name                                    | 0 Age                             | Assigned To   | Last Request Date | LOC Type       | LOC Decision | Medical Information Request | ٥ | Actions |
| EDD Lette   | rs             |             | No data available in table |        |                      |                                               |                                   |               |                   |                |              |                             |   |         |
|             |                |             |                            |        |                      |                                               |                                   |               | No data avali     | able III tablé |              |                             |   |         |

An additional filter will appear called "Due Within" with the options:

1. All Due and Overdue - Displays records for clients that have an NF or CPAS LOC form with an expiration/end date that is either past due or due within 90 days where the client is either Pending or Enrolled in the respective program that LOC

form is used for (i.e. CO, ICS and CFC use the NF LOC form and CPAS uses the CPAS LOC form).

- 2. Due within 30 days or less
- 3. Due within 60 days or less
- 4. Due within 90 days or less
- 5. Overdue

Note: "Due" is determined by the End date of the LOC, which is calculated as the Effective Date + 14 months

# 5. LOC My List- New show me category "My Clients with LOCs Due or Overdue"

Authorized users of the LOC My List will now have access to a new show me option "My Clients with LOCs Due or Overdue." This change will affect users with the following user roles:

• SPA Supports Planner - Access to their assigned clients only

| LISSIN                  | aryianu          |             |        | Locatio              | n: Beatrice Loving I | leart    | i.      |             |    |                   |             |          |              |                                   | Menu | Account |
|-------------------------|------------------|-------------|--------|----------------------|----------------------|----------|---------|-------------|----|-------------------|-------------|----------|--------------|-----------------------------------|------|---------|
| 🔂 Home                  | & Clients        | i⊟ My Lists | Alerts | M Dashboard          | Reports              |          |         |             |    |                   |             |          |              |                                   |      |         |
| • My Client             | t List           |             | LO     | C List               |                      |          |         |             |    |                   |             |          |              |                                   |      |         |
| My Clients              |                  |             |        |                      |                      |          |         |             |    |                   |             |          |              |                                   |      |         |
| Application<br>Assessme |                  |             |        | / me*                |                      |          | Vithin* |             |    | _                 |             |          |              |                                   |      |         |
| Nurse Mor               |                  |             | My     | Clients with LOCs Du | e or Overdue         | ✓ All D  | ue and  | Overdue     | ~  | ·                 |             |          |              |                                   |      |         |
| LOC                     |                  |             |        | Filter               |                      |          |         |             |    |                   |             |          |              |                                   |      |         |
| POS                     |                  |             |        |                      |                      |          |         |             |    |                   |             |          |              |                                   |      |         |
| ATP                     |                  |             | Client | ID 🗘 Last Nam        | e 🗘 First Nar        | ne 🌣 Age | • •     | Assigned To | \$ | Last Request Date | e 0         | LOC Type | COC Decision | \$<br>Medical Information Request | ٥    | Actions |
| MDC                     |                  |             |        |                      |                      |          |         |             |    | No data a         | wailable in | table    |              |                                   |      |         |
|                         | y Settings Qu    | estionnaire |        |                      |                      |          |         |             |    |                   |             |          |              |                                   |      |         |
| EDD Lette               | rs               |             |        |                      |                      |          |         |             |    |                   |             |          |              |                                   |      |         |
| Appeals ar              | nd Eligibility C | hange       |        |                      |                      |          |         |             |    |                   |             |          |              |                                   |      |         |
| Redetermi               | inations         |             |        |                      |                      |          |         |             |    |                   |             |          |              |                                   |      |         |
| Reportable              | e Events         |             |        |                      |                      |          |         |             |    |                   |             |          |              |                                   |      |         |
| Coverage                | Group Chang      | es          |        |                      |                      |          |         |             |    |                   |             |          |              |                                   |      |         |
| MyLTSS                  | List             |             |        |                      |                      |          |         |             |    |                   |             |          |              |                                   |      |         |

Similar to the "All Clients with LOCs Due or Overdue" My List, an additional filter will then appear called "Due Within" with the options:

- 6. All Due and Overdue Displays records for clients that have an NF or CPAS LOC form with an expiration/end date that is either past due or due within 90 days where the client is either Pending or Enrolled in the respective program that LOC form is used for (i.e. CO, ICS and CFC use the NF LOC form and CPAS uses the CPAS LOC form).
- 7. Due within 30 days or less
- 8. Due within 60 days or less
- 9. Due within 90 days or less

10. Overdue

Note: "Due" is determined by the end date of the LOC, which is calculated as the Effective Date .