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

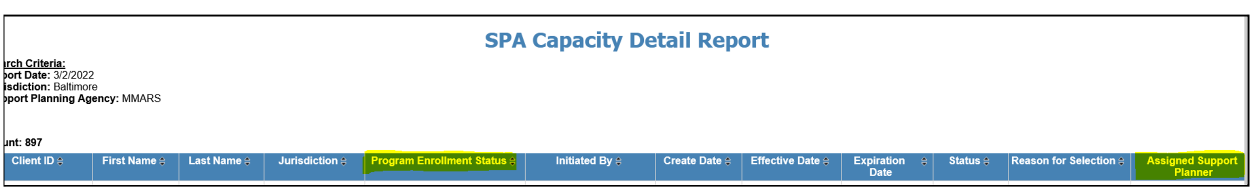
New output columns have been added to the detail level of the SPA Capacity Report for the following user roles:

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 Detail Report

rch Criteria:
ort Date: 3/2/2022
isdiction: Baltimore
port Planning Agency: MMARS

unt: 897

Client ID	First Name	Last Name	Jurisdiction	Program Enrollment Status	Initiated By	Create Date	Effective Date	Expiration Date	Status	Reason for Selection	Assigned Support Planner

2. Current Assignments Report: New Output Columns

ID:

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 **only** 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	CP	can view all clients assigned to their location
FMCS Staff	CP	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	CO	can view all clients assigned to their location
SPA Billing Staff	CO	can view all clients assigned to their location
SPA Intake	CO	can view all clients assigned to their location
SPA Supervisor	CO	can view all clients assigned to their location
SPA Support Planner	CO	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

Current Assignments Report

Total Records: 4093

LTSS Client ID	Client First Name	Client Last Name	MA Number	Assigned Staff	Jurisdiction	Program Enrollment Status

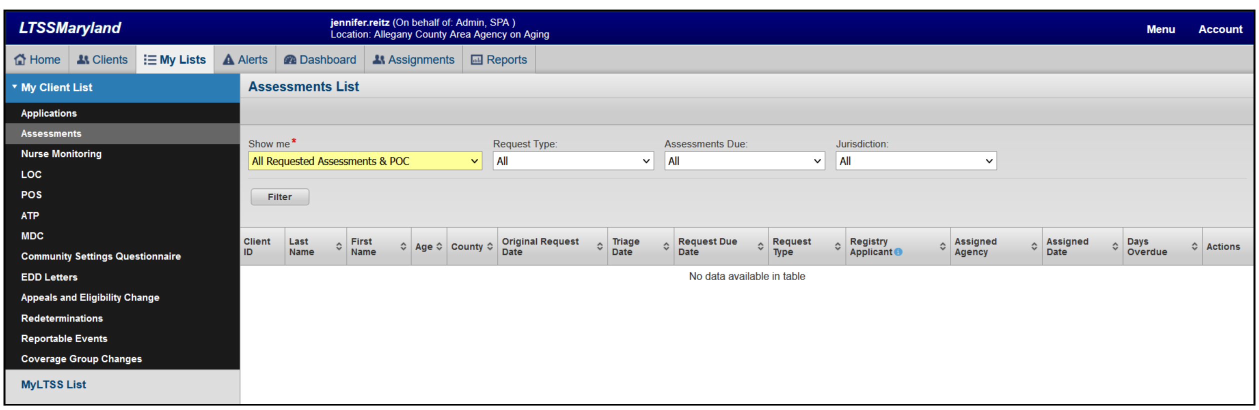
3. Assessment Request My List- Add SPA Agency Access

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:

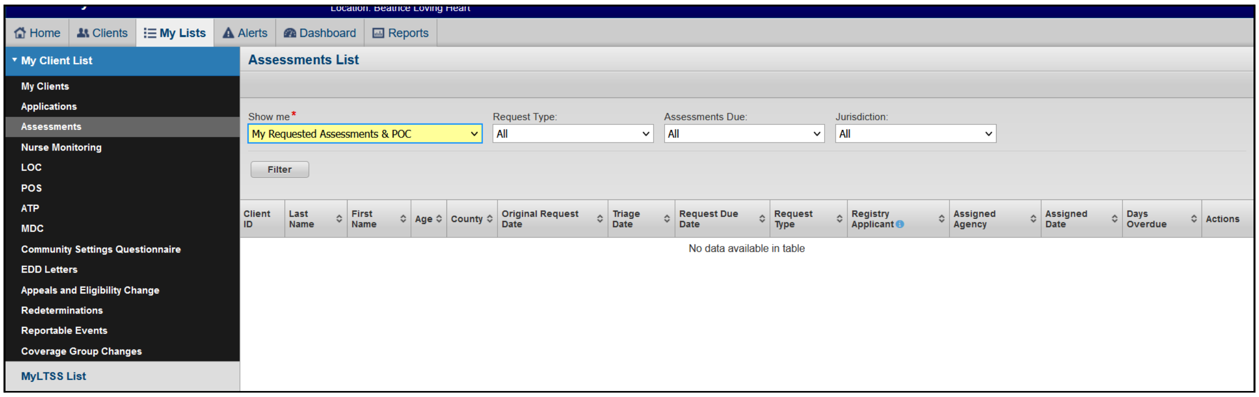
SPA Admin	can view all clients assigned to their location
SPA Intake	can view all clients assigned to their location
SPA Supervisor	can view all clients assigned to their location
SPA Support Planner	can view **only** clients assigned to them

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



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



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

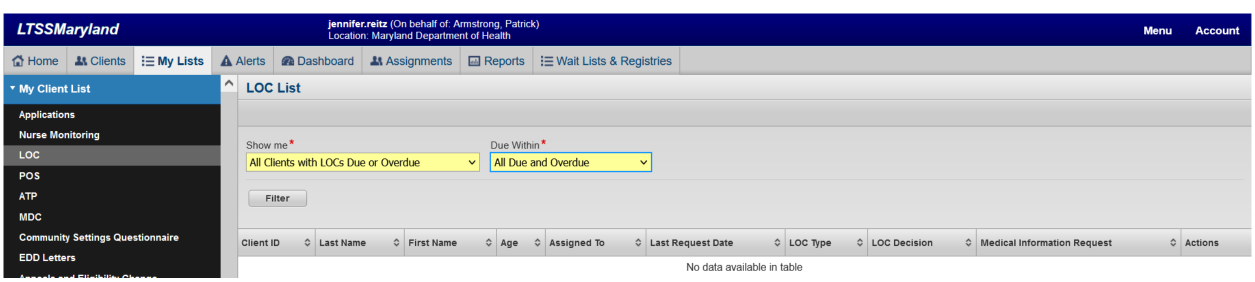
- **View**- User is redirected to Assessment & POC list for the corresponding client

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"



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

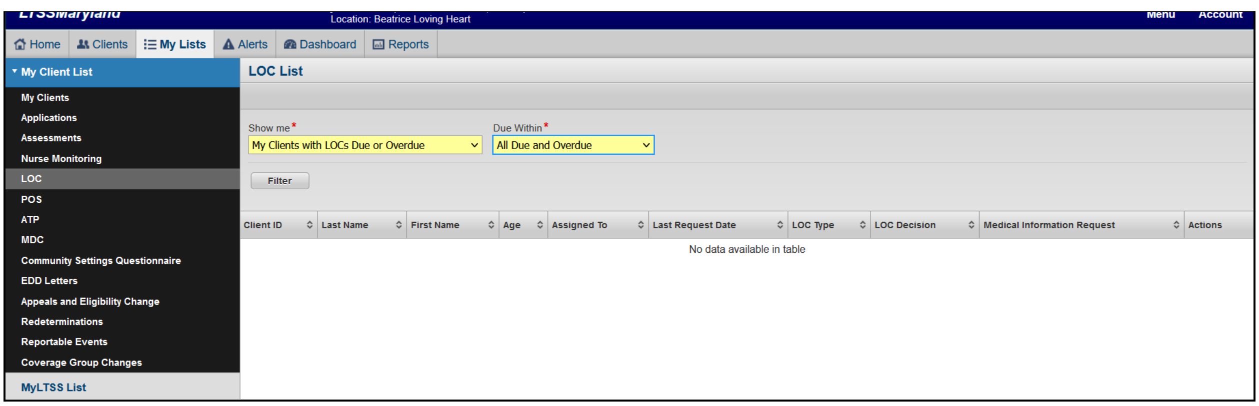
form is used for (i.e. CO, ICS and CFC use the NF LOC form and CPAS uses the CPAS LOC form).
2. Due within 30 days or less
3. Due within 60 days or less
4. Due within 90 days or less
5. Overdue

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



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 .