

# LTSS Maryland - Common Functions for REM

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## 1) Introduction

### a) Purpose and Scope

The purpose of this user manual is to provide specific information and instructions regarding use of the Client Profile module, Client Summary module and Common User Interface (UI) actions in LTSS.

The Client Profile is a feature of LTSSMaryland that stores pertinent information about a person. It contains information such as demographics, Medicaid information, phone numbers, addresses, representatives, and client portal login information.

The user can perform the following functions in the Client Profile:

- Search and review a List View of Clients
- Create Client Profile
- View Client Profile
- Edit certain Client Demographic Information
- Manage Medicaid Number
- Manage Phone Numbers
- Manage Addresses
- Manage Representatives

### b) Acronyms Used

Acronym	Description
<b>CMA</b>	Case Management Agency
<b>CM</b>	Case Manager
<b>LTSS</b>	Long Term Services and Support
<b>MA</b>	Medicaid Number (Medical Assistance Number)
<b>MDH</b>	Maryland Department of Health
<b>MFP</b>	Money Follows the Person program
<b>MMIS</b>	Medicaid Management Information System
<b>SSN</b>	Social Security Number
<b>LOC</b>	Level of Care
<b>LHD</b>	Local Health Department
<b>DDA</b>	Developmental Disabilities Administration
<b>MAPC</b>	Medical Assistance Personal Care -archived waiver program, no longer used
<b>HDM</b>	Home Delivered Meals
<b>DONS</b>	Department of Nursing Services
<b>CCS</b>	Coordinator of Community Services

<b>LHD</b>	Local Health Department
<b>DDA</b>	Developmental Disabilities Administration
<b>MAPC</b>	Medical Assistance Personal Care -archived waiver program, no longer used
<b>HDM</b>	Home Delivered Meals
<b>DONS</b>	Department of Nursing Services
<b>CCS</b>	Coordinator of Community Services
<b>MDC</b>	Medical Day Care
<b>CO</b>	Community Options waiver
<b>CFC</b>	Community First Choice waiver
<b>CPAS</b>	Community Personal Assistance Services waiver
<b>ICS</b>	Increased Community Services waiver
<b>BI</b>	Brain Injury
<b>OHQC</b>	Office of Health Care Quality
<b>SPA</b>	Supports Planner Agency
<b>SP</b>	Supports Planner
<b>SNF</b>	Service Notification Form
<b>POS</b>	Plan of Service (CO programs)
<b>PCP</b>	Person Centered Plan (DDA)
<b>PCP</b>	Primary Care Provider (REM)
<b>CP</b>	Care Plan (DDA)
<b>SP</b>	Service Plan (MDC)
<b>ISAS</b>	In-Home Supports Assurance System
<b>ATP</b>	Authorization to Participate
<b>EA</b>	Environmental Assessment
<b>NF</b>	Nursing Facility
<b>QOL</b>	Quality of Life (survey)
<b>CSQ</b>	Community Settings Questionnaire
<b>EVV</b>	Electronic Visit Verification for community-based services
<b>interRAI</b>	International Resident Assessment Instrument for community-based services
<b>LAH</b>	Living at Home waiver (no longer used)
<b>WOA</b>	Waiver for Older Adults (no longer used)
<b>MDOD</b>	Maryland Department of Disabilities
<b>MyLTSS</b>	Client portal to access certain information in LTSS
<b>RE</b>	Reportable Event (Significant Event, Reportable Incident)

**TABLE 1 – ACRONYMS USED**

### c) Primary Actors

Unless otherwise noted in this section, the following users have access to Client Search, Client profile, Client Summary:

Organization	Role
<b>MDH</b>	MDH REM Administrator, MDH REM Intake Specialist, MDH REM Intake Nurse, MDH REM Physician Advisor
<b>Assigned REM CMA</b>	CMA REM Administrator, CMA REM Case Manager, CMA REM Supervisor, CMA REM Intake Specialist, CMA REM Provider Relations Representative

## 2) Client Search

The purpose of the client search is to assist users in locating clients with an existing profile in the LTSSMaryland system.

### a) Search and List Clients

After going to the Clients tab at the top of LTSSMaryland home page, the user will be presented with a page where they can search for clients in the system by using a combination of filter criteria. Based on the criteria entered, the system will search for the closest matching clients within the LTSSMaryland tracking system.

1. On the Top Navigation bar, select the “Clients” tab to display the search function.
2. The search feature can be used to locate clients based on specific client information.
  1. The “Search” function will display a list of clients with a link to the client profile.
3. Using “Search” you will be able to locate clients and view their client profile, which will allow you to determine if an individual is receiving services, to find the client’s program information or to view other client-specific information.

### i) Search Criteria

- A. The “Search” function can be used to locate individuals in LTSSMD based one or more of the following six (6) criteria:
  1. Client ID [Note: This is a LTSS system-generated, unique ID for each client]
  2. Last Name
  3. First Name
  4. Social Security Number (SSN#)
  5. Medicaid Number (MA#)
  6. Date of Birth

- B. The “Search” function can be used by entering any one of these items individually or by using a combination.
  - 1. Partial information, such the first few letters of a name, can be entered in the Search text boxes.
  - 2. When searching for Client Profiles, the system should implement fuzzy logic on each search criteria field so that the results produced find exact and nearly matching clients (this assists if the user makes a small typo).
    - i. I.e. BATMAN may return BATEMAN or BITMAN
  - 3. The user may select “Clear” to clear all the data in the search criteria fields.

**ii) Search Results**

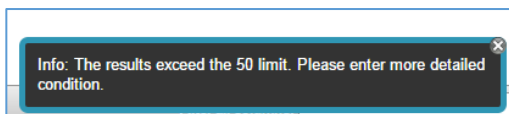
**A. “No Data Available in Table”**

When you enter client information, in the search criteria, if the client is not present within LTSS, the system will show you the following message: “No Data Available in table.”

- 1. Clear the search and try again using a different search criteria or partial information to attempt to find the individual.
  - i. Sometimes a person’s name is spelled differently, or an inaccurate Medicaid number may have been provided.
  - ii. Information provided was too narrow and excluded the individual you were searching for.
- 2. If alternative ways to find the individual still results in the “No data available in table” message, a new Client Profile will be needed to be added in the LTSSMD system before any programmatic changes or management can occur.
  - i. To ensure consistency and data accuracy, new Client Profiles can only be created by MDH REM Administrator, MDH REM Intake Specialist, MDH REM Intake Nurse
  - ii. This process is necessary to avoid duplicate client entries for the same individual.

**B. Display Limits**

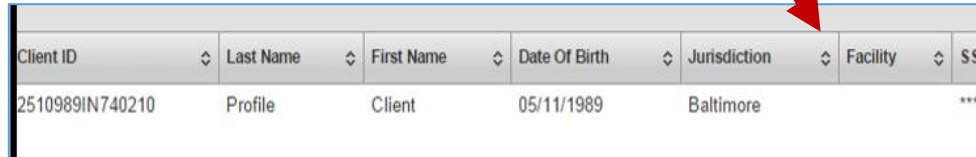
- 1. LTSSMD will return up to 50 exact or near matches
- 2. When searching for Client Profiles, if the search criteria entered by the user is not specific enough to produce less than 50 matching results, the Authorized User will be presented with a message prompting them to enter additional search criteria to narrow the results if necessary.





iii) Search List View

- A. Results will be displayed in the table below the search fields.
- B. The Default sort option is in numeric order of the Client ID.
- C. Search results may be reordered by using the Gray arrows at the end of each display column, shown here.



Client ID	Last Name	First Name	Date Of Birth	Jurisdiction	Facility	SS
2510989IN740210	Profile	Client	05/11/1989	Baltimore		***

- D. Additionally, the user can filter the results by typing in the Filter all columns box located at the bottom right of the screen, seen here.



Filter all columns:

b) Cases Search

To review program-related information for a client, the Authorized User can enter the search criteria and press the Cases button as seen in the figure below, and this will display a list of clients, with the “Client Summary” link displayed in the “Actions” column.

- i. The “Client Summary” link will take the user to the client summary page. The user can either click the blue hyperlink to view client summary, or can right click on the blue hyperlink and click “Open link in new tab” to preserve the search page results and open a new browser tab.

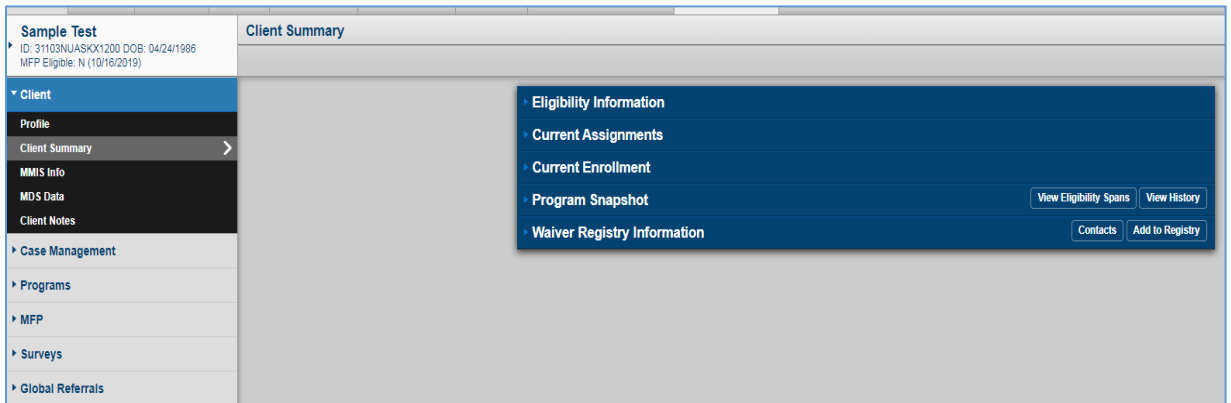


Client ID	Last Name	First Name	Date Of Birth	Jurisdiction	Facility	SSN#	Current MA#	Primary Phone#	Program Enrollment	Actions
11103NUASHOX1200	Test	Sample	04/24/1986	Montgomery		***-**-0000	1111111111	(301) 111-1111	CFC	<a href="#">Client Summary</a> <a href="#">Add to Reality</a>
11190POASKBS100	Test	Sample	01/01/2010	Baltimore City		***-**-0000	0000000000		CFC	<a href="#">Client Summary</a> <a href="#">Add to Reality</a>

i) Client Summary Link

- 1. An Authorized User can view the “Client Summary” for a specific individual based on certain permissions. The following information is displayed. Detailed information

related to Client Summary is listed towards the end of this user manual.



- When going to the Client Profile Summary page, the following warning messages are displayed if the associated conditions are not met:

Warning Message	Details
<b>If client does not have an address marked as “current” display:</b>	Info: The client profile has no current address
<b>If the client does not have a Medicaid # marked as “current” display:</b>	Info: The client profile has no current MA #
<b>If client does not have any representative marked as “Guardian of person” display:</b>	Info: The client profile has no current guardian of person
<b>If client does not have any representative marked as “Power of attorney (for medical decisions)” display:</b>	Info: The client profile has no Power of attorney (for medical decisions)
<b>If client does not have any representative marked as “Power of attorney” display:</b>	Info: The client profile has no Power of attorney
<b>If client does not have any representative marked as “Power of attorney (other)” display:</b>	Info: The client profile has no Power of attorney (other)

### c) Profile Search

Much like the Cases Search, after entering search criteria and searching using the “Profiles” action, a listing of matching clients will be displayed, and an authorized user can navigate to a Client Profile by clicking the Profile link under the Actions column.

### 3) Client Profile

The Client Profile or Client Details tab gives authorized users a high level view in to the various sections that comprise a Client Profile. For each respective section, users will be able to see summary information. Each area of the Client Profile left side navigation will have its own independent section where the user can expand by clicking on it to see summary details. If certain pieces of information are missing from the Client Profile, the system will show informational messages to the user as outlined above.

#### a) Create Client Profile

Information about a client must be entered in LTSSMaryland in order to complete program-specific forms.

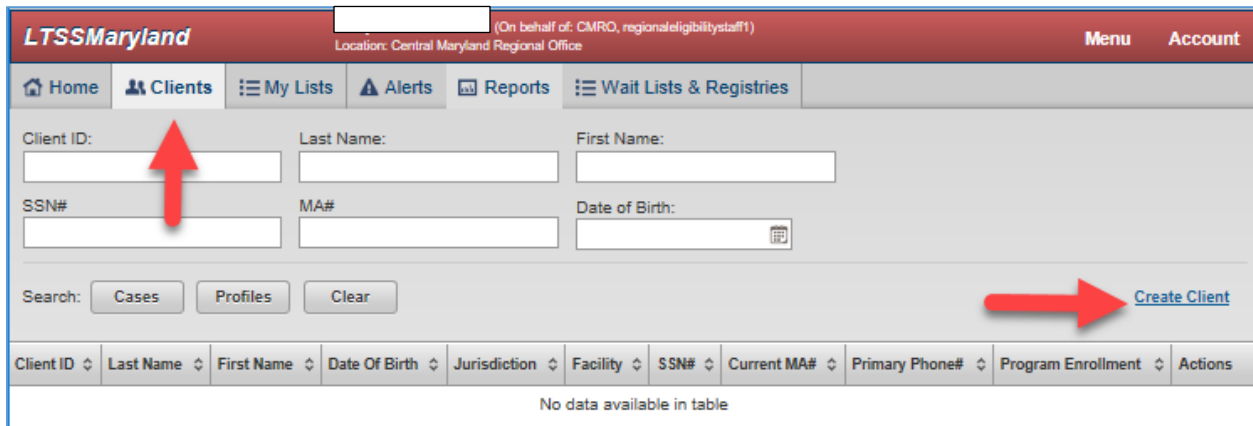
In the event a person does not have a Client Profile set up in the system, authorized users will have the ability to create a Client Profile and start capturing the necessary data to set up the client’s record in the

tracking system. **Extreme care should be taken to ensure the user does not create a duplicate profile for a client.**

The following users associated to the REM Program have access to this function:

- REM Admin, REM Intake Nurse, REM Intake Specialist

1. Create a profile by selecting the “Clients” tab at the top of the page, then select the “Create Client” link.



This will open the first section of the profile, the “Demographic” page.

This is the only section that must be completed in order to create a client’s Profile in LTSSMaryland. All other sections are optional for initial creation, but information from those sections may be required to complete other processes.

2. The required fields are marked with a red star “\*”. Once completed, select the “Continue” button at the top right of the screen. The system will perform validation checks.

client:New Client ID: - DOB: -undefined

Client Profile — Demographics New

[Cancel](#) Continue

### Client Demographic Information

#### Client Information

First Name: \*

Last Name: \*

Middle Name:

Suffix:

Birth Name (Maiden Name):

Also Known As:

Date of Birth: \*

Gender: \*

Race:

Hispanic:  Yes  No

Jurisdiction/County: \*

Dependent of Legal Resident who is an Active Military Service Member:  Yes  No

#### Additional Client Information

SSN# \*

Check if SSN# is unknown  
*Disclaimer: By checking this box you are agreeing to the risk of creating a duplicate client record.*

Medicare #

Marital Status:

Email Address:

Primary Language:

Date of Death:

#### Advanced Directives

DNR:  Yes  No  Unknown

Advanced Directives Living Will:  Yes  No  Unknown

Medical POA:  Yes  No  Unknown

Advanced Directives Medical POA Durable:  Yes  No  Unknown

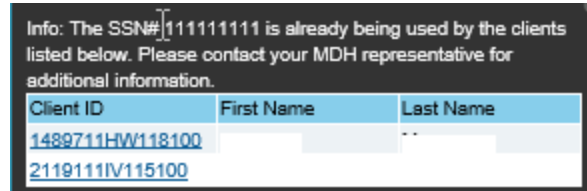
Advanced Directives General POA:  Yes  No  Unknown

Advanced Directives General POA Durable:  Yes  No  Unknown

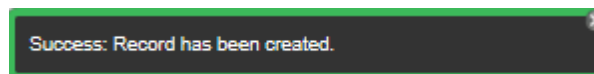
Advanced Directives Guardian of Person:  Yes  No  Unknown

Advanced Directives Guardian of Property:  Yes  No  Unknown

- Upon submission, the system will automatically check if the SSN# matches any current profiles in LTSSMaryland. If it does, an error message is displayed. Do not create a new profile for a client who is already in LTSSMaryland.

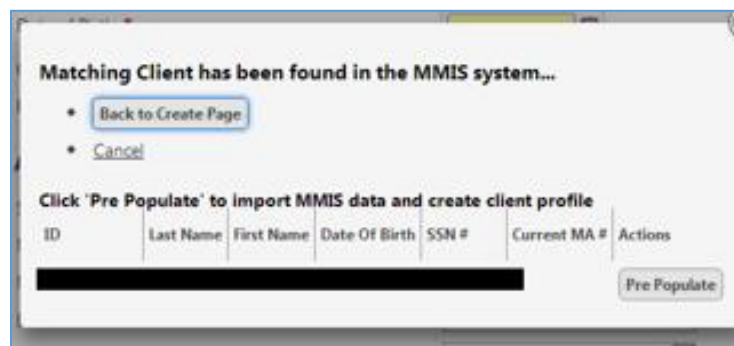


- When there are no errors, a message will appear stating that the information was saved.



- If the system detects that the client’s demographics information already exists in LTSSMaryland, the matching client(s) will be displayed. The user can select which to use and will send the user to the “Client Summary” page.

If the client already exists in MMIS, the user will have to decide whether to proceed creating a new client profile or use information from an existing record. The user can select whether to pre-populate a client’s Profile using information from MMIS or to continue with the manually entered data.



- The user may select the “Back to Create Page” to begin again, “Cancel” to proceed to the next page, or “Pre Populate” to copy the information from MMIS and send the user to the “Client Profile” page.

When the client profile does not exist in LTSSMaryland or in MMIS, the “MA Number” page will appear. The MA number will appear when it is copied from MMIS. The “Skip” button will allow this user to skip to the next page. The user may enter another MA # after the Client Profile has been created.

Client: Train Trainer1 ID: 2119013RT110100 DOB: 01/01/1900 MFP Eligible: N/A

Client Profile — MA Number New

[Skip](#)

### Client MA Number

#### Medical Assistance Information

Would you like to set this as the current MA#?

Set as Current MA#

MA#: \*

Eligibility Type:

Coverage Group:

Start Date:

End Date:

Comment:

- 7. The “Phone Number” page will appear. The “Skip” button may be selected to pass this page. The required fields are marked with “\*”. When the “Save & Continue” button is selected, the validation of the fields will be performed. When there are no errors, a message will appear stating that the information was saved.

Client Profile — Phone Number New

[Skip](#) Save & Continue

### Client Phone

#### Client Phone Number

Would you like to make this the primary phone number?

Set as Primary Phone

Phone Type: \*

Best Time to Call:

Phone Number: (XXX XXX XXXX)\*  Ext:

Notes:

- 8. The “Address” page will appear. The “Skip” button may be selected to pass this page. The required fields are marked with “\*”. When the “Save & Continue” button is selected, the validation of the fields will be performed. When there are no errors, a message will appear stating that the information was saved.

**Client Profile — Address** New

[Skip](#) [Save & Continue](#)

---

### Client Address Form

**Client Address Information**

Would you like to set this as the current address?  
 Set as Current Address

Would you like to set this as the mailing address?  
 Set as Mailing Address

Would you like to set this as the permanent address?  
 Set as Permanent Address

Address Type: \*

Address Description:

Transition Date:

Length of Stay:

Street Address 1: \*

Street Address 2:

City: \*

State: \*

Zip Code: \*

Jurisdiction/County: \*

Please make sure the jurisdiction matches the address.

Meets Definition of Community Setting?

---

**Comments:**

Comment:

145.9 MS  
599.1 MS

9. The “Representative” page will appear. The “Skip” button may be selected to pass this page. The required fields are marked with “\*”. When the “Save & Finish” button is selected, the validation of the fields will be performed. When there are no errors, a message will appear stating that the information was saved.



Client Profile — Representative New

[Skip](#) [Save & Finish](#)

### Representative Contact Form

---

#### Representative Information

First Name: \*

Last Name: \*

Middle Name:

Suffix:

Date of Birth:

Relationship to Client: \*

---

#### Representative Contact Information

Phone Type: \*

Best Time to Call:

Phone Number: (XXX XXX XXXX) \*  Ext:

Email:

Street Address 1:

Street Address 2:

City:

State:

Zip Code:

Jurisdiction/County:

---

#### 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)

**I would like my representative to: (Check all that apply)**

Receive copies of all letters about my eligibility and discuss my eligibility with the Maryland Department of Health.

Receive a Medical Assistance Card on my behalf.

---

#### Caregiver Information

Set as Primary Caregiver

*If selected, Date of Birth is Required.*

---

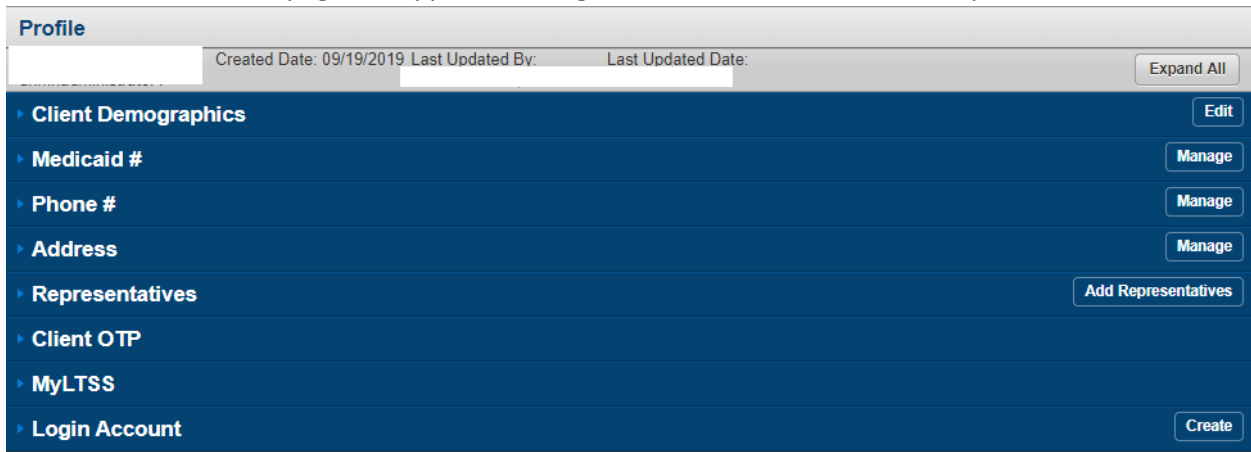
#### Comments

Comment:

3080.3 ms

2027.9 ms

10. The client “Profile” page will appear allowing the user to review and edit the profile information.

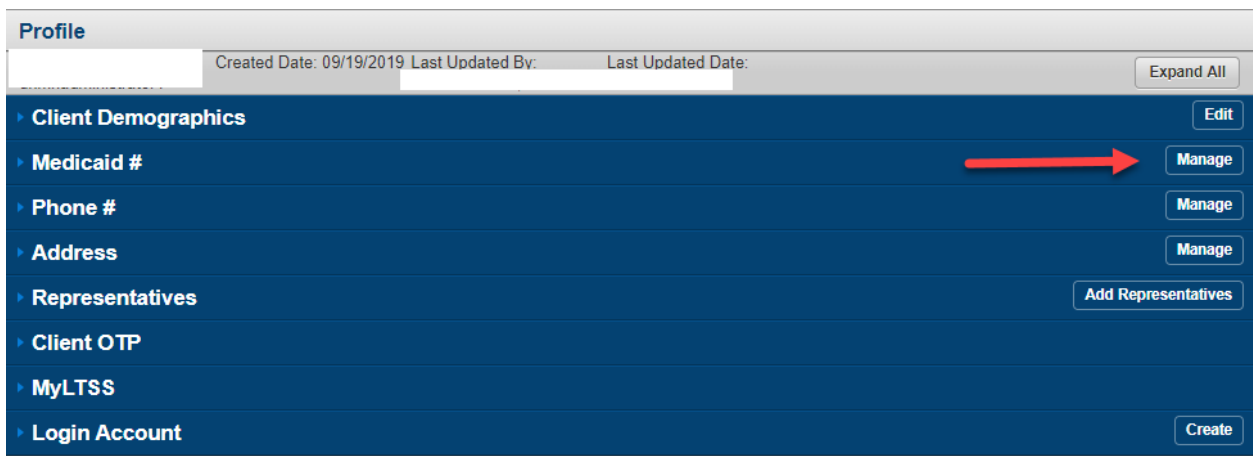


### b) Medicaid Number

An individual may have more than one Medicaid number (MA#) over his or her lifespan. To avoid replicating clients within the LTSSMaryland system, an Authorized User can manage an individual’s MA#. This allows the user to enter the history of Medicaid number information for a client over their lifespan. The current MA# is required for an individual to appear as eligible to receive services under the programs operating within LTSSMaryland.

#### i) View and List

A client can have only one original MA#. A client can have only one current MA# at a time, but multiple in the past. This shows how users can navigate to see the full history of MA# information for a client by clicking the Manage function on the Medicaid # section of the Client Profile summary page.

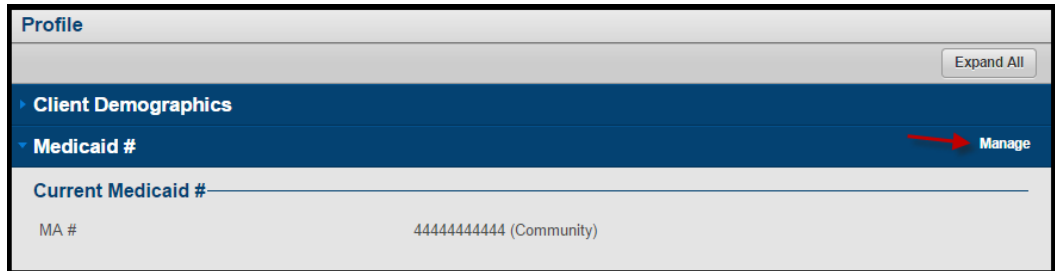


#### ii) Manage

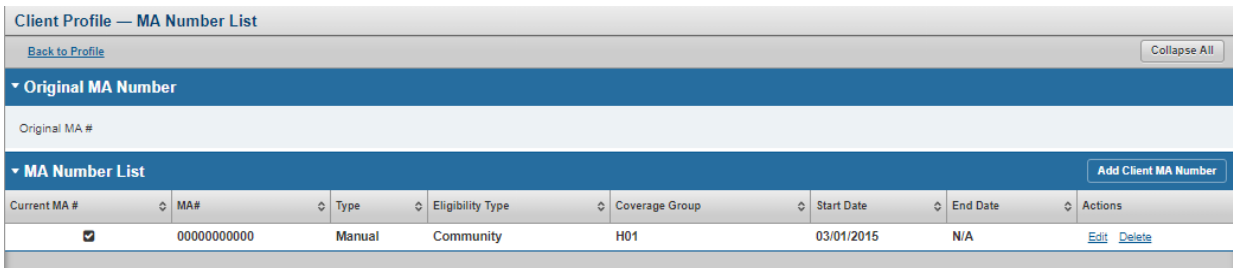
A. The ability to manage this information is available when the client did not have the

number imported from MMIS. Once imported, the ability to manage is not available.

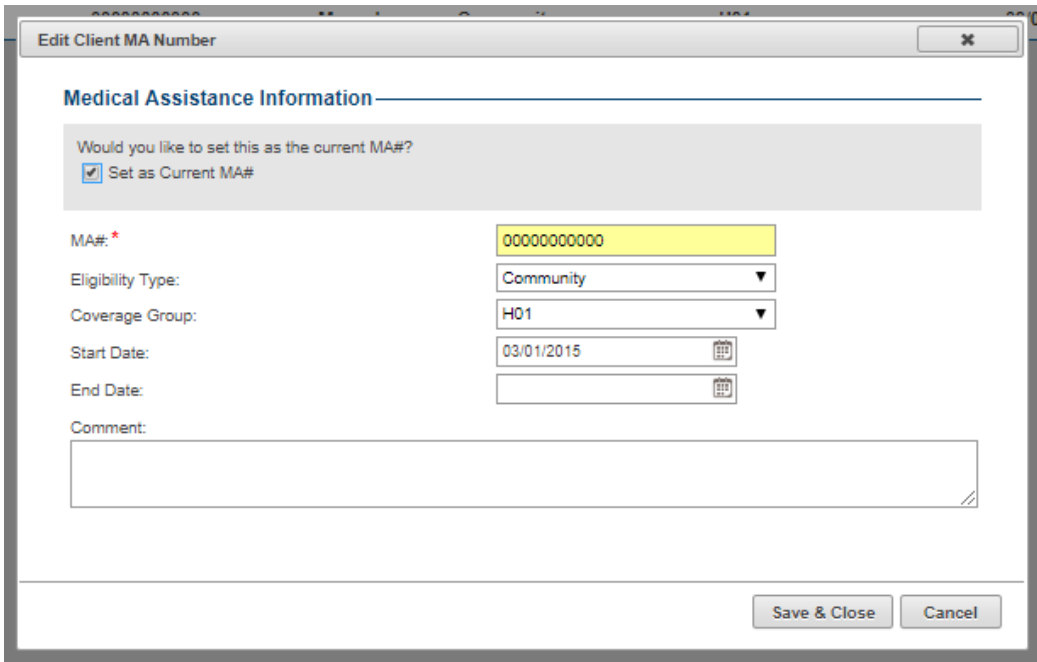
- B. From the client’s “Profile” link, select the “Manage” button on the “Medicaid #” line.



- C. System will navigate the user to the Client Profile-MA Number List page, authorized users can add MA Number by clicking on the “Add Client MA Number” button.



- D. Enter values in the required field (required field are marked with a red Asterix) and click on Save & Close.



c) Phone Number

This contains the phone number information for a client. For clients with multiple phone numbers on their profile you must click Manage to view the full list of phone numbers.

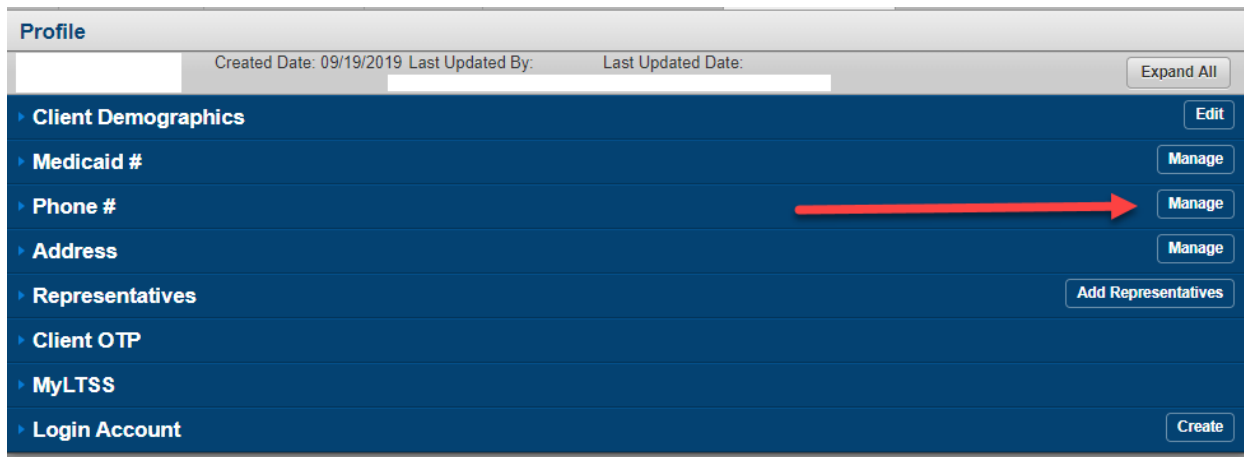
i) View

- A. If the client has a primary phone number, that information will be displayed on the client’s Profile page by clicking on the blue Phone # bar.
- B. A client can have only one primary phone number at a time.

ii) Manage Phone Number

This section shows how users can navigate to see the full list of phone number information for a client. Do so by clicking the Manage function on the Phone # section of the Client Profile Summary page.

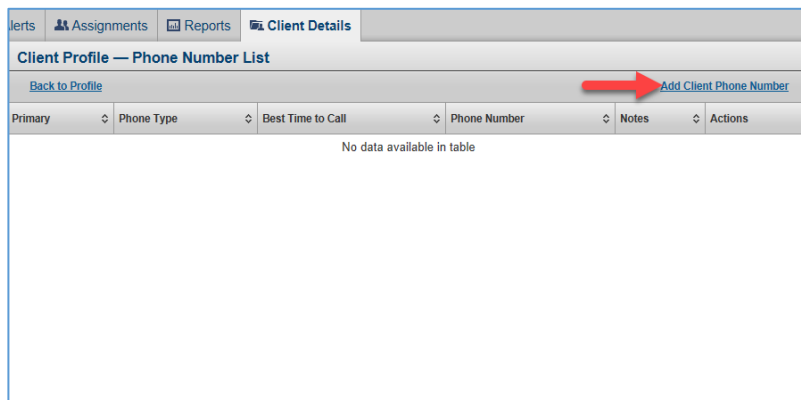
- A. From the “Client Profile” link, select the “Manage” button on the “Phone #” line.



- B. This screen illustrates the phone number information for a client. From this page, users will be able to see all phone number information for a client as well as take certain actions related to phone numbers based on their permissions.

iii) Add Client Phone Number

- A. Select the “Add Client Phone Number” link.



- B. When adding a new phone number for a client, the user will be prompted to provide specific information related to the new phone number. Adding comments in the comments field is strongly encouraged. Do not check the Allow for ISAS IVR checkbox unless the number is intended to be used for ISAS billing.

Note: Fields with “\*” (single red asterisk) are required to contain data.

**iv) Set Primary Number**

- A. An individual may have multiple numbers in the system, however there can only be one primary number at a time.
- B. The “Set as Primary Phone” box must be selected for at least one of the numbers or an error message will be displayed on the client’s Profile page.

**v) Save and Close**

- A. Select the “Save & Close” button to save the edits.
- B. When no error messages are displayed, the data is saved.
- C. Select “Cancel” to discard changes.
- D. The client’s “Phone Number List” page is displayed. You can return to the Client Profile summary by clicking the Back to Profile blue hyperlink in the upper left corner.

vi) Edit Phone Number

A. The “Edit” button allows the user to update or change the information for the selected phone number.

Primary	Phone Type	Best Time to Call	Phone Number	Notes	Actions
<input checked="" type="checkbox"/>	Mobile	Both	(410)		Edit Delete

vii) Delete Phone Number

- A. The “Delete” button allows the user to remove the information for the selected phone number.
- B. When attempting to delete a phone number for a client, the Authorized User will be prompted to confirm their decision.

Additional Notes:

1. The user may enter the phone number “000-000-0000” and use the comments box to add other important phone number information.
2. If a blue Similar Records hyperlink displays next to a client phone number, this will take you to a list of clients who have the same phone number listed on their client profile.
3. MMIS Import will import phone numbers from MMIS. These numbers may or may not be up-do-date. To identify an out-of-date phone number, click Edit and enter comments indicating the number is no longer valid for this client.

d) Address

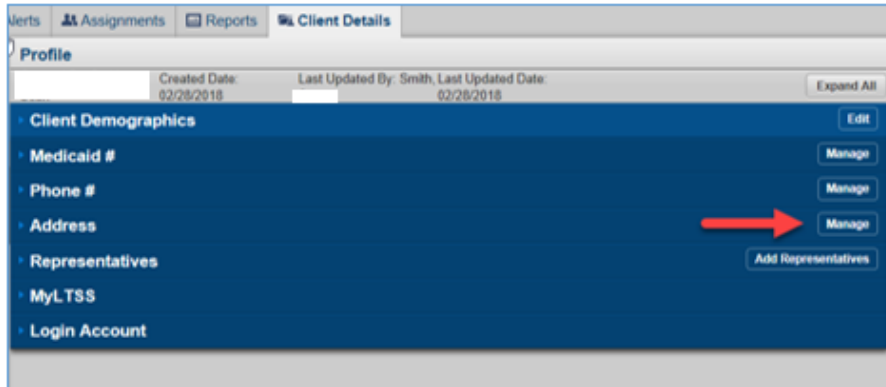
The Address section is used to capture the history of address information for a client. From the Address List page, Authorized Users will be able to see the history of address information for a client as well as take certain actions related to addresses based on their user permissions.

i) View

- A. The current address will be displayed on the client’s Profile page.
  - i. An individual may have several addresses in the LTSSMD System
  - ii. An individual can have only one of each of the following address types at a time:
    - current address
    - mailing address
    - permanent address
- B. An individual must have one current address identified in the LTSSMD system or an error message will appear on the “Client Profile” page.
- C. To view all addresses on file, click the Manage button on the client profile next to Address

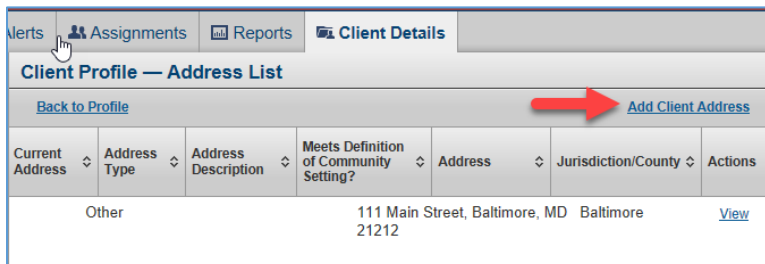
ii) Manage Address

- A. From the client’s Profile link, select the “Manage” button on the Address line.



iii) Add Address

To add an address, select the “Add Client Address” link.



Fields with “\*” are required. A client is required to have one current address, or an error message will appear on the client’s Profile page.

**Client Profile — Address**
New

Cancel
Save

**Client Address Form**

**Client Address Information**

Would you like to set this as the current address?  
 Set as Current Address

Would you like to set this as the mailing address?  
 Set as Mailing Address

Would you like to set this as the permanent address?  
 Set as Permanent Address

Address Type: \*

Address Description:

Transition Date:

Length of Stay:

Street Address 1: \*

Street Address 2:

City: \*

State: \* Maryland

Zip Code: \*

Jurisdiction/County: \*   
Please make sure the jurisdiction matches the address.

Meets Definition of Community Setting? N/A

**Comments:**

Comment:

**iv) Save**

- A. Select the “Save” button to accept the edits.



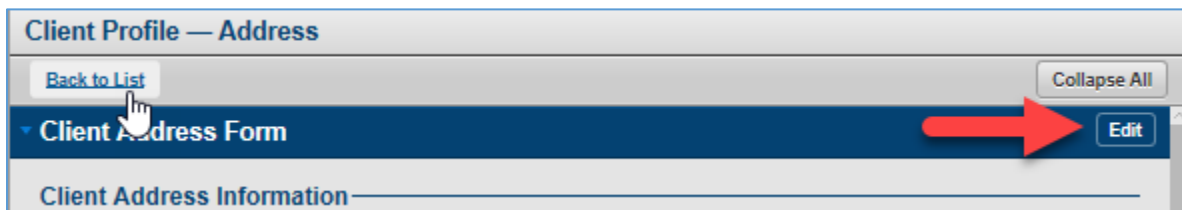
- a. When no error messages are displayed, the data is saved.
  - b. If you do not want to not save the data, select the “Cancel” button.
- B. The individual’s “Address Number List” page is displayed.

v) View & Edit

- A. To view the address details, select the “View” button.



- B. For some Authorized Users, selecting “View” allows the Authorized User to view and edit the information.



e) Representatives

This section contains the history of representative information. Representative information is utilized within the system to know if another person is authorized to take action on behalf of a client and their level of involvement in the client’s application and enrollment process. Summary information about the client’s representatives will be shown to the user on the profile page. Certain Authorized users will have the ability to view additional details and take other necessary actions on representative information.

i) View

From the Client Profile summary page, an Authorized User can view summary details of client’s representatives within the list and view all the details for an existing representative by clicking the view link or add new representative information.

- A. To view a specific Representatives information, select the “View” link.
- i. This takes the Authorized User to the view page of the specific representative record where they can view further details.
  - ii. From this page you can Edit the information (see iii below).

- iii. CFC Representative Form from this page you can view the list of CFC representatives at the bottom of the form. Authorized Users can View, Print, or Add a CFC Representative here

**Profile**

Created Date: 09/19/2019 Last Updated By: Last Updated Date: Expand All

- ▶ Client Demographics Edit
- ▶ Medicaid # Manage
- ▶ Phone # Manage
- ▶ Address Manage
- ▶ Representatives Add Representatives

Representative Name	Date of Birth	Relationship	Guardian of	CFC Representative	Actions
Connie REP CO REM REp		Guardian	Person, Property	<input checked="" type="checkbox"/>	<a href="#">View</a>

**Client Profile — Representative**

[Back to Summary](#) Expand All

- ▶ Representative Contact Form Edit
- ▶ CFC Representative Form Add

ii) Add Representative

- A. From the client Profile, select the “Add Representative” button on the “Representatives” line.

**Profile**

Created Date: 09/19/2019 Last Updated By: Last Updated Date: Expand All

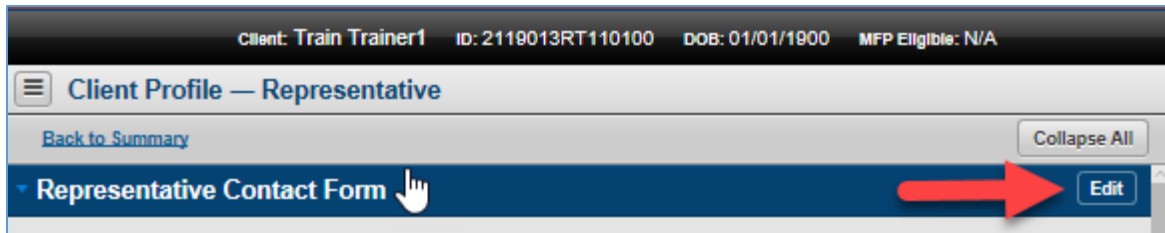
- ▶ Client Demographics Edit
- ▶ Medicaid # Manage
- ▶ Phone # Manage
- ▶ Address Manage
- ▶ Representatives Add Representatives

- B. When adding a new representative for a client, the user will be prompted to provide specific information.

- C. After entering new client representative information, user should press Save and the system will display the Representatives List with the new client representative record. Note: Fields with “\*” are required to contain data.

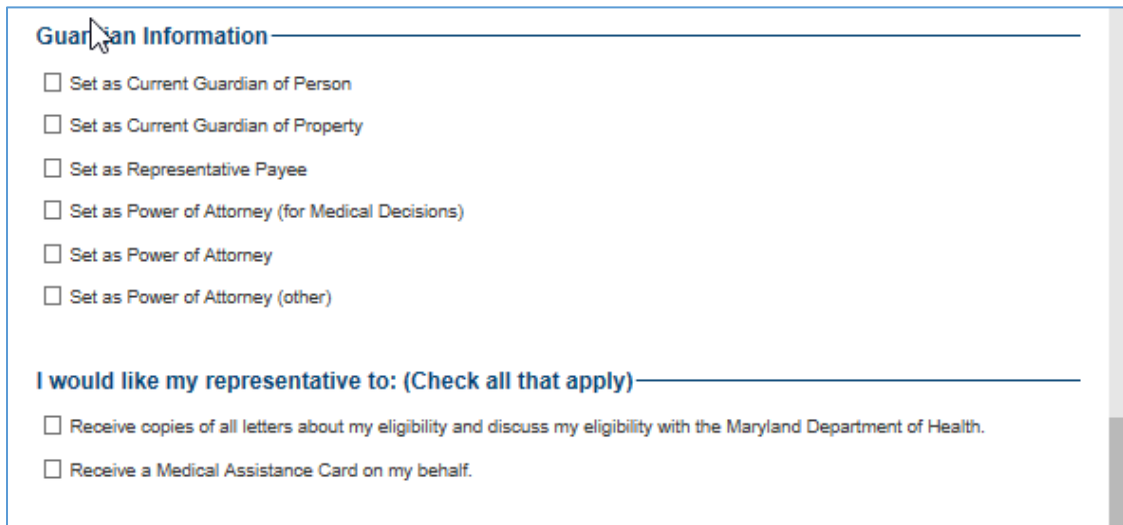
iii) Edit

- A. The Edit button takes the Authorized User to “edit” mode of the specific representative where the Authorized User can modify necessary information.
- B. To edit a representative’s information, Authorized Users can select the “Edit” button while in the View mode.



Note: Fields with “\*” are required to contain data.

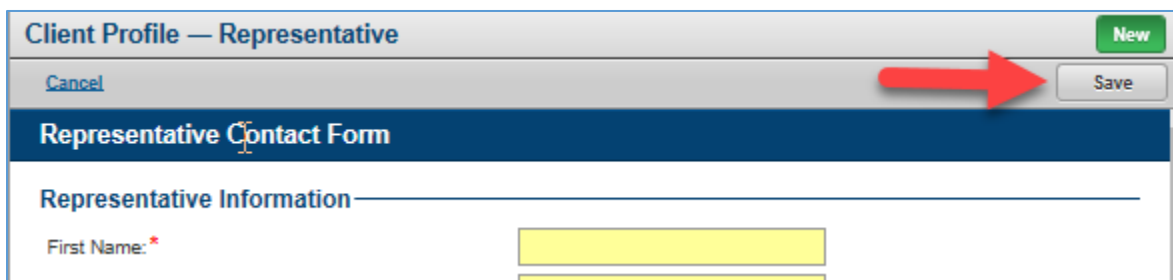
Note: A client must have one “Current Guardian of Person” and one “Current Guardian of Property” or an error message will appear on the client’s Profile page. A client can have only one “Current Guardian of Person” and one “Current Guardian of Property”.



iv) Save

- A. The “Save” button allows the Authorized User to save the Representative information that is being added or edited.
  - a. The system will check the specific section for required to save fields and produce an error message letting the user know which were missed, if any.

- b. When no error messages are displayed, the data is saved.
- c. If the Authorized User selects the “Cancel” button, the system returns the Authorized User to the Client Profile – Summary screen and will not save the previously entered information.
- B. After saving a representative, authorized users will be able to view information related to that representative and edit information related to that representative.



- E. Strengths  
This section is program-specific and is not utilized by REM
- F. Goals  
This section is program-specific and is not utilized by REM
- G. Client OTP  
This section is program-specific and is not utilized by REM. It contains the One Time Password Device assignment capability
- H. MyLTSS  
This section is program-specific and is not utilized by REM at this time. It may be utilized at a later date.
- I. Login Account  
This section is program-specific and is not utilized by REM

## 4) Client Summary

The Client Summary is intended to provide a concise overview of information related to the client with access to Program Application, Enrollment, Eligibility Information, Current Assignments as well as waiver and waiting list information. The Client Summary page combines information from the client profile, MMIS, and various forms related to the client into one page in LTSSMD. An Authorized User can access each area by clicking on each panel or by clicking on the “Expand All” button.

### a) View Client Summary

#### i) Purpose of This Function

The Client Summary page gives an overview of all the program related information for a client.

### ii) Authorized Users

The following roles have View access to this function and related subsection:

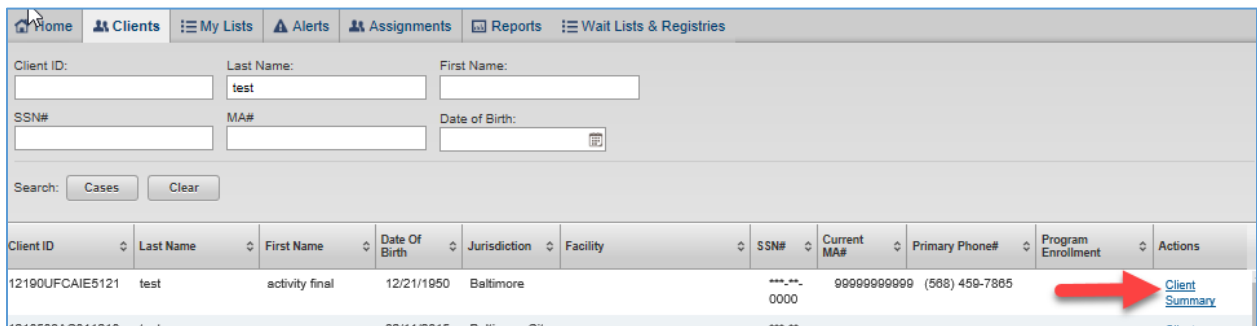
Any role authorized to access the LTSS system.

Note: Some information that may be available to view under the Client Summary may be from an individual who is concurrently enrolled in another MDH program or waiver.

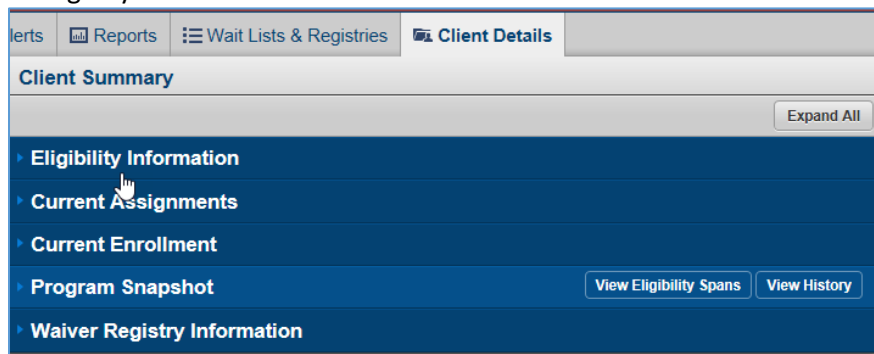
Note: Some information may be grayed out and action links shown below may not be available for certain users who do not have View or Edit permissions for that specific information.

### iii) How to Access This Function

1. From the LTSS MD Home Page, select the <Clients> tab.
  - a. Enter the search criteria to locate the client and search.
  - b. Click the <Client Summary> link.



2. The Client Summary page will display the links to the following information:
  - a. Eligibility Information
  - b. Current Assignments
  - c. Current Enrollment
  - d. Program Snapshot
  - e. Waiver Registry Information



3. Display Options
  - a. Expand All

Allows the actor to expand all the sections within the Client Summary in order to see the summary details of each section.

b. Collapse All

Allows the actor to collapse/close all the sections within the Client Summary in order to see the panel headings and identify the different sections within the Client Summary without seeing the specific content within each section.

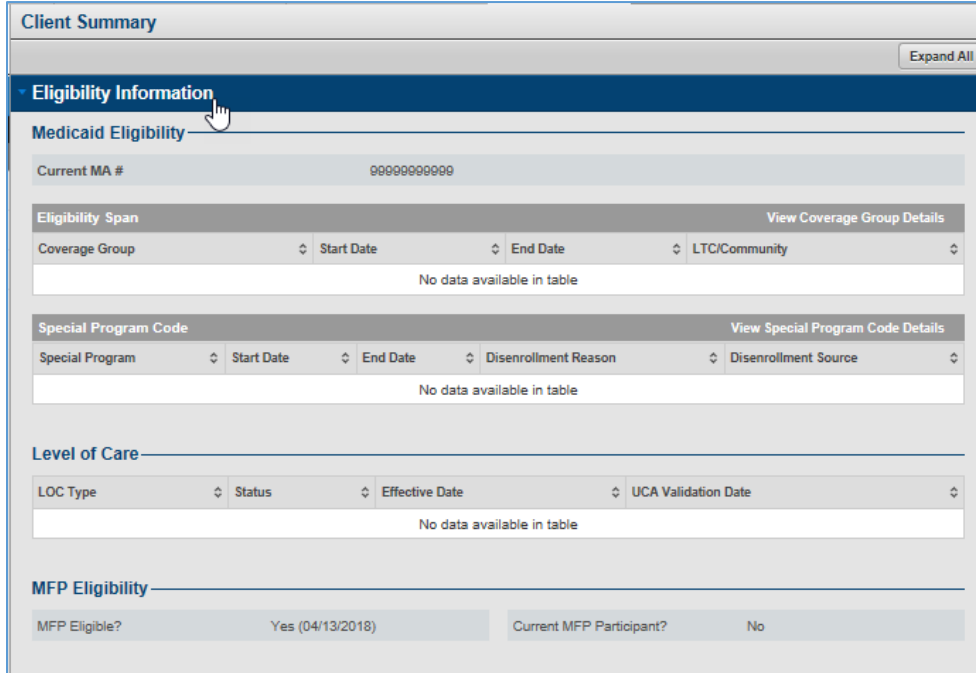
b) Eligibility Information

i) Purpose of This Function

The Eligibility Information section of the Client Summary will contain information about the client’s Medicaid Number (MA#), the Eligibility Span information, Special Program Codes, Level of Care information, and the MFP eligibility. Based on the Authorized User’s permissions, information about different coverage groups and special program codes may also be displayed. This information is updated nightly using records from MMIS and cannot be edited on this page.

ii) How to Use This Function

1. From the Client Summary, click the <Eligibility Information> bar.



c) View Current Assignments

i) Purpose of This Function

The current assignments section in the Client Summary will incorporate all the details about the agency and staff assignments for the client.

ii) How to Use This Function

1. From the Client Summary, click the <Current Assignments> bar.
  - a. The View History link is located in the 'Agency Assignments' section under the Current Assignment section. The View History link takes the actor to different pages depending on the specific agency provider assignment.

The screenshot displays the 'Current Assignments' section of the LTSS system. It features two main tables: 'Agency Assignments' and 'Staff Assignments'. The 'Agency Assignments' table lists two entries: 'BI Provider' assigned to 'Dove Pointe (Default All Jurisdictions)' on 09/20/2019, and 'REM CMA' assigned to 'THE COORDINATING CENTER' on 10/17/2019, with a 'View History' link for the latter. The 'Staff Assignments' table lists four entries with columns for Assignment Type, Date Assigned, Staff Name, Agency, Phone Number, and Email. The 'Current Enrollment' section is partially visible at the bottom, along with a 'View Eligibility Spans' button.

Assignment Type	Provider	Assignment Date	Action
BI Provider	Dove Pointe (Default All Jurisdictions)	09/20/2019	
REM CMA	THE COORDINATING CENTER	10/17/2019	<a href="#">View History</a>

Assignment Type	Date Assigned	Staff Name	Agency	Phone Number	Email
BI Case Manager	10/01/2019	bicasemanager1 MHA	Mental Hygiene Administration - Mental Hygiene Administration (Default All Jurisdictions)	(410) 715-6559	bicasemgr1@ltssdomain.com
CMA REM Case Manager	09/21/2019	CMA REM Case Manager1	THE COORDINATING CENTER - THE COORDINATING CENTER	(306) 308-0000	
EDD Case Manager	09/20/2019	dewscasemanager1 EDD	DEWS - EDD (Default All Jurisdictions)	(410) 715-6539	dummy@ltssdomain.com
BI Provider Staff	09/20/2019	biproviderstaff1 DP	Dove Pointe - Dove Pointe (Default All Jurisdictions)	(410) 715-6539	dummy@ltssdomain.com

d) View Current Enrollment

i) Purpose of This Function

The purpose of this function is to display a list of the program or waivers that the individual is currently enrolled in.

ii) How to Use This Function

- From the Client Summary page, click the <Current Enrollment> bar.

Note: If the client is not enrolled in a program, you will receive a “Client doesn’t have active enrollment message.”

Eligibility Information							
Current Assignments							
Current Enrollment							
Program	Enrollment Date	Annual Med/Tech/LOC Due Date	Annual Med/Tech/LOC Status	Waiver Financial Redetermination Due Date	Waiver Financial Redetermination Status	Receiving MDC Services	Actions
Rare and Expensive Case Management	09/20/2019	N/A		N/A		N/A	
Brain Injury Waiver	09/20/2019	N/A		09/20/2020		No	

Program Snapshot View Eligibility Spans

Waiver Registry Information

e) Program Snapshot

i) Purpose of This Function

The Program Snapshot section of the Client Summary will show a complete history of waiver or programs the individual has been enrolled in, as well as the enrollment date and disenrollment date for each, along with the current status.

ii) Select Program Snapshot

- Click the <Program Snapshot> bar.
  - For a client with a lengthy history, click the <View Detail> hyperlink to open the Program Decision History window.
- When there is no Program Decision History for the individual, the message “No data available in table” will be displayed.

iii) View Eligibility Spans

- Authorized Users can utilize the View Eligibility Spans link is in the Program Snapshot section.



Client Eligibility Spans		
<a href="#">Back to Client Summary</a>		
<b>Program Eligibility Span</b>		
Waiver/Program	Enrollment Date	Disenrollment Date
BI	09/20/2019	N/A
REM	09/20/2019	N/A
<b>CFC Participation Period</b>		
Start Date	End Date	
No data available in table		
<b>Appeal Period</b>		
Waiver/Program	Start Date	End Date
No data available in table		

iv) View History

1. This function is available on the Program Snapshot section of Client Summary
2. This page includes the Program Decision history for the individual.

v) Back to Client Summary

1. Takes the actors back to the client summary page

f) View Waiver Registry Information

i) Purpose of This Function

The purpose of this section is to track waiver registry and wave actions for the client. As of now, the waiver registry is used for the 'CO' program and does not relate to the REM program.

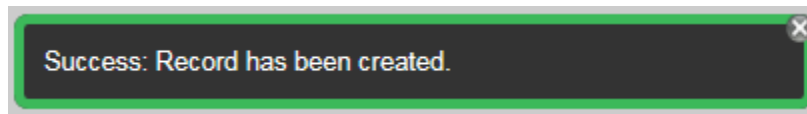
<b>Eligibility Information</b>			
<b>Current Assignments</b>			
<b>Current Enrollment</b>			
<b>Program Snapshot</b>			<a href="#">View Eligibility Spans</a>
<b>Waiver Registry Information</b>			
Current Priority Group:	N/A		
As of Date:	N/A		
Registry Status:	N/A		
Date Added to Registry:	N/A		
Wave Number:	N/A		
Deactivation Reason:	N/A		
Action	Staff	Action Date	Wave Number
No data available in table			

g) Messages

There are several message notifications throughout the LTSS MD system. The primary purpose of the notification is to let the user know what the system has recorded an action or if an update is missing required information. These appear in the lower right corner of the screen.

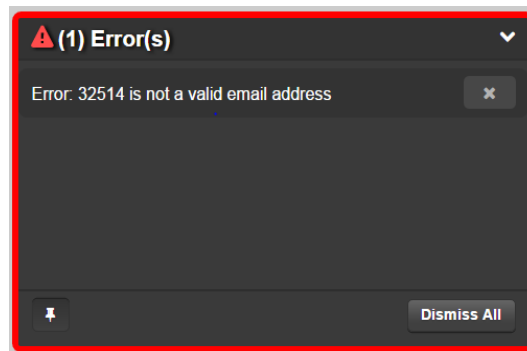
i) Success Messages

The following notifications indicate the system successfully processed the information; they are outlined in green.



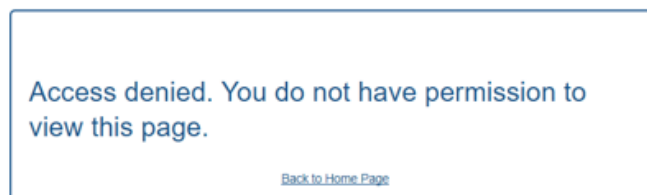
ii) Error Messages

The following notifications indicate information is missing or more information is needed to proceed to the next task; they are outlined in red.



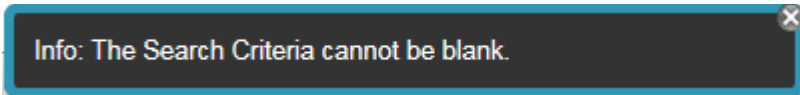
iii) Invalid Permission Error

The following notification indicates that the user does not have authorization to access a page; it is outlined in blue.



iv) Informational Messages

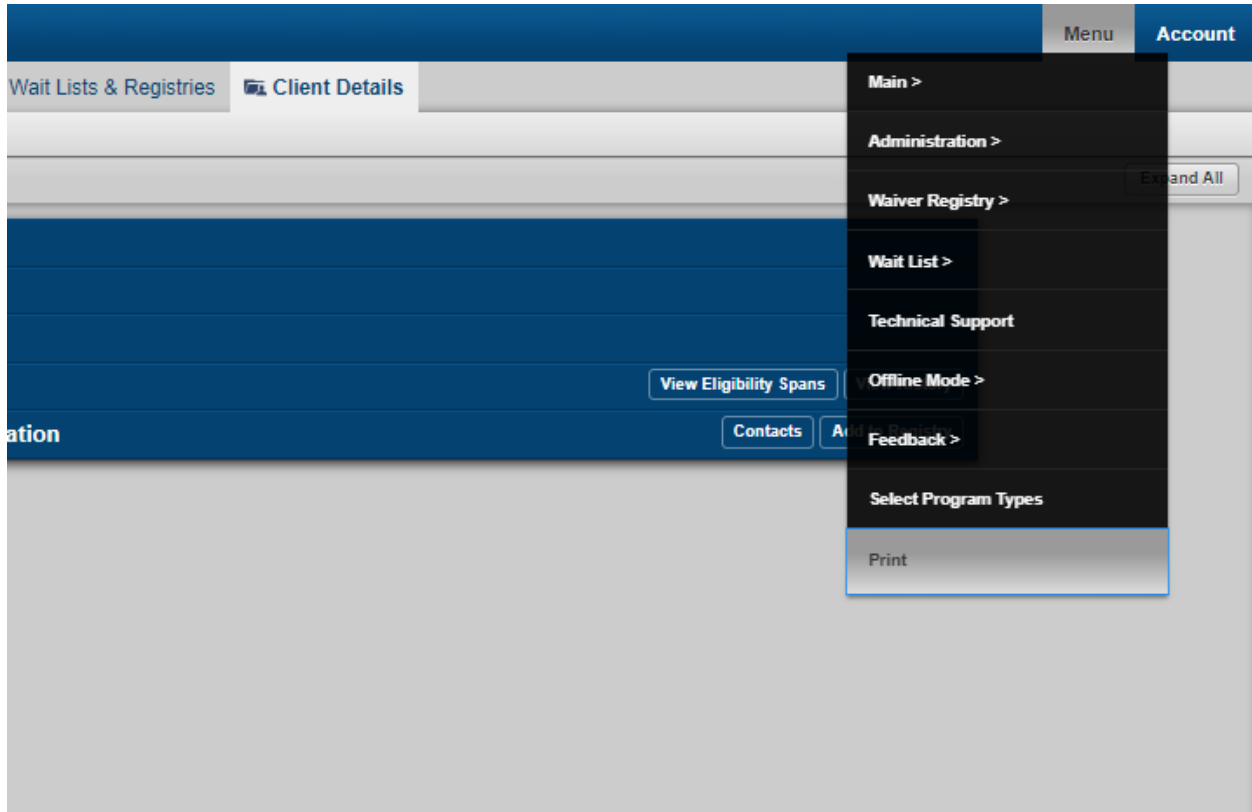
The following notifications provide high level overview information and warning messages; they are outlined in blue.



v) Global Print

A user can print any page in the LTSSMD system. User can navigate to the Menu button in the upper right corner of the screen. Upon hover over, the menu will appear, the last option on the list is Print.

This will create a PDF of the current page.



## 5) System Navigation

### LTSS MD Top-Level Navigation

i) Home

The landing page also includes the following tabs/sections:

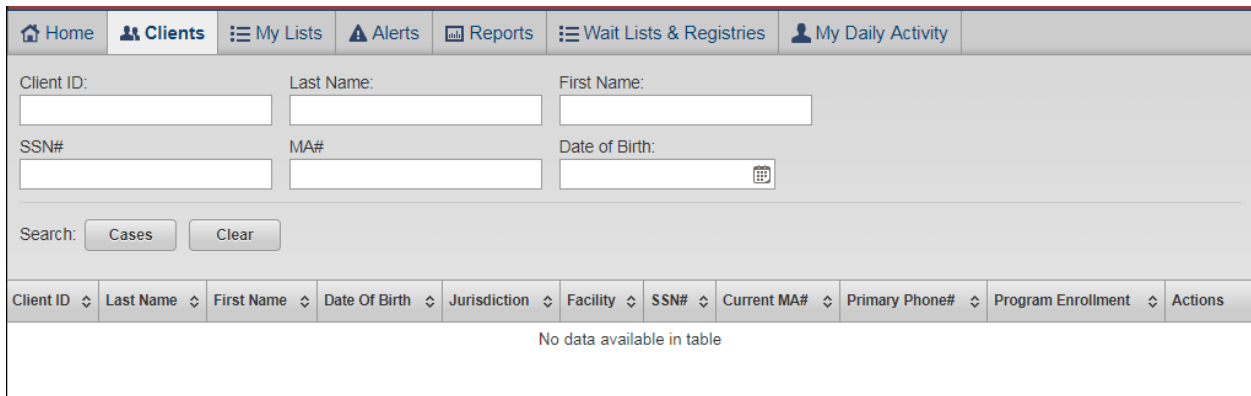
- Home (Landing Page)
- Clients
- My Lists
- Alerts
- Dashboard

- Assignments
- Reports
- Wait Lists & Registries
- My Daily Activity

**Note:** Available tabs are based on user role and permissions. Not all users will see all tabs.

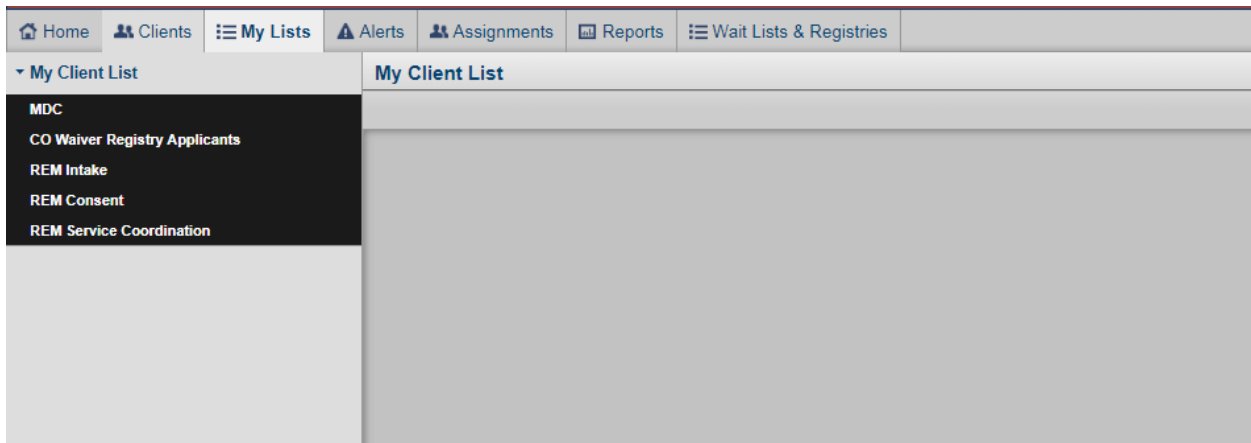
### ii) Client

Since the LTSSMD system is a Client-centered system, this is the go-to page for locating clients, regardless of the Medicaid program in which they are enrolled. From this tab, users can access search for client profile.



### iii) My Lists

My Lists are primarily utilized by authorized users to identify outstanding work that needs to be completed or to track forms/data at various statuses. See detailed information about My Lists in sections below.



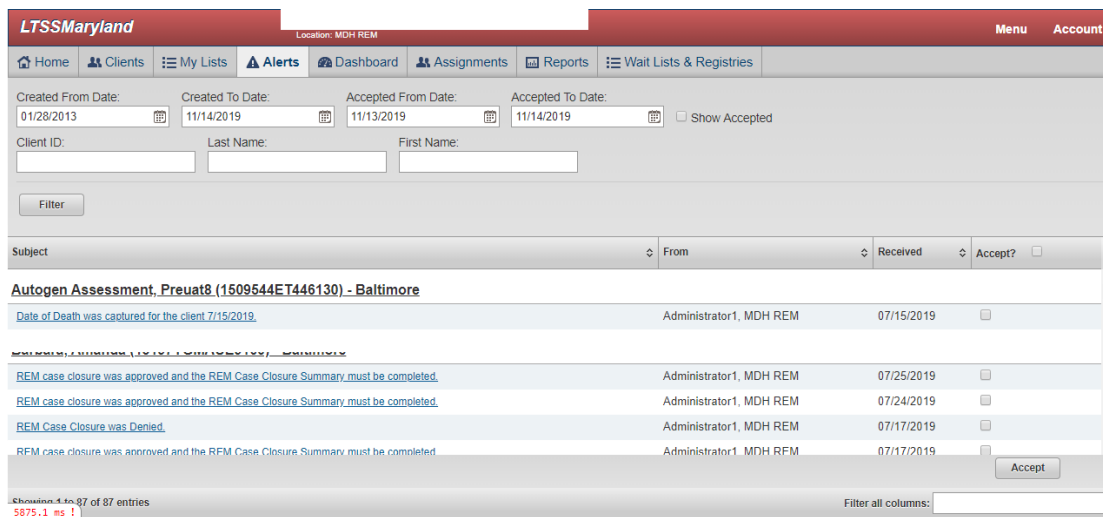
### iv) Alerts

The Alerts page provides descriptive information about the status of an Individual or Client record. Users

can receive alerts for specific actions based on their role.

Alerts can be accessed from 2 locations:

1. Top Level Navigation “Alerts” tab – If accessed from here then alerts will be sorted per clients for the user logged in.
2. Client > Left Navigation Pane > Case Management > Alerts – If accessed from here then alerts will be listed for the particular client for the user logged in.



User can filter the alerts using the filter options such as creation date, client name, client ID etc.

Upon Filter system displays the list of alerts. The alert message will be a hyperlink which navigates the screen to the alert’s relevant location.

User can accept the alert as an acknowledgement by checking the Accept checkbox and clicking on the Accept button. Once an alert is accepted, system will remove that alert from the list page.

Note: The accepted alerts can be accessed again by checking “Show Accepted” checkbox from the filter options.

### v) Dashboard

The dashboard allows the authorized users to view report jurisdiction report or activities related to SPA and NM.

### vi) Assignments

The “Assignments” page (for batch CM assignments) allows authorized users to manage (assign, unassign, reassign) organization unit and staff assignments.

Last Name	First Name	Current Address	County	Age	ICD-10 Codes	Enrolled in	Actions
Test	ODF_ErrorMag1		Baltimore	19	B20		<a href="#">View</a>
Test	328462_User1		Baltimore	19	B20		<a href="#">View</a>
Test	SCF_Alert3		Baltimore City	20	B20		<a href="#">View</a>
Test	Add_SCF Manual		Baltimore	19	B20		<a href="#">View</a>
Test	Regression_ODFClient12		Baltimore	19	B20		<a href="#">View</a>
Test	313329_User3		Baltimore	39	C960		<a href="#">View</a>
Test	ODF_ErrorMag		Baltimore	19	B20		<a href="#">View</a>
Test	Regression_ODFClient11		Baltimore	19	B20		<a href="#">View</a>
Test	Letter_Client8		Baltimore	64	C960		<a href="#">View</a>

ASSIGNMENTS TAB

vii) Reports

The Reports tab will provide access to all reports with respect to the user role. These reports will provide a wide range of data inform within the LTSS system. For detailed information on reports, reference the Reports User Guide.

Category	Name	Actions
REM Reports	Export For Cost Analysis And Export REM Enrollees Report - HILLTOP	<a href="#">View</a>
REM Reports	REM Activity Report	<a href="#">View</a>
REM Reports	REM Cases In Status Report	<a href="#">View</a>
REM Reports	REM Client Summary Report	<a href="#">View</a>
REM Reports	REM Closure Report	<a href="#">View</a>
REM Reports	REM CMA Report	<a href="#">View</a>
REM Reports	REM Denials Report	<a href="#">View</a>
REM Reports	REM Enrollee Report	<a href="#">View</a>
REM Reports	REM Enrollment Timeline	<a href="#">View</a>
REM Reports	REM Intake Referral Statistics Report	<a href="#">View</a>
REM Reports	RFM I OC Report	<a href="#">View</a>

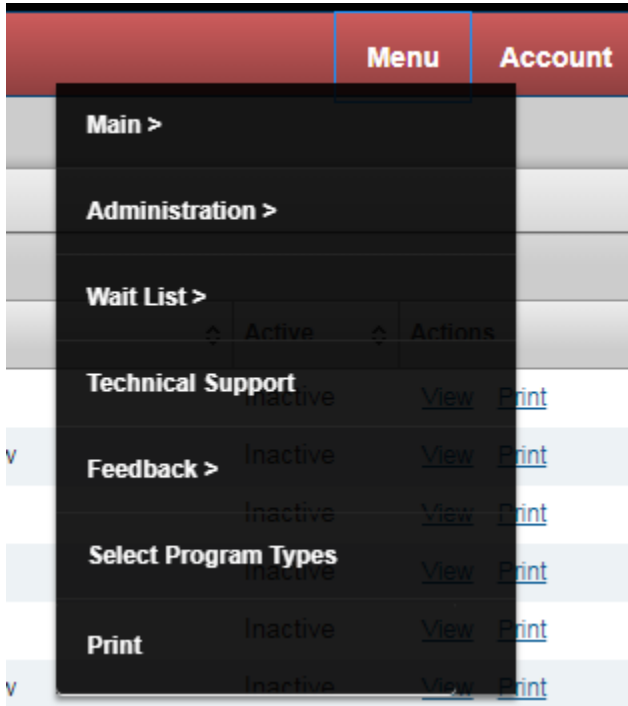
Showing 1 to 16 of 16 entries  
28290.9 ms

Filter all columns:

## Global Menu

This menu functionality is used to navigate to all system functions/features available. The menu options vary based on the user’s assigned permissions. The following options may not be applicable to all users.

- Global Menu has the following options:



- Main
- Administration
- Wait List – not utilized by the REM Program
- Technical Support
- Feedback
- Select Program Types
- Print

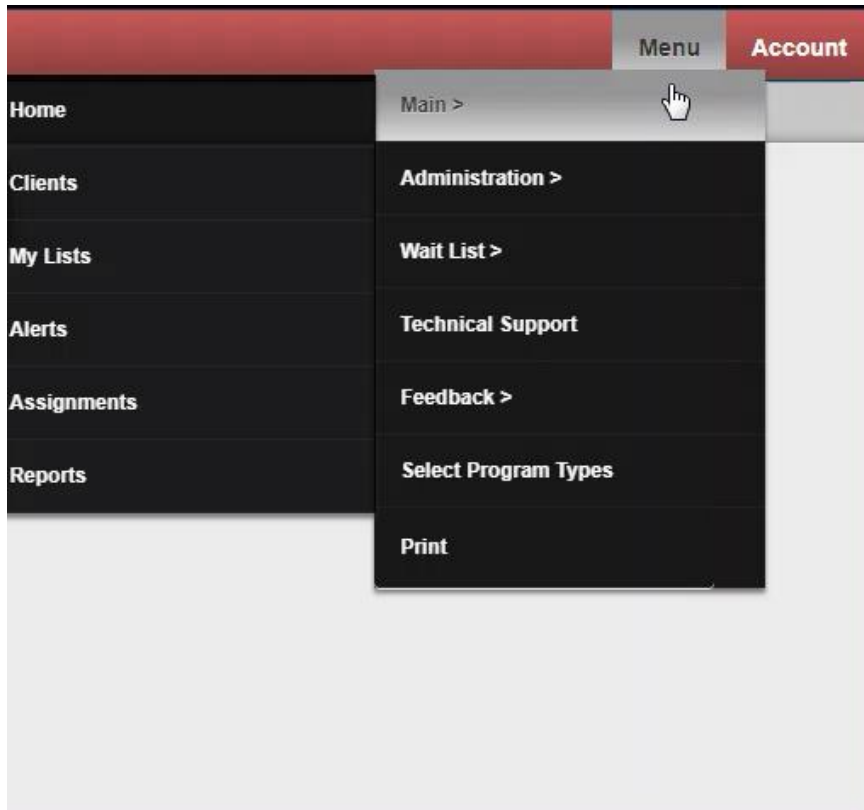
Each of these options is explained below in detail. Any of the menu options with a rightward pointing arrow is in turn another menu.

The menu options are available strictly based on the agency and role of the user. Some options will not be applicable to REM users.

### viii) Main

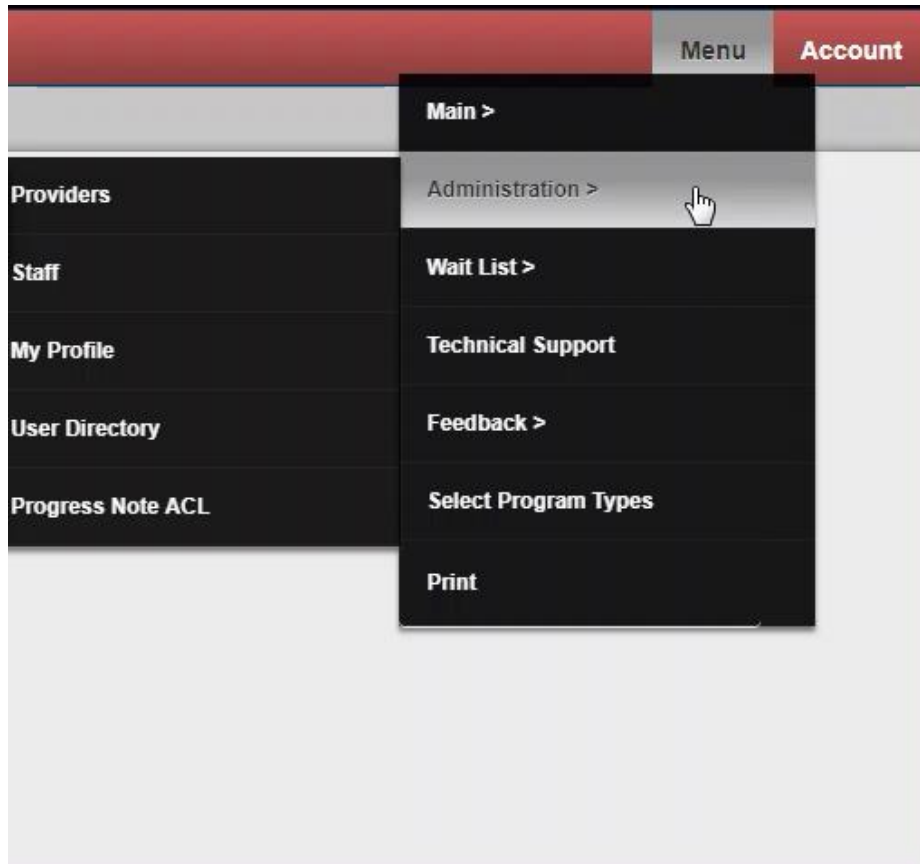
Click or hover over the <Menu> button, then select <Main> to see the main sub-options. The main sub-

options are the same as the top-level navigation tabs discussed in the sections above. The sub-options are the tabs available at the top of the home page.

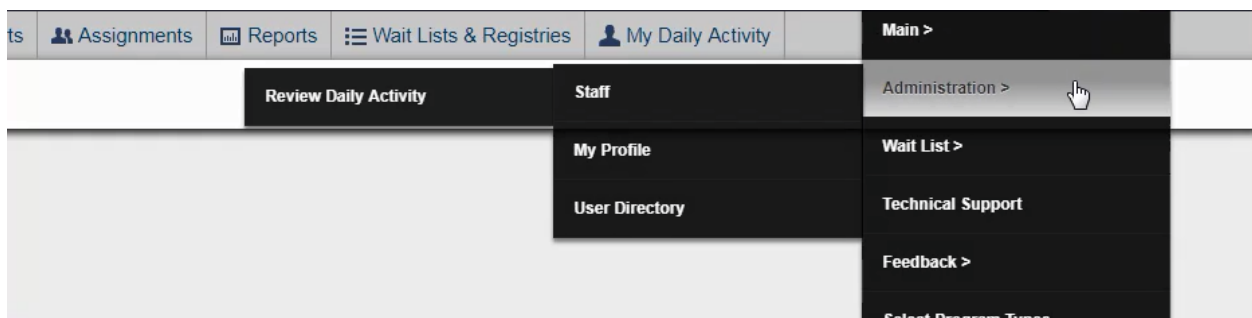




ix) Administration



ADMINISTRATION OPTION



ADMINISTRATION OPTION FOR CMA SUPERVISORS, ADMINS, AND COORDINATORS

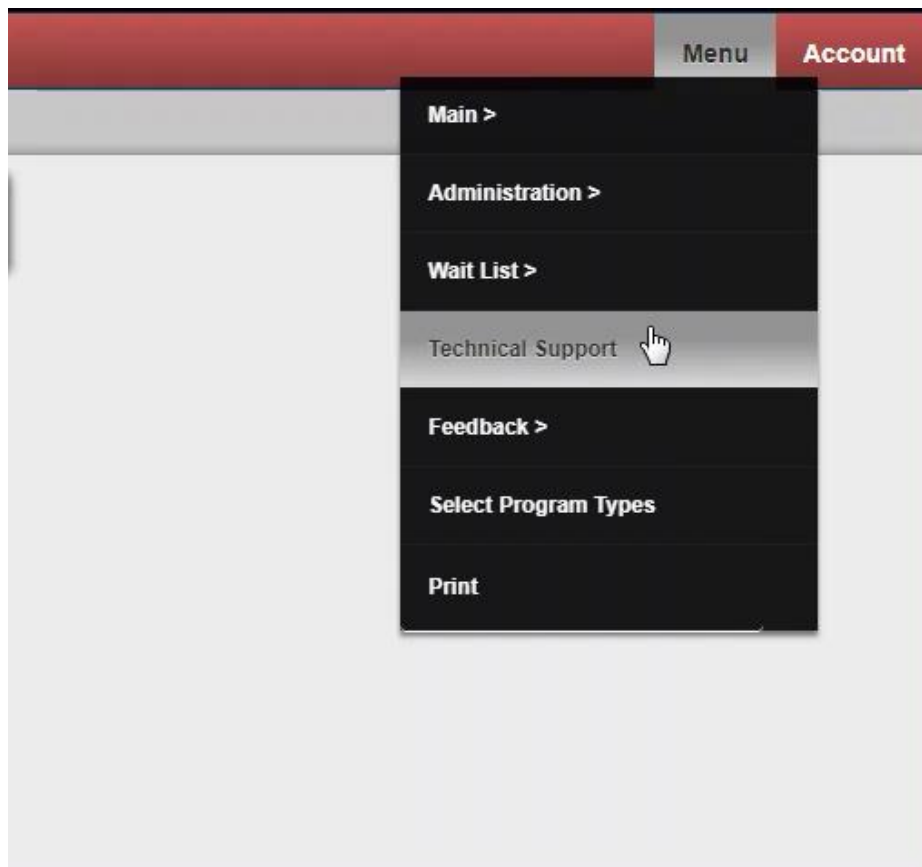
x) Technical Support

Click the <Menu> button, then select <Technical Support> to view contact information for the Helpdesk. Please communicate technical issues to your LTSS Liaison upon reporting the issue to the help desk.

It is important that technical issues be reported and tracked appropriately. If you encounter what you believe to be a system error, you may report it to the Help Desk. They will issue a ticket number and will respond to you with feedback. If a system error, it must be escalated for review by the LTSSMaryland team at Gantech (Help Desk) and internally at MDH (ISAS Division).

Note: It is not uncommon for small errors to occur after system upgrades, even with system upgrades do not pertain to the REM program. If you notice an issue, it may be a bug that needs to be addressed timely. Do not assume an issue is user error. Please reports issues right away.

When emailing the Help Desk, please copy/paste the URL into the email. A Screenshot or Snip of the screen you were on when you encountered the issue is helpful, kindly remove PHI before sending. The Snipping tool is useful for this purpose.



## Technical Support

**Submit Your Case Online**

If you experience any problems, please use the Feedback tool in LTSSMaryland to create a Help Desk ticket. The Feedback tool is located under the Menu link at the top right corner of each screen in LTSSMaryland. The Feedback tool allows users to create Help Desk requests and to track the status of their existing requests. In addition, you may use the information below to contact the Help Desk.

**Call Help Desk**

1-855-4MD-LTSS (1-855-463-5877)

**Email Help Desk**

LTSS: LTSSHelpDesk@ltssmaryland.org  
ISAS: ISASHelpDesk@ltssmaryland.org

**Hours Of Operation:**

LTSS: Monday - Friday, 9 a.m. - 5 p.m. Eastern Time  
ISAS: Monday - Friday, 6 a.m. - 8 p.m. Eastern Time

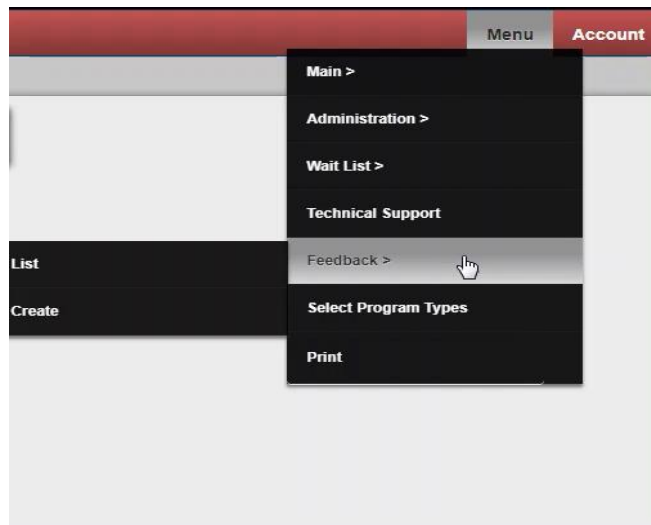
**Recent System Updates**

Recent system updates can be found [here](#).

### xi) Feedback

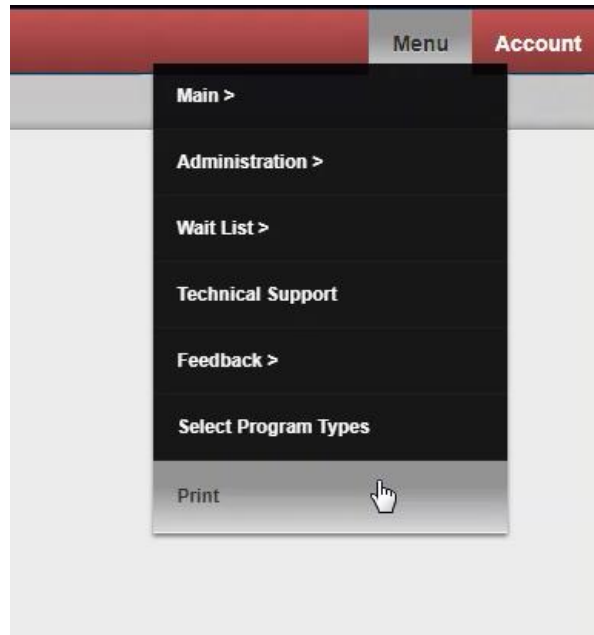
Click the <Menu> button, then select <Feedback> to see the feedback sub-options. System errors or concerns can be reported and tracked via this Feedback link.

By navigating to the feedback- List page the authorized user can view the list of feedback items added by that user. The feedback is used in UAT's to enter feedback/ bugs found during UAT testing, which is then exported to excel to further investigate and fix the issue.



**xii) Print**

Click the <Menu> button, then select <Print> to print the current form with the standard print output. (See: Global Print.)



**6) Help and Contacts**

For any questions regarding the LTSS system, contact the LTSSMaryland Help Desk at [LTSSHelpDesk@LTSSMaryland.org](mailto:LTSSHelpDesk@LTSSMaryland.org) or 1-855-463-5877.

**7) Authorize**

Authorize allows certain users to authorize and log in on Behalf of some other users.

**8) Sign Out**

This is used to sign out from LTSSMD.