MDC Provider Reports

A systematic navigational process

June 2020

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Table of Contents

Table of Contents 1
REPORTS 6
1 When to Start Using MDC Provider Reports 6
1.1 Steps for adding a new user to the system: 6
2 MDC - Active ADCAPS Report 7
2.1 Search Report (Inputs) 7
2.2 View Report Summary (Outputs) 9
2.3 View Report Details (Outputs) 11
2.4 Export Report 17
3 Provider - ADCAPS Productivity Report 18
3.1 Search Report (Inputs) 18
3.2 View Report Summary Count (Outputs) 21
3.3 View Report Details (Outputs) 23
3.4 Export Report 27
4 Provider - Client Transfers Report 28
4.1 Search Report (Inputs) 28
4.2 View Report Summary (Outputs) 30
4.3 View Report Detail-Incoming Transfers (Outputs) 31
4.4 View Report Detail-Outgoing Transfers (Outputs) 35
4.5 Export Report 38
5 Provider - Current Assignment Report 39
5.1 Search Report (Inputs) 39
5.2 View Report Select All (Outputs) 41
5.3 View Report Primary MDC Provider (Outputs) 45
5.4 View Report Additional MDC Provider (Outputs) 49
5.5 Export Report 53
6 Provider - Open Forms Report 54
6.1 Search Report (Inputs) 54
6.2 View Report Staff Summary (Outputs) 57
6.3 View Report Form Type Summary (Outputs) 58

6.4 View Report Details (Outputs) 59
6.5 Export Report 61
7 Provider - Programs of Enrollment Report 62
7.1 Search Report (Inputs) 62
7.2 View Report (Outputs) 64
7.3 Export Report 74
8 Provider - Service Plan Annual Rate Report 75
8.1 Search Report (Inputs) 75
8.2 View Report (Outputs) 77
8.3 Export Report 87

Figure 1-View MDC-Active ADCAPS Report 7
Figure 2-MDC-Active ADCAPS Report Search Parameters 8
Figure 3-MDH Active ADCAPS Report Summary View 9
Figure 4-Active ADCAPS Details View 1 11
Figure 5-ADCAPS Type in Overview Information 12
Figure 6-ADCAPS Submit Date in Workflow History 12
Figure 7-ADCAPS Submitted By in Workflow History 13
Figure 8-MDH-Active ADCAPS Details View 2 13
Figure 9-Assessment Conducted On in Overview Information 14
Figure 10-Assessment Submit Date in Overview Information 14
Figure 11-Next Assessment Due By date 15
Figure 12-MDT Last Convened On Date in Care Plan 15
Figure 13-Next Care Plan Review Due By in ADCAPS 16
Figure 14-Export Options 17
Figure 15-View Provider-ADCAPS Productivity Report 18
Figure 16-ADCAPS Productivity Report Search Parameters 19
Figure 17-Provider ADCAPS Productivity Report Summary Count 21
Figure 18-ADCAPS Productivity Report Detail View 1 23
Figure 19-ADCAPS Type in Overview Information 24
Figure 20-ADCAPS Submitted By in Workflow History 24
Figure 21-ADCAPS Submit Date in Workflow History 25
Figure 22- ADCAPS Productivity Report Detail View 2 25
Figure 23-Assessment Conducted On in Overview Information 26
Figure 24-Assessment Submit Date in Overview Information 26
Figure 25-MDT Last Convened On Date in Care Plan 27
Figure 26-Export Options 27

Figure 27-View Provider-Client Transfers Report 28
Figure 28-Provider-Client Transfers Report Search Parameters..... 29
Figure 29- Client Transfers Summary View..... 30
Figure 30-Detail-Incoming Transfers View 1..... 31
Figure 31-Detail-Incoming Transfers View 2..... 32
Figure 32-Status within the Voluntary Consent to Transfer form 32
Figure 33-Transferring From Provider within the Voluntary Consent to Transfer form 33
Figure 34-Transferring To Provider within the Voluntary Consent to Transfer..... 33
Figure 35-Anticipated Start Date within the Voluntary Consent to Transfer form 34
Figure 36-Detail-Outgoing Transfers View 1..... 35
Figure 37-Detail-Outgoing Transfers View 2..... 36
Figure 38-Status within the Voluntary Consent to Transfer form 36
Figure 39-Transferring From Provider within the Voluntary Consent to Transfer form 37
Figure 40-Transferring To Provider within the Voluntary Consent to Transfer..... 37
Figure 41-Anticipated Start Date within the Voluntary Consent to Transfer form 38
Figure 42-Export Options..... 38
Figure 43-View Provider-Current Assignments Report..... 39
Figure 44-Provider-Client Assignment Report Search Parameters..... 40
Figure 45-Client Assignment Report View 1 41
Figure 46-Client Assignment Report View 2 42
Figure 47-Assignment Type as displayed in the Current Assignment section of the Client Summary..... 42
Figure 48-Provider Name as displayed in the Current Assignment section of the Client Summary 42
Figure 49-Primary MDC Provider Staff as displayed in the Current Assignment section of the Client Summary 43
Figure 50-Secondary Provider Staff as displayed in the Current Assignment section of the Client Summary 43
Figure 51-Assignment Date as displayed in the Current Assignment section of the Client Summary..... 44
Figure 52-Client Assignment Report Primary MDC Provider View 1 45
Figure 53-Client Assignment Report Primary MDC Provider View 2 46
Figure 54-Provider Name as displayed in the Current Assignment section of the Client Summary 46
Figure 55-Primary MDC Provider Staff as displayed in the Current Assignment section of the Client Summary 47
Figure 56-Secondary Provider Staff as displayed in the Current Assignment section of the Client Summary 47
Figure 57-Assignment Date as displayed in the Current Assignment section of the Client Summary..... 48
Figure 58-Additional MDC Providers as displayed in the Current Assignment section of the Client Summary 48
Figure 59-Client Assignment Report Primary MDC Provider View 1 49
Figure 60-Client Assignment Report Primary MDC Provider View 2 50
Figure 61-Provider Name as displayed in the Current Assignment section of the Client Summary 50

Figure 62-Primary MDC Provider Staff as displayed in the Current Assignment section of the Client Summary 51
Figure 63-Secondary Provider Staff as displayed in the Current Assignment section of the Client Summary 51
Figure 64-Assignment Date as displayed in the Current Assignment section of the Client Summary 52
Figure 65-Primary MDC Provider as displayed in the Current Assignment section of the Client Summary 52
Figure 66-Export Options 53
Figure 67-View Provider-Open Forms Report 54
Figure 68-Provider-Open Forms Report Search Parameters 55
Figure 69-Provider Open Forms Staff Summary View 57
Figure 70-Provider Open Forms Form Type Summary View 58
Figure 71-Provider Open Forms Report Detail View 1 59
Figure 72-Provider Open Forms Report Detail View 2 60
Figure 73-Export Options 61
Figure 74-View Provider-Programs of Enrollment Report 62
Figure 75-Programs of Enrollment search parameters 63
Figure 76-Programs of Enrollment Report View 1 64
Figure 77-Current MA# as displayed in the Client Summary 65
Figure 78-MA Coverage Group as displayed in the Client Summary 65
Figure 79-Start Date as displayed in the Client Summary 66
Figure 80-End Date as displayed in the Client Summary 66
Figure 81-Programs of Enrollment Report View 2 67
Figure 82-Special Program Code as displayed in the Client Summary 67
Figure 83-Start Date as displayed in the Client Summary 68
Figure 84-End Date as displayed in the Client Summary 68
Figure 85-Program(s) as displayed in the Client Summary 69
Figure 86-Program Status as displayed in the Client Summary 69
Figure 87-Last Enrollment Date as displayed in the Client Summary 70
Figure 88-Last Denial Date as displayed in the Client Summary 70
Figure 89-Last Disenrollment Date as displayed in the Client Summary 71
Figure 90-Programs of Enrollment Report View 3 71
Figure 91-Submitted Date as displayed in the interRAI Assessment list view 72
Figure 92-Status as displayed in the NF Level of Care list view 72
Figure 93-Status as displayed in the ADCAPS list view 73
Figure 94-Export Options 74
Figure 95-View Service Plan Annual Rate Report 75
Figure 96-Transfer History Report search parameters 76
Figure 97-Service Plan Annual Rate Report View 1 77
Figure 98-Primary MDC Provider as displayed in the ADCAPS Overview 78
Figure 99-Additional MDC Provider(s) as displayed in the ADCAPS Overview 79

Figure 100-Service Plan Annual Rate Report View 2 80
Figure 101-ADCAPS Type as displayed in the ADCAPS Overview 80
Figure 102-ADCAPS Created By as displayed in the ADCAPS Overview 81
Figure 103-Active as displayed in the ADCAPS list view 81
Figure 104-No. of days per week as displayed in the MDC Service Plan 82
Figure 105-No. of days per week for center as displayed in the MDC Service Plan 83
Figure 106- No. of weeks as displayed in the MDC Service Plan 84
Figure 107-Rate as displayed in the MDC Service Plan 85
Figure 108-Annual Cost as displayed in the MDC Service Plan 86
Figure 109-Export Options 87

REPORTS

MDC Provider user roles have access to reports that will allow them to have a consolidated view of MDC participants, the MDC forms associated with their assigned participants, and their business processes within the system of record, LTSSMaryland.

1 When to Start Using MDC Provider Reports

Beginning on **June 27, 2020**, MDC Providers will have access to seven (7) new MDC Reports in LTSSMaryland.

1.1 Steps for adding a new user to the system:

1. A new user John Smith joins an agency
2. Admin enters staff profile for John Smith in LTSS
3. The supervisor emails LTSS Help Desk (LTSSHelpDesk@LTSSMaryland.org) with John Smith's details.
4. LTSS Help Desk creates a login entry for John Smith
5. LTSS Help Desk informs John Smith of his user ID (via email)

Sample email format:

The supervisor sends an email to **LTSSHelpDesk@LTSSMaryland.org** requesting a new staff person receive access to the system

The email includes:

- Supervisor name: Anna Scott
- Supervisor email: Anna.Scott@agency.com
- Supervisor Phone Number: 410-111-2233
- Agency: Sample agency
- New Username: John Smith
- New User email: *John.Smith@agency.com*
- New User phone: 410-222-3344
- A statement that this email serves as authorization to add this new user John Smith

2 MDC - Active ADCAPS Report

This report populates a current snapshot of the Assessments and Care Plans that are due for the MDC Providers' assigned participants. The purpose of this report is so that MDC Providers have a consolidated view of ADCAPS due in order to facilitate the timeliness of the MDC Provider's requirements to complete Assessments for MDC Waiver participants every 120 days and Care Plan reviews every 180 days.

The MDC Provider Admin, MDC Provider Staff, MDC Provider Intake, and MDC Provider Nurse user roles will have access to this report.

2.1 Search Report (Inputs)

The search parameters of a report are designed to allow the user to filter the report contents by searching for desired records only. By utilizing the search input options, the user can specify what they want to view in the report output.

1. Navigate to the **Reports** tab in LTSSMaryland
2. Select **MDC** from the Category field, then **Filter**
3. Select the View hyperlink next to **MDC - Active ADCAPS Report**

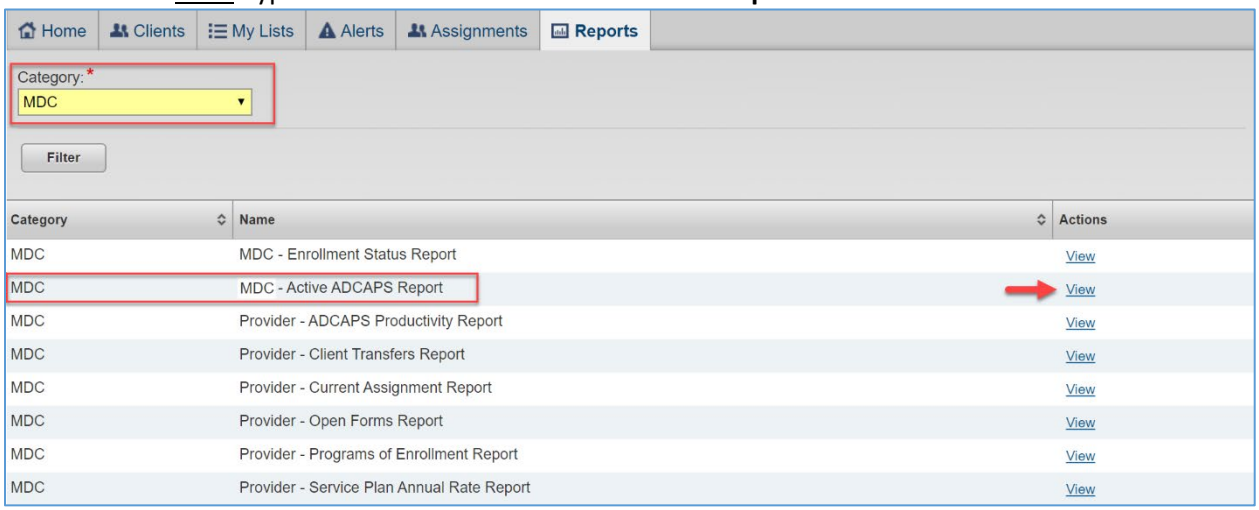


Figure 1-View MDC - Active ADCAPS Report

4. Enter the desired search parameters and select **View Report**:

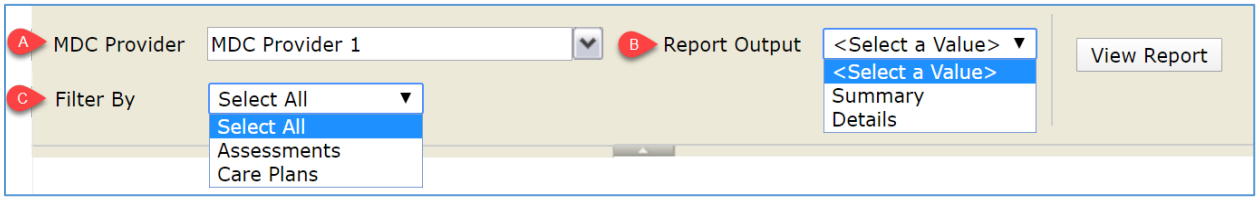


Figure 2-MDC-Active ADCAPS Report Search Parameters

A. **MDC Provider**
   - Defaults to the MDC Provider location to which the user's login is associated
   - Required to search

B. **Report Output**
   - Report type that allows the user to select their preferred report view
   - Available Options:
     - *Summary:* Populates outputs with a count of Assessment and Care Plans due for participants that are actively assigned to the MDC Provider, as the Primary or Additional MDC Provider
     - *Detail:* Populates outputs with ADCAPS data of participants that are actively assigned to the MDC Provider, as the Primary or Additional MDC Provider
   - Defaults to blank
   - Single-Select
   - Required to search

C. **Filter By**
   - Report filter applies to the **Report Output** option, *Summary*
   - Options:
     - *Select All:* Populates counts of Assessments and Care Plans due
     - *Assessments:* Populates counts of Assessments due, only
     - *Care Plans:* Populates counts of Care Plans due, only
   - Defaults to *Select All*
   - Single-Select
   - Required to search

2.2 View Report Summary (Outputs)

Once the user enters desired search parameters for the Report Output, *Summary* and selects **View Report**, the Active ADCAPS Report will display a count of Assessments and/or Care Plans due.

The following data elements will be displayed:

Date Created: 5/11/2020 4:52:32 PM

Active ADCAPS Report

Please NOTE: Data prior to July 19, 2019 is not available in this report.

Search Criteria:

MDC Provider: MDC Provider 1 (Default All Jurisdictions)
Summary Count For: Select All
Report Output: Summary

Total Records: 1

Provider		Assessments				Care Plans			
1 Provider Location	2 Provider #	3 Due within 30 Days	4 Overdue by 0 to 30 Days	5 Overdue by more than 30 Days	6 Totals	7 Due within 30 Days	8 Overdue by 0 to 30 Days	9 Overdue by more than 30 Days	10 Totals
MDC Provider 1	101010110	8	3	36	47	2	0	21	23
Totals		8	3	36	47	2	0	21	23

Page 1 of 1

Figure 3-MDH Active ADCAPS Report Summary View

1. **Provider Location**
   - Name of the MDC Provider
2. **Provider #**
   - Provider Locations unique identification number
3. **Assessments: Due within 30 Days**
   - Populates the number of Assessments for participants to which the Provider is assigned (as Primary or Additional MDC Provider), with a Due Date that is within the next 30 days of the current system date
   - When the hyperlink is selected, the user will be re-directed to the Details view of the report, where the user will view the participants and their associated active ADCAPS data that make up the count
4. **Assessments: Overdue by 0 to 30 Days**
   - Populates the number of Assessments for participants to which the Provider is assigned (as Primary or Additional MDC Provider), with a Due Date that is the current date or overdue
   - When the hyperlink is selected, the user will be re-directed to the Details view of the report, where the user will view the participants and their associated active ADCAPS data that make up the count
5. **Assessments: Overdue by more than 30 days**
   - Populates the number of Assessments for participants to which the Provider is assigned (as Primary or Additional MDC Provider), with a Due Date that 31 days or more in the past
   - When the hyperlink is selected, the user will be re-directed to the Details view of the report, where the user will view the participants and their associated active ADCAPS data that make up the count

6. **Assessments: Totals**
    - Populates the total number of Assessments for participants to which the Provider is assigned (as Primary or Additional MDC Provider)
    - When the hyperlink is selected, the user will be re-directed to the Details view of the report, where the user will view the participants and their associated active ADCAPS data that make up the count

NOTE: The Summary count for Assessments will only display if the user selects "*Select All*" or "*Assessments*" within the report search parameter, **Filter By**.

7. **Care Plans: Due within 30 Days**
    - Populates the number of Care Plans for participants to which the Provider is assigned (as Primary or Additional MDC Provider), with a Due Date that is within the next 30 days of the current system date
    - When the hyperlink is selected, the user will be re-directed to the Details view of the report, where the user will view the participants and their associated active ADCAPS data that make up the count
8. **Care Plans: Overdue by 0 to 30 Days**
    - Populates the number of Care Plans for participants to which the Provider is assigned (as Primary or Additional MDC Provider), with a Due Date that is the current system date or overdue
    - When the hyperlink is selected, the user will be re-directed to the Details view of the report, where the user will view the participants and their associated active ADCAPS data that make up the count
9. **Care Plans: Overdue by more than 30 days**
    - Populates the number of Care Plans for participants to which the Provider is assigned (as Primary or Additional MDC Provider), with a Due Date that 31 days or more in the past
    - When the hyperlink is selected, the user will be re-directed to the Details view of the report, where the user will view the participants and their associated active ADCAPS data that makeup the count
10. **Care Plans: Totals**
    - Populates the total number of Care Plans for participants to which the Provider is assigned (as Primary or Additional MDC Provider)
    - When the hyperlink is selected, the user will be re-directed to the Details view of the report, where the user will view the participants and their associated active ADCAPS data that make up the count

NOTE: The Summary count for Care Plans will only display if the user selects "*Select All*" or "*Care Plans*" within the report search parameter, ***Filter By.***

2.3 View Report Details (Outputs)

Once the user enters desired search parameters for the Report Output *Details* and selects View Report or navigates to the Details view by selecting a count within the *Summary view of the report,* then the user will be able to view the participant records with the active ADCAPS data.

The following data elements will be displayed:

Provider		Client			ADCAPS		
1 Provider Location	2 Provider #	3 Client ID	4 Client First Name	5 Client Last Name	6 ADCAPS Type	7 ADCAPS Submit Date	8 ADCAPS Submitted By
MDC Provider 1 (Default All Jurisdictions)	101010110	1079489RP887121	Prob	Demo	Significant Change	01/09/2020	MDC1, mdcprovidernurse1
MDC Provider 1 (Default All Jurisdictions)	101010110	16295XWUJA88110	June2020	MDC	Initial	01/02/2020	MDC1, mdcprovidernurse1
MDC Provider 1 (Default All Jurisdictions)	101010110	1929579PC848100	CP	Demo	Initial-Revised	02/05/2020	MDC1, mdcprovidernurse1

Figure 4-Active ADCAPS Details View 1

1. **Provider Location**
   - Name of the MDC Provider
2. **Provider #**
   - Provider Locations unique identification number
3. **Client ID**
   - Participant's unique identification number within LTSSMaryland
   - When the hyperlink is selected by the user, a new tab will open to the *Client Summary*
   - Column may be sorted in ascending or descending order by selecting the arrows within the column label
4. **Client First Name**
   - First Name of the participant as of the current system date
   - Column may be sorted in ascending or descending order by selecting the arrows within the column label
5. **Client Last Name**
   - Last Name of the participant as of the current system date

Column may be sorted in ascending or descending order by selecting the arrows within the column label

6. **ADCAPS Type**
   - Type of ADCAPS submitted by the provider for the participant, as noted in the *active* ADCAPS *Overview Information*
   - Output Options: *Initial, Initial-Revised, Annual, Annual-Revised, 120 Day, 120-Day Revised, Transfer, Transfer-Revised, Significant Change,* or *Significant Change-Revised*
   - When the hyperlink is selected by the user, a new tab will open to the *ADCAPS Summary*
   - Column may be sorted in ascending or descending order by selecting the arrows within the column label

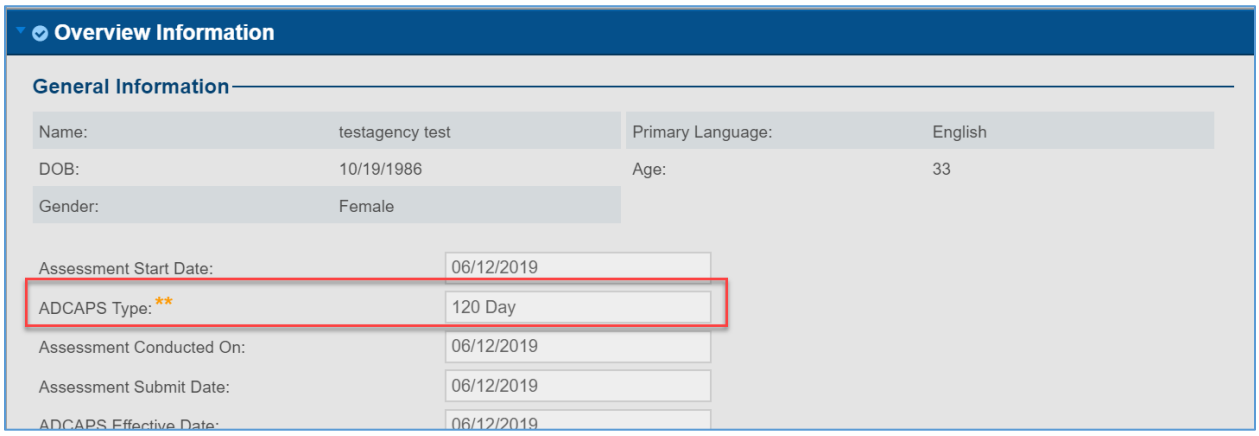


Figure 5-ADCAPS Type in Overview Information

7. ADCAPS Submit Date

- Date of ADCAPS submission, as noted in the *Workflow History* of the *active* ADCAPS
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

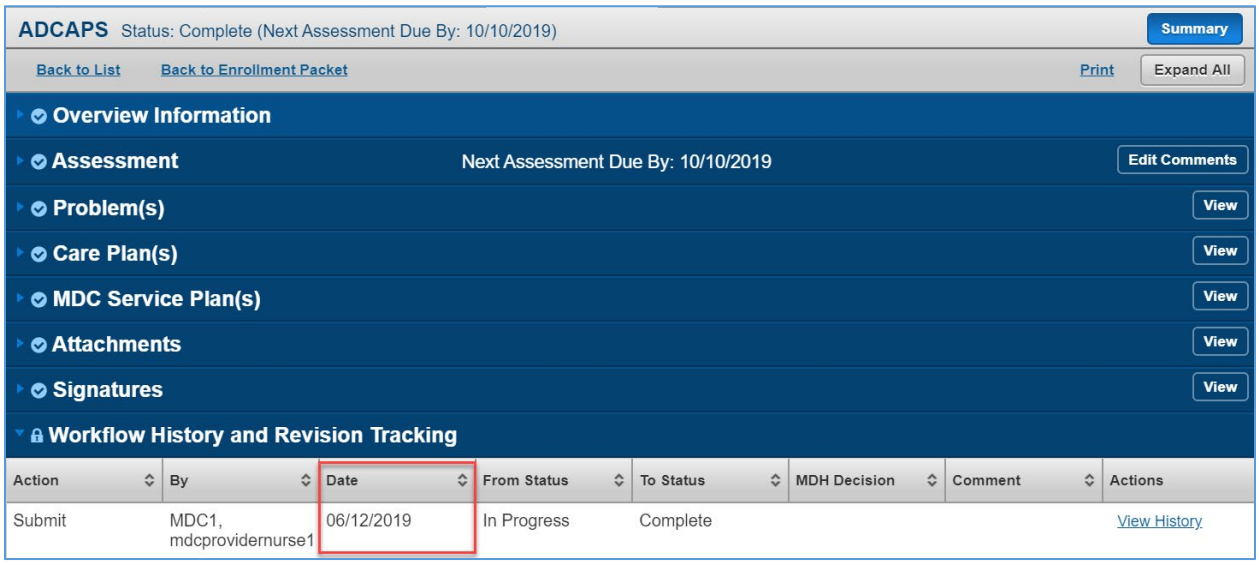


Figure 6-ADCAPS Submit Date in Workflow History

8. ADCAPS Submitted By

- Name of user that submitted the ADCAPS, as noted in the *Workflow History* of the *active* ADCAPS
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

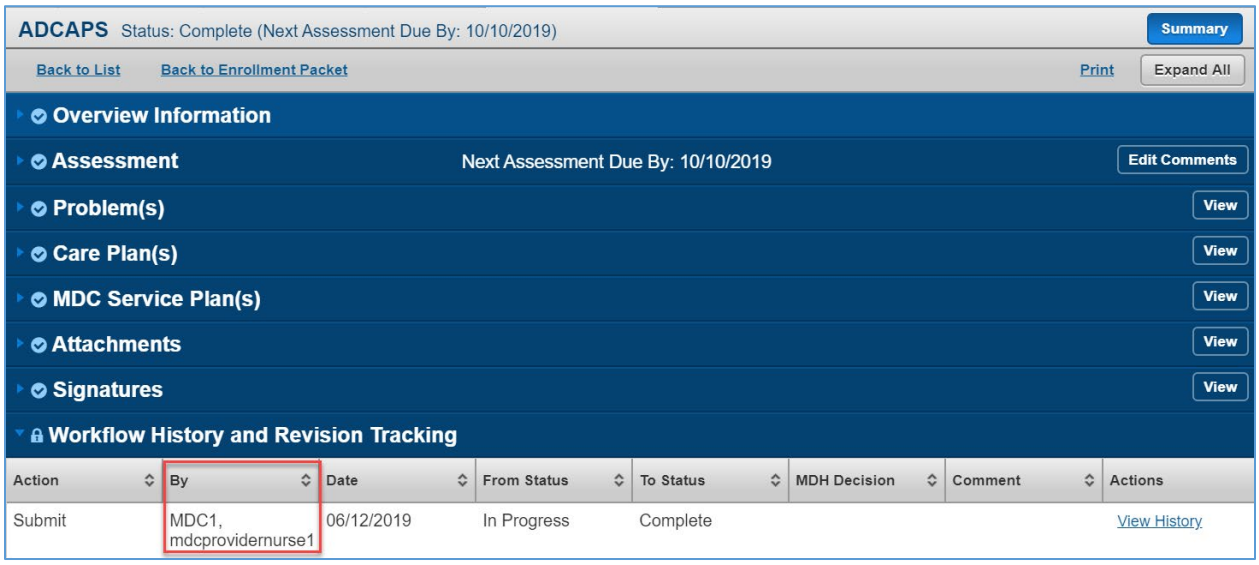


Figure 7-ADCAPS Submitted By in Workflow History

	Assessment				Care Plan		
9 Assessment Conducted On	10 Assessment Submit Date	11 Next Assessment Due By	12 Overdue By	13 MDT Last Convened On Date	14 Next Care Plan Review Due By	15 Overdue By
02/10/2020	02/10/2020	02/10/2020	91	02/10/2020	02/10/2020	91
01/01/2020	01/09/2020	05/08/2020	3	01/01/2020	06/29/2020	-49
09/27/2019	09/30/2019	01/28/2020	104	09/11/2019	03/09/2020	63

Figure 8-MDH-Active ADCAPS Details View 2

9. Assessment Conducted On

- Date entered by Provider as the "Assessment Conducted On", as noted in the *Overview Information* of the *active* ADCAPS
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

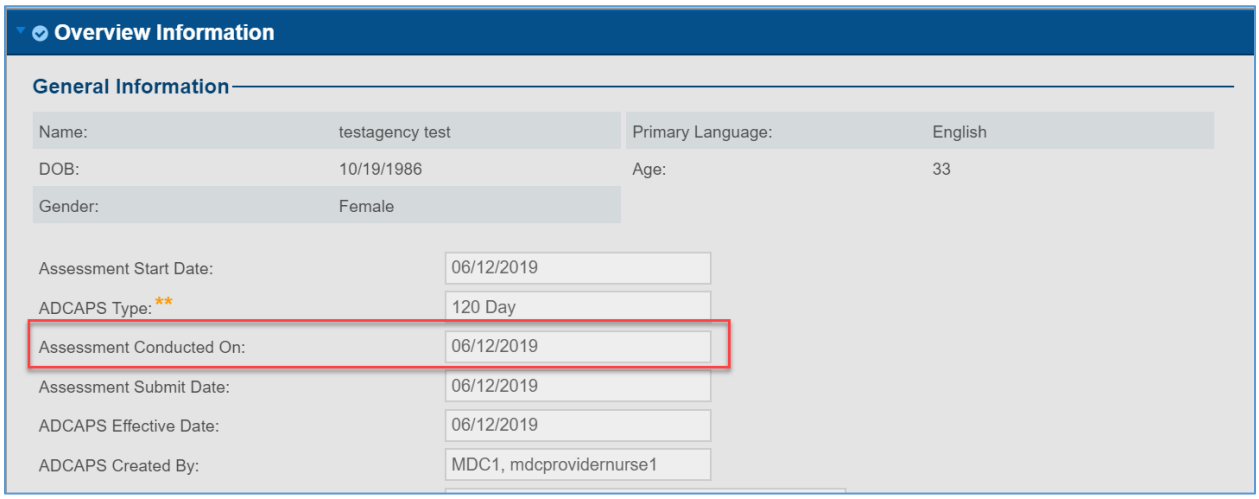


Figure 9-Assessment Conducted On in Overview Information

10. Assessment Submit Date

- Date Assessment was submitted by the Provider, as noted in the *Overview Information* of the *active* ADCAPS
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

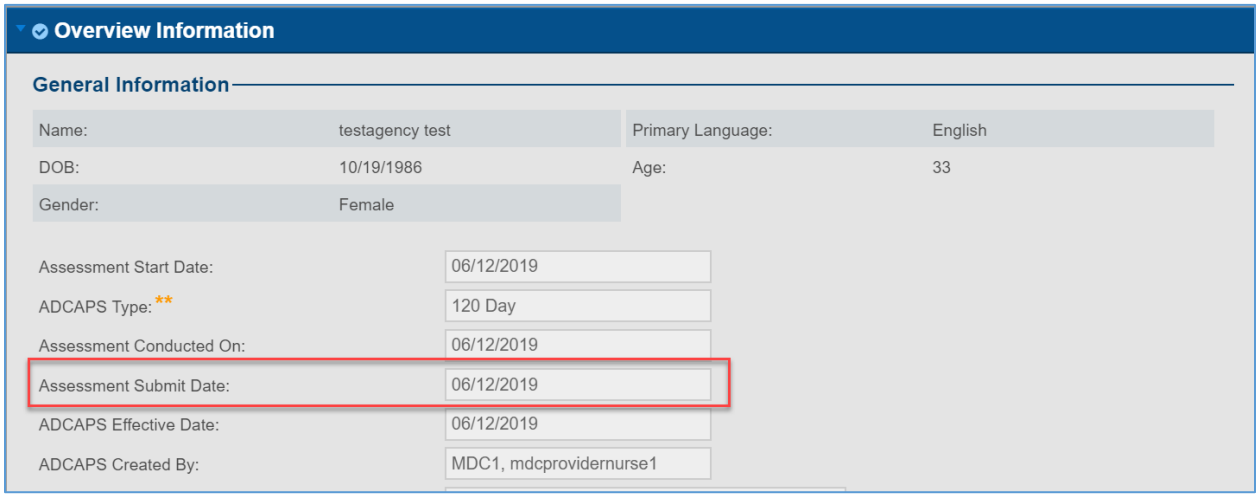


Figure 10-Assessment Submit Date in Overview Information

11. Next Assessment Due By

- Date next Assessment is due, as noted in the *Assessment* banner of the *active* ADCAPS
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

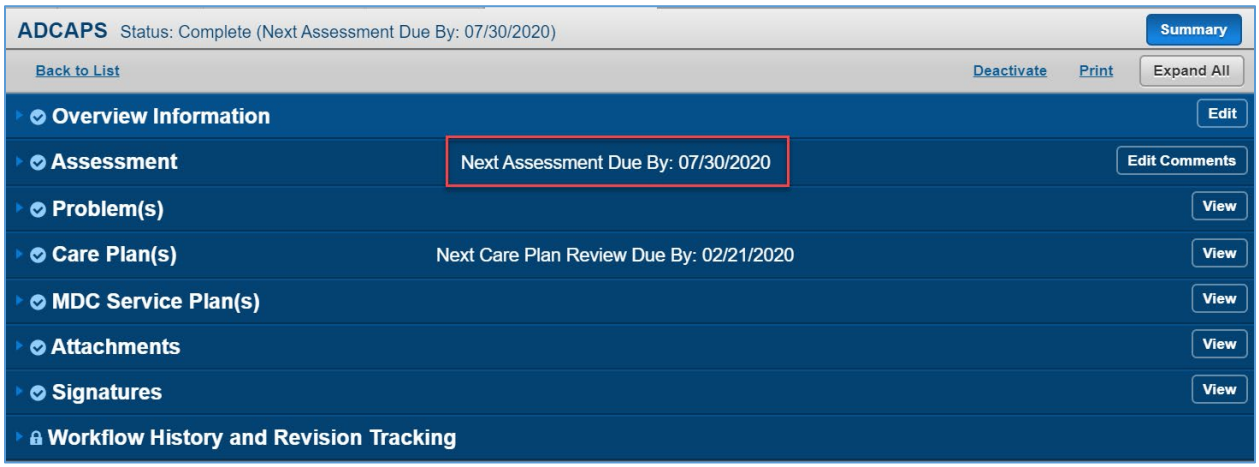


Figure 11-Next Assessment Due By date

12. Overdue By

- Count of days from the Next Assessment Due By date to the current system date
- In cases of a future due date, this will be a negative number
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

13. MDT Last Convened On Date

- Date entered by Provider as "Multi-disciplinary team last convened on", as noted in the *Care Plan* of the *active* ADCAPS
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

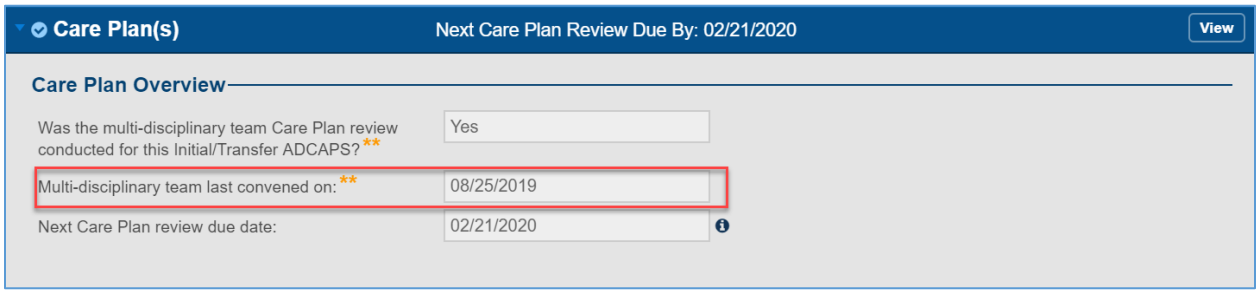


Figure 12-MDT Last Convened On Date in Care Plan

14. Next Care Plan Review Due By

- Date next Care Plan Review is due, as noted in the *Care Plan* banner of the *active* ADCAPS
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

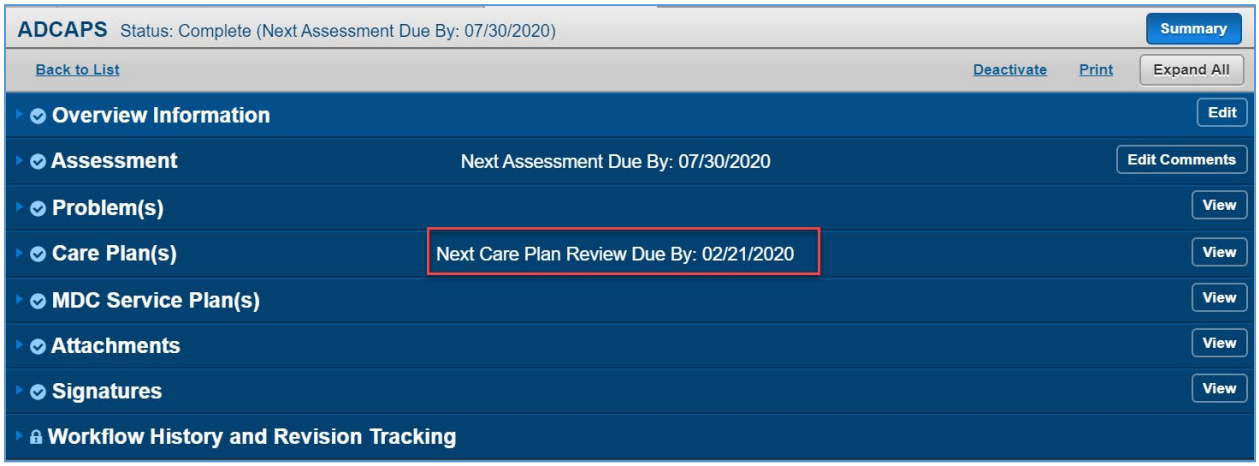


Figure 13-Next Care Plan Review Due By in ADCAPS

15. Overdue By

- Count of days from the Next Care Plan Review Due By date to the current system date
- In cases of a future due date, this will be a negative number
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

2.4 Export Report

Users may export the report from the **Summary** or **Details** view by selecting the icon in the navigation bar of the report. Available export options:

- Word
- Excel
- PDF
- TIFF file
- MHTML (web archive)
- CSV (comma delimited)
- XML file with report data

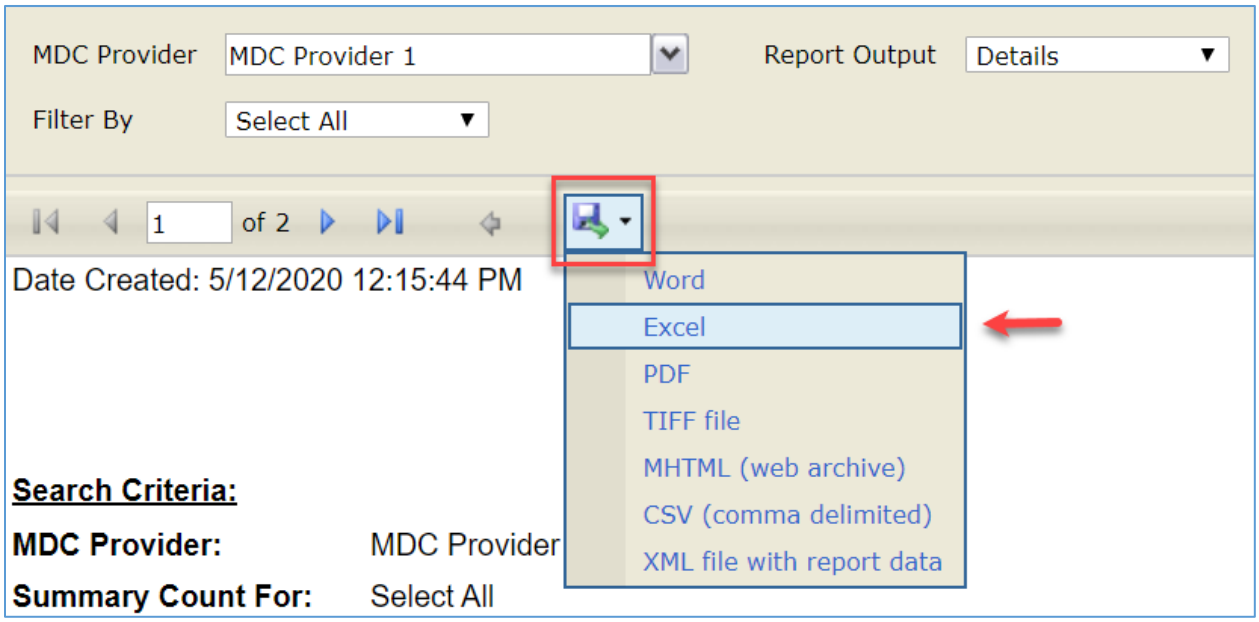


Figure 14-Export Options

TIP: Due to the size and number of columns in the report, it is recommended that users export to Excel or CSV (comma delimited) for ideal formatting

3 Provider - ADCAPS Productivity Report

This report will allow MDC Providers to view the number of ADCAPS Assessments and Care Plans that have been completed by their center's MDC Provider Nurses, within a given date range. The purpose of this report is so that MDC providers may track ADCAPS per MDC Provider Nurse.

The MDC Provider Admin, MDC Provider Staff, MDC Provider Intake, and MDC Provider Nurse user roles will have access to this report.

3.1 Search Report (Inputs)

The search parameters of a report are designed to allow the user to filter the report contents by searching for desired records only. By utilizing the search input options, the user can specify what they want to view in the report output.

1. Navigate to the **Reports** tab in LTSSMaryland
2. Select **MDC** from the Category field, then **Filter**
3. Select the View hyperlink next to **Provider - ADCAPS Productivity Report**

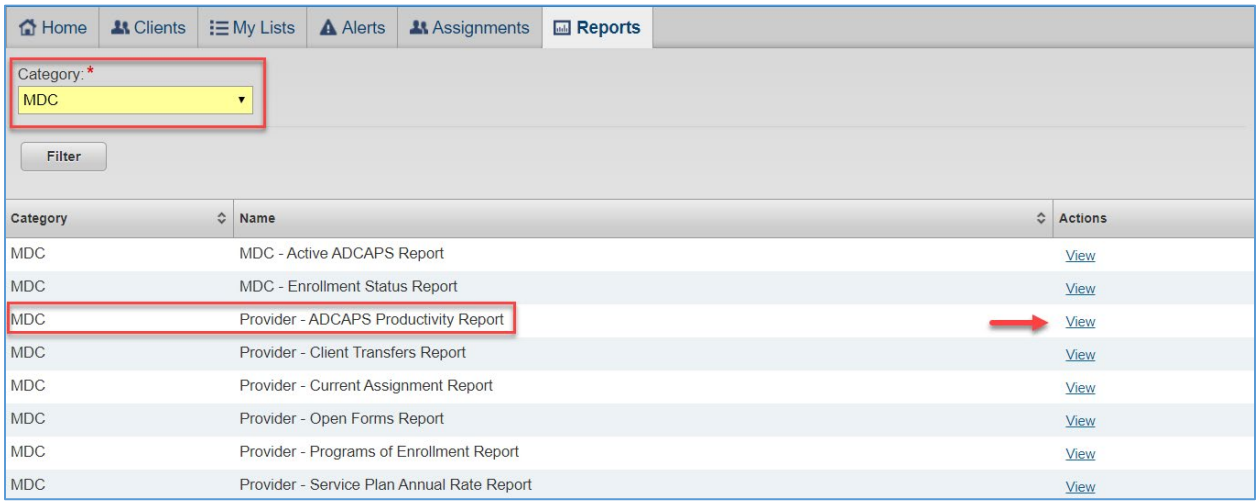


Figure 15-View Provider - ADCAPS Productivity Report

4. Enter the desired search parameters and select **View Report**:

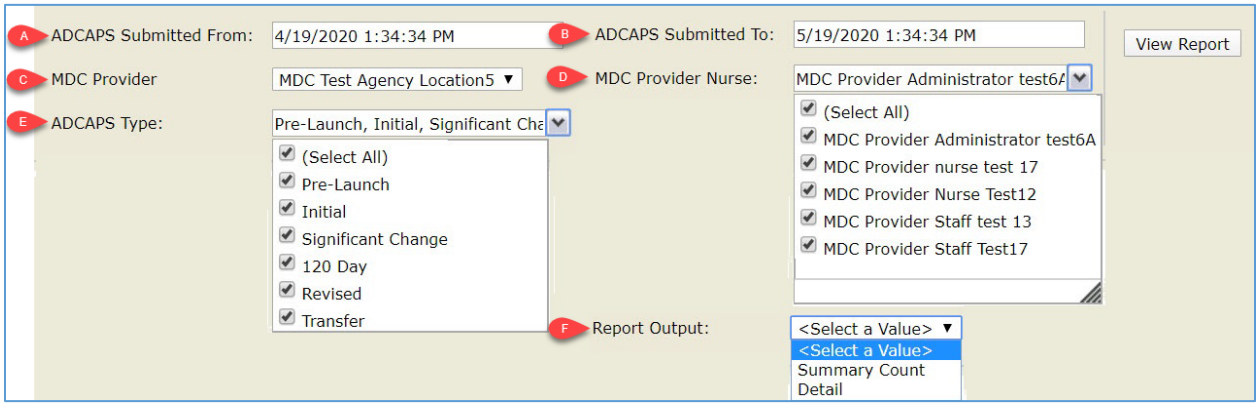


Figure 16-ADCAPS Productivity Report Search Parameters

A. **ADCAPS Submitted From**
   - Searches ADCAPS in the "Complete" status, based on the date submitted
   - Defaults to 30 days prior to the current system date
   - Required to search
   - **NOTE:** The report will not allow the user to input a date prior to July 19, 2019, since the ADCAPS module did not exist in LTSSMaryland prior to that date.

B. **ADCAPS Submitted To**
   - Searches ADCAPS in the "Complete" status, based on the date submitted
   - Defaults to the current system date
   - Required to search
   - Date range cannot exceed 365 days

C. **MDC Provider**
   - Defaults to the MDC Provider location to which the user's login is associated
   - Required to search

D. **MDC Provider Nurse**
   - Populates staff names that are associated with the MDC Provider location with the MDC Provider Nurse user role, as of the current system date
   - Includes MDC Provider Nurses that are currently inactive so that the report may include ADCAPS that were submitted by staff that may no longer be with the center
   - Defaults to *Select All*
   - Multi-Select
   - Required to search

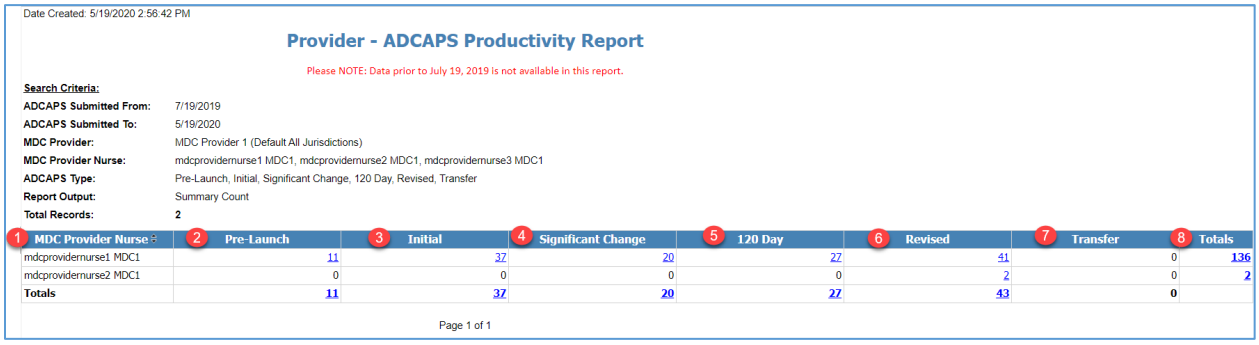
E. **ADCAPS Type**
- Filters report based on the type of ADCAPS
- Available options:
  - *Select All*
  - *Pre-Launch* (Includes Initial, Significant Change, or 120-Day ADCAPS that were entered during the Pre-Launch window from July 22, 2019 to August 10, 2019)
  - *Initial*
  - *Significant Change*
  - *120-Day*
  - *Revised* (Includes Initial, Significant Change, 120-Day or Transfer ADCAPS that have been Revised)
  - *Transfer*
- Defaults to *Select All*
- Multi-Select
- Required to search

F. **Report Output**
- Report type that allows the user to select their preferred report view
- Available Options:
  - *Summary Count:* Populates outputs with a count of ADCAPS type per MDC Provider Nurse
  - *Detail:* Populates outputs with participant details of ADCAPS that have been submitted by the MDC Provider Nurse
- Defaults to blank
- Single-Select
- Required to search

3.2 View Report Summary Count (Outputs)

Once the user enters desired search parameters for the Report Output, *Summary* and selects **View Report**, the ADCAPS Productivity Report will display a count ADCAPS types submitted by the MDC Provider Nurse roles.

The following data elements will be displayed:



Date Created: 5/19/2020 2:56:42 PM

Provider - ADCAPS Productivity Report

Please NOTE: Data prior to July 19, 2019 is not available in this report.

Search Criteria:

ADCAPS Submitted From: 7/19/2019
ADCAPS Submitted To: 5/19/2020
MDC Provider: MDC Provider 1 (Default All Jurisdictions)
MDC Provider Nurse: mdcprovidernurse1 MDC1, mdcprovidernurse2 MDC1, mdcprovidernurse3 MDC1
ADCAPS Type: Pre-Launch, Initial, Significant Change, 120 Day, Revised, Transfer
Report Output: Summary Count
Total Records: 2

1 MDC Provider Nurse	2 Pre-Launch	3 Initial	4 Significant Change	5 120 Day	6 Revised	7 Transfer	8 Totals
mdcprovidernurse1 MDC1	11	37	20	27	41	0	136
mdcprovidernurse2 MDC1	0	0	0	0	2	0	2
Totals	**11**	**37**	**20**	**27**	**43**	**0**	

Page 1 of 1

Figure 17-Provider ADCAPS Productivity Report Summary Count

1. **MDC Provider Nurse**
   - Name of the MDC Provider Nurses that are or have been associated with the MDC Provider location
   - Column may be sorted in ascending or descending order by selecting the arrows within the column label
2. **Pre-Launch**
   - Populates the number of *Pre-Launch* ADCAPS (Initial, 120-Day, or Significant Change) that have been submitted by the MDC Provider Nurse during the selected date range
   - When the hyperlink is selected, the user will be re-directed to the Details view of the report, where the user will view the participants and their associated ADCAPS data that make up the count
3. **Initial**
   - Populates the number of *Initial* ADCAPS that have been submitted by the MDC Provider Nurse during the selected date range
   - When the hyperlink is selected, the user will be re-directed to the Details view of the report, where the user will view the participants and their associated ADCAPS data that make up the count
4. **Significant Change**
   - Populates the number of *Significant* ADCAPS that have been submitted by the MDC Provider Nurse during the selected date range
   - When the hyperlink is selected, the user will be re-directed to the Details view of the report, where the user will view the participants and their associated ADCAPS data that make up the count

5. **120 Day**
    - Populates the number of *120-Day* ADCAPS that have been submitted by the MDC Provider Nurse during the selected date range
    - When the hyperlink is selected, the user will be re-directed to the Details view of the report, where the user will view the participants and their associated ADCAPS data that make up the count

6. **Revised**
    - Populates the number of *Revised* ADCAPS (Initial, 120-Day, Significant Change, or Transfer) that have been submitted by the MDC Provider Nurse during the selected date range
    - When the hyperlink is selected, the user will be re-directed to the Details view of the report, where the user will view the participants and their associated ADCAPS data that make up the count
7. **Transfer**
    - Populates the number of *Transfer ADCAPS* that have been submitted by the MDC Provider Nurse during the selected date range
    - When the hyperlink is selected, the user will be re-directed to the Details view of the report, where the user will view the participants and their associated ADCAPS data that make up the count
8. **Totals**
    - Populates the aggregate total of ADCAPS types per MDC Provider Nurse
    - When the hyperlink is selected, the user will be re-directed to the Details view of the report, where the user will view the participants and their associated ADCAPS data that make up the count

3.3 View Report Details (Outputs)

Once the user enters desired search parameters for the Report Output *Details* and selects **View Report** or navigates to the Details view by selecting a count within the *Summary Count,* then the user will be able to view the participant records with ADCAPS data.

The following data elements will be displayed:

Client			ADCAPS		
1 Client ID	2 Client First Name	3 Client Last Name	4 ADCAPS Type	5 ADCAPS Submitted By	6 ADCAPS Submit Date
2430768VA880210	AVERY	AGNES	Significant Change	mdcprovidernurse1 MDC1	03/06/2020
2249741UJ158101	June2018	MDC	120 Day	mdcprovidernurse1 MDC1	03/05/2020
2329494ZE616100	Ezekiel	Mulligan	Initial	mdcprovidernurse1 MDC1	03/05/2020
27694DEETFA9100	TestClient	Auto	Initial	mdcprovidernurse1 MDC1	03/22/2020
211905694549100	52	Agent	Significant Change	mdcprovidernurse1 MDC1	02/20/2020
1219779NA867120	Annie	MDC Test	Initial	mdcprovidernurse1 MDC1	02/12/2020
111902294729100	49	Agent	Initial-Pre-Launch	mdcprovidernurse1 MDC1	02/10/2020
2119133HC339100	Pat	Desmond	Significant Change	mdcprovidernurse1 MDC1	01/09/2020
1079489RP887121	Prob	Demo	Significant Change	mdcprovidernurse1 MDC1	01/09/2020

Figure 18-ADCAPS Productivity Report Detail View 1

1. **Client ID**
   - Participant's unique identification number within LTSSMaryland
   - When the hyperlink is selected by the user, a new tab will open to the *Client Summary*
   - Column may be sorted in ascending or descending order by selecting the arrows within the column label
   - **NOTE:** If the participant had multiple ADCAPS submitted during the selected date range, the participant will display in multiple rows.
2. **Client First Name**
   - First Name of the participant as of the current system date
   - Column may be sorted in ascending or descending order by selecting the arrows within the column label
3. **Client Last Name**
   - Last Name of the participant as of the current system date
   - Column may be sorted in ascending or descending order by selecting the arrows within the column label
4. **ADCAPS Type**
   - Type of ADCAPS submitted by the MDC Provider Nurse for the participant, as noted in the ADCAPS *Overview Information*
   - Output Options: *Initial, Initial-Revised, Initial- Pre-Launch, 120 Day, 120 Day-Pre-Launch, 120 Day-Revised, Significant Change, Significant Change-Revised, Significant Change-Pre-Launch, Transfer, or Transfer-Revised*
   - When the hyperlink is selected by the user, a new tab will open to the *ADCAPS Summary*
   - Column may be sorted in ascending or descending order by selecting the arrows within the column label

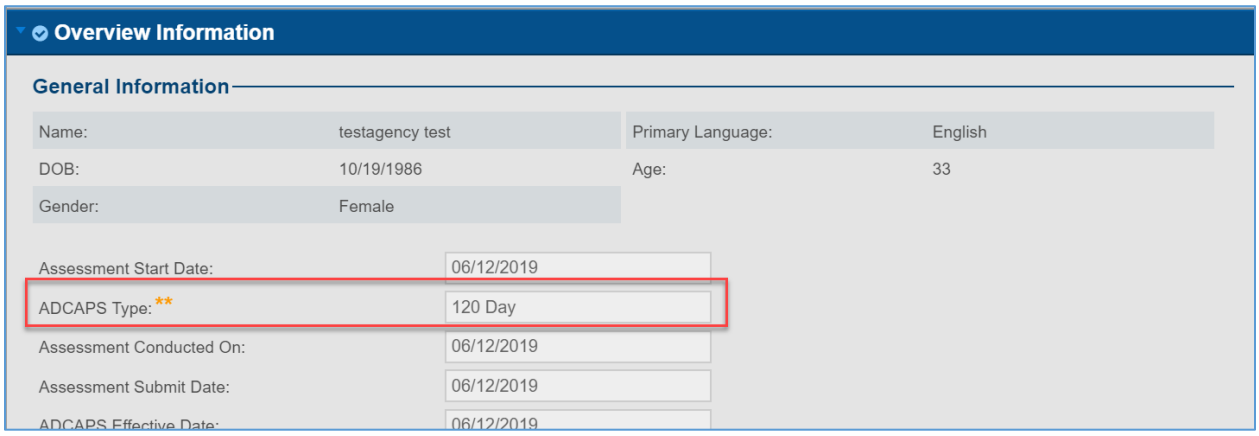


Figure 19-ADCAPS Type in Overview Information

5. ADCAPS Submitted By

- Name of user that submitted the ADCAPS, as noted in the *Workflow History* of the ADCAPS
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

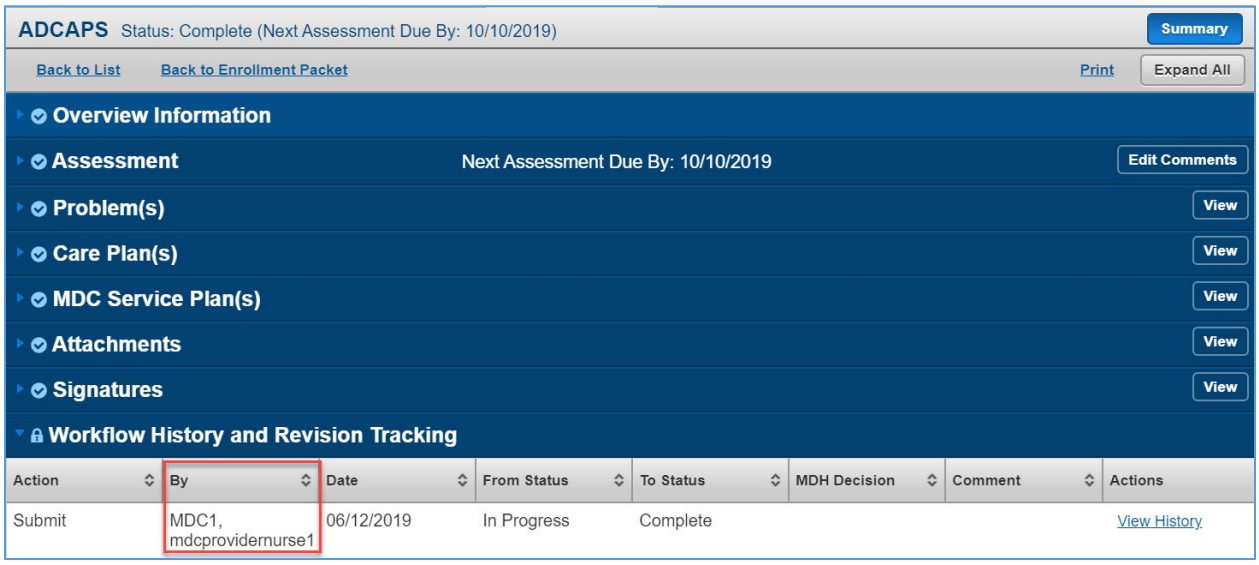


Figure 20-ADCAPS Submitted By in Workflow History

6. ADCAPS Submit Date

- Date of ADCAPS submission, as noted in the *Workflow History* of the ADCAPS
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

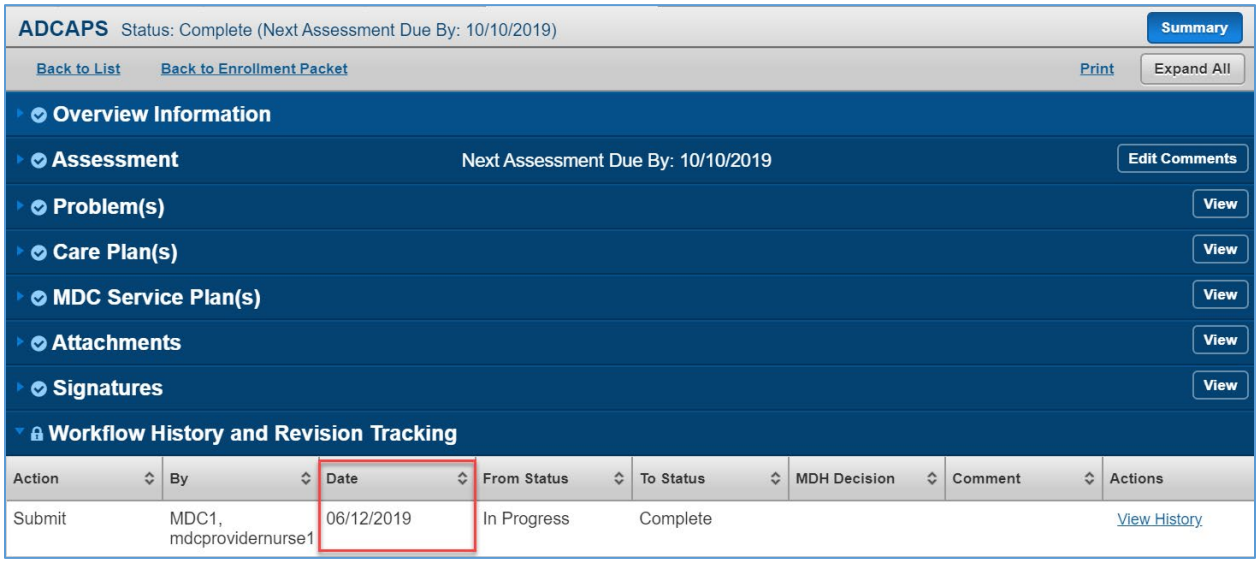


Figure 21-ADCAPS Submit Date in Workflow History

Assessment		Care Plan
7 Assessment Conducted On	8 Assessment Submit Date	9 MDT Last Convened On Date
03/06/2020	03/06/2020	03/06/2020
03/05/2020	03/05/2020	03/05/2020
03/05/2020	03/05/2020	03/05/2020
03/01/2020	03/22/2020	03/01/2020
02/19/2020	02/20/2020	02/10/2020
02/12/2020	02/12/2020	02/12/2020

Figure 22- ADCAPS Productivity Report Detail View 2

7. Assessment Conducted On

- Date entered by Provider as the "Assessment Conducted On", as noted in the *Overview Information* of the ADCAPS
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

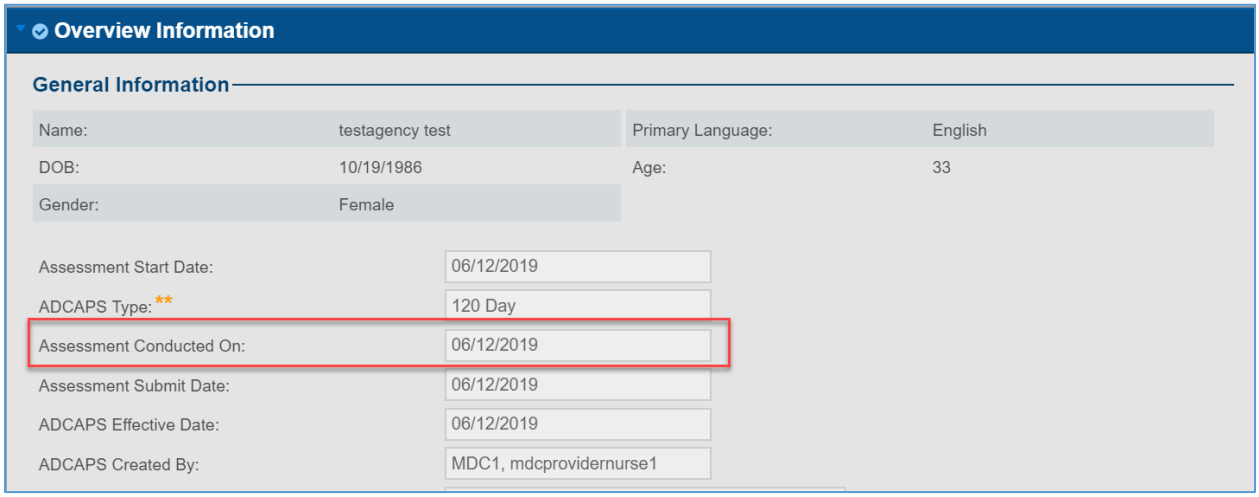


Figure 23-Assessment Conducted On in Overview Information

8. Assessment Submit Date

- Date Assessment was submitted by the Provider, as noted in the *Overview Information* of the ADCAPS
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

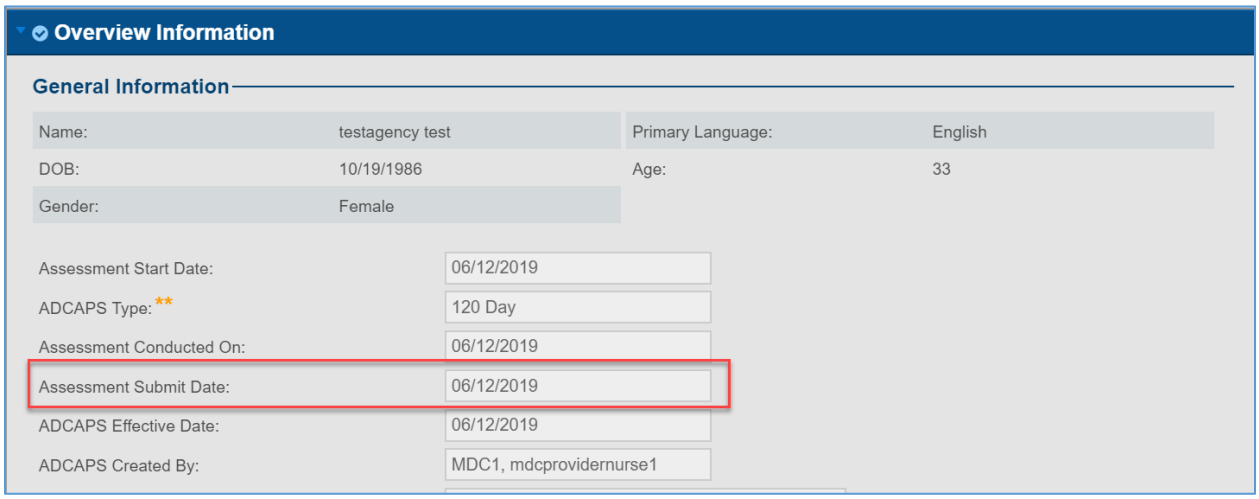


Figure 24-Assessment Submit Date in Overview Information

9. MDT Last Convened On Date

- Date entered by Provider as "Multi-disciplinary team last convened on", as noted in the *Care Plan* section of the ADCAPS
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

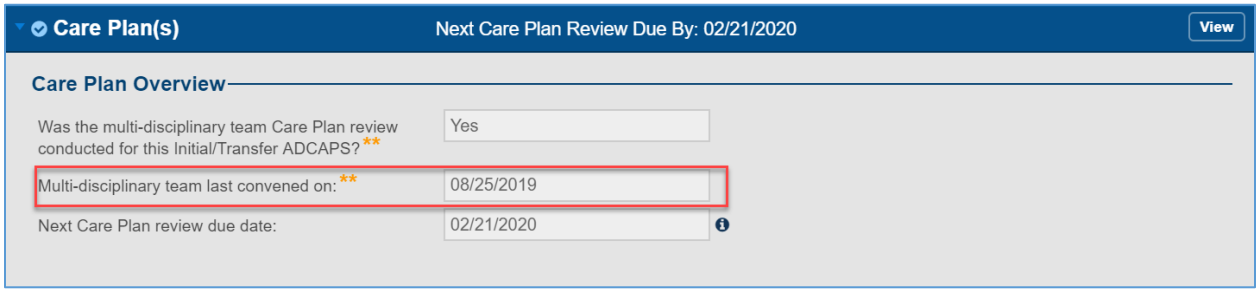


Figure 25-MDT Last Convened On Date in Care Plan

3.4 Export Report

Users may export the report by selecting the icon in the navigation bar of the report. Available export options:

- Word
- Excel
- PDF
- TIFF file
- MHTML (web archive)
- CSV (comma delimited)
- XML file with report data

TIP: Due to the size and number of columns in the report, it is recommended that users export to Excel or CSV (comma delimited) for ideal formatting

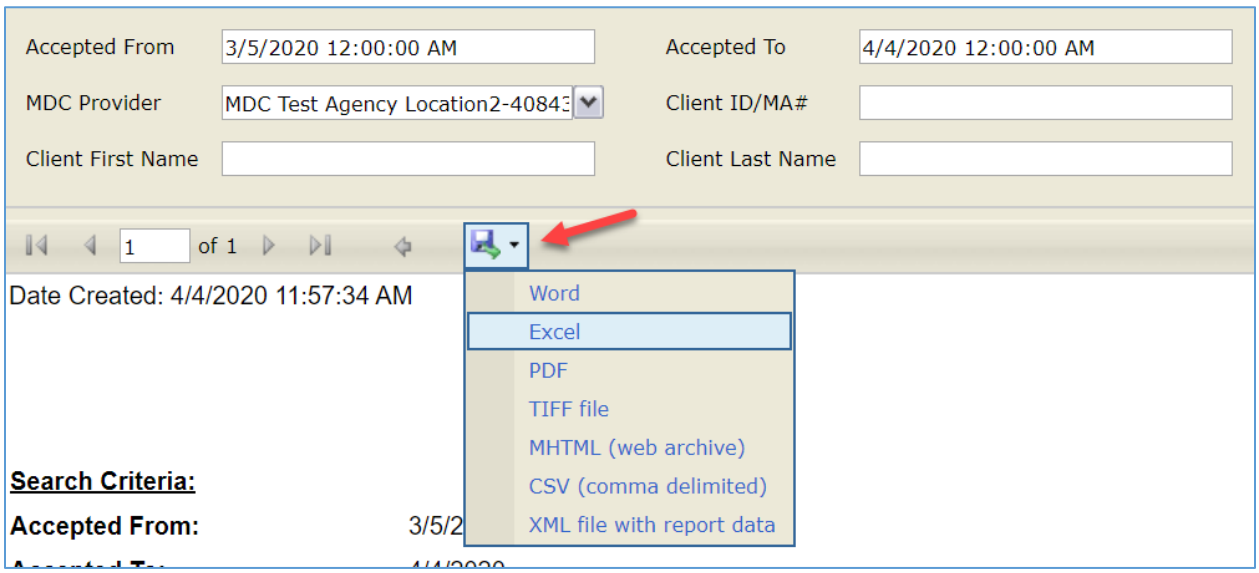


Figure 26-Export Options

4 Provider - Client Transfers Report

This report will allow MDC Providers to view historical and pending transfers by providing a list of participants with submitted Voluntary Consent to Transfer forms, within a given date range. The purpose of this report is so that MDC providers may identify participants that may be transferring to or from their MDC Provider location.

The MDC Provider Admin, MDC Provider Staff, MDC Provider Intake, and MDC Provider Nurse user roles will have access to this report.

4.1 Search Report (Inputs)

The search parameters of a report are designed to allow the user to filter the report contents by searching for desired records only. By utilizing the search input options, the user can specify what they want to view in the report output.

1. Navigate to the **Reports** tab in LTSSMaryland
2. Select **MDC** from the Category field, then **Filter**
3. Select the View hyperlink next to **Provider - Client Transfers Report**

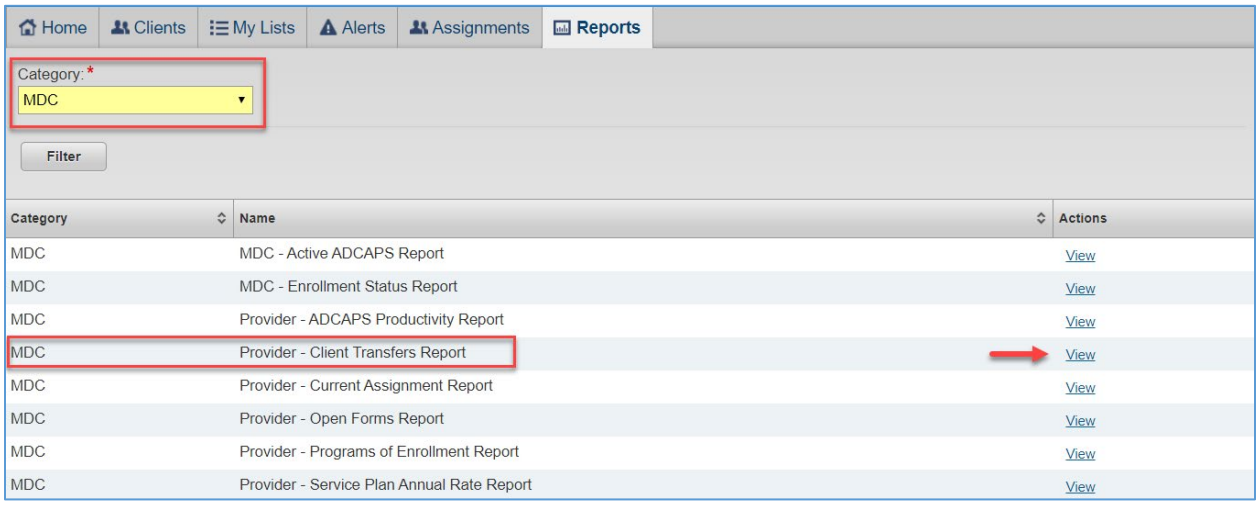


Figure 27-View Provider - Client Transfers Report

4. Enter the desired search parameters and select **View Report**:

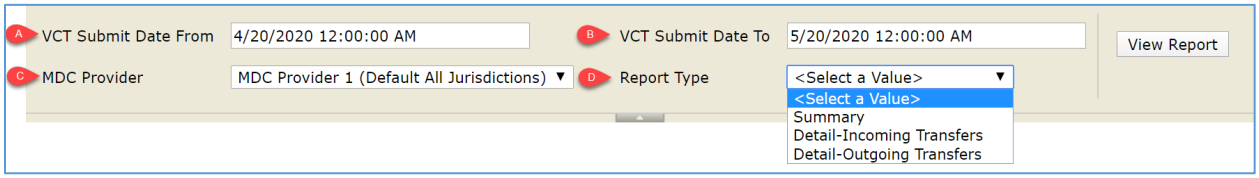


Figure 28-Provider-Client Transfers Report Search Parameters

A. **VCT Submit Date From**
   - Searches based on the Submit Date of the *Voluntary Consent to Transfer* Form, where the MDC Provider is selected within the form as the *Provider Transferring To* or *Provider Transferring From*
   - Defaults to 30 days prior to the current system date
   - Required to search

NOTE: The report will not allow the user to input a date prior to July 19, 2019, since the Voluntary Consent to Transfer form did not exist in LTSSMaryland prior to that date.

B. **VCT Submit Date To**
   - Searches based on the Submit Date of the *Voluntary Consent to Transfer* Form, where the MDC Provider is selected within the form as the *Provider Transferring To* or *Provider Transferring From*
   - Defaults to the current system date
   - Required to search
   - Date range cannot exceed 365 days

C. **MDC Provider**
   - Defaults to the MDC Provider location to which the user's login is associated
   - Required to search

D. **Report Type**
   - Report type that allows the user to select their preferred report view
   - Available Options:
     - *Summary:* Populates a summary count of Incoming or Outgoing Transfers during the selected date range
     - *Detail-Incoming Transfers:* Populates the details of participants where the MDC Provider is the "Provider Transferring To" within their Voluntary Consent to Transfer forms
     - *Detail-Outgoing Transfers:* Populates the details of participants where the MDC Provider is the "Provider Transferring From" within their Voluntary Consent to Transfer forms
   - Defaults to blank *<Select a Value>*
   - Single-Select
   - Required to search

4.2 View Report Summary (Outputs)

Once the user enters desired search parameters for the Report Type *Summary* and selects **View Report**, the report will display a count of Incoming and Outgoing transfers within the selected date range. The *Summary* view also displays the total count of participants that are actively assigned to the location as the Primary MDC Provider.

The following data elements will be displayed:

Date Created: 5/20/2020 10:35:12 AM

Provider - Client Transfers Report

Please NOTE: Data prior to July 19, 2019 is not available in this report.

Search Criteria:

Report Type:	Summary
MDC Provider:	MDC Provider 1 (Default All Jurisdictions)
VCT Submit Date From:	7/19/2019
VCT Submit Date To:	5/20/2020
Total Records:	1

1 Primary MDC Provider	2 Provider #	3 Incoming Transfers	4 Outgoing Transfers	5 Current Primary Provider Assignment
MDC Provider 1 (Default All Jurisdictions)	101010110	8	15	126

Page 1 of 1

Figure 29- Client Transfers Summary View

1. **Provider Location**
   - Name of the MDC Provider
2. **Provider #**
   - Provider Locations unique identification number
3. **Incoming Transfers**
   - Count of participants with a Voluntary Consent to Transfer form that was submitted within the selected date range, where the MDC Provider is listed as the *Provider Transferring To*
   - When the hyperlink is selected, the user will be re-directed to the Details view of the report, where the user will view the participants and their associated Voluntary Consent to Transfer form data that make up the count
4. **Outgoing Transfers**
   - Count of participants with a Voluntary Consent to Transfer form that was submitted within the selected date range, where the MDC Provider is listed as the *Provider Transferring From*
   - When the hyperlink is selected, the user will be re-directed to the Details view of the report, where the user will view the participants and their associated Voluntary Consent to Transfer form data that make up the count
5. **Current Primary Provider Assignment**
   - Count of participants that are actively assigned to the MDC Provider as their Primary, as of the current system date

4.3 View Report Detail-Incoming Transfers (Outputs)

Once the user enters desired search parameters for the Report Output *Detail-Incoming Transfers* and selects **View Report** or navigates to the Detail view by selecting a count within the "*Incoming Transfers*" column of the *Summary Report,* then the user will be able to view the participant records with Voluntary Consent to Transfer data.

The following data elements will be displayed:

1 Client ID	2 Client First Name	3 Client Last Name	4 Jurisdiction	5 Zip Code
2499742AU569110	UAT DEMO	Client 5	Baltimore	21046
2919293AD595110	DAVID	GOLDBERGER	Baltimore City	
1459857AS466100	sai2	han	Anne Arundel	22222
2719044OB449100	Bob	Hughes	Baltimore	12345
16895XCCQ7B6110	QC	New6	Baltimore	20103
1329043ED456100	Demo1	Preuat	Baltimore	
1730221ET330200	Peter	Test	Howard	
2210888PE971211	EPTest1	test1	Baltimore	20103

Figure 30-Detail Report-Incoming Transfers View 1

1. **Client ID**
   - Participant's unique identification number within LTSSMaryland
   - When the hyperlink is selected by the user, a new tab will open to the *Client Summary*
   - Column may be sorted in ascending or descending order by selecting the arrows within the column label
2. **Client First Name**
   - First Name of the participant as of the current system date
   - Column may be sorted in ascending or descending order by selecting the arrows within the column label
3. **Client Last Name**
   - Last Name of the participant as of the current system date
   - Column may be sorted in ascending or descending order by selecting the arrows within the column label
4. **Jurisdiction**
   - Participant's assigned jurisdiction as of the current system date
   - Column may be sorted in ascending or descending order by selecting the arrows within the column label
5. **Zip Code**
   - Participant's zip code as of the current system date
   - Column may be sorted in ascending or descending order by selecting the arrows within the column label

6 Current VCT Status	7 Transferring From Provider	8 Transferring To Provider	9 Date VCT Submitted by Transferring To Provider	10 Anticipated Start Date
Pending MDH Review	MDC Provider 6 (Howard County)	MDC Provider 1 (Default All Jurisdictions)	08/01/2019	08/01/2019
Accepted	MDC Provider 2 (Default All Jurisdictions)	MDC Provider 1 (Default All Jurisdictions)	07/30/2019	07/30/2019
Accepted	MDC Provider 2 (Default All Jurisdictions)	MDC Provider 1 (Default All Jurisdictions)	07/31/2019	05/27/2018
Accepted	MDC Test Agency Location4	MDC Provider 1 (Default All Jurisdictions)	02/10/2020	04/01/2019
Accepted	MDC Provider 2 (Default All Jurisdictions)	MDC Provider 1 (Default All Jurisdictions)	08/16/2019	04/01/2019
Pending MDH Review	MDC Provider 2 (Default All Jurisdictions)	MDC Provider 1 (Default All Jurisdictions)	08/02/2019	08/02/2019
Clarification Requested	MDC Test Agency Location5	MDC Provider 1 (Default All Jurisdictions)	03/05/2020	03/01/2020
Pending MDH Review	MDC Provider 4 (Default All Jurisdictions)	MDC Provider 1 (Default All Jurisdictions)	09/05/2019	08/28/2019

Figure 31-Detail-Incoming Transfers View 2

6. Current VCT Status

- Status of the Voluntary Consent to Transfer form as of the current system date
- Column may be sorted in ascending or descending order by selecting the arrows within the column label
- **NOTE:** Report excludes Voluntary Consent to Transfer forms that are "*In Progress*", "*Deleted*", or "*Discarded*"

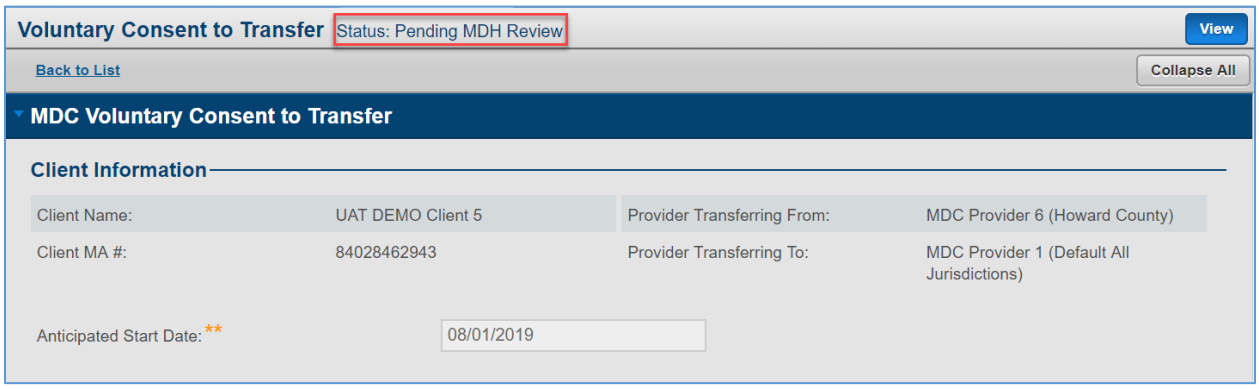


Figure 32-Status within the Voluntary Consent to Transfer form

7. Transferring From Provider

- MDC Provider Location that is selected in the *Provider Transferring From* field of the submitted Voluntary Consent to Transfer form
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

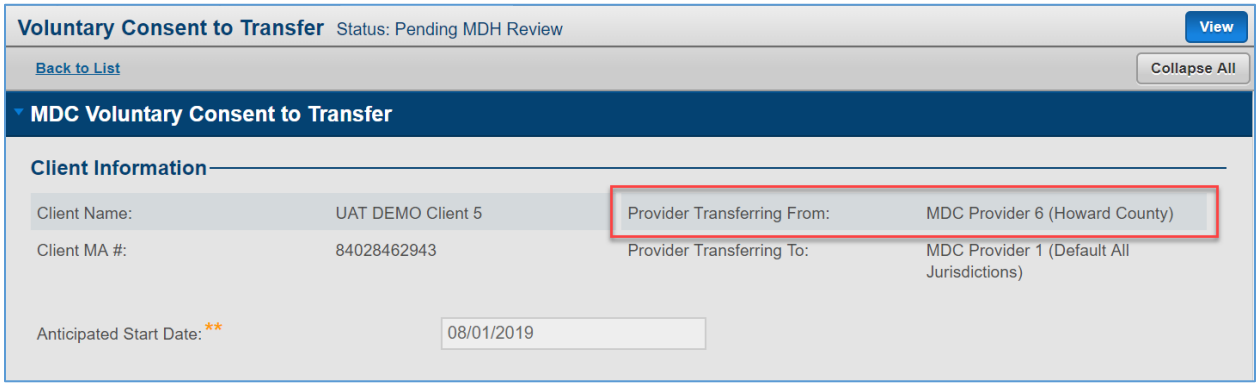


Figure 33-Transferring From Provider within the Voluntary Consent to Transfer form

8. Transferring To Provider

- MDC Provider Location that is selected in the *Provider Transferring To* field of the submitted Voluntary Consent to Transfer form
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

NOTE: Users should view their associated MDC Provider Location name only in this column, when viewing *Incoming Transfers*

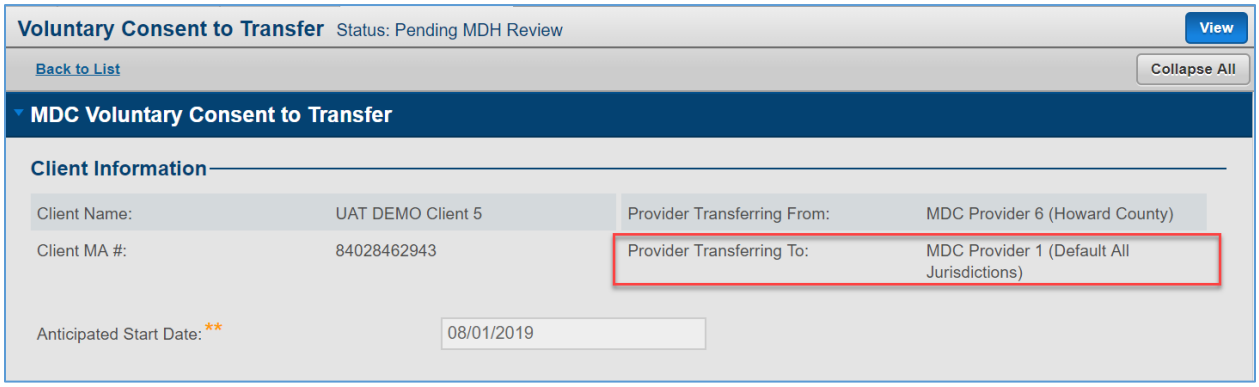


Figure 34-Transferring To Provider within the Voluntary Consent to Transfer

9. Date VCT Submitted by Transferring To Provider

- Date the Voluntary Consent to Transfer form was submitted by the Provider that is accepting the incoming participant
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

10. Anticipated Start Date

- Date entered as the *Anticipated Start Date* in the submitted Voluntary Consent to Transfer form
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

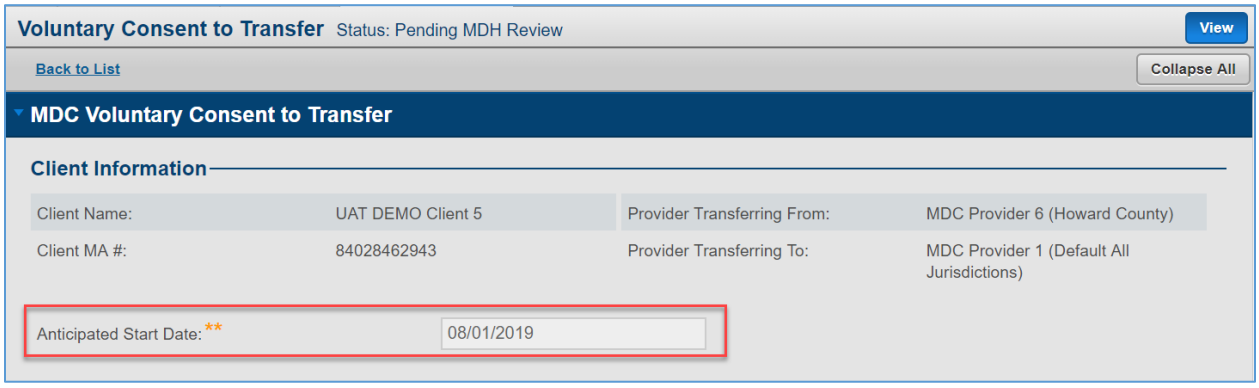


Figure 35-Anticipated Start Date within the Voluntary Consent to Transfer form

4.4 View Report Detail-Outgoing Transfers (Outputs)

Once the user enters desired search parameters for the Report Output *Detail-Outgoing Transfers* and selects **View Report** or navigates to the Detail view by selecting a count within the "*Outgoing Transfers*" column of the *Summary,* then the user will be able to view the participant records with Voluntary Consent to Transfer data.

The following data elements will be displayed:

1 Client ID	2 Client First Name	3 Client Last Name	4 Jurisdiction	5 Zip Code
12345B56789	48	Agent	Allegany	21044
12345B56789	Super	Big	Baltimore	12345
12345B56789	Vivas50	Demo123	Queen Anne's	12345
12345B56789	CCCtest	Demo1test	Baltimore	20103

Figure 36-Detail-Outgoing Transfers View 1

1. **Client ID**
   - Participant's unique identification number within LTSSMaryland
   - When the hyperlink is selected by the user, a new tab will open to the *Client Summary*
   - Column may be sorted in ascending or descending order by selecting the arrows within the column label
2. **Client First Name**
   - First Name of the participant as of the current system date
   - Column may be sorted in ascending or descending order by selecting the arrows within the column label
3. **Client Last Name**
   - Last Name of the participant as of the current system date
   - Column may be sorted in ascending or descending order by selecting the arrows within the column label
4. **Jurisdiction**
   - Participant's assigned jurisdiction as of the current system date
   - Column may be sorted in ascending or descending order by selecting the arrows within the column label
5. **Zip Code**
   - Participant's zip code as of the current system date
   - Column may be sorted in ascending or descending order by selecting the arrows within the column label

6 Current VCT Status	7 Transferring From Provider	8 Transferring To Provider	9 Date VCT Submitted by Transferring To Provider	10 Anticipated Start Date
Accepted	MDC Provider 1 (Default All Jurisdictions)	MDC Provider 2 (Default All Jurisdictions)	02/04/2020	02/04/2020
Pending MDH Review	MDC Provider 1 (Default All Jurisdictions)	MDC Provider 3 (Default All Jurisdictions)	04/01/2020	04/01/2020
Accepted	MDC Provider 1 (Default All Jurisdictions)	MDC Provider 5 (Default All Jurisdictions)	01/09/2020	01/09/2020
Pending MDH Review	MDC Provider 1 (Default All Jurisdictions)	MDC Provider 3 (Default All Jurisdictions)	04/09/2020	04/10/2020
Accepted	MDC Provider 1 (Default All Jurisdictions)	MDC Provider 3 (Default All Jurisdictions)	02/20/2020	02/24/2020
Pending MDH Review	MDC Provider 1 (Default All Jurisdictions)	MDC Provider 2 (Default All Jurisdictions)	02/07/2020	04/01/2019
Pending MDH Review	MDC Provider 1 (Default All Jurisdictions)	MDC Provider 2 (Default All Jurisdictions)	04/09/2020	04/10/2020
Accepted	MDC Provider 1 (Default All Jurisdictions)	MDC Provider 2 (Default All Jurisdictions)	07/29/2019	07/29/2019

Figure 37-Detail-Outgoing Transfers View 2

6. Current VCT Status

- Status of the Voluntary Consent to Transfer form as of the current system date
- Column may be sorted in ascending or descending order by selecting the arrows within the column label
- **NOTE:** Report excludes Voluntary Consent to Transfer forms that are "*In Progress*", "*Deleted*", or "*Discarded*"

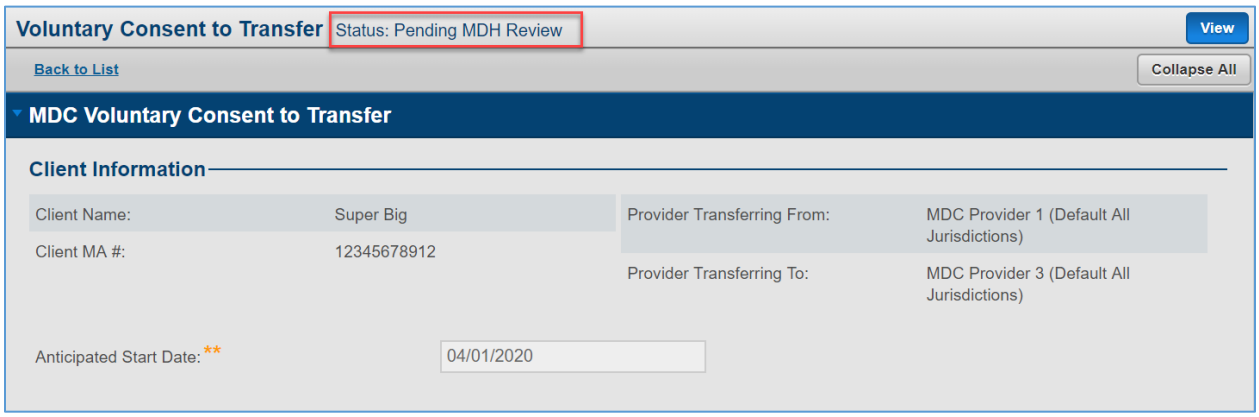


Figure 38-Status within the Voluntary Consent to Transfer form

7. **Transferring From Provider**
   - MDC Provider Location that is selected in the *Provider Transferring From* field of the submitted Voluntary Consent to Transfer form
   - Column may be sorted in ascending or descending order by selecting the arrows within the column label

   NOTE: Users should view their associated MDC Provider Location name only in this column, when viewing *Outgoing Transfers*

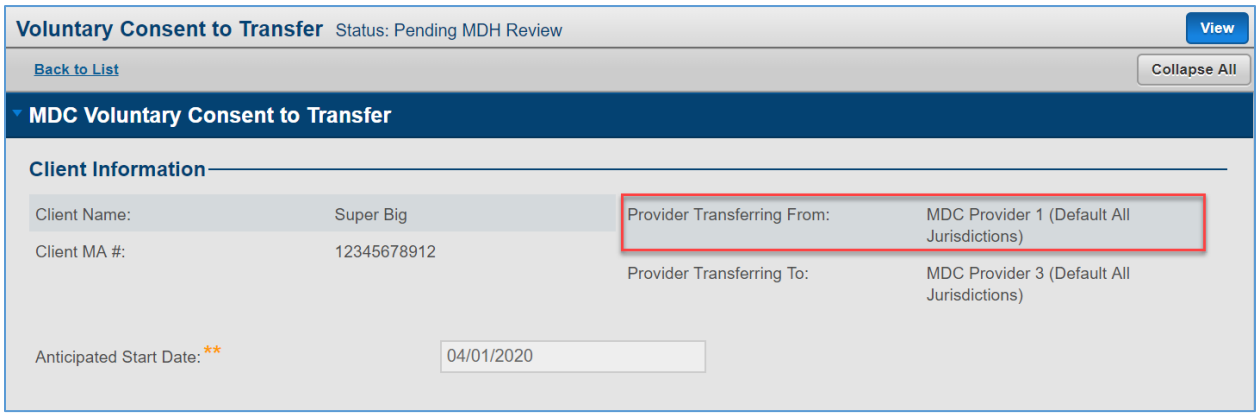


Figure 39-Transferring From Provider within the Voluntary Consent to Transfer form

8. **Transferring To Provider**
   - MDC Provider Location that is selected in the *Provider Transferring To* field of the submitted Voluntary Consent to Transfer form
   - Column may be sorted in ascending or descending order by selecting the arrows within the column label

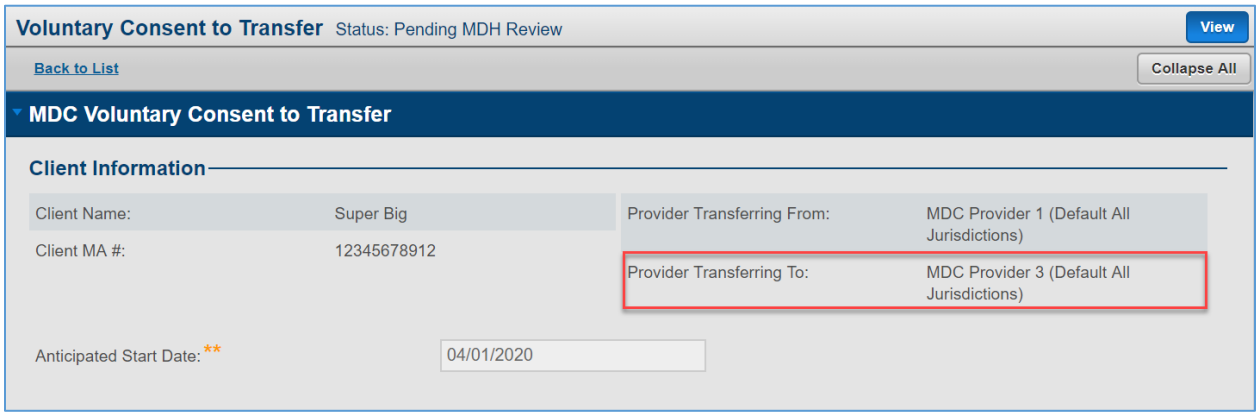


Figure 40-Transferring To Provider within the Voluntary Consent to Transfer

9. **Date VCT Submitted by Transferring To Provider**
   - Date the Voluntary Consent to Transfer form was submitted by the Provider that is accepting the incoming participant
   - Column may be sorted in ascending or descending order by selecting the arrows within the column label

10. Anticipated Start Date

- Date entered as the *Anticipated Start Date* in the submitted Voluntary Consent to Transfer form
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

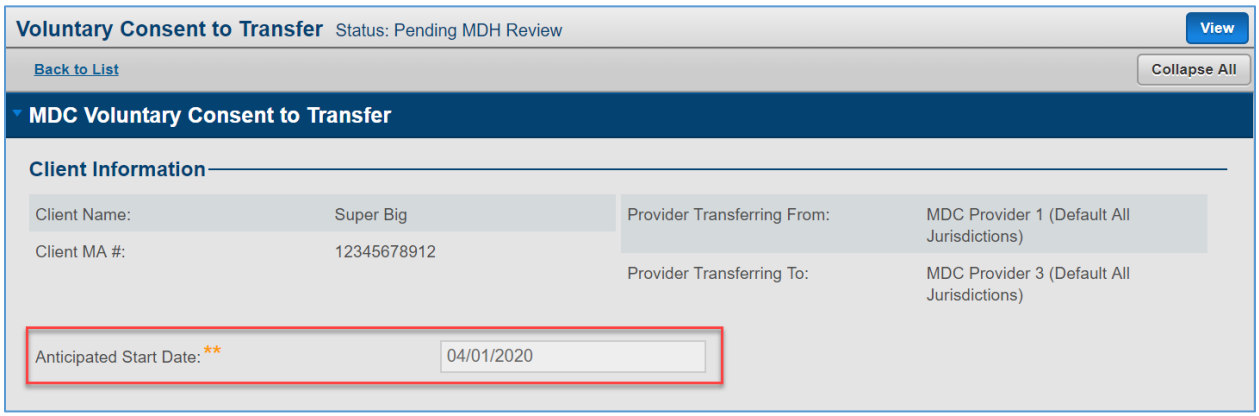


Figure 41-Anticipated Start Date within the Voluntary Consent to Transfer form

4.5 Export Report

Users may export the report by selecting the icon in the navigation bar of the report. Available export options:

- Word
- Excel
- PDF
- TIFF file
- MHTML (web archive)
- CSV (comma delimited)
- XML file with report data

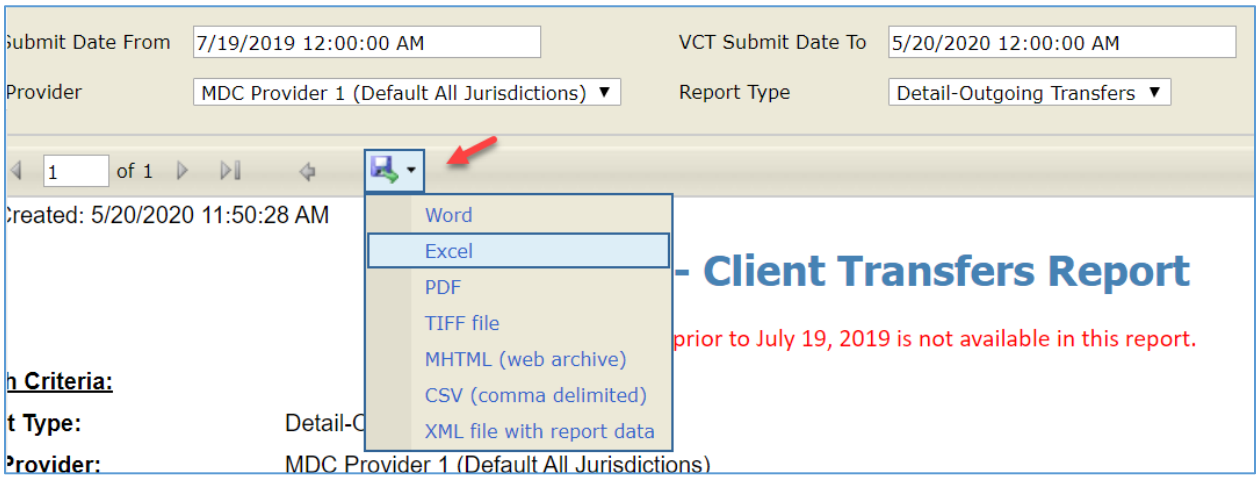


Figure 42-Export Options

TIP: Due to the size and number of columns in the report, it is recommended that users export to Excel or CSV (comma delimited) for ideal formatting

5 Provider - Current Assignment Report

This report will allow the MDC Provider to view a list of participants who are currently assigned to their MDC Provider location where they are the active Primary or Additional MDC Provider. The purpose of this report is so that MDC Providers may evaluate the assignment of participants and the caseload at their center.

The MDC Provider Admin, MDC Provider Staff, MDC Provider Intake, and MDC Provider Nurse user roles will have access to this report.

5.1 Search Report (Inputs)

The search parameters of a report are designed to allow the user to filter the report contents by searching for desired records only. By utilizing the search input options, the user can specify what they want to view in the report output.

1. Navigate to the **Reports** tab in LTSSMaryland
2. Select **MDC** from the Category field, then **Filter**
3. Select the View hyperlink next to **Provider - Current Assignment Report**

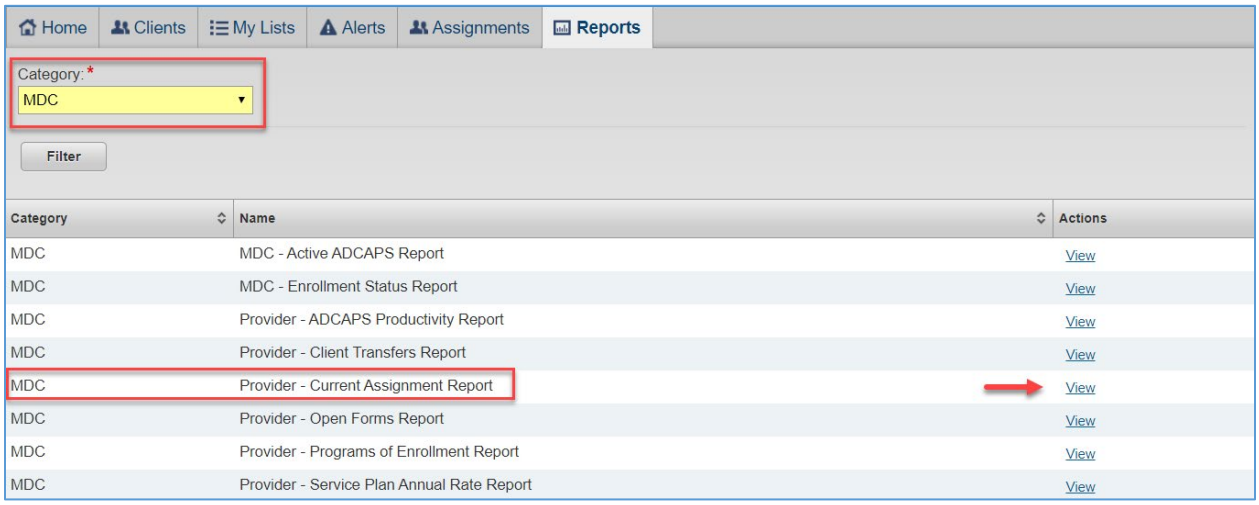


Figure 43-View Provider - Current Assignments Report

4. Enter the desired search parameters and select **View Report**:

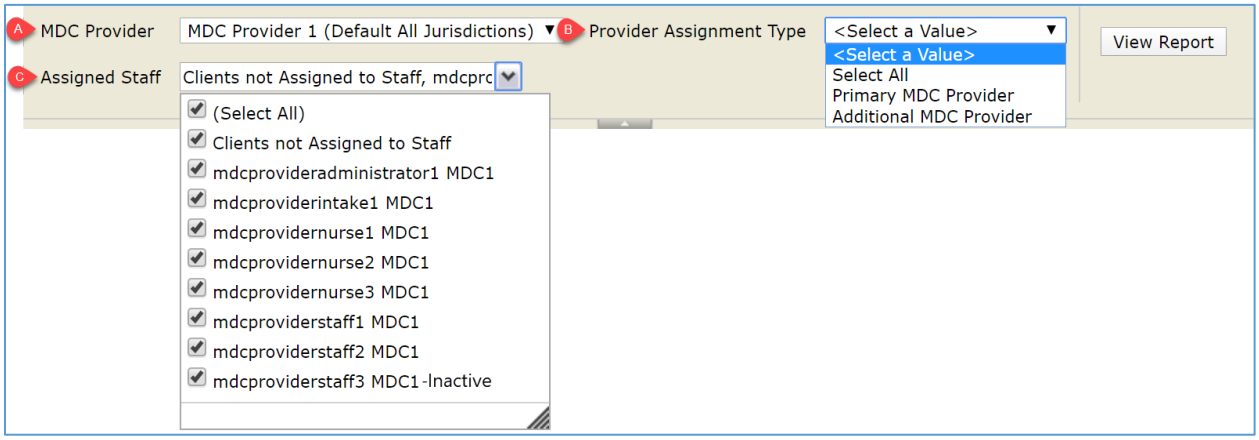


Figure 44-Provider-Client Assignment Report Search Parameters

A. **MDC Provider**
   - Defaults to the MDC Provider location to which the user's login is associated
   - Required to search

B. **Provider Assignment Type**
   - Filters report based on the type of assignment
   - Available options:
     - *Select All*
     - *Primary MDC Provider:* Populates a list of participants where the MDC Provider is assigned as the Primary MDC Provider
     - *Additional MDC Provider:* Populates a list of participants where the MDC Provider is assigned as the Additional MDC Provider
   - Defaults to blank
   - Single-Select
   - Required to search

C. **Assigned Staff**
   - Populates staff names that are associated with the MDC Provider as of the current system date, including staff that are currently *Inactive*
   - Includes *Clients Not Assigned to Staff* so that the report will capture any participants that have yet to be assigned to a Staff role by the MDC Provider
   - Defaults to *Select All*
   - Multi-Select
   - Required to search

5.2 View Report Select All (Outputs)

Once the user enters desired search parameters with *Select All* as the **Provider Assignment Type**, and selects **View Report**, then the user will be able to view the participant records and assignment details.

The following data elements will be displayed:

NOTE: When the user chooses the "*Select All*" option for **Provider Assignment Type**, participant records will appear multiple times to show both Primary and Additional MDC Provider assignment details.

1 Client ID	2 Client First Name	3 Client Last Name	4 Jurisdiction	5 Zip Code
2229112RA167121	archmdc	active	Montgomery	28099
2229112RA167121	archmdc	active	Montgomery	28099
1110024VE310200	Eve	Adam	Carroll	
1110024VE310200	Eve	Adam	Carroll	
1519406DM049100	MDC Test	Addie	Baltimore	21218
1519406DM049100	MDC Test	Addie	Baltimore	21218

Figure 45-Client Assignment Report View 1

1. **Client ID**
   - Participant's unique identification number within LTSSMaryland
   - When the hyperlink is selected by the user, a new tab will open to the *Client Summary*
   - Column may be sorted in ascending or descending order by selecting the arrows within the column label
2. **Client First Name**
   - First Name of the participant as of the current system date
   - Column may be sorted in ascending or descending order by selecting the arrows within the column label
3. **Client Last Name**
   - Last Name of the participant as of the current system date
   - Column may be sorted in ascending or descending order by selecting the arrows within the column label
4. **Jurisdiction**
   - Participant's assigned jurisdiction as of the current system date
   - Column may be sorted in ascending or descending order by selecting the arrows within the column label
5. **Zip Code**
   - Participant's zip code as of the current system date
   - Column may be sorted in ascending or descending order by selecting the arrows within the column label

6 Assignment Type	7 Provider Name	8 Primary Assigned Staff	9 Secondary Assigned Staff	10 Center Assignment Date
Primary	MDC Provider 2 (Default All Jurisdictions)	MDC Provider Staff1 MDC2	mdcproviderstaff2 MDC2	03/26/2019
Additional	MDC Provider 1 (Default All Jurisdictions)	mdcproviderstaff1 MDC1	mdcproviderstaff2 MDC1	03/06/2020
Primary	MDC Provider 2 (Default All Jurisdictions)			01/07/2020
Additional	MDC Provider 1 (Default All Jurisdictions)	mdcproviderstaff1 MDC1	mdcproviderstaff2 MDC1	03/06/2020
Primary	MDC Provider 1 (Default All Jurisdictions)	mdcproviderstaff1 MDC1		05/07/2019
Additional	MDC Provider 2 (Default All Jurisdictions)			05/07/2019
Primary	MDC Provider 1 (Default All Jurisdictions)			02/10/2020

Figure 46-Client Assignment Report View 2

6. Assignment Type

- Displays whether the Provider Name is the assigned *Primary* or *Additional* MDC Provider
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

Current Assignments

Agency Assignments

Assignment Type	Provider	Assignment Date	Action
Primary MDC Provider	MDC Provider 2 (Default All Jurisdictions)	03/26/2019	View History
Additional MDC Provider	MDC Provider 1 (Default All Jurisdictions)	03/06/2020	View History
Assessor Agency	LHD (Default All Jurisdictions)	03/18/2019	View History

Figure 47-Assignment Type as displayed in the Current Assignment section of the Client Summary

7. Provider Name

- Populates the MDC Provider location that is the actively assigned Primary or Additional Provider
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

Current Assignments

Agency Assignments

Assignment Type	Provider	Assignment Date	Action
Primary MDC Provider	MDC Provider 2 (Default All Jurisdictions)	03/26/2019	View History
Additional MDC Provider	MDC Provider 1 (Default All Jurisdictions)	03/06/2020	View History
Assessor Agency	LHD (Default All Jurisdictions)	03/18/2019	View History

Figure 48-Provider Name as displayed in the Current Assignment section of the Client Summary

8. Primary Assigned Staff

- Populates the name of the MDC Provider user role that is actively assigned to the participant by the Primary or Additional MDC Provider as the *Primary* Staff
- Blank if none assigned
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

Staff Assignments

Assignment Type	Date Assigned	Staff Name	Agency	Phone Number	Email
ATP Staff	03/06/2020	atpstaff1 DHMH	MDH - DHMH	(410) 715-6539	dummy@ltssdomain.com
MDC Provider Staff (Primary)	03/06/2020	mdcproviderstaff1 MDC1	MDC Provider 1 - MDC Provider 1 (Default All Jurisdictions) (Additional)	(410) 715-6539	dummy@ltssdomain.com
MDC Provider Staff (Secondary)	03/06/2020	mdcproviderstaff2 MDC1	MDC Provider 1 - MDC Provider 1 (Default All Jurisdictions) (Additional)	(410) 715-6539	dummy@ltssdomain.com
MDC Provider Staff (Primary)	03/06/2020	MDC Provider Staff1 MDC2	MDC Provider 2 - MDC Provider 2 (Default All Jurisdictions) (Primary)	(410) 715-6538	dummy@ltssdomain.com
MDC Provider Staff (Secondary)	03/06/2020	mdcproviderstaff2 MDC2	MDC Provider 2 - MDC Provider 2 (Default All Jurisdictions) (Primary)	(410) 715-6539	dummy@ltssdomain.com

Figure 49-Primary MDC Provider Staff as displayed in the Current Assignment section of the Client Summary

9. Secondary Assigned Staff

- Populates the name of the MDC Provider user role that is actively assigned to the participant by the Primary or Additional MDC Provider as the *Secondary* Staff
- Blank if none assigned
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

Staff Assignments

Assignment Type	Date Assigned	Staff Name	Agency	Phone Number	Email
ATP Staff	03/06/2020	atpstaff1 DHMH	MDH - DHMH	(410) 715-6539	dummy@ltssdomain.com
MDC Provider Staff (Primary)	03/06/2020	mdcproviderstaff1 MDC1	MDC Provider 1 - MDC Provider 1 (Default All Jurisdictions) (Additional)	(410) 715-6539	dummy@ltssdomain.com
MDC Provider Staff (Secondary)	03/06/2020	mdcproviderstaff2 MDC1	MDC Provider 1 - MDC Provider 1 (Default All Jurisdictions) (Additional)	(410) 715-6539	dummy@ltssdomain.com
MDC Provider Staff (Primary)	03/06/2020	MDC Provider Staff1 MDC2	MDC Provider 2 - MDC Provider 2 (Default All Jurisdictions) (Primary)	(410) 715-6538	dummy@ltssdomain.com
MDC Provider Staff (Secondary)	03/06/2020	mdcproviderstaff2 MDC2	MDC Provider 2 - MDC Provider 2 (Default All Jurisdictions) (Primary)	(410) 715-6539	dummy@ltssdomain.com

Figure 50-Secondary Provider Staff as displayed in the Current Assignment section of the Client Summary

10. Center Assignment Date

- Date that the MDC Provider was actively assigned to the participant
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

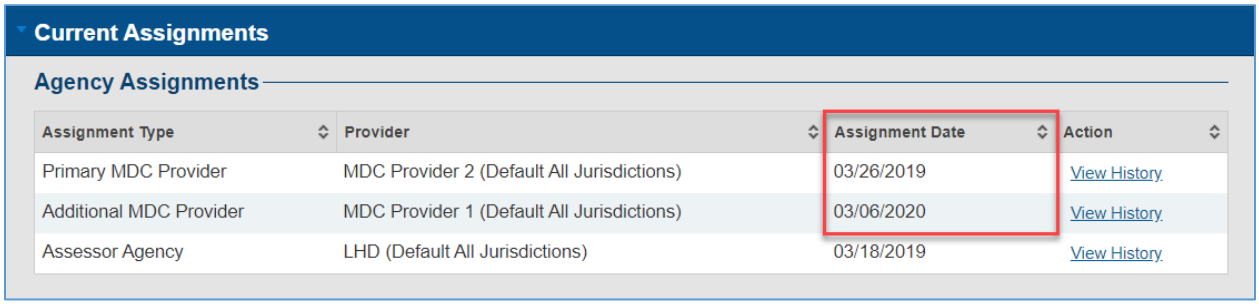


Figure 51-Assignment Date as displayed in the Current Assignment section of the Client Summary

5.3 View Report Primary MDC Provider (Outputs)

Once the user enters desired search parameters with *Primary MDC Provider* as the **Provider Assignment Type**, and selects **View Report***,* then the user will be able to view the participant records and assignment details where their MDC Provider Location is the assigned *Primary MDC Provider*

The following data elements will be displayed:

Client				
1 Client ID	2 Client First Name	3 Client Last Name	4 Jurisdiction	5 Zip Code
2759099OJ996120	Joe	Black	Baltimore	12345
1929579PC848100	CP	Demo	Howard	21075
1519406DM049100	MDC Test	Addie	Baltimore	21218
2430768VA880210	AVERY	AGNES	Baltimore	20103

Figure 52-Client Assignment Report Primary MDC Provider View 1

1. **Client ID**
   - Participant's unique identification number within LTSSMaryland
   - When the hyperlink is selected by the user, a new tab will open to the *Client Summary*
   - Column may be sorted in ascending or descending order by selecting the arrows within the column label
2. **Client First Name**
   - First Name of the participant as of the current system date
   - Column may be sorted in ascending or descending order by selecting the arrows within the column label
3. **Client Last Name**
   - Last Name of the participant as of the current system date
   - Column may be sorted in ascending or descending order by selecting the arrows within the column label
4. **Jurisdiction**
   - Participant's jurisdiction as of the current system date
   - Column may be sorted in ascending or descending order by selecting the arrows within the column label
5. **Zip Code**
   - Participant's zip code as of the current system date
   - Column may be sorted in ascending or descending order by selecting the arrows within the column label

Primary MDC Provider				Additional MDC Provider(s)
6 Provider Name	7 Primary Assigned Staff	8 Secondary Assigned Staff	9 Primary Center Assignment Date	10 Additional MDC Provider(s)
MDC Provider 1 (Default All Jurisdictions)	mdcproviderstaff1 MDC1	mdcproviderstaff3 MDC1	02/15/2019	MDC Provider 3 (Default All Jurisdictions), MDC Provider 6 (Howard County)
MDC Provider 1 (Default All Jurisdictions)	mdcproviderstaff1 MDC1	mdcproviderstaff3 MDC1	03/04/2020	MDC Provider 2 (Default All Jurisdictions)
MDC Provider 1 (Default All Jurisdictions)	mdcproviderstaff1 MDC1	mdcproviderstaff3 MDC1	02/07/2020	MDC Provider 5 (Default All Jurisdictions)
MDC Provider 1 (Default All Jurisdictions)	mdcproviderstaff1 MDC1	mdcproviderstaff3 MDC1	07/13/2018	

Figure 53-Client Assignment Report Primary MDC Provider View 2

6. Provider Name

- Populates the MDC Provider location that is the actively assigned Primary MDC Provider
- Column may be sorted in ascending or descending order by selecting the arrows within the column label
- **NOTE:** Users should view their associated MDC Provider Location name only in this column, when viewing the **Provider Assignment Type**, *Primary MDC Provider*

Current Assignments

Agency Assignments

Assignment Type	Provider	Assignment Date	Action
Primary MDC Provider	MDC Provider 2 (Default All Jurisdictions)	03/26/2019	View History
Additional MDC Provider	MDC Provider 1 (Default All Jurisdictions)	03/06/2020	View History
Assessor Agency	LHD (Default All Jurisdictions)	03/18/2019	View History

Figure 54-Provider Name as displayed in the Current Assignment section of the Client Summary

7. Primary Assigned Staff

- Populates the name of the MDC Provider user role that is actively assigned to the participant by the Primary MDC Provider as the *Primary* Staff
- Blank if none assigned
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

Staff Assignments

Assignment Type	Date Assigned	Staff Name	Agency	Phone Number	Email
ATP Staff	03/06/2020	atpstaff1 DHMH	MDH - DHMH	(410) 715-6539	dummy@ltssdomain.com
MDC Provider Staff (Primary)	03/06/2020	mdcproviderstaff1 MDC1	MDC Provider 1 - MDC Provider 1 (Default All Jurisdictions) (Additional)	(410) 715-6539	dummy@ltssdomain.com
MDC Provider Staff (Secondary)	03/06/2020	mdcproviderstaff2 MDC1	MDC Provider 1 - MDC Provider 1 (Default All Jurisdictions) (Additional)	(410) 715-6539	dummy@ltssdomain.com
MDC Provider Staff (Primary)	03/06/2020	MDC Provider Staff1 MDC2	MDC Provider 2 - MDC Provider 2 (Default All Jurisdictions) (Primary)	(410) 715-6538	dummy@ltssdomain.com
MDC Provider Staff (Secondary)	03/06/2020	mdcproviderstaff2 MDC2	MDC Provider 2 - MDC Provider 2 (Default All Jurisdictions) (Primary)	(410) 715-6539	dummy@ltssdomain.com

Figure 55-Primary MDC Provider Staff as displayed in the Current Assignment section of the Client Summary

8. Secondary Assigned Staff

- Populates the name of the MDC Provider user role that is actively assigned to the participant by the Primary MDC Provider as the *Secondary* Staff
- Blank if none assigned
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

Staff Assignments

Assignment Type	Date Assigned	Staff Name	Agency	Phone Number	Email
ATP Staff	03/06/2020	atpstaff1 DHMH	MDH - DHMH	(410) 715-6539	dummy@ltssdomain.com
MDC Provider Staff (Primary)	03/06/2020	mdcproviderstaff1 MDC1	MDC Provider 1 - MDC Provider 1 (Default All Jurisdictions) (Additional)	(410) 715-6539	dummy@ltssdomain.com
MDC Provider Staff (Secondary)	03/06/2020	mdcproviderstaff2 MDC1	MDC Provider 1 - MDC Provider 1 (Default All Jurisdictions) (Additional)	(410) 715-6539	dummy@ltssdomain.com
MDC Provider Staff (Primary)	03/06/2020	MDC Provider Staff1 MDC2	MDC Provider 2 - MDC Provider 2 (Default All Jurisdictions) (Primary)	(410) 715-6538	dummy@ltssdomain.com
MDC Provider Staff (Secondary)	03/06/2020	mdcproviderstaff2 MDC2	MDC Provider 2 - MDC Provider 2 (Default All Jurisdictions) (Primary)	(410) 715-6539	dummy@ltssdomain.com

Figure 56-Secondary Provider Staff as displayed in the Current Assignment section of the Client Summary

9. Primary Center Assignment Date

- Date that the Primary MDC Provider was actively assigned to the participant
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

Current Assignments

Agency Assignments

Assignment Type	Provider	Assignment Date	Action
Primary MDC Provider	MDC Provider 2 (Default All Jurisdictions)	03/26/2019	View History
Additional MDC Provider	MDC Provider 1 (Default All Jurisdictions)	03/06/2020	View History
Assessor Agency	LHD (Default All Jurisdictions)	03/18/2019	View History

Figure 57-Assignment Date as displayed in the Current Assignment section of the Client Summary

10. Additional MDC Provider(s)

- Lists the actively assigned Additional MDC Providers, separated by commas in cases of multiple
- Blank if none assigned
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

Current Assignments

Agency Assignments

Assignment Type	Provider	Assignment Date	Action
Support Planning Agency	TCC - TCC (Default All Jurisdictions)	03/12/2019	View History
Primary MDC Provider	MDC Provider 1 (Default All Jurisdictions)	02/15/2019	View History
Additional MDC Provider	MDC Provider 6 (Howard County)	08/06/2019	View History
Additional MDC Provider	MDC Provider 3 (Default All Jurisdictions)	04/02/2019	View History

Figure 58-Additional MDC Providers as displayed in the Current Assignment section of the Client Summary

5.4 View Report Additional MDC Provider (Outputs)

Once the user enters desired search parameters with *Additional MDC Provider* as the **Provider Assignment Type**, and selects **View Report***,* then the user will be able to view the participant records and assignment details where their MDC Provider Location is the assigned *Additional MDC Provider*.

Client				
1 Client ID	2 Client First Name	3 Client Last Name	4 Jurisdiction	5 Zip Code
2759099OJ996120	Joe	Black	Baltimore	12345
1929579PC848100	CP	Demo	Howard	21075
1519406DM049100	MDC Test	Addie	Baltimore	21218
2430768VA880210	AVERY	AGNES	Baltimore	20103

Figure 59-Client Assignment Report Primary MDC Provider View 1

1. **Client ID**
   - Participant's unique identification number within LTSSMaryland
   - When the hyperlink is selected by the user, a new tab will open to the *Client Summary*
   - Column may be sorted in ascending or descending order by selecting the arrows within the column label
2. **Client First Name**
   - First Name of the participant as of the current system date
   - Column may be sorted in ascending or descending order by selecting the arrows within the column label
3. **Client Last Name**
   - Last Name of the participant as of the current system date
   - Column may be sorted in ascending or descending order by selecting the arrows within the column label
4. **Jurisdiction**
   - Participant's jurisdiction as of the current system date
   - Column may be sorted in ascending or descending order by selecting the arrows within the column label
5. **Zip Code**
   - Participant's zip code as of the current system date
   - Column may be sorted in ascending or descending order by selecting the arrows within the column label

Additional MDC Provider				Primary MDC Provider
6 Provider Name	7 Primary Assigned Staff	8 Secondary Assigned Staff	9 Additional Center Assignment Date	10 Primary MDC Provider
MDC Provider 1 (Default All Jurisdictions)	mdcproviderstaff1 MDC1	mdcproviderstaff3 MDC1	03/18/2019	MDC Provider 3 (Default All Jurisdictions)
MDC Provider 1 (Default All Jurisdictions)	mdcproviderstaff1 MDC1	mdcproviderstaff2 MDC1	03/06/2020	MDC Provider 2 (Default All Jurisdictions)
MDC Provider 1 (Default All Jurisdictions)	mdcproviderstaff2 MDC1	mdcproviderstaff1 MDC1	06/25/2019	MDC Provider 2 (Default All Jurisdictions)
MDC Provider 1 (Default All Jurisdictions)	mdcproviderstaff1 MDC1	mdcproviderstaff2 MDC1	01/07/2019	MDC Provider 4 (Default All Jurisdictions)
MDC Provider 1 (Default All Jurisdictions)	mdcproviderstaff1 MDC1	mdcproviderstaff2 MDC1	03/19/2020	MDC Provider 3 (Default All Jurisdictions)

Figure 60-Client Assignment Report Primary MDC Provider View 2

6. Provider Name

- Populates the MDC Provider location that is the actively assigned Additional MDC Provider
- Column may be sorted in ascending or descending order by selecting the arrows within the column label
- **NOTE:** Users should view their associated MDC Provider Location name only in this column, when viewing the **Provider Assignment Type**, *Additional MDC Provider*

Current Assignments

Agency Assignments

Assignment Type	Provider	Assignment Date	Action
Primary MDC Provider	MDC Provider 2 (Default All Jurisdictions)	03/26/2019	View History
Additional MDC Provider	MDC Provider 1 (Default All Jurisdictions)	03/06/2020	View History
Assessor Agency	LHD (Default All Jurisdictions)	03/18/2019	View History

Figure 61-Provider Name as displayed in the Current Assignment section of the Client Summary

7. Primary Assigned Staff

- Populates the name of the MDC Provider user role that is actively assigned to the participant by the Additional MDC Provider as the *Primary* Staff
- Blank if none assigned
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

Staff Assignments

Assignment Type	Date Assigned	Staff Name	Agency	Phone Number	Email
ATP Staff	03/06/2020	atpstaff1 DHMH	MDH - DHMH	(410) 715-6539	dummy@ltssdomain.com
MDC Provider Staff (Primary)	03/06/2020	mdcproviderstaff1 MDC1	MDC Provider 1 - MDC Provider 1 (Default All Jurisdictions) (Additional)	(410) 715-6539	dummy@ltssdomain.com
MDC Provider Staff (Secondary)	03/06/2020	mdcproviderstaff2 MDC1	MDC Provider 1 - MDC Provider 1 (Default All Jurisdictions) (Additional)	(410) 715-6539	dummy@ltssdomain.com
MDC Provider Staff (Primary)	03/06/2020	MDC Provider Staff1 MDC2	MDC Provider 2 - MDC Provider 2 (Default All Jurisdictions) (Primary)	(410) 715-6538	dummy@ltssdomain.com
MDC Provider Staff (Secondary)	03/06/2020	mdcproviderstaff2 MDC2	MDC Provider 2 - MDC Provider 2 (Default All Jurisdictions) (Primary)	(410) 715-6539	dummy@ltssdomain.com

Figure 62-Primary MDC Provider Staff as displayed in the Current Assignment section of the Client Summary

8. Secondary Assigned Staff

- Populates the name of the MDC Provider user role that is actively assigned to the participant by the Additional MDC Provider as the *Secondary* Staff
- Blank if none assigned
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

Staff Assignments

Assignment Type	Date Assigned	Staff Name	Agency	Phone Number	Email
ATP Staff	03/06/2020	atpstaff1 DHMH	MDH - DHMH	(410) 715-6539	dummy@ltssdomain.com
MDC Provider Staff (Primary)	03/06/2020	mdcproviderstaff1 MDC1	MDC Provider 1 - MDC Provider 1 (Default All Jurisdictions) (Additional)	(410) 715-6539	dummy@ltssdomain.com
MDC Provider Staff (Secondary)	03/06/2020	mdcproviderstaff2 MDC1	MDC Provider 1 - MDC Provider 1 (Default All Jurisdictions) (Additional)	(410) 715-6539	dummy@ltssdomain.com
MDC Provider Staff (Primary)	03/06/2020	MDC Provider Staff1 MDC2	MDC Provider 2 - MDC Provider 2 (Default All Jurisdictions) (Primary)	(410) 715-6538	dummy@ltssdomain.com
MDC Provider Staff (Secondary)	03/06/2020	mdcproviderstaff2 MDC2	MDC Provider 2 - MDC Provider 2 (Default All Jurisdictions) (Primary)	(410) 715-6539	dummy@ltssdomain.com

Figure 63-Secondary Provider Staff as displayed in the Current Assignment section of the Client Summary

9. Additional Center Assignment Date

- Date that the Additional MDC Provider was actively assigned to the participant
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

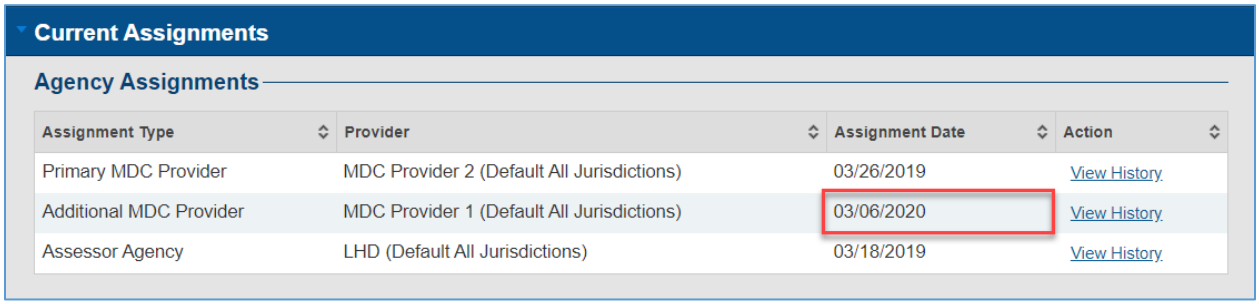


Figure 64-Assignment Date as displayed in the Current Assignment section of the Client Summary

10. Primary MDC Provider

- Lists the actively assigned Primary MDC Provider
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

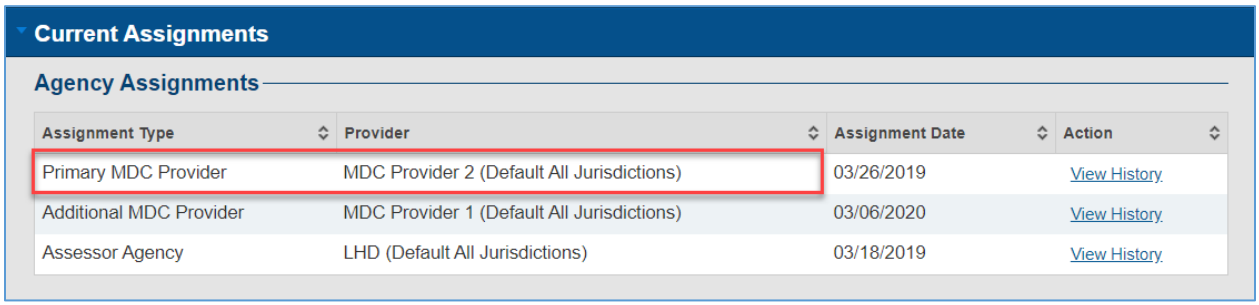


Figure 65-Primary MDC Provider as displayed in the Current Assignment section of the Client Summary

5.5 Export Report

Users may export the report by selecting the icon in the navigation bar of the report. Available export options:

- Word
- Excel
- PDF
- TIFF file
- MHTML (web archive)
- CSV (comma delimited)
- XML file with report data

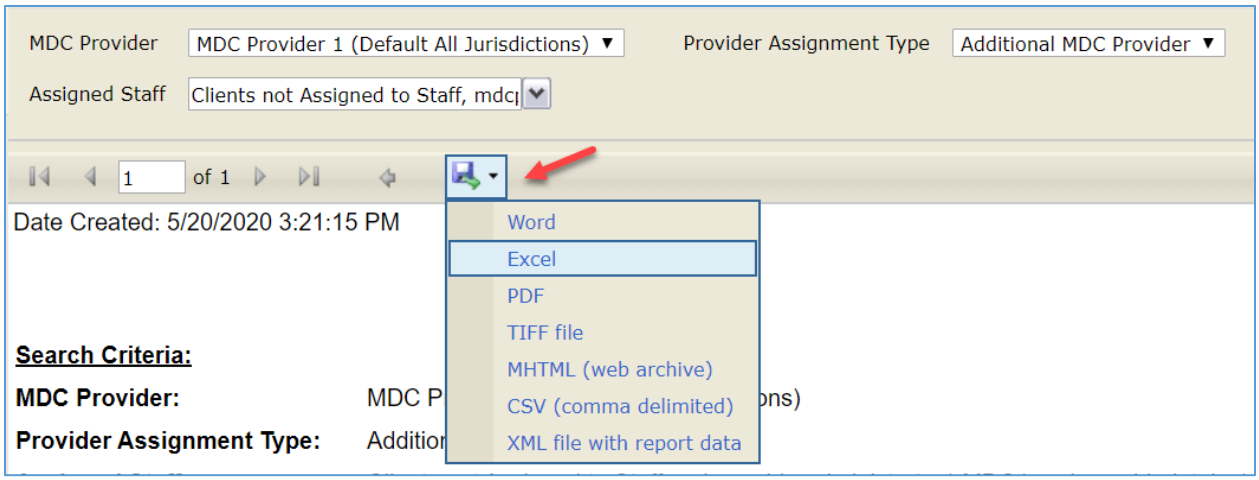


Figure 66-Export Options

TIP: Due to the size and number of columns in the report, it is recommended that users export to Excel or CSV (comma delimited) for ideal formatting

6 Provider - Open Forms Report

This report will allow MDC Providers to view a list of MDC Forms that are in an open status (*In Progress*, *Pending MDH Review*, or *Clarification Requested*). The intent of this report is so that MDC Provider users have a consolidated view of forms that require action, as well as the MDC Provider users that have created those forms.

The MDC Provider Admin, MDC Provider Staff, MDC Provider Intake, and MDC Provider Nurse user roles will have access to this report.

6.1 Search Report (Inputs)

The search parameters of a report are designed to allow the user to filter the report contents by searching for desired records only. By utilizing the search input options, the user can specify what they want to view in the report output.

1. Navigate to the **Reports** tab in LTSSMaryland
2. Select **MDC** from the Category field, then **Filter**
3. Select the View hyperlink next to **Provider - Open Forms Report**

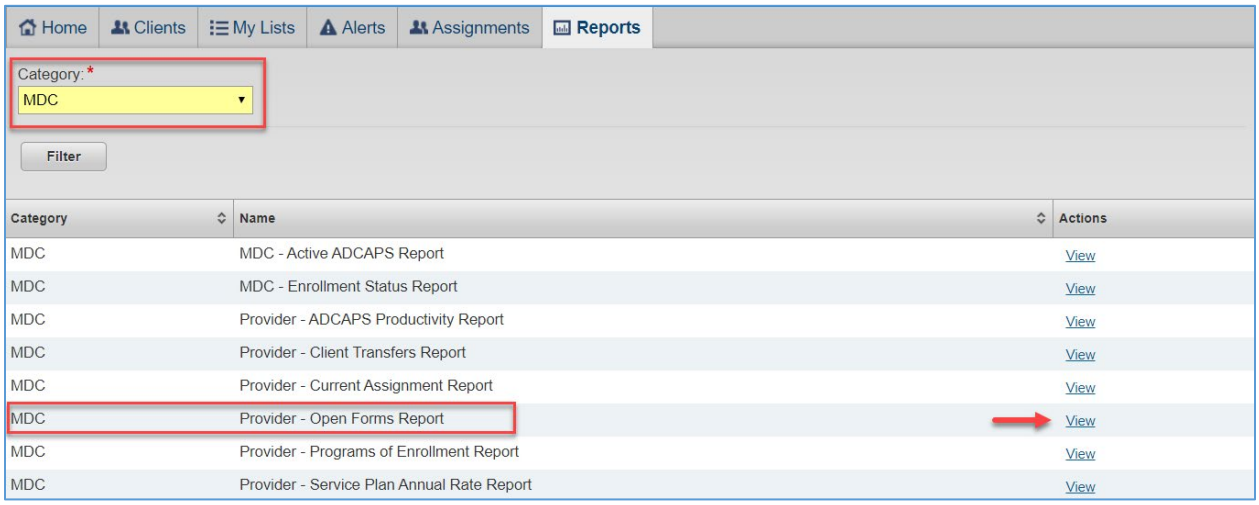


Figure 67-View Provider - Open Forms Report

4. Enter the desired search parameters and select **View Report**:

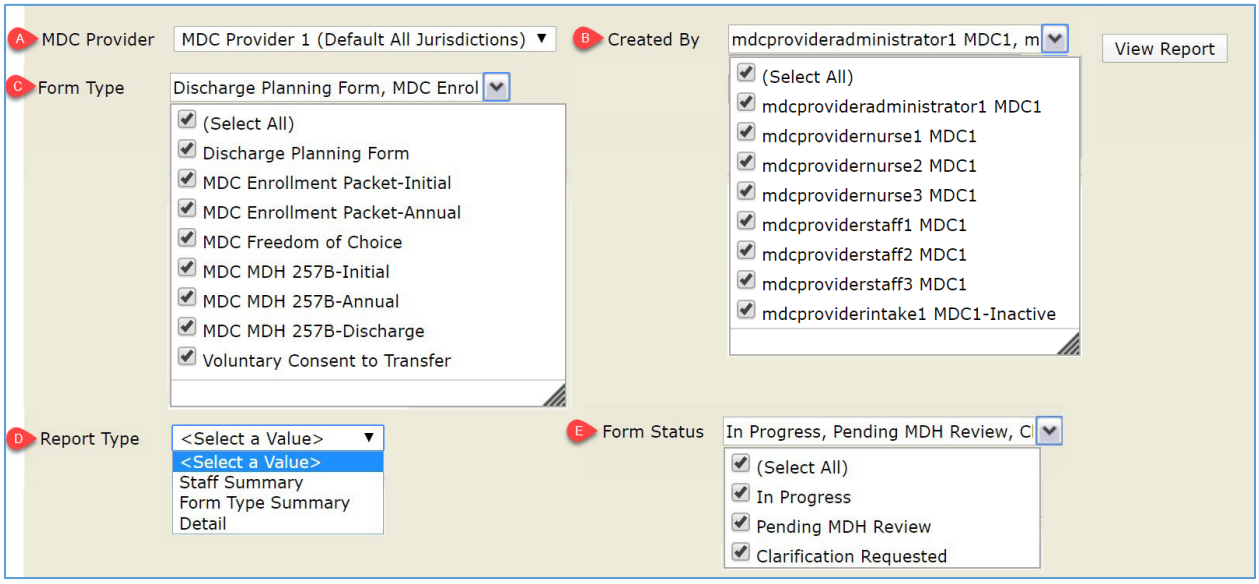


Figure 68-Provider-Open Forms Report Search Parameters

A. **MDC Provider**
   - Defaults to the MDC Provider location to which the user's login is associated
   - Required to search

B. **Created By**
   - Populates staff names that are associated with the MDC Provider as of the current system date, including staff that are currently *Inactive*
   - Defaults to *Select All*
   - Multi-Select
   - Required to search

C. **Form Type**
   - Report filter that allows the user to select the MDC form that they wish to view
   - Available Options:
     - *Discharge Planning Form*
     - *MDC Enrollment Packet-Initial*
     - *MDC Enrollment Packet-Annual*
     - *MDC Freedom of Choice*
     - *MDC MDH 257B-Initial*
     - *MDC MDH 257B-Annual*
     - *MDC MDH 257B- Discharge*
     - *Voluntary Consent to Transfer*
   - **NOTE:** Report does not include forms in "*Accepted*", "*Rejected*', "*Discarded*" or "*Deleted*" statuses.

D. **Report Type**
- Report type that allows the user to select their preferred report view
- Available Options:
  - *Staff Summary:* Populates the count of all MDC forms that are in an open status as of the current system date, based on the MDC Provider user that created the form
  - *Form Type Summary:* Populates the count of all MDC forms that are in an open status as of the current system date, based on the type of form
  - *Detail:* Populates the details of participants with an MDC form that is in an open status
- Defaults to blank *<Select a Value>*
- Single-Select
- Required to search

D. **Form Status**
- Report filter that allows the user to choose the status of the forms selected, as of the current system date
- Available Options:
  - *Select All*
  - *In Progress*: Form has been created and saved, but not submitted to MDH
  - *Pending MDH Review:* Form has been submitted to MDH, but is awaiting review and decision
  - *Clarification Requested:* During review, MDH requested clarification from the MDC Provider that submitted the form
  - **NOTE:** *MDC MDH 257B (Initial and Annual)* and *MDC Freedom of Choice* forms that are linked to an *MDC Enrollment Packet (Initial and Annual)* will follow the status of the MDC Enrollment Packet, not as an individual form.
- Defaults to *Select All*
- Multi-Select
- Required to search

6.2 View Report Staff Summary (Outputs)

Once the user enters desired search parameters for the Report Type *Staff Summary* and selects **View Report**, the report will display a count of forms in an open status, per MDC Provider user that is associated with the MDC Provider Location.

The following data elements will be displayed:

1 Staff Name	2 In Progress	3 Pending MDH Review	4 Clarification Requested	5 Total
mdcprovideradministrator1 MDC1	27	31	7	65
mdcproviderintake1 MDC1	1	0	0	1
mdcprovidernurse1 MDC1	7	13	4	24
mdcproviderstaff1 MDC1	0	3	1	4
mdcproviderstaff3 MDC1	0	1	1	2
Total	35	48	13	
Page 1 of 1				

Figure 69-Provider Open Forms Staff Summary View

1. **Staff Name**
   - Name of the MDC Provider user that created a form
2. **In Progress**
   - Count of forms that are in the status, "*In Progress*" as of the current system date, per staff
   - When the hyperlink is selected, the user will be re-directed to the Details view, where the user will view the forms and participants that make up the count
3. **Pending MDH Review**
   - Count of forms that are in the status, "*Pending MDH Review*" as of the current system date, per staff
   - When the hyperlink is selected, the user will be re-directed to the Details view, where the user will view the forms and participants that make up the count
4. **Clarification Requested**
   - Count of forms that are in the status, "*Clarification Requested*" as of the current system date, per staff
   - When the hyperlink is selected, the user will be re-directed to the Details view, where the user will view the forms and participants that make up the count
5. **Total**
   - Populates the total number of forms, in an open status, per staff
   - When the hyperlink is selected, the user will be re-directed to the Details view, where the user will view the forms and participants that make up the count

6.3 View Report Form Type Summary (Outputs)

Once the user enters desired search parameters for the Report Type *Form Type Summary* and selects **View Report**, the report will display a count of forms that are in an open status, per MDC form.

The following data elements will be displayed:

1 Form Type	2 In Progress	3 Pending MDH Review	4 Clarification Requested	5 Total
Discharge Planning Form	1	7	2	10
MDC Enrollment Packet-Initial	20	10	3	33
MDC Enrollment Packet-Annual	1	1	1	3
MDC Freedom of Choice	10	11	5	26
MDC MDH 257B-Initial	0	12	0	12
MDC MDH 257B-Annual	0	1	0	1
MDC MDH 257B-Discharge	1	0	1	2
Voluntary Consent to Transfer	2	6	1	9
Total	35	48	13	

Page 1 of 1

Figure 70-Provider Open Forms Form Type Summary View

1. **Form Type**
   - Name of the MDC Form
2. **In Progress**
   - Count of form type that is in the status, "*In Progress*" as of the current system date
   - When the hyperlink is selected, the user will be re-directed to the Details view, where the user will view the forms and participants that make up the count
3. **Pending MDH Review**
   - Count of form type that is in the status, "*Pending MDH Review*", as of the current system date
   - When the hyperlink is selected, the user will be re-directed to the Details view, where the user will view the forms and participants that make up the count
4. **Clarification Requested**
   - Count of form type that is in the status, "*Clarification Requested*", as of the current system date
   - When the hyperlink is selected, the user will be re-directed to the Details view, where the user will view the forms and participants that make up the count
5. **Total**
   - Populates the total number of the forms that are in an open status, as of the current system date
   - When the hyperlink is selected, the user will be re-directed to the Details view, where the user will view the forms and participants that make up the count

6.4 View Report Details (Outputs)

Once the user enters desired search parameters for the Report Output *Detail* and selects **View Report** or navigates to the Details view by selecting a count within the *Staff Summary or Form Type Summary,* then the user will be able to view the participant and form details.

The following data elements will be displayed:

1 Client ID	2 Client First Name	3 Client Last Name	4 Form Name
2229112RA167121	archmdc	active	Discharge Planning Form
2229112RA167121	archmdc	active	MDC Enrollment Packet-Initial
27694DEETFA9100	TestClient	Auto	MDC Enrollment Packet-Initial
27694DEETFA9100	TestClient	Auto	MDC MDH 257B-Discharge
1229791AU807101	UAT MDC Client	Billing	MDC Enrollment Packet-Initial
1140073LC281211	Client	Billing 1	MDC MDH 257B-Initial
2429253LC288120	Client	Billing 3	MDC Freedom of Choice
1209885LC978111	Client	Billing 365	MDC Freedom of Choice
1160195LC681220	Client	Billing 4	MDC Freedom of Choice
1499851LC678120	Client	Billing 6	MDC Freedom of Choice
1499851LC678120	Client	Billing 6	MDC Enrollment Packet-Initial
1250485DM471221	MDC Billing	Client	MDC Freedom of Choice
1779925AU317110	UAT Billing	Client 3	Voluntary Consent to Transfer

Figure 71-Provider Open Forms Report Detail View 1

1. **Client ID**
   - Participant's unique identification number within LTSSMaryland
   - When the hyperlink is selected by the user, a new tab will open to the *Client Summary*
   - Column may be sorted in ascending or descending order by selecting the arrows within the column label
   - **NOTE:** In instances where a participant has more than one form in an open status, the record will appear multiple times.
2. **Client First Name**
   - First Name of the participant as of the current system date
   - Column may be sorted in ascending or descending order by selecting the arrows within the column label
3. **Client Last Name**
   - Last Name of the participant as of the current system date
   - Column may be sorted in ascending or descending order by selecting the arrows within the column label
4. **Form Name**
   - Name of the MDC form that is in an open status, as of the current system date
   - When the hyperlink is selected by the user, a new tab will open to the form's detail view
   - Column may be sorted in ascending or descending order by selecting the arrows within the column label

5 Form Status	6 Create Date	7 Created By	8 Submitted Date	9 Submitted By
Pending MDH Review	03/18/2019	mdcprovideradministrator1 MDC1	03/18/2019	mdcprovideradministrator1 MDC1
In Progress	03/20/2019	mdcprovideradministrator1 MDC1	N/A	N/A
In Progress	02/04/2020	mdcprovidernurse1 MDC1	N/A	N/A
In Progress	03/22/2020	mdcprovidernurse1 MDC1	N/A	N/A
In Progress	01/11/2019	mdcprovidernurse1 MDC1	N/A	N/A
Pending MDH Review	02/15/2019	mdcprovideradministrator1 MDC1	02/15/2019	mdcprovideradministrator1 MDC1
In Progress	07/25/2018	mdcprovidernurse1 MDC1	N/A	N/A
Clarification Requested	07/12/2018	mdcprovideradministrator1 MDC1	07/12/2018	mdcprovideradministrator1 MDC1
In Progress	08/10/2018	mdcprovideradministrator1 MDC1	N/A	N/A
Pending MDH Review	08/23/2018	mdcprovideradministrator1 MDC1	08/23/2018	mdcprovideradministrator1 MDC1
In Progress	01/27/2020	mdcprovideradministrator1 MDC1	N/A	N/A
Pending MDH Review	07/19/2018	mdcprovideradministrator1 MDC1	07/19/2018	mdcprovideradministrator1 MDC1
In Progress	01/07/2019	mdcprovideradministrator1 MDC1	N/A	N/A

Figure 72-Provider Open Forms Report Detail View 2

5. **Form Status**
   - Status of the associated form as of the current system date
   - Output options: *In Progress, Pending MDH Review, Clarification Requested*
   - Column may be sorted in ascending or descending order by selecting the arrows within the column label
6. **Create Date**
   - Date that the form was created
   - Column may be sorted in ascending or descending order by selecting the arrows within the column label
7. **Created By**
   - Name of the MDC Provider user that created the form
   - Column may be sorted in ascending or descending order by selecting the arrows within the column label
8. **Submitted Date**
   - Date that the form was submitted to MDH for review
   - If a form is *In Progress*, this field will display as "*N/A*"
   - Column may be sorted in ascending or descending order by selecting the arrows within the column label
9. **Submitted By**
   - Name of the MDC Provider user that submitted the form to MDH for review
   - If a form is *In Progress*, this field will display as "*N/A*"
   - Column may be sorted in ascending or descending order by selecting the arrows within the column label

6.5 Export Report

Users may export the report by selecting the icon in the navigation bar of the report. Available export options:

- Word
- Excel
- PDF
- TIFF file
- MHTML (web archive)
- CSV (comma delimited)
- XML file with report data

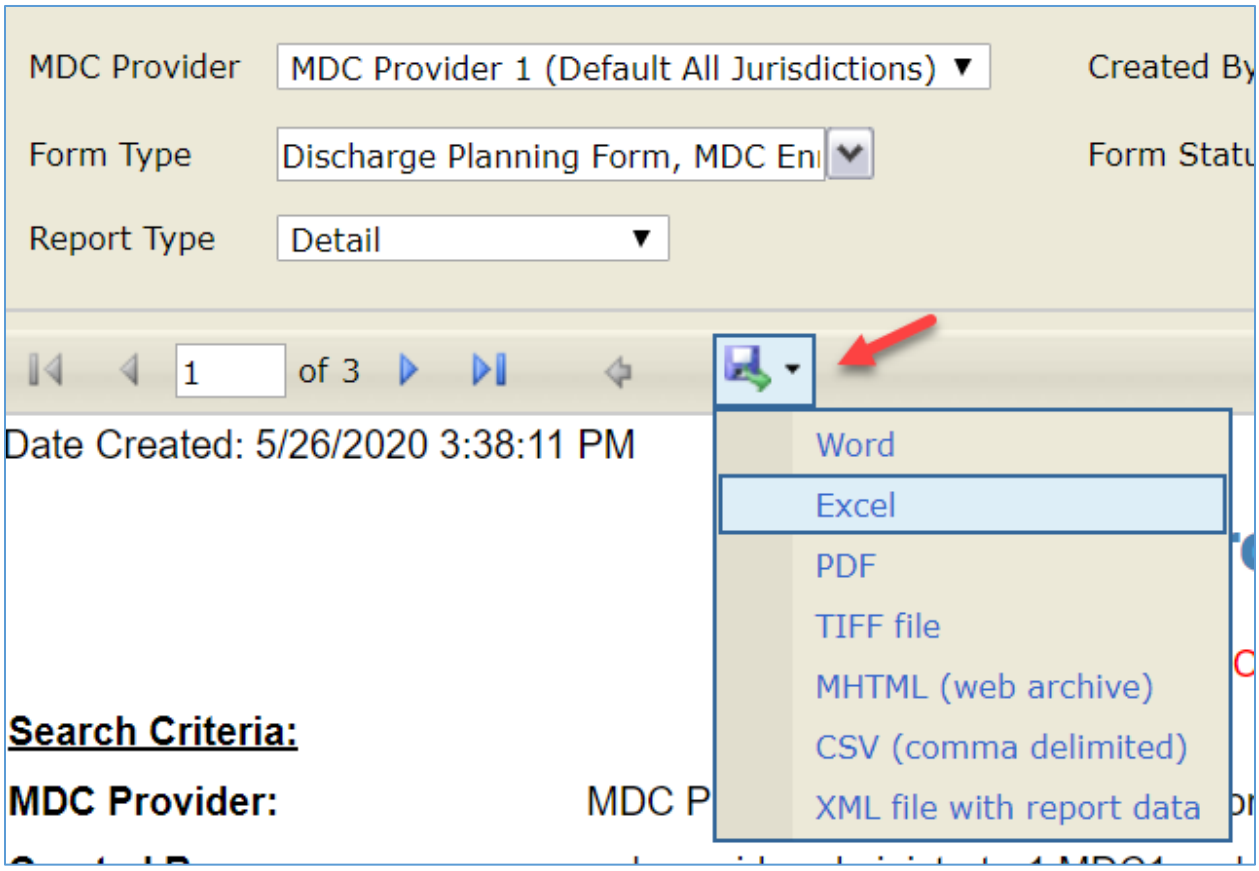


Figure 73-Export Options

TIP: Due to the size and number of columns in the report, it is recommended that users export to Excel or CSV (comma delimited) for ideal formatting

7 Provider - Programs of Enrollment Report

This report will allow MDC Providers to view participants that are actively assigned to their location, their programs of enrollment, and latest assessments and plans. The purpose of this report is so that providers may have a consolidated snapshot of their participants' program(s) status as of the current system date.

The MDC Provider Admin, MDC Provider Staff, MDC Provider Intake, and MDC Provider Nurse user roles will have access to this report.

7.1 Search Report (Inputs)

The search parameters of a report are designed to allow the user to filter the report contents by searching for desired records only. By utilizing the search input options, the user can specify what they want to view in the report output.

1. Navigate to the **Reports** tab in LTSSMaryland
2. Select **MDC** from the Category field, then **Filter**
3. Select the View hyperlink next to **Provider - Programs of Enrollment Report**

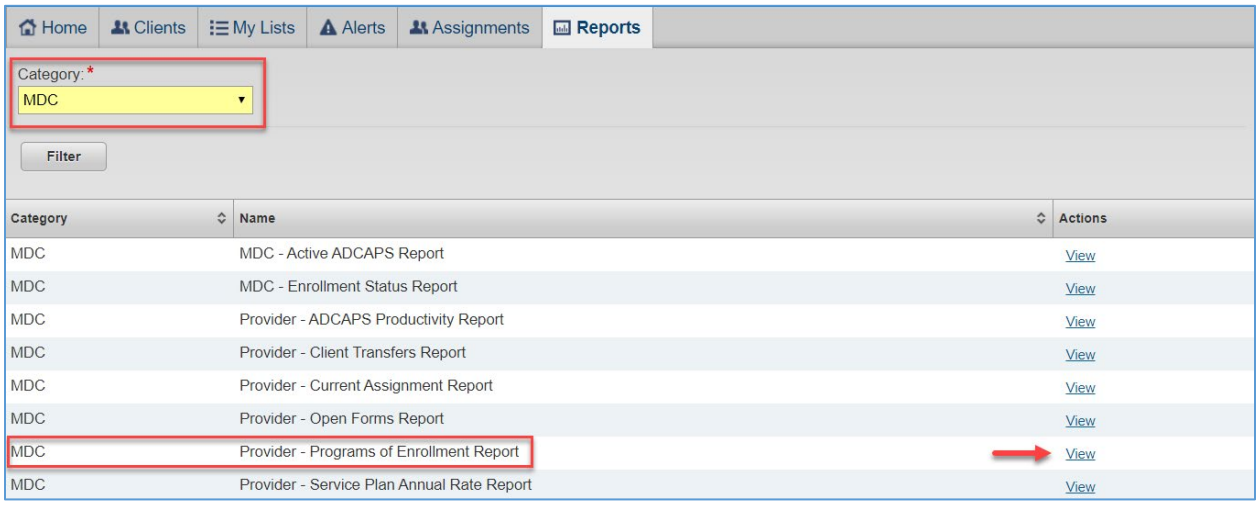


Figure 74-View Provider - Programs of Enrollment Report

4. Enter the desired search parameters and select **View Report**:

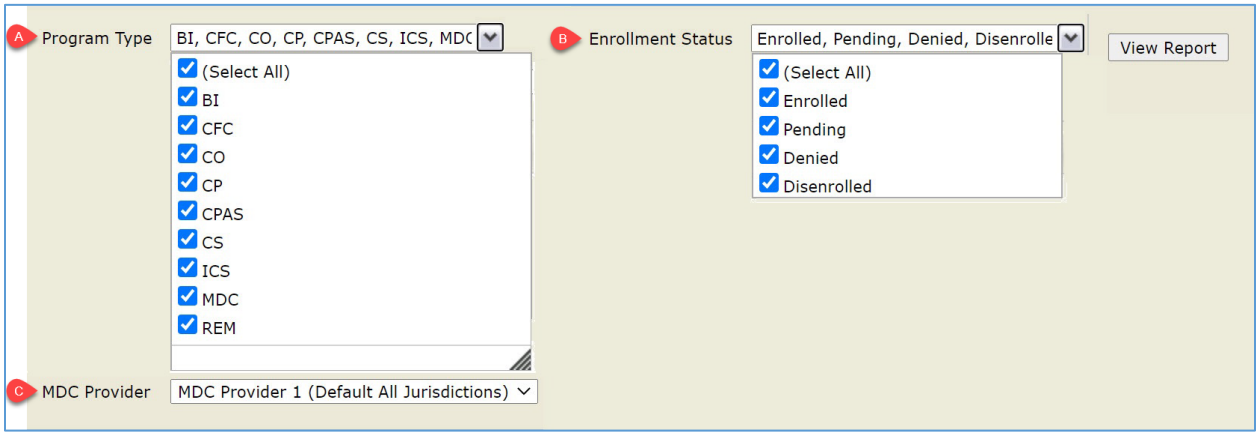


Figure 75-Programs of Enrollment search parameters

A. **Program Type**
- Searches actively assigned participants based on the program(s) to which they are associated, as of the current system date
- Available options:
  - *Select All*
  - *BI* (Waiver for Individuals with Traumatic Brain Injury)
  - *CFC* (Community First Choice)
  - *CO* (Community Options Waiver)
  - *CP* (Community Pathways Waiver)
  - *CPAS* (Community Personal Assistance Services)
  - *CS* (Community Supports Waiver)
  - *ICS* (Increased Community Services Program)
  - *MDC* (Medical Day Care Services Waiver Program)
  - *REM* (Rare and Expensive Case Management Program)
- Defaults to *Select All*
- Multi-Select
- Required to search

B. **Enrollment Status**
- Report filter that allows the user to select a specific enrollment status for the **Program Types** that have been selected
- Available options:
  - *Select All*
  - *Enrolled*
  - *Pending*
  - *Denied*
  - *Disenrolled*
- Defaults to *Select All*
- Multi-Select
- Required to search

C. **MDC Provider**
- Defaults to the MDC Provider location to which the user's login is associated
- Required to search

7.2 View Report (Outputs)

Once the user enters desired search parameters for the Report Output and selects **View Report**, the Programs of Enrollment report will display participant data regarding their current MDC Waiver Program eligibility information, Program Snapshot information, as well as the current status of the latest submitted InterRAI, Nursing Facility Level of Care, and ADCAPS.

The following data elements will be displayed:

Client Summary							
1 Client ID	2 Client First Name	3 Client Last Name	4 Jurisdiction	5 MA#	6 MA Coverage Group Type	7 MA Start Date	8 MA End Date
2110724ET151200	Test	PEDS	Baltimore	25631478965	S01	07/07/2016	12/07/2020
2110724ET151200	Test	PEDS	Baltimore	25631478965	S01	07/07/2016	12/07/2020
2110724ET151200	Test	PEDS	Baltimore	25631478965	S01	07/07/2016	12/07/2020
1690279LS861200	Sloka	Test	Baltimore	98789765755	S01	05/01/2018	05/01/2023
1690279LS861200	Sloka	Test	Baltimore	98789765755	S01	05/01/2018	05/01/2023
1690279LS861200	Sloka	Test	Baltimore	98789765755	S01	05/01/2018	05/01/2023
1269974IV889101	Rebecca	Test	Howard	32423432478	S02	03/01/2019	03/01/2022
1269974IV889101	Rebecca	Test	Howard	32423432478	S02	03/01/2019	03/01/2022
1269974IV889101	Rebecca	Test	Howard	32423432478	S02	03/01/2019	03/01/2022
2229885LC697101	Client	PREUAT	Baltimore	45822365974	F99	12/18/2017	02/21/2018

Figure 76-Programs of Enrollment Report View 1

1. **Client ID**
   - Participant's unique identification number within LTSSMaryland
   - When the hyperlink is selected by the user, a new tab will open to the *Client Summary*
   - Column may be sorted in ascending or descending order by selecting the arrows within the column label
   - **NOTE:** In instances where a participant has been processed for enrollment in more than one program, the record will appear multiple times.
2. **Client First Name**
   - First Name of the participant as of the current system date
   - Column may be sorted in ascending or descending order by selecting the arrows within the column label
3. **Client Last Name**
   - Last Name of the participant as of the current system date
   - Column may be sorted in ascending or descending order by selecting the arrows within the column label
4. **Jurisdiction**
   - Participant's assigned jurisdiction as of the current system date
   - Column may be sorted in ascending or descending order by selecting the arrows within the column label

5. MA #

- Participant's Current MA #
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

Eligibility Information

Medicaid Eligibility

Current MA #	25631478965

Eligibility Span — View Coverage Group Details

Coverage Group	Start Date	End Date	LTC/Community
S01	07/07/2016	12/07/2020	Community

Special Program Code — View Special Program Code Details

Special Program	Start Date	End Date	Disenrollment Reason	Disenrollment Source
MDC	01/01/2017	05/28/2019		

Figure 77-Current MA# as displayed in the Client Summary

6. MA Coverage Group Type

- The current Coverage Group as noted within the participant's Eligibility Span
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

Eligibility Information

Medicaid Eligibility

Current MA #	25631478965

Eligibility Span — View Coverage Group Details

Coverage Group	Start Date	End Date	LTC/Community
S01	07/07/2016	12/07/2020	Community

Special Program Code — View Special Program Code Details

Special Program	Start Date	End Date	Disenrollment Reason	Disenrollment Source
MDC	01/01/2017	05/28/2019		

Figure 78-MA Coverage Group as displayed in the Client Summary

7. MA Start Date

- Start Date of the Eligibility Span
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

Eligibility Information

Medicaid Eligibility

Current MA #	25631478965

Eligibility Span — View Coverage Group Details

Coverage Group	Start Date	End Date	LTC/Community
S01	07/07/2016	12/07/2020	Community

Special Program Code — View Special Program Code Details

Special Program	Start Date	End Date	Disenrollment Reason	Disenrollment Source
MDC	01/01/2017	05/28/2019		

Figure 79-Start Date as displayed in the Client Summary

8. MA End Date

- End Date of the Eligibility Span
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

Eligibility Information

Medicaid Eligibility

Current MA #	25631478965

Eligibility Span — View Coverage Group Details

Coverage Group	Start Date	End Date	LTC/Community
S01	07/07/2016	12/07/2020	Community

Special Program Code — View Special Program Code Details

Special Program	Start Date	End Date	Disenrollment Reason	Disenrollment Source
MDC	01/01/2017	05/28/2019		

Figure 80-End Date as displayed in the Client Summary

MDC Eligibility Info			Program Snapshot				
9 Special Program Code	10 Start Date	11 End Date	12 Program	13 Program Status	14 Enrollment Date	15 Denial Date	16 Disenrollment Date
MDC	01/01/2017	05/28/2019	CPAS	Pending	N/A	N/A	N/A
MDC	01/01/2017	05/28/2019	MDC	Enrolled	1/1/2017	N/A	5/28/2019
MDC	01/01/2017	05/28/2019	CFC	Pending	N/A	N/A	N/A
MDC	11/01/2017	09/05/2019	CPAS	Pending	N/A	N/A	N/A
MDC	11/01/2017	09/05/2019	MDC	Enrolled	11/1/2017	N/A	9/5/2019
MDC	11/01/2017	09/05/2019	CFC	Enrolled	2/6/2019	N/A	N/A
MDC	10/01/2018	11/27/2019	CPAS	Pending	N/A	N/A	N/A
MDC	10/01/2018	11/27/2019	MDC	Pending	10/1/2018	N/A	11/27/2019
MDC	10/01/2018	11/27/2019	CO	Enrolled	10/12/2018	N/A	N/A
MDC	02/01/2018	01/01/2019	MDC	Pending	2/1/2018	N/A	1/1/2019

Figure 81-Programs of Enrollment Report View 2

9. Special Program Code

- Special Program as noted in within the participant's Eligibility Information
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

Eligibility Information

Medicaid Eligibility

Current MA # 25631478965

Eligibility Span — View Coverage Group Details

Coverage Group	Start Date	End Date	LTC/Community
S01	07/07/2016	12/07/2020	Community

Special Program Code — View Special Program Code Details

Special Program	Start Date	End Date	Disenrollment Reason	Disenrollment Source
MDC	01/01/2017	05/28/2019		

Figure 82-Special Program Code as displayed in the Client Summary

10. Start Date

- Start Date of the Special Program
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

Eligibility Information

Medicaid Eligibility

Current MA #	25631478965

Eligibility Span — View Coverage Group Details

Coverage Group	Start Date	End Date	LTC/Community
S01	07/07/2016	12/07/2020	Community

Special Program Code — View Special Program Code Details

Special Program	Start Date	End Date	Disenrollment Reason	Disenrollment Source
MDC	01/01/2017	05/28/2019		

Figure 83-Start Date as displayed in the Client Summary

11. End Date

- End Date of the Special Program
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

Eligibility Information

Medicaid Eligibility

Current MA #	25631478965

Eligibility Span — View Coverage Group Details

Coverage Group	Start Date	End Date	LTC/Community
S01	07/07/2016	12/07/2020	Community

Special Program Code — View Special Program Code Details

Special Program	Start Date	End Date	Disenrollment Reason	Disenrollment Source
MDC	01/01/2017	05/28/2019		

Figure 84-End Date as displayed in the Client Summary

12. Program

- Name of the program to which the participant is associated
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

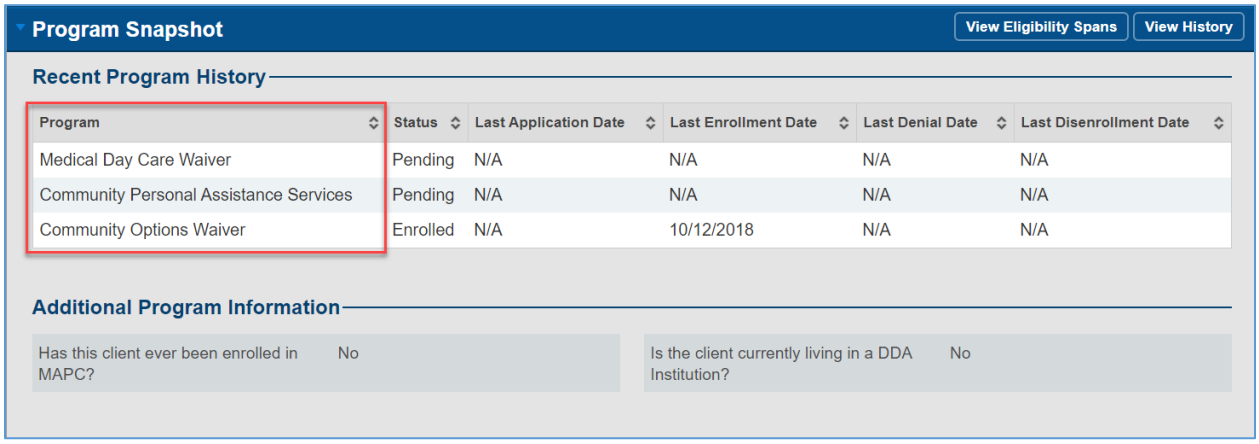


Figure 85-Program(s) as displayed in the Client Summary

13. Program Status

- Status of the program enrollment as of the current system date
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

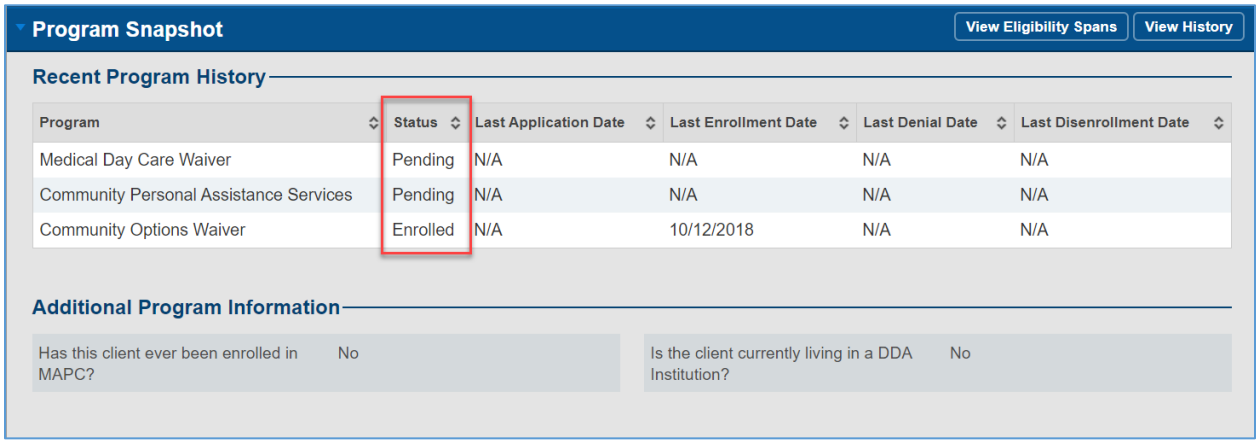


Figure 86-Program Status as displayed in the Client Summary

14. Enrollment Date

- Date of enrollment when the participant is currently "Enrolled" in a given program
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

Program Snapshot View Eligibility Spans | View History

Recent Program History

Program	Status	Last Application Date	Last Enrollment Date	Last Denial Date	Last Disenrollment Date
Medical Day Care Waiver	Pending	N/A	N/A	N/A	N/A
Community Personal Assistance Services	Pending	N/A	N/A	N/A	N/A
Community Options Waiver	Enrolled	N/A	10/12/2018	N/A	N/A

Additional Program Information

Has this client ever been enrolled in MAPC? No

Is the client currently living in a DDA Institution? No

Figure 87-Last Enrollment Date as displayed in the Client Summary

15. Denial Date

- Date of denial when the participant is currently "Denied" from a given program
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

Program Snapshot View Eligibility Spans | View History

Recent Program History

Program	Status	Last Application Date	Last Enrollment Date	Last Denial Date	Last Disenrollment Date
Medical Day Care Waiver	Denied	N/A	N/A	03/17/2020	N/A
Community Personal Assistance Services	Pending	N/A	N/A	N/A	N/A
Community First Choice	Denied	N/A	N/A	03/06/2020	N/A

Additional Program Information

Has this client ever been enrolled in MAPC? No

Is the client currently living in a DDA Institution? No

Figure 88-Last Denial Date as displayed in the Client Summary

16. Disenrollment Date

- Date of disenrollment when the participant is currently "Disenrolled" from a given program
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

Program Snapshot View Eligibility Spans | View History

Recent Program History

Program	Status	Last Application Date	Last Enrollment Date	Last Denial Date	Last Disenrollment Date
Community Options Waiver	Disenrolled	07/06/2018	07/06/2018	N/A	07/07/2018
Increased Community Services	Pending	07/09/2018	N/A	N/A	N/A

Additional Program Information

Has this client ever been enrolled in MAPC? No

Is the client currently living in a DDA Institution? No

Figure 89-Last Disenrollment Date as displayed in the Client Summary

Assessments and Plans

17 Latest Submitted InterRAI	18 NF LOC Decision	19 ADCAPS Status
12/16/2019	Generated Based On interRAI HC MD Assessment	In Progress
12/16/2019	Generated Based On interRAI HC MD Assessment	In Progress
12/16/2019	Generated Based On interRAI HC MD Assessment	In Progress
01/29/2019	Approved By UCA Nurse	Complete
01/29/2019	Approved By UCA Nurse	Complete
01/29/2019	Approved By UCA Nurse	Complete

Figure 90-Programs of Enrollment Report View 3

17. Latest Submitted InterRAI

- Date that the latest "active" interRAI Assessment was submitted
- When the hyperlink is selected by the user, a new tab will open to the participant's latest interRAI Assessment
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

interRAI Assessment Add Prepare Offline

Assessments	Assessment Reference Date	Assessment Status	Request Type	Program Type	MDC Referral	RUG	Submitted Date	Active	Actions
interRAI HC	01/17/2019	Submitted	Initial		No	CA1	12/16/2019	Yes	Summary Results
interRAI HC	12/16/2019	Submitted			Yes		12/16/2019	No	Summary Results
interRAI HC	01/17/2019	Discarded	Initial		No	CA1	N/A	No	Summary
interRAI-PEDS	07/07/2017	Discarded	Initial		No	N/A	N/A	No	Summary

Figure 91-Submitted Date as displayed in the interRAI Assessment list view

18. NF LOC Decision

- Decision of the latest "active" Nursing Facility Level of Care
- When the hyperlink is selected by the user, a new tab will open to the participant's latest NF Level of Care
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

NF Level of Care

Create Date	Effective Date	Status	Verification Required?	Active	Actions
12/16/2019	12/16/2019	Generated Based On interRAI HC MD Assessment	No	Yes	View
09/30/2019	09/30/2019	Generated Based On interRAI HC MD Assessment	No	No	View
04/12/2019	04/12/2019	Approved By UCA Nurse	No	No	View
04/11/2019	N/A	Denied By UCA Physician	No	No	View
09/28/2018	09/28/2018	Approved By UCA Nurse	No	No	View
02/22/2019	N/A	Discarded	No	No	View
01/24/2019	N/A	Discarded	No	No	View

Figure 92-Status as displayed in the NF Level of Care list view

19. ADCAPS Status

- Status of the latest ADCAPS as of the current system date
- When the hyperlink is selected by the user, a new tab will open to the participant's latest ADCAPS.
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

Adult Day Care Assessment and Planning System (ADCAPS)

ADCAPS Type	Create Date	Provider Type	Effective Date	Submit Date	MDH Decision	End Date	Status	Active	Actions
120 Day-Revised	03/06/2020		07/02/2019	N/A		N/A	In Progress	Inactive	Details Print
120 Day-Revised	07/02/2019	Additional	07/02/2019	07/02/2019		N/A	Complete	Active	Details Print
120 Day-Revised	07/02/2019	Additional	07/02/2019	07/02/2019		07/02/2019	Complete	Inactive	Details Print
120 Day	06/23/2019	Additional	06/23/2019	06/23/2019		07/02/2019	Complete	Inactive	Details Print
120 Day-Revised	06/23/2019	Additional	06/23/2019	06/23/2019		06/23/2019	Complete	Inactive	Details Print
120 Day	02/20/2019	Additional	02/20/2019	02/20/2019		06/23/2019	Complete	Inactive	Details Print
Initial-Pre-Launch	02/20/2019	System				N/A		Inactive	Details
120 Day	06/23/2019		N/A	N/A		N/A	Discarded	Inactive	Details Print
Significant Change	06/23/2019		N/A	N/A		N/A	Discarded	Inactive	Details Print

Figure 93-Status as displayed in the ADCAPS list view

7.3 Export Report

Users may export the report by selecting the icon in the navigation bar of the report. Available export options:

- Word
- Excel
- PDF
- TIFF file
- MHTML (web archive)
- CSV (comma delimited)
- XML file with report data

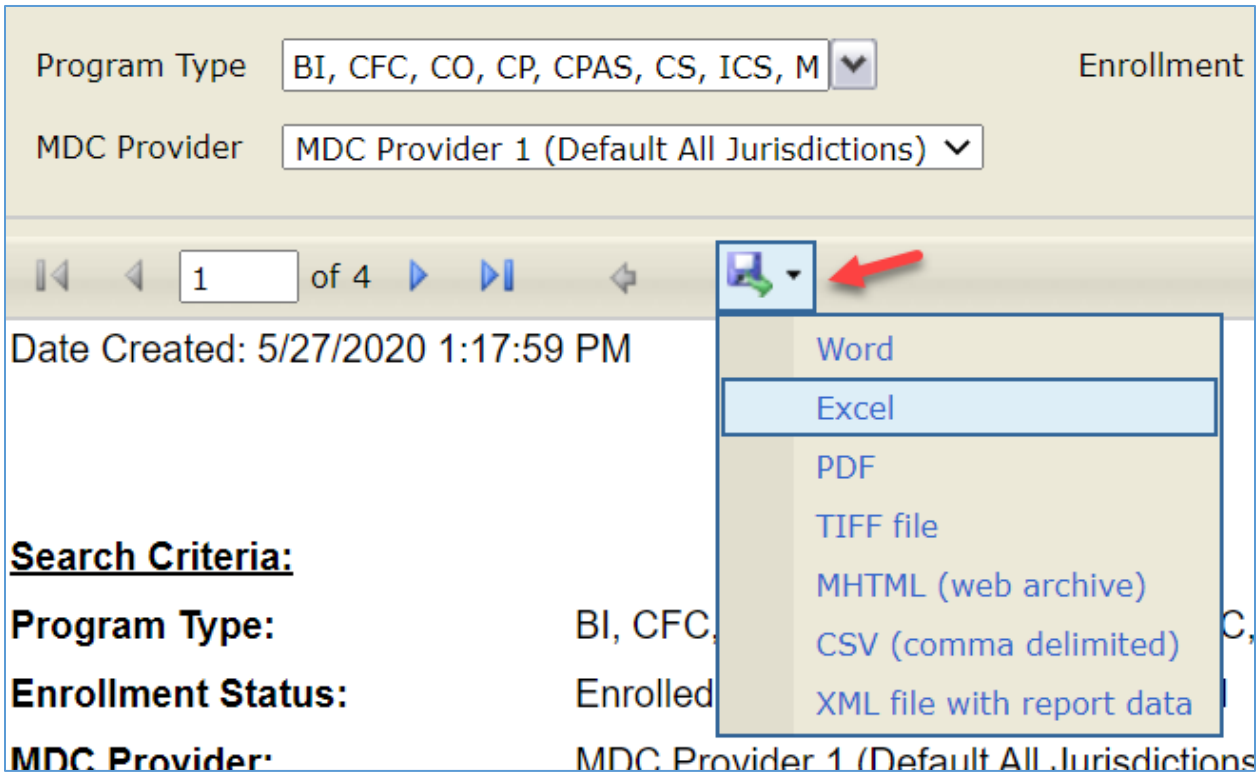


Figure 94-Export Options

TIP: Due to the size and number of columns in the report, it is recommended that users export to Excel or CSV (comma delimited) for ideal formatting

8 Provider - Service Plan Annual Rate Report

This report will allow MDC Providers to view a consolidated list of the MDC Service Plan details within ADCAPS that have been completed by their MDC Provider location. The purpose of this report is so that MDC Providers may evaluate historic and current participants' approved Annual rates.

The MDC Provider Admin, MDC Provider Staff, MDC Provider Intake, and MDC Provider Nurse user roles will have access to this report.

8.1 Search Report (Inputs)

The search parameters of a report are designed to allow the user to filter the report contents by searching for desired records only. By utilizing the search input options, the user can specify what they want to view in the report output.

1. Navigate to the **Reports** tab in LTSSMaryland
2. Select **MDC** from the Category field, then **Filter**
3. Select the View hyperlink next to **Provider - Service Plan Annual Rate Report**

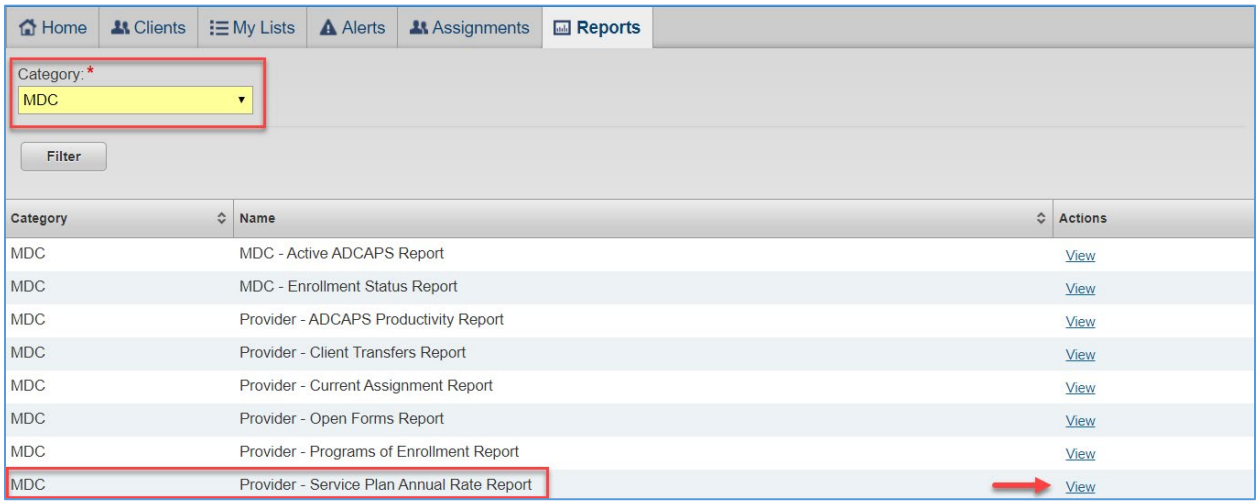


Figure 95-View Provider - Service Plan Annual Rate Report

4. Enter the desired search parameters and select **View Report**:

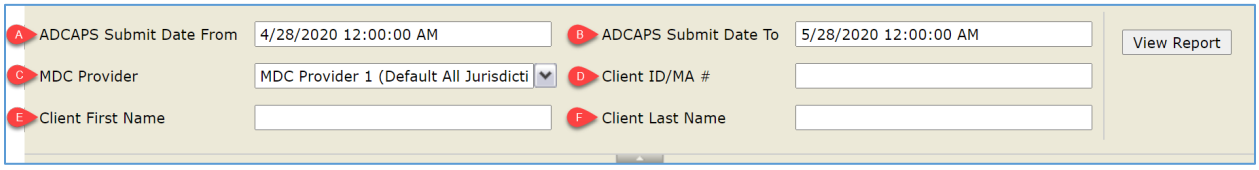


Figure 96-Transfer History Report search parameters

A. ADCAPS Submit Date From

- Searches ADCAPS in the "Complete" status, based on the date submitted
- Defaults to 30 days prior to the current system date
- Required to search
- **NOTE:** The report will not allow the user to input a date prior to July 19, 2019, since the ADCAPS module did not exist in LTSSMaryland prior to that date.

B. ADCAPS Submit Date To

- Searches ADCAPS in the "Complete" status, based on the date submitted
- Defaults to the current system date
- Required to search
- Date range cannot exceed 365 days

C. MDC Provider

- Defaults to the MDC Provider location to which the user's login is associated
- Required to search

D. Client ID/MA #

- Users may enter the specific Client ID or MA#
- Must enter the exact Client ID or MA# to return results
- Optional

E. Client First Name

- Users may enter the first name of a participant
- Search must include at least the first 3-characters of the first name
- Optional

F. Client Last Name

- Users may enter the last name of a participant
- Search must include at least the first 3-characters of the last name
- Optional

8.2 View Report (Outputs)

Once the user enters desired search parameters and selects View Report, then the user will be able to view the participants' MDC Service Plan details within ADCAPS that have been submitted by the user's MDC Provider location.

The following data elements will be displayed:

Client				MDC Provider	
1 Client ID	2 Client First Name	3 Client Last Name	4 Current MDC Waiver Enrollment Status	5 Primary Provider Name	6 Additional Provider Name
2439279ET689100	MDCSampleClient01	DemoMK	Enrolled	MDC Provider 1 (Default All Jurisdictions)	MDC Test Agency Location5, MDC Provider 3 (Default All Jurisdictions)
17699PYERNU5110	Devs	Preuat	Enrolled	MDC Provider 1 (Default All Jurisdictions)	MDC Provider 5 (Default All Jurisdictions), MDC Provider 6 (Howard County)
1339041ED456100	Demo3	Preuat	Disenrolled	MDC Provider 1 (Default All Jurisdictions)	MDC Provider 5 (Default All Jurisdictions)
12297HNOY7C6100	Yoon	Seri	Pending	MDC Provider 1 (Default All Jurisdictions)	MDC Provider 5 (Default All Jurisdictions)
16295XWUJA88110	June2020	MDC	Pending	MDC Provider 1 (Default All Jurisdictions)	MDC Provider 4 (Default All Jurisdictions)
2369018LC139110	Client01	Bolt	Denied	MDC Provider 1 (Default All Jurisdictions)	MDC Provider 3 (Default All Jurisdictions), MDC Provider 4 (Default All Jurisdictions)

Figure 97-Service Plan Annual Rate Report View 1

1. **Client ID**
   - Participant's unique identification number within LTSSMaryland
   - When the hyperlink is selected by the user, a new tab will open to the *Client Summary*
   - Column may be sorted in ascending or descending order by selecting the arrows within the column label
   - **NOTE:** If the participant had multiple ADCAPS submitted during the selected date range, the participant will display in multiple rows.
2. **Client First Name**
   - First Name of the participant as of the current system date
   - Column may be sorted in ascending or descending order by selecting the arrows within the column label
3. **Client Last Name**
   - Last Name of the participant as of the current system date
   - Column may be sorted in ascending or descending order by selecting the arrows within the column label
4. **Current MDC Waiver Enrollment Status**
   - Participant's status of enrollment in the MDC Waiver Program as of the current system date
   - Column may be sorted in ascending or descending order by selecting the arrows within the column label

5. Primary Provider Name

- Name of the assigned Primary MDC Provider at the time the ADCAPS was completed
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

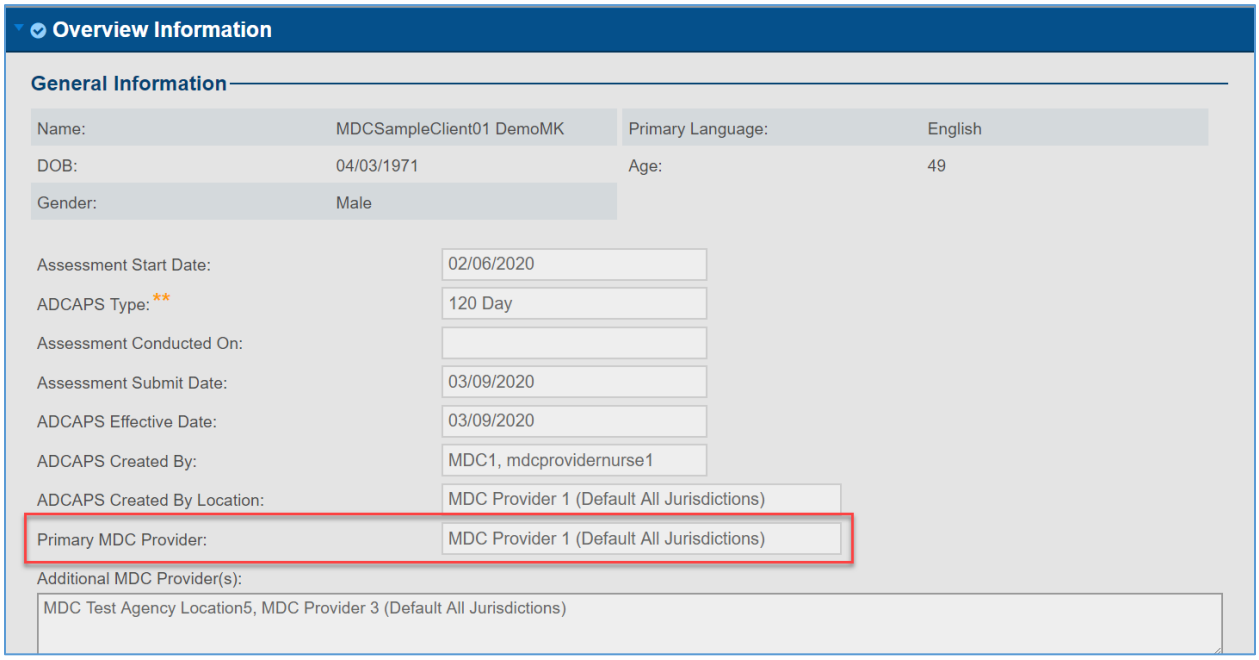


Figure 98-Primary MDC Provider as displayed in the ADCAPS Overview

6. Additional Provider Name

- Name of the assigned Additional MDC Provider at the time the ADCAPS was completed
- In cases of multiple, the Additional MDC Providers will be listed in alphabetical order
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

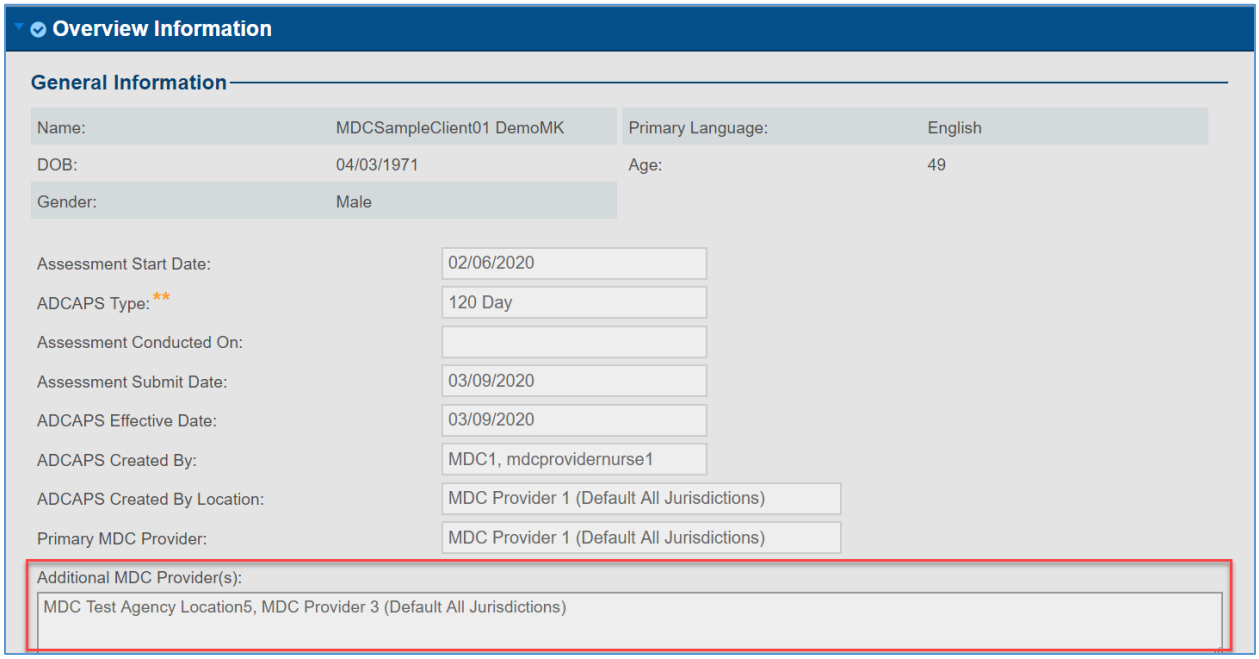


Figure 99-Additional MDC Provider(s) as displayed in the ADCAPS Overview

MDC Service Plan								
7 ADCAPS Type	8 Created By	9 Create Date	10 Active	11 Total No. of Days per Week	12 Total No. of Days per Week for Center	13 No. of Weeks for Center	14 Rate	15 Annual Cost
120 Day	mdcprovidernurse1 MDC1	3/9/2020	Active	5	5	45	$74.50	$16,762.50
Initial	mdcprovidernurse1 MDC1	1/23/2020	Active	7	7	52	$74.50	$27,118.00
120 Day	mdcprovidernurse1 MDC1	8/28/2019	Inactive	5	5	5	$74.50	$1,862.50
Initial	mdcprovidernurse1 MDC1	2/7/2020	Active	6	6	24	$74.50	$10,728.00
Initial	mdcprovidernurse1 MDC1	1/2/2020	Active	5	2	10	$74.50	$1,490.00
Significant Change - Revised	mdcprovidernurse1 MDC1	6/24/2019	Active	6	4	20	$74.50	$5,960.00

Figure 100-Service Plan Annual Rate Report View 2

7. ADCAPS Type

- Type of ADCAPS submitted
- Output Options: *Initial, Initial-Revised, 120 Day, 120 Day-Revised, Significant Change, Significant Change-Revised, Transfer, or Transfer-Revised*
- When the hyperlink is selected by the user, a new tab will open to the *ADCAPS Summary*
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

Overview Information

General Information

Name:	MDCSampleClient01 DemoMK	Primary Language:	English
DOB:	04/03/1971	Age:	49
Gender:	Male		

Assessment Start Date:	02/06/2020
ADCAPS Type:**	120 Day
Assessment Conducted On:	
Assessment Submit Date:	03/09/2020
ADCAPS Effective Date:	03/09/2020
ADCAPS Created By:	MDC1, mdcprovidernurse1

Figure 101-ADCAPS Type as displayed in the ADCAPS Overview

8. Create By

- Name of user that created the ADCAPS
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

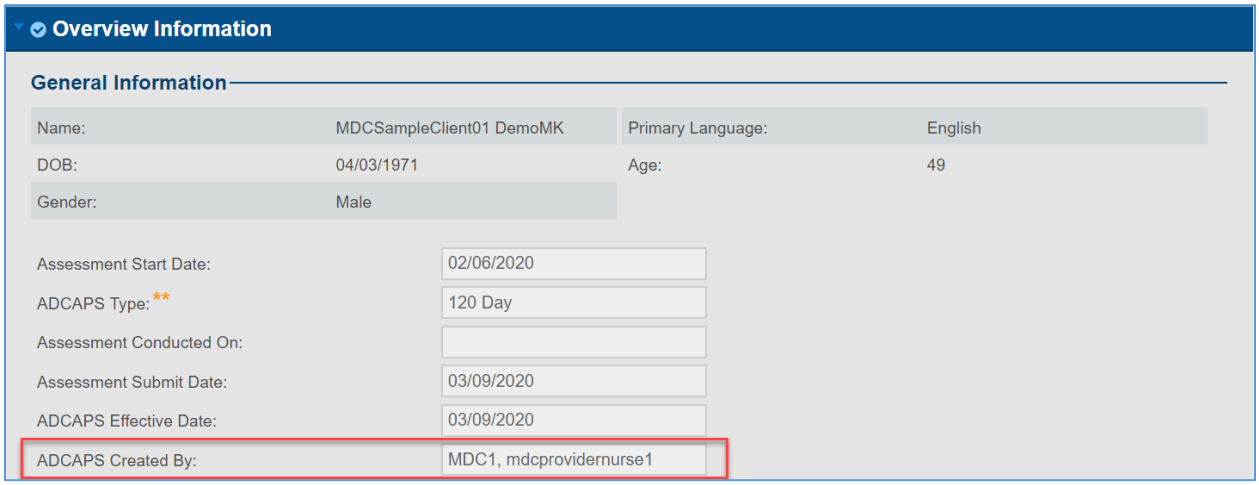


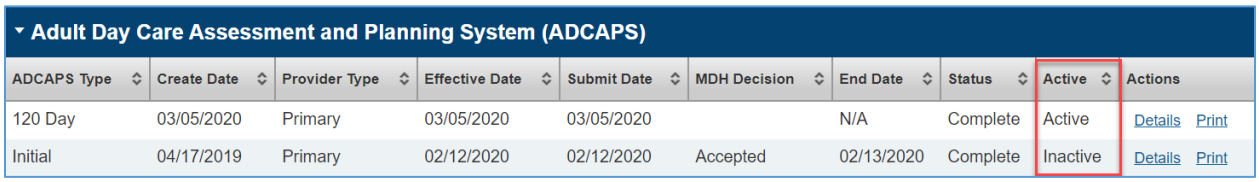
Figure 102-ADCAPS Created By as displayed in the ADCAPS Overview

9. Create Date

- Date that the ADCAPS was created
- **NOTE:** This date may vary from the Submit Date of the *Assessment* and *Care Plans*
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

10. Active

- Displays whether the ADCAPS is *Active* or *Inactive* as of the current system date
- Column may be sorted in ascending or descending order by selecting the arrows within the column label



Adult Day Care Assessment and Planning System (ADCAPS)

ADCAPS Type	Create Date	Provider Type	Effective Date	Submit Date	MDH Decision	End Date	Status	Active	Actions
120 Day	03/05/2020	Primary	03/05/2020	03/05/2020		N/A	Complete	Active	Details Print
Initial	04/17/2019	Primary	02/12/2020	02/12/2020	Accepted	02/13/2020	Complete	Inactive	Details Print

Figure 103-Active as displayed in the ADCAPS list view

11. Total No. of Days per Week

- Number of days, as captured in the Service Plan of the ADCAPS where the user's location is noted as the *Provider Name*
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

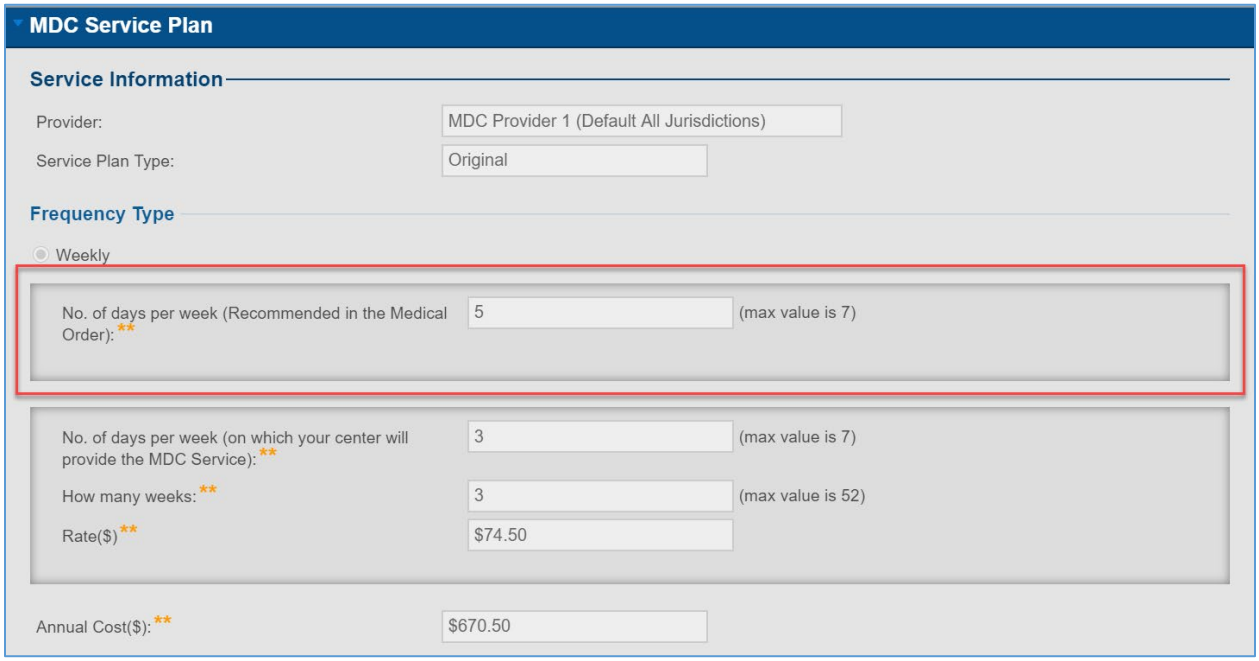


Figure 104-No. of days per week as displayed in the MDC Service Plan

12. Total No. of Days per Week for Center

- Number of days for the user's associated center, as captured in the Service Plan of the ADCAPS where the user's location is noted as the *Provider Name*
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

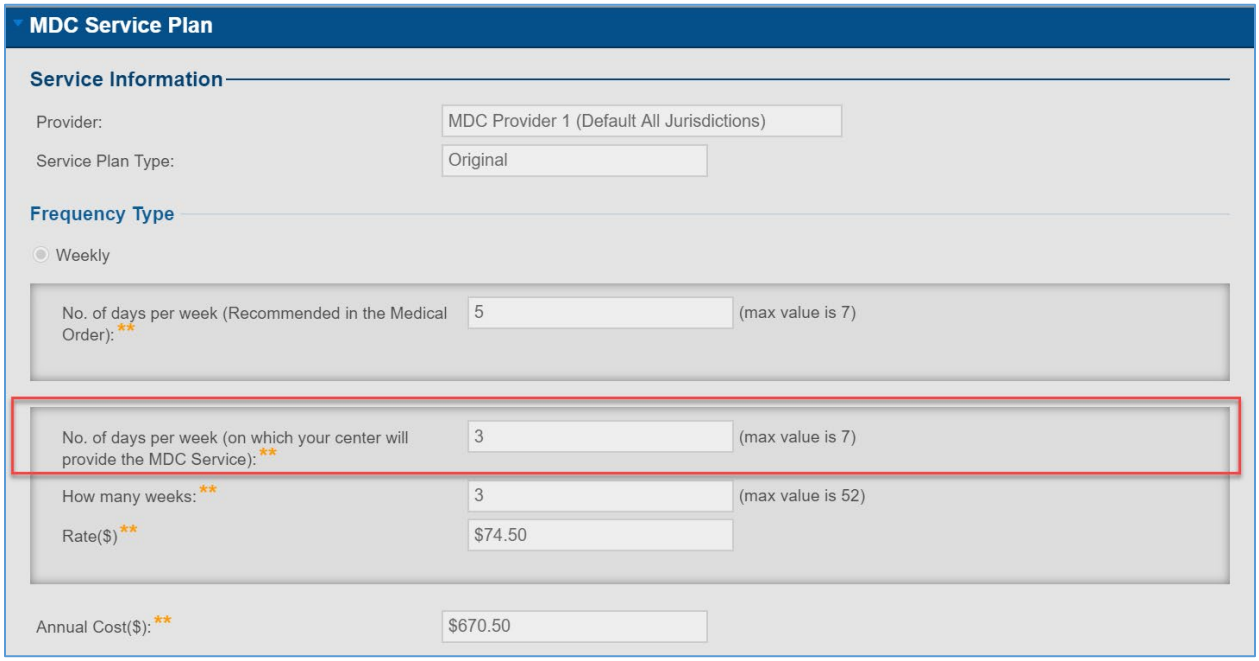


Figure 105-No. of days per week for center as displayed in the MDC Service Plan

13. No. of Weeks for Center

- Number of weeks for the user's associated center, as captured in the Service Plan of the ADCAPS where the user's location is noted as the *Provider Name*
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

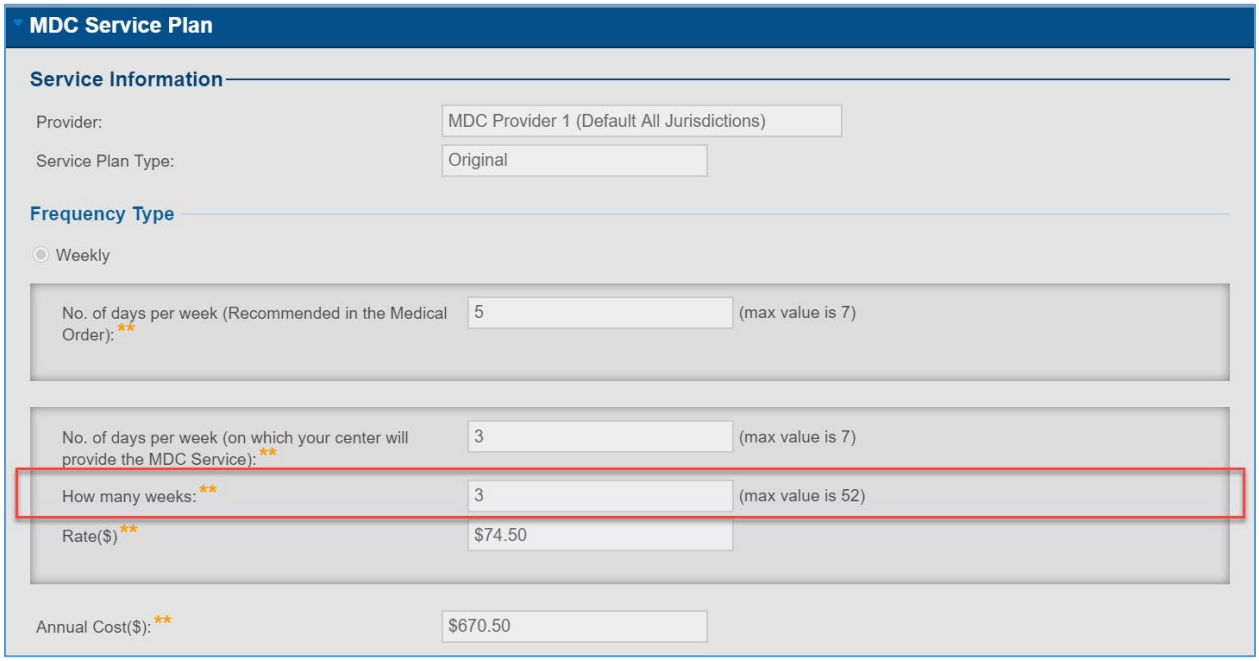


Figure 106- No. of weeks as displayed in the MDC Service Plan

14. Rate

- Rate ($), as captured in the Service Plan of the ADCAPS where the user's location is noted as the *Provider Name*
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

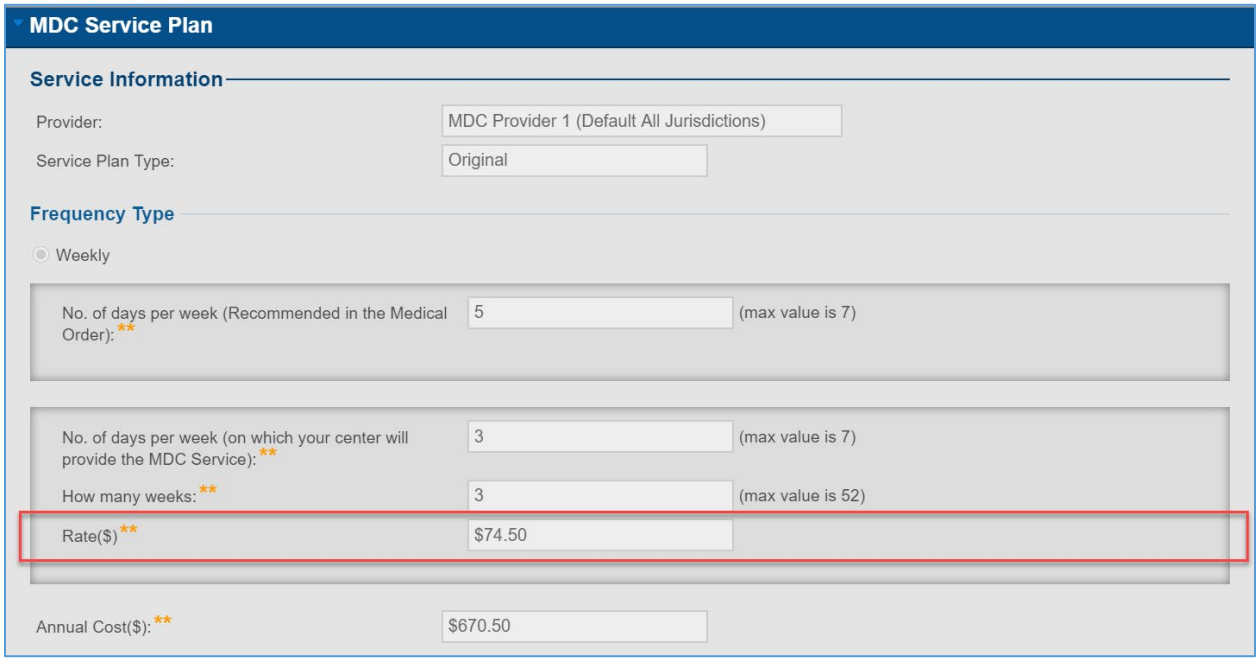


Figure 107-Rate as displayed in the MDC Service Plan

15. Annual Cost

- Annual Cost ($) as captured in the Service Plan of the ADCAPS where the user's location is noted as the *Provider Name*
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

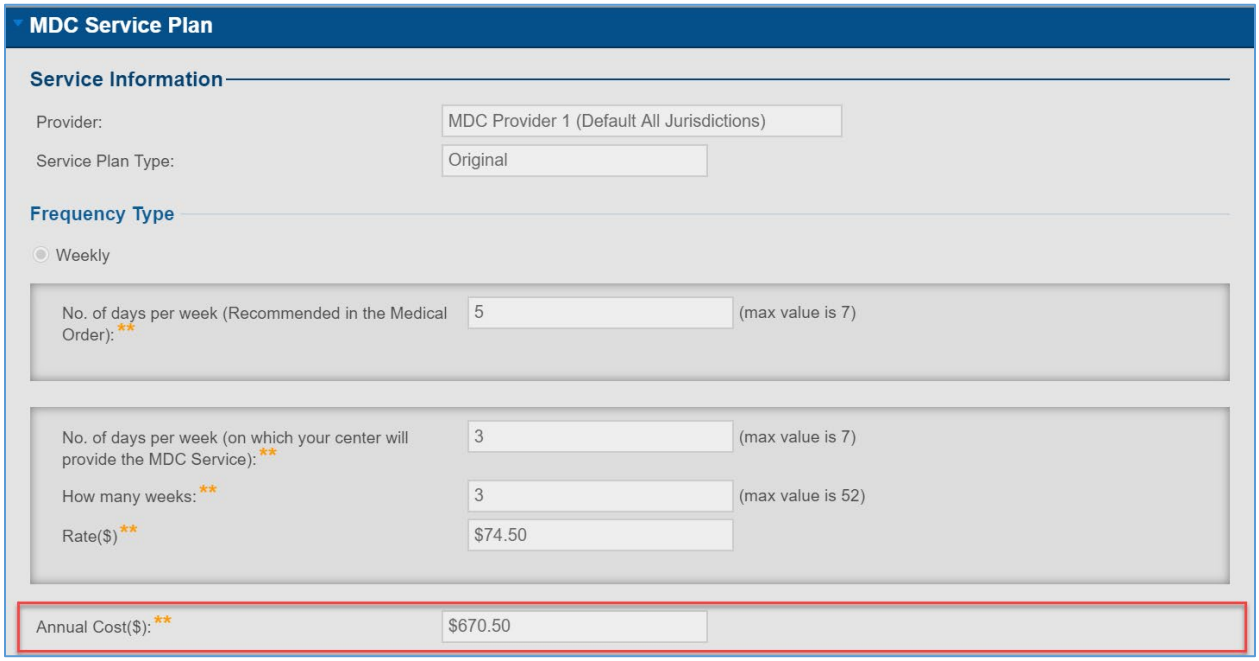


Figure 108-Annual Cost as displayed in the MDC Service Plan

8.3 Export Report

Users may export the report by selecting the icon in the navigation bar of the report. Available export options:

- Word
- Excel
- PDF
- TIFF file
- MHTML (web archive)
- CSV (comma delimited)
- XML file with report data

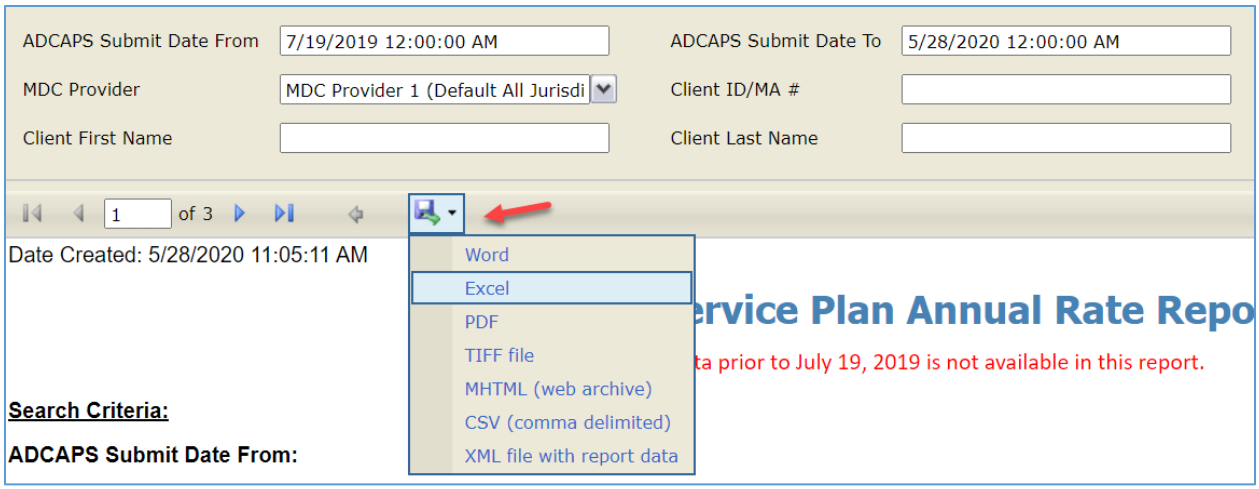


Figure 109-Export Options

TIP: Due to the size and number of columns in the report, it is recommended that users export to Excel or CSV (comma delimited) for ideal formatting