



# MDC PROVIDER ACCESS TO PARTICIPANT RECORDS

## Provider Guide

System Guide to inform MDC Provider Users which elements are accessible within the  
Participants' Records of LTSSMaryland

## Contents

I.	Viewing Participant Records as Assigned or Pending MDC Provider.....	2
A.	Participant Search .....	2
B.	Client Name.....	3
C.	Client Profile.....	5
D.	Client Summary.....	11
E.	Case Management .....	15
F.	Programs .....	22
II.	Viewing Participant Records as Unassigned MDC Provider.....	27
A.	Participant Search .....	27
B.	Client Summary.....	28
C.	Case Management .....	31
D.	Programs .....	34

## I. Viewing Participant Records as Assigned or Pending MDC Provider

As the system of record, LTSSMaryland captures and maintains records for participants. Medical Day Care Providers have access to these records within LTSSMaryland. In this section, we will review the sections of a participant's record that may be accessed as the Assigned or Pending MDC Primary and/or Additional Provider.

MDC Provider Admin, MDC Provider Staff, MDC Provider Intake, and MDC Provider Nurse roles that are associated with the Assigned or Pending MDC Provider Location have access to the following modules within the participant's record.

### A. Participant Search

1. Login to LTSSMaryland.org
2. Select the **Clients** tab at the top navigation header of the landing page
3. Enter known participant data to search for and then access the **Client Summary**
4. Once the desired search criteria are entered, upon selecting **Cases**, the system will display the following information columns for participants that meet the search criteria:


Client ID	Last Name	First Name	Date Of Birth	Jurisdiction	Facility	SSN#	Current MA#	Primary Phone#	Program Enrollment	Actions
152955SA557100	client2	astest2	05/02/1975	Frederick		***-**-5555	22545678945	(453) 666-4644	MDC	<a href="#">Client Summary</a>

Figure 1-Participant Search

- **Client ID**
  - Unique identification number associated with the participant in LTSSMaryland
- **Last Name**
  - Last Name of the participant as of the current system date
- **First Name**
  - First Name of the participant as of the current system date
- **Date of Birth**
  - Participant's DOB in MM/DD/YYYY format
- **Jurisdiction**
  - Jurisdiction to which the participant is associated as of the current system date
- **Facility**
  - If the participant's *Current Address* is a facility as of the current system date, the name of facility is listed
- **SSN#**
  - Last four digits of the participant's Social Security number in \*\*\*-\*\*-xxxx format
- **Current MA#**
  - MA number selected as the *Current MA #* within the Client Profile

- **Primary Phone #**
  - Phone number selected as the *Primary* within the Client Profile
- **Program Enrollment**
  - Program and/or Waiver(s) in which the participant is enrolled as of the current system date.
- **Actions**
  - Hyperlink that re-directs the user to the Client Summary page

## B. Client Name

1. Once the desired participant has been found within the **Client** search, the user may select the Client Summary hyperlink to navigate to the participant record.
2. Select the expand arrow icon  within the *Client Name* header to view the following data elements:

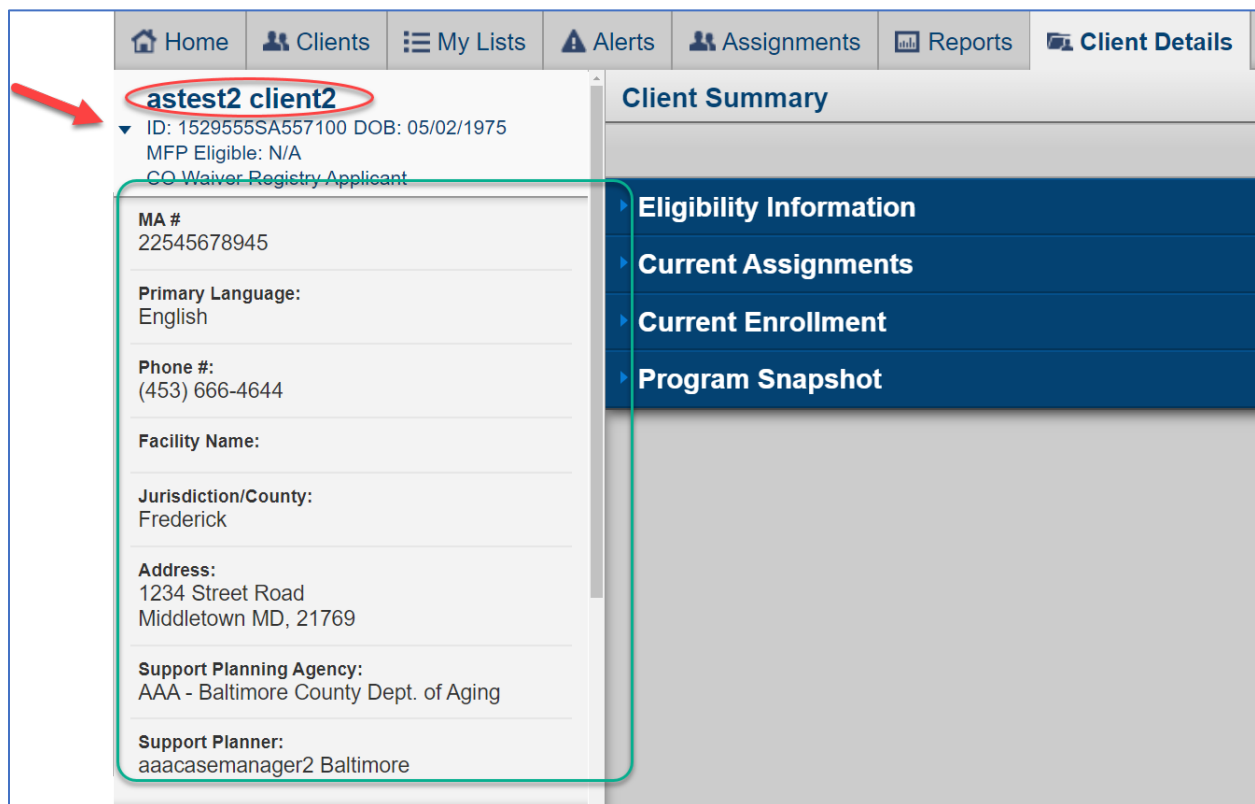



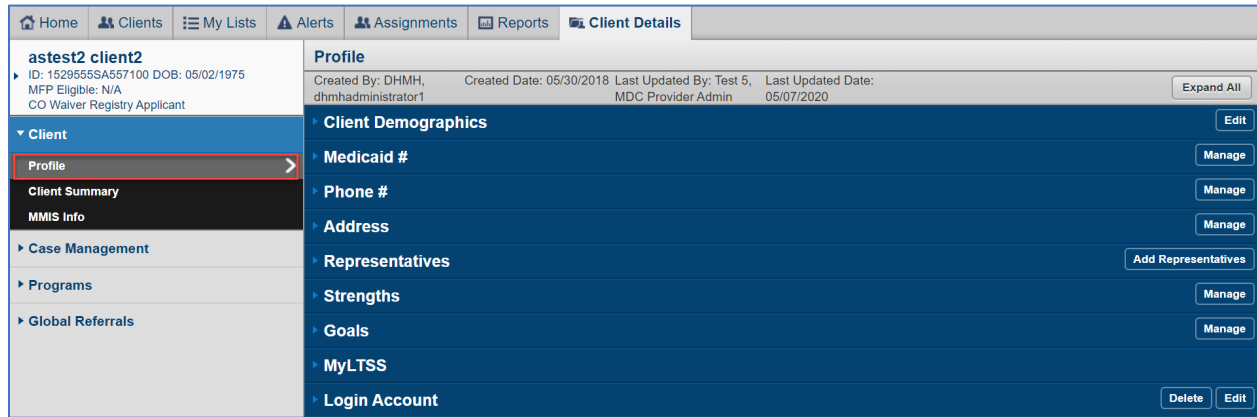
Figure 2-Client Name header

- **Client ID**
  - Unique identification number associated with the participant in LTSSMaryland
- **Date of Birth**
  - Participant's DOB in *MM/DD/YYYY* format
- **MFP Eligible**
  - Displays participant's eligibility status for Money Follows the Person (MFP), based on the *MFP Questionnaire*

- **CO Waiver Registry Applicant**
  - Displays only if the participant has applied for the Community Options Waiver
- **MA#**
  - MA number selected as the *Current MA #* within the Client Profile
- **Primary Language**
  - Participant's primary language
- **Phone #**
  - Phone number selected as the *Primary* within the Client Profile
- **Facility Name**
  - If the participant's *Current Address* is a facility as of the current system date, the name of facility is listed
- **Jurisdiction/County**
  - Jurisdiction to which the participant is associated as of the current system date
- **Address**
  - *Current Address* of the participant as of the current system date
- **Support Planning Agency**
  - Assigned SPA as of the current system date
- **Support Planner**
  - Assigned Support Planner staff as of the current system date

### C. Client Profile

1. Once the desired participant has been found within the **Client** tab search, the user may select the Client Summary hyperlink to navigate to the participant's record.
2. Select the expand arrow icon  within the **Client** option on the left navigation.
3. Select **Profile** to view the following data elements:



The screenshot shows the 'Client Profile' page for a user named 'astest2 client2'. The page has a top navigation bar with links to Home, Clients, My Lists, Alerts, Assignments, Reports, and Client Details. The left sidebar contains a list of navigation options: Client, Profile, Client Summary, MMIS Info, Case Management, Programs, and Global Referrals. The 'Profile' option is selected and highlighted. The main content area displays the profile details for 'astest2 client2', including a list of tabs: Profile, Client Summary, MMIS Info, Case Management, Programs, and Global Referrals. The 'Profile' tab is active, showing a list of data elements: Client Demographics, Medicaid #, Phone #, Address, Representatives, Strengths, Goals, MyLTSS, and Login Account. Each data element has a corresponding 'Manage' or 'Edit' button. The 'Client Demographics' section is expanded, showing a list of fields: Client Demographics, Medicaid #, Phone #, Address, Representatives, Strengths, Goals, MyLTSS, and Login Account. The 'Client Demographics' section is highlighted with a red box.

Figure 3-Client Profile

- **Client Demographics**
  - Displays *Client Information, Additional Client Information, and Advanced Directives*

**NOTE:** Assigned Primary MDC Providers may **Edit** this section of a Client Profile

**Client Demographics**

**Client Information**

First Name:	astest2
Last Name:	client2
Middle Name:	
Suffix:	
Birth Name (Maiden Name):	
Also Known As:	
Date of Birth:	05/02/1975
Gender:	Female
Race:	
Hispanic:	
Jurisdiction/County:	Frederick
Dependent of Legal Resident who is an Active Military Service Member:	

**Additional Client Information**

Client Identifier:	1529555SA557100
SSN #	***-**-5555
Medicare #	
Marital Status:	
Email Address:	
Primary Language:	English
Date of Death:	
Facility Name:	

**Advanced Directives**

DNR:	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Unknown
Living Will:	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Unknown
Medical POA:	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Unknown
Medical POA Durable:	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Unknown
General POA:	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Unknown
General POA Durable:	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Unknown
Guardian of Person:	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Unknown
Guardian of Property:	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Unknown

Figure 4-Client Demographics detail view

- **Medicaid #**

- Displays *Current Medicaid #* Information, *Coverage Group*, and span

**NOTE:** Assigned Primary MDC Providers may **Manage** this section of a Client Profile

The screenshot shows the 'Medicaid #' section of a client profile. It has a dark blue header with a dropdown arrow and the text 'Medicaid #'. Below the header, the section is titled 'Current Medicaid #' and is followed by a horizontal line. The form contains several fields: 'MA #' with the value '22545678945 (Community)', 'Original MA #', 'Coverage Group:' with the value 'C13', 'Start Date:' with the value '02/24/2019', and 'End Date:' with the value '04/06/2020'. The 'MA #' field is circled in green, and the 'Coverage Group:', 'Start Date:', and 'End Date:' fields are grouped together and circled in green.

Figure 5-Medicaid # summary view

- **Phone #**

- Displays Phone # Information
- MDC Provider users may select **Manage** to view all Phone numbers associated with the participant.

The screenshot shows the 'Phone #' section of a client profile. It has a dark blue header with a dropdown arrow and the text 'Phone #'. In the top right corner of the header, there is a red arrow pointing to a 'Manage' button. Below the header, the section is titled 'Primary Phone #' and is followed by a horizontal line. The form contains several fields: 'ISAS IVR:' with the value 'Yes', 'Phone Type:' with the value 'Mobile', 'Phone Owner:', 'Specify:', 'Phone #' with the value '(453) 666-4644', 'Best Time to Call:', and 'Notes:' with a text area below it.

Figure 6-Phone # summary view



Client Profile — Phone Number List						
<a href="#">Back to Profile</a>						
Primary	Phone Type	Best Time to Call	Phone Number	ISAS IVR	Notes	
	Other		325-8174	<input checked="" type="checkbox"/>	Import	
	Other		468-2717	<input checked="" type="checkbox"/>		
	Home		664-0462			
<input checked="" type="checkbox"/>	Home		468-2717			

Figure 7-Phone # list view

#### Address

- Displays *Current Address, Type, Description*, and whether it *Meets Definition of Community Setting*
- MDC Provider users may select **Manage** within this section to view the addresses associated with the participant. Upon selecting **View**, the user may view more details about the address.

Address

Manage

---

**Current Address**

Address Type: Community

Address Description: Home

Address: 1234 Street Road  
Middletown , MD , 21769  
Frederick

Meets Definition of Community Setting?

Mailing Address? No

Permanent Address? No

Figure 8-Address summary view

Client Profile — Address List						
<a href="#">Back to Profile</a>						
Current Address	Address Type	Address Description	Meets Definition of Community Setting?	Address	Jurisdiction/County	Actions
<input checked="" type="checkbox"/>	Community	Home		1234 Street Road, Middletown, MD 21769	Frederick	<a href="#">View</a>

Figure 9-Address list view

**Client Address Form**

**Client Address Information**

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

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

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

Address Type: \*\*

Address Description:

Transition Date:

Length of Stay:

Address: \*\*

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

Meets Definition of Community Setting?

**Comments:**

Comment:

Figure 10-Address detail view

▪ **Representatives**

- Displays the participant's representatives' information
- MDC Provider users may select **View** within this section to view more details about the participant's representatives.

**NOTE:** Assigned Primary MDC Providers may Add or Edit this section of the Client Profile

Representatives						<a href="#">Add Representatives</a>
Representative Name	Date of Birth	Relationship	Guardian of	CFC Representative	Actions	
test testing		Spouse	Person, Property		<a href="#">View</a>	

Figure 11-Representatives list view

**Representative Contact Form**

**Representative Information**

First Name:

test

Last Name:

testing

Middle Name:

Suffix:

Date of Birth:

Relationship to Client:

Spouse

**Representative Contact Information**

Phone Type:

Mobile

Best Time to Call:

Phone Number: (XXX XXX XXXX)

5646666666

Ext:

Email Address:

Street Address 1:

567v ertret

Street Address 2:

City:

city

State:

Maryland

Zip Code:

87667

Jurisdiction/County:

Baltimore

**Guardian Information**

☒ Set as Current Guardian of Person

☒ Set as Current Guardian of Property

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


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

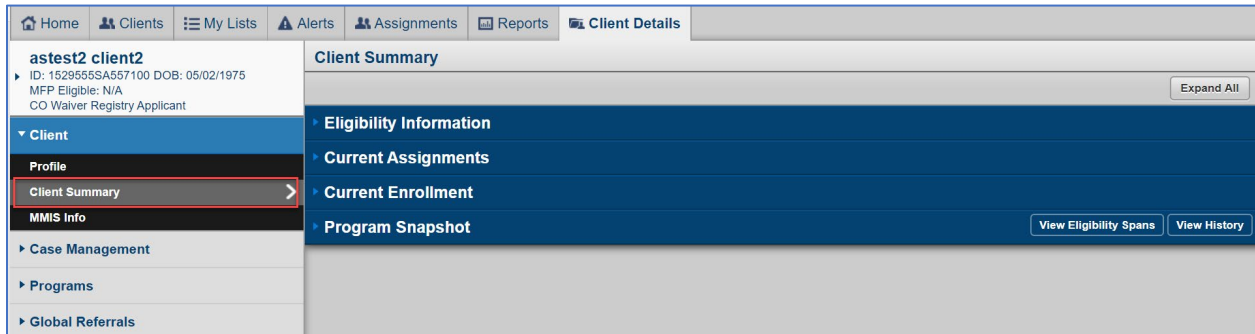
☒ Receive and complete my annual application form for me.

☒ Receive a Medical Assistance Card on my behalf.

Figure 12-Representatives detail view

#### D. Client Summary

1. Once the desired participant has been found within the **Client** tab search, the user may select the Client Summary hyperlink to navigate to the participant's record.
2. Select the expand arrow icon  within the **Client** option on the left navigation.
3. Select **Client Summary** to view the following data elements:



astest2 client2  
ID: 1529555SA557100 DOB: 05/02/1975  
MFP Eligible: N/A  
CO Waiver Registry Applicant

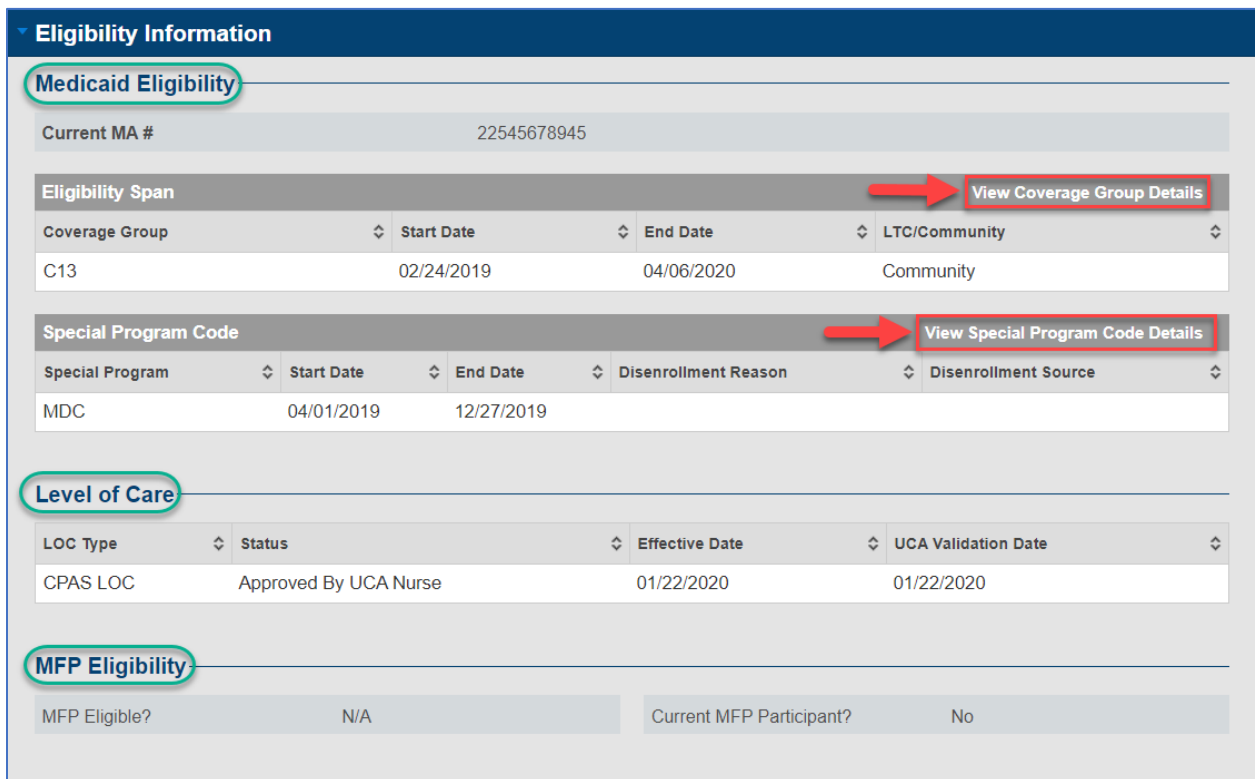
**Client Summary** Expand All

- Eligibility Information
- Current Assignments
- Current Enrollment
- Program Snapshot View Eligibility Spans View History

Case Management  
Programs  
Global Referrals

Figure 13-Client Summary

- **Eligibility Information**
  - Displays *Medicaid Eligibility*, *Level of Care*, and *MFP Eligibility*
  - MDC Provider users may select the **View Coverage Group Details** or **View Special Program Code Details** buttons to be re-directed to a .pdf version of the “Quick Reference Guide to Medical Care Program Coverage Groups and HealthChoice Eligibility” or “Special Program Code List”



**Eligibility Information**

**Medicaid Eligibility**

Current MA # 22545678945

**Eligibility Span** View Coverage Group Details

Coverage Group	Start Date	End Date	LTC/Community
C13	02/24/2019	04/06/2020	Community

**Special Program Code** View Special Program Code Details

Special Program	Start Date	End Date	Disenrollment Reason	Disenrollment Source
MDC	04/01/2019	12/27/2019		

**Level of Care**

LOC Type	Status	Effective Date	UCA Validation Date
CPAS LOC	Approved By UCA Nurse	01/22/2020	01/22/2020

**MFP Eligibility**

MFP Eligible? N/A Current MFP Participant? No

Figure 14-Eligibility Information summary view

## MDC PROVIDER ACCESS TO PARTICIPANT RECORDS

### Current Assignments

- Displays active *Agency Assignments* and *Staff Assignments*
- MDC Provider users may select the View History hyperlink to see the details of the Agency Assignment. From that view, the user may select the View hyperlink to see details of the Provider assignment.

Current Assignments

Agency Assignments

Assignment Type	Provider	Assignment Date	Action
Support Planning Agency	AAA - Baltimore County Dept. of Aging	11/19/2018	<a href="#">View History</a>
Primary MDC Provider	MDC Test Agency Location6	05/11/2020	<a href="#">View History</a>
Additional MDC Provider	MDC Test Agency Location2	05/11/2020	<a href="#">View History</a>
Assessor Agency	LHD (Default All Jurisdictions)	05/04/2020	<a href="#">View History</a>

Staff Assignments

Assignment Type	Date Assigned	Staff Name	Agency	Phone Number	Email
MDH MDC Staff	02/28/2020	dhhmmdcstaff2 DHMH	MDH - DHMH	(410) 715-6539	dummy@ltssdomain.com
SPA Support Planner(Active)	03/08/2019	aaacasemanager2 Baltimore	AAA - MAC Incorporated	(410) 715-6539	dummy@ltssdomain.com

Figure 15-Current Assignments summary view

Agency Selection

Collapse All

Primary Medical Day Care Provider Assignment

Create Date	Initiated By	Assignment Date	Expiration Date	MDC Provider	Selection Status	Actions
03/24/2020	DHMH, dhmhmdcadministrator1	04/07/2020	N/A	MDC Test Agency Location5	Active	<a href="#">View</a>
02/28/2020	Admin, MDH MDC	02/28/2020	N/A	MDC Test Agency Location1	Inactive	<a href="#">View</a>
02/28/2020	Admin, MDH MDC	02/28/2020	N/A	MDC Provider 1 (Default All Jurisdictions)	Inactive	<a href="#">View</a>
06/07/2019	DHMH, dhmhmdcadministrator1	06/07/2019	N/A	MDC Provider 1 (Default All Jurisdictions)	Inactive	<a href="#">View</a>
11/20/2018	DHMH, dhmhmdcadministrator1	11/28/2018	N/A	MDC Provider 5 (Default All Jurisdictions)	Inactive	<a href="#">View</a>

Additional Medical Day Care Provider Assignment

Create Date	Initiated By	Assignment Date	Expiration Date	MDC Provider	Selection Status	Actions
02/28/2020	Admin, MDH MDC	02/28/2020	N/A	MDC Test Agency Location2	Inactive	<a href="#">View</a>
02/28/2020	Admin, MDH MDC	02/28/2020	N/A	MDC Test Agency Location4	Inactive	<a href="#">View</a>

Figure 16-Agency Assignment History view

## MDC PROVIDER ACCESS TO PARTICIPANT RECORDS

**Medical Day Care Provider Selection — Primary MDC Provider Assignment**
Status: Active View

[Back to List](#)

**Medical Day Care Provider Assignment**

**Medical Day Care Provider Selection**

Medical Day Care Provider: \*\* MDC Test Agency - MDC Test Agency Location5 - 456767600

☐ Assigning hospital and nursing home admissions

Assignment Date:

**Reason for Transfer \*\***

☐ Client moved to new region/jurisdiction

☒ Requested by client

☐ Other

*Figure 17-Provider Assignment detail view*

- **Current Enrollment**

- Displays *Program(s)* in which the participant is actively enrolled and their corresponding *Annual Med/Tech/LOC Due Date* and *Waiver Financial Redetermination Due Date*

Current Enrollment							
Program	Enrollment Date	Annual Med/Tech/LOC Due Date	Annual Med/Tech/LOC Status	Waiver Financial Redetermination Due Date	Waiver Financial Redetermination Status	Receiving MDC Services	Actions
Community First Choice	06/24/2018	N/A		N/A		N/A	
Medical Day Care Waiver	01/15/2020	04/01/2021		N/A	N/A	Receiving MDC services as a part of the MDC Waiver	

*Figure 18-Current Enrollment summary view*

- **Program Snapshot**

- Displays the *Recent Program History* and *Additional Program Information*
- MDC Provider users may select the **View Eligibility Spans** button to view more detail about the programs of enrollment; or select the **View History** button to view more detail about program decision history.

## MDC PROVIDER ACCESS TO PARTICIPANT RECORDS

**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	Enrolled	N/A	01/15/2020	03/01/2019	N/A
Community Personal Assistance Services	Pending	N/A	N/A	N/A	N/A
Community First Choice	Enrolled	N/A	06/24/2018	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 19-Program Snapshot summary view

**Client Eligibility Spans**
[Back to Client Summary](#)
[Collapse All](#)

**Program Eligibility Span**

Waiver/Program	Enrollment Date	Disenrollment Date
MDC	01/15/2020	N/A
CFC	06/24/2018	N/A

**CFC Participation Period**

Start Date	End Date
06/24/2018	N/A


Figure 20-Eligibility Span detail view

**Program Decision History**
[Back to Client Summary](#)

Event	Program Type	Date
Approve	Medical Day Care Waiver	01/15/2020
Deny	Medical Day Care Waiver	03/01/2019
Approve	Community First Choice	06/24/2018

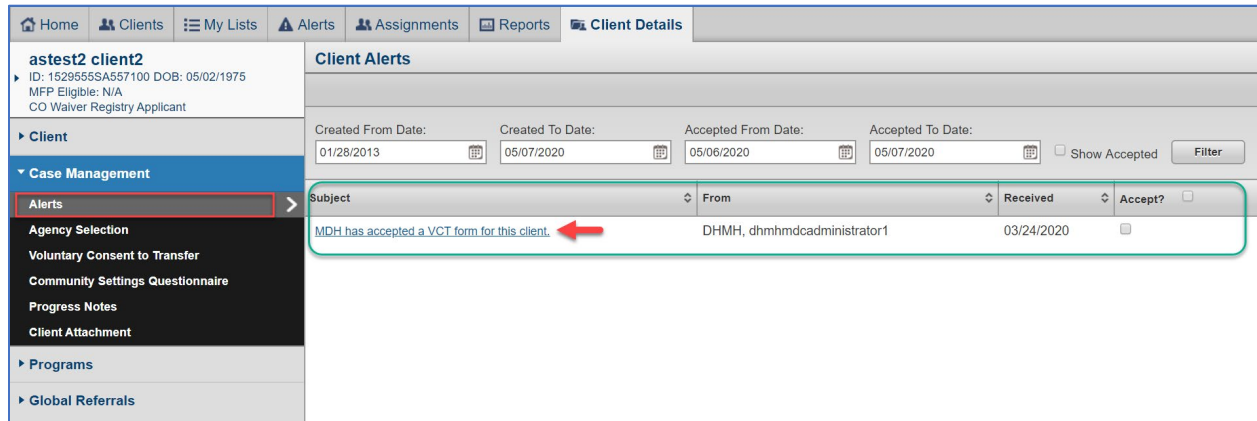
Figure 21-Program Decision History view

## E. Case Management

1. Once the desired participant has been found within the **Client** tab search, the user may select the Client Summary hyperlink to navigate to the participant's record.
2. Select the expand arrow icon  within the **Case Management** option on the left navigation.
3. Within the Case Management module, MDC Providers will be able to access the following features and functions:

- **Alerts**

- A consolidated list of participant-specific alerts that have been sent to the MDC Provider location associated with the logged-in user.
- By selecting the hyperlink of the *Subject*, the user will be re-directed to the related form.



**astest2 client2**  
ID: 1529555SA557100 DOB: 05/02/1975  
MFP Eligible: N/A  
CO Waiver Registry Applicant

**Client Alerts**

Created From Date: 01/28/2013 Created To Date: 05/07/2020 Accepted From Date: 05/06/2020 Accepted To Date: 05/07/2020 ☐ Show Accepted

Subject	From	Received	Accept?
<a href="#">MDH has accepted a VCT form for this client.</a>	DHMH, dhmhmdadministrator1	03/24/2020	<input type="checkbox"/>

Figure 22-Alerts list view



## MDC PROVIDER ACCESS TO PARTICIPANT RECORDS

### ▪ Agency Selection

- Displays detailed information and history of the participant's *Primary Medical Day Care Provider Assignment* and *Additional Medical Day Care Provider Assignment*
- By selecting the View hyperlink, users may view assignment details.

**NOTE:** Assigned Primary MDC Providers may **Assign** an Additional MDC Provider

Home

Clients

My Lists

Alerts

Assignments

Reports

Client Details

astest2 client2

ID: 1529555SA557100 DOB: 05/02/1975

MFP Eligible: N/A

CO Waiver Registry Applicant

Client

Case Management

Alerts

Agency Selection

Voluntary Consent to Transfer

Community Settings Questionnaire

Progress Notes

Client Attachment

Programs

Global Referrals

Agency Selection

Collapse All

Primary Medical Day Care Provider Assignment

Create Date	Initiated By	Assignment Date	Expiration Date	MDC Provider	Selection Status	Actions
03/24/2020	DHMH, dhmhmdcadministrator1	04/07/2020	N/A	MDC Test Agency Location5	Active	<a href="#">View</a>
02/28/2020	Admin, MDH MDC	02/28/2020	N/A	MDC Test Agency Location1	Inactive	<a href="#">View</a>
02/28/2020	Admin, MDH MDC	02/28/2020	N/A	MDC Provider 1 (Default All Jurisdictions)	Inactive	<a href="#">View</a>
06/07/2019	DHMH, dhmhmdcadministrator1	06/07/2019	N/A	MDC Provider 1 (Default All Jurisdictions)	Inactive	<a href="#">View</a>
11/20/2018	DHMH, dhmhmdcadministrator1	11/28/2018	N/A	MDC Provider 5 (Default All Jurisdictions)	Inactive	<a href="#">View</a>

Additional Medical Day Care Provider Assignment

Assign

Create Date	Initiated By	Assignment Date	Expiration Date	MDC Provider	Selection Status	Actions
02/28/2020	Admin, MDH MDC	02/28/2020	N/A	MDC Test Agency Location2	Inactive	<a href="#">View</a>
02/28/2020	Admin, MDH MDC	02/28/2020	N/A	MDC Test Agency Location4	Inactive	<a href="#">View</a>

Figure 23-Agency Selection list view

**Medical Day Care Provider Selection — Primary MDC Provider Assignment**
Status: Active
[View](#)

[Back to List](#)

**Medical Day Care Provider Assignment**

**Medical Day Care Provider Selection**

Medical Day Care Provider: \*\* MDC Test Agency - MDC Test Agency Location5 - 456767600

☐ Assigning hospital and nursing home admissions

Assignment Date: 04/07/2020

**Reason for Transfer\*\***

☐ Client moved to new region/jurisdiction

☒ Requested by client

☐ Other

Figure 24-Provider Assignment detail view

**Medical Day Care Provider Selection — Additional MDC Provider Assignment**
[New](#)

[Cancel](#)
[Submit](#)

**New Medical Day Care Provider Assignment**

**New Medical Day Care Provider Selection**

Medical Day Care Provider: \*

Figure 25-Additional MDC Provider Assignment page

### Voluntary Consent to Transfer

- Displays a list of Voluntary Consent to Transfer forms
- By selecting the View hyperlink, the user will view form details; and, by selecting the Print hyperlink, the user will be able to print the form.
- See also the **Medical Day Care Provider Guide** located within <https://www.Itsstraining.org/user-guides> for more detail on the Voluntary Consent to Transfer form.

Home

Clients

My Lists

Alerts

Assignments

Reports

Client Details

astest2 client2

ID: 1529555SA557100 DOB: 05/02/1975

MFP Eligible: N/A

CO Waiver Registry Applicant

Client

Case Management

Alerts

Agency Selection

Voluntary Consent to Transfer

Community Settings Questionnaire

Progress Notes

Client Attachment

Programs

Global Referrals

Voluntary Consent To Transfer - List

Provider Transferring to	Anticipated Start Date	Last Modified Date	Last Modified By	Provider Transferring from	Status	Signature Status	Actions
MDC Test Agency Location5	04/01/2019	03/24/2020	DHMH, dhmhmdcadmistrator1	MDC Test Agency Location1	Accepted	Not signed	<a href="#">View</a> <a href="#">Print</a>
MDC Provider 5 (Default All Jurisdictions)	10/31/2019	11/19/2019	Admin, MDH MDC	MDC Provider 1 (Default All Jurisdictions)	Accepted	Signed copy uploaded	<a href="#">View</a> <a href="#">Print</a>
MDC Provider 4 (Default All Jurisdictions)	01/03/2019	11/19/2019	Admin, MDH MDC	MDC Provider 5 (Default All Jurisdictions)	Discarded	Signed copy uploaded	<a href="#">View</a> <a href="#">Print</a>
MDC Provider 5 (Default All Jurisdictions)	11/08/2018	11/20/2018	DHMH, dhmhmdcadmistrator1	MDC Provider 1 (Default All Jurisdictions)	Accepted	Signed copy uploaded	<a href="#">View</a> <a href="#">Print</a>

Figure 26-Voluntary Consent to Transfer list view

### Community Settings Questionnaire

- Displays a list of Day Community Settings Questionnaires
- By selecting the View hyperlink, the user will view form details; and, by selecting the Print hyperlink, the user will be able to print the form.
- See also the **Community Settings Questionnaire** webinar located within <https://www.Itsstraining.org/webinars> for more detail on the Community Settings Questionnaire.

**NOTE:** Assigned Primary MDC Providers may **Add** a Community Settings Questionnaire

Home

Clients

My Lists

Alerts

Assignments

Reports

Client Details

astest2 client2

ID: 1529555SA557100 DOB: 05/02/1975

MFP Eligible: N/A

CO Waiver Registry Applicant

Client

Case Management

Alerts

Agency Selection

Voluntary Consent to Transfer

Community Settings Questionnaire

Progress Notes

Client Attachment

Programs

Global Referrals

Community Settings Questionnaire

Collapse All

Day

Add

Create Date	Last Modified	Last Modified By	Meets Definition of a Community Setting?	Determined By	Program Group	Provider Name	Provider Number	Provider Location	Status	Active	Actions
05/07/2020	05/07/2020	Test 5, MDC Provider Admin			MDC	MDC Provider 5 (Default All Jurisdictions)	505050550	2108 W. Preston Street, Baltimore, MD 21201	Pending MDC Program Review	Inactive	<a href="#">View</a> <a href="#">Print</a>

Figure 27-Community Settings Questionnaire list view

### Progress Notes

- Displays Progress Notes that have been entered by the MDC Provider location to which the user is associated, and where MDC Provider user may **Add** Progress Notes for their participant.
- See also **MDC Provider April Release Guide** located within <https://www.itsstraining.org/user-guides> for more detail on the Progress Notes module.

The screenshot displays the MDC Provider interface. The top navigation bar includes links for Home, Clients, My Lists, Alerts, Assignments, Reports, and Client Details. The left sidebar shows a tree view with categories like Client, Case Management, Alerts, Agency Selection, Voluntary Consent to Transfer, Community Settings Questionnaire, Progress Notes (highlighted with a red box), Client Attachment, Programs, and Global Referrals. The main content area shows the 'Progress Notes' window for client 'Amy DemoMK'. The window includes fields for Client's Name, Category Tags, Discarded status, and Sort order. A note is displayed with details: Agency: MDC Test Agency, Staff: Test 5, MDC Provider Admin, Date: May 7, 2020, 12:10 PM, Waiver/Program: MDC, and Category Tags: Social Services. The note text is 'Notes added by MDC Provider user'. At the bottom, there are input fields for Waiver/Program and Category Tags, a large yellow text area for the note, and buttons for Close, Add Progress Note, and Print.

Figure 28-Progress Notes

### ▪ Client Attachments

- MDC Provider Admin, MDC Provider Staff, and MDC Provider Nurse user roles may access the following Client Attachments categories:
    - Application
    - Exceptions Forms
    - Financial Documents
    - Guardian of Person
    - Guardian of Property
    - Housing Documents
    - Medicaid Card
    - Medical Day Care Services
- Medical Documentation
  - Other
  - Power of Attorney
  - Power of Attorney (for Medical Decisions)
  - Power of Attorney (Other)
  - REM Documents
  - Social Security Card

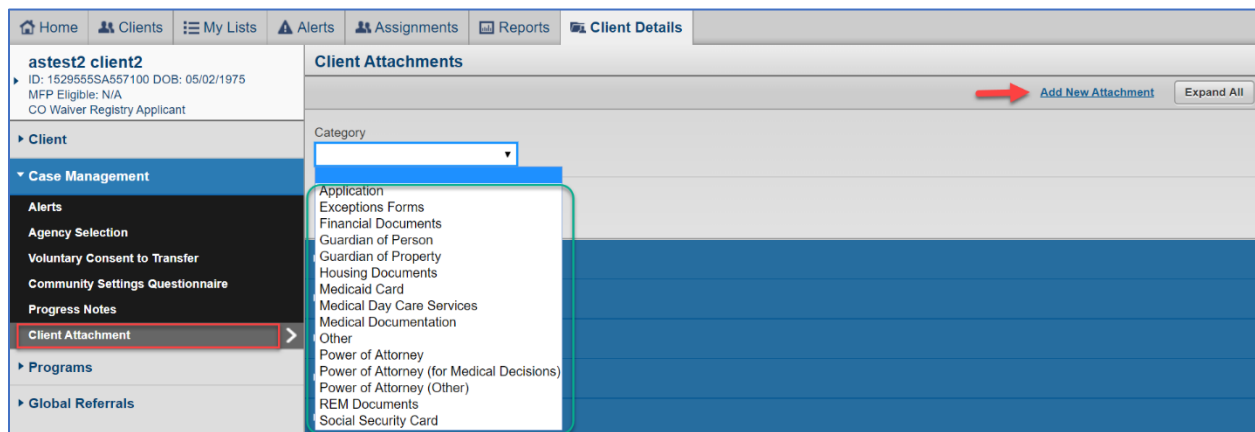
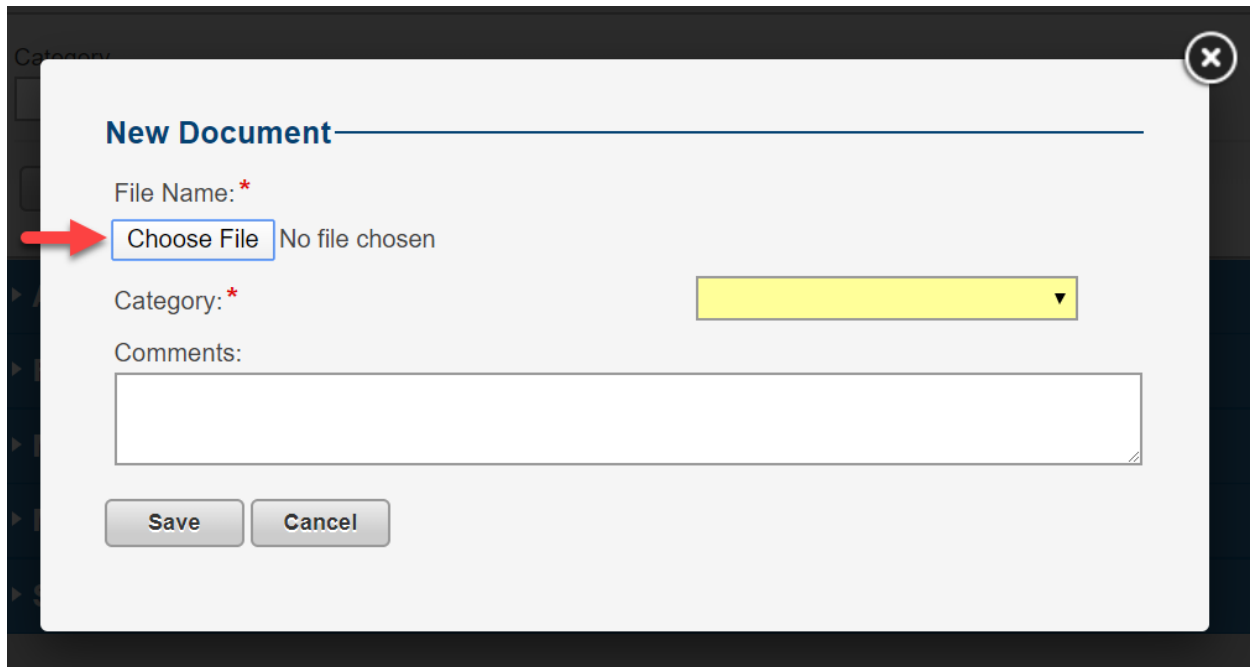


Figure 29-Client Attachment list view

- To add an attachment for the participant's record, select **Add New Attachment**
- Select **Choose File** and select the desired file from the local PC



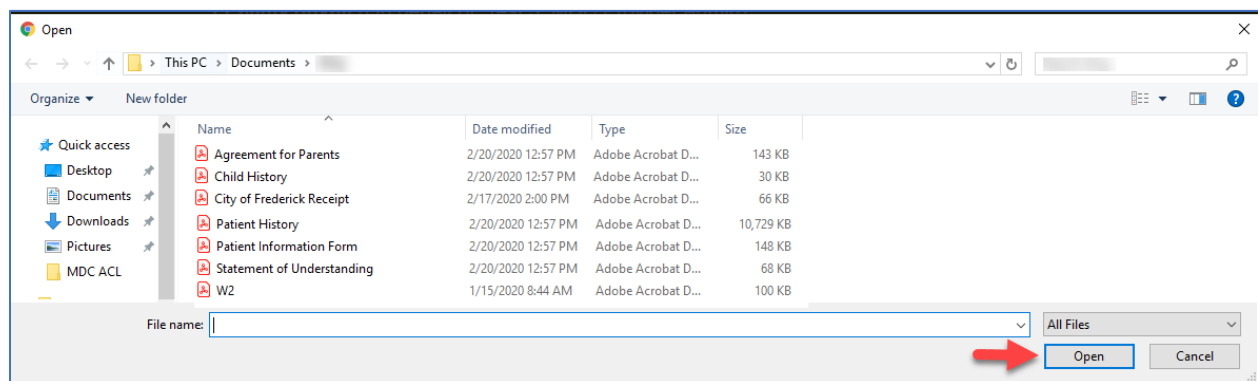
**New Document**

File Name: \*  
**Choose File** No file chosen

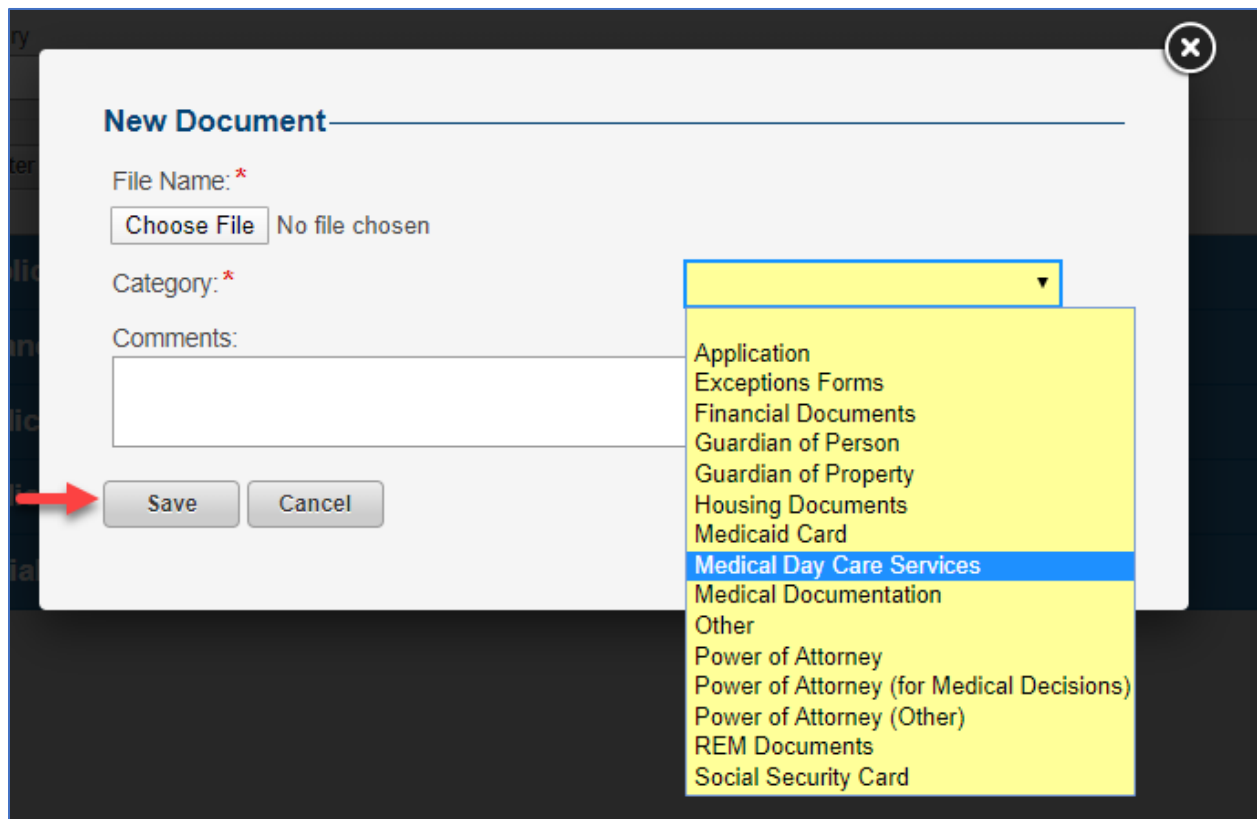
Category: \*  
[Yellow dropdown menu]

Comments:  
[Text area]

**Save** **Cancel**

*Figure 30-Choose File**Figure 31-File selection*

- Select the applicable category to which the document belongs, then select **Save**



The screenshot shows a 'New Document' form with the following fields and controls:

- File Name:** A text input field with a red asterisk. Below it is a 'Choose File' button and the text 'No file chosen'.
- Category:** A dropdown menu with a red asterisk. The menu is open, showing a list of categories. 'Medical Day Care Services' is highlighted in blue.
- Comments:** A text input field.
- Buttons:** 'Save' and 'Cancel' buttons at the bottom. A red arrow points to the 'Save' button.


The dropdown menu contains the following categories:

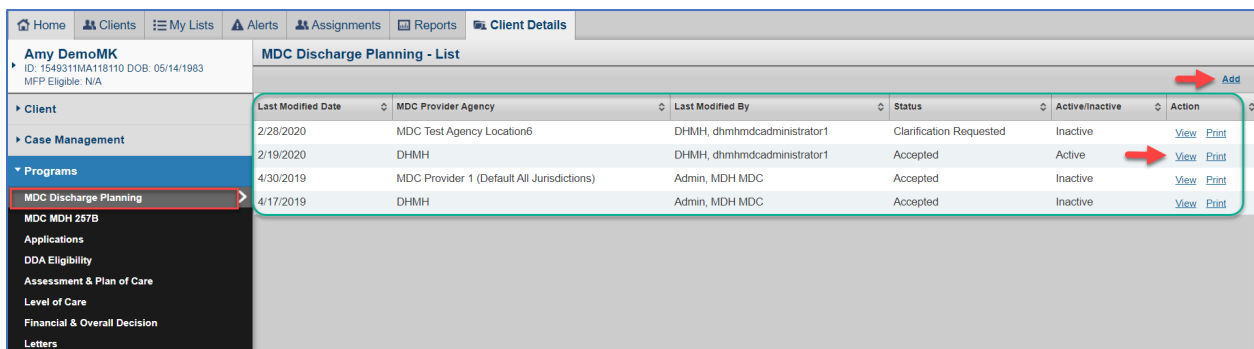
- Application
- Exceptions Forms
- Financial Documents
- Guardian of Person
- Guardian of Property
- Housing Documents
- Medicaid Card
- Medical Day Care Services**
- Medical Documentation
- Other
- Power of Attorney
- Power of Attorney (for Medical Decisions)
- Power of Attorney (Other)
- REM Documents
- Social Security Card

Figure 32-Attachment Categories

- Once saved, the document may be accessed by any LTSSMaryland user that is authorized for the category under which the document has been saved, as long as they are authorized to view the participant's record.

## F. Programs

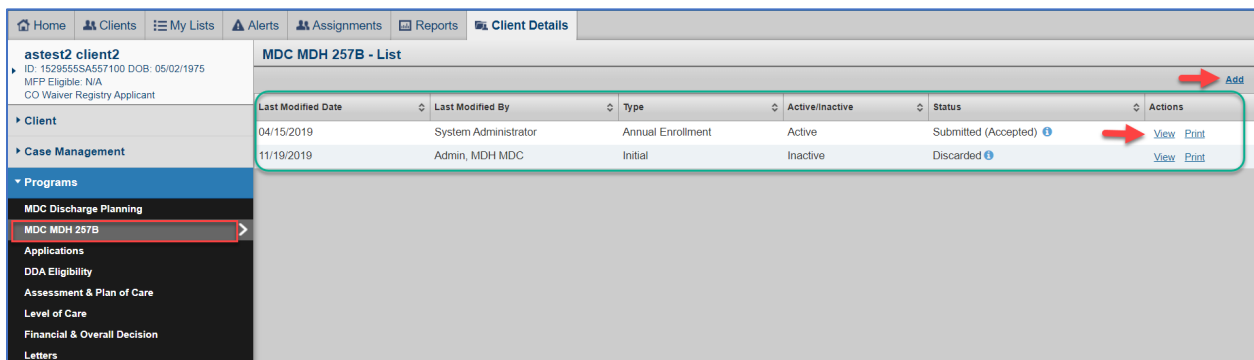
- Once the desired participant has been found within the **Client** tab search, the user may select the Client Summary hyperlink to navigate to the participant's record.
- Select the expand arrow icon  within the **Programs** option on the left navigation.
- Within the Programs module, MDC Providers will be able to access the following features and functions:
  - MDC Discharge Planning**
    - Displays a list of Discharge Planning forms, and where the MDC Provider may **Add** a new form for their participant and **View** and **Print** existing forms.
    - See also the **Medical Day Care Provider Guide** located within <https://www.itsstraining.org/user-guides> for more detail on the Discharge Planning form process.



Last Modified Date	MDC Provider Agency	Last Modified By	Status	Active/Inactive	Action
2/28/2020	MDC Test Agency Location6	DHMH, dhmhmdcadministrator1	Clarification Requested	Inactive	<a href="#">View</a> <a href="#">Print</a>
2/19/2020	DHMH	DHMH, dhmhmdcadministrator1	Accepted	Active	<a href="#">View</a> <a href="#">Print</a>
4/30/2019	MDC Provider 1 (Default All Jurisdictions)	Admin, MDH MDC	Accepted	Inactive	<a href="#">View</a> <a href="#">Print</a>
4/17/2019	DHMH	Admin, MDH MDC	Accepted	Inactive	<a href="#">View</a> <a href="#">Print</a>

Figure 33-MDC Discharge Planning

- MDC MDH 257B**
  - Displays a list of MDC MDH 257B forms, and where the MDC Provider may **Add** a new form for their participant and **View** and **Print** existing forms.
  - See also the **Medical Day Care Provider Guide** located within <https://www.itsstraining.org/user-guides> for more detail on the MDC MDH 257B form process.



Last Modified Date	Last Modified By	Type	Active/Inactive	Status	Actions
04/15/2019	System Administrator	Annual Enrollment	Active	Submitted (Accepted)	<a href="#">View</a> <a href="#">Print</a>
11/19/2019	Admin, MDH MDC	Initial	Inactive	Discarded	<a href="#">View</a> <a href="#">Print</a>

Figure 34-MDC MDH 257B

## Applications

- Here, MDC Providers may access the **MDC Freedom of Choice Forms** where they can **Add** a new form for their participant, and **View** and **Print** existing forms.
- Additionally, this module is where the MDC Provider will access the **MDC Enrollment Packet** to **Add** a new packet for their participant and view the **Details** of existing packets.
- See also the **Medical Day Care Provider Guide** located within <https://www.itsstraining.org/user-guides> for more detail on the MDC Freedom of Choice form and MDC Enrollment Packet process.

**NOTE:** Additional MDC Providers do not have access to this section of the participant's record

**Applications — List**

**MDC Freedom of Choice Forms**

Last Modified Date	Created By Agency	Last Modified By Agency	Signature Status	Enrollment Packet Decision	Status	Client Consent	Provider Selected	Active/Inactive	Actions
04/17/2019	DHMH	DHMH	Signed and paper copy on file		Submitted	HCBS Setting	MDC Provider 1 (Default All Jurisdictions)	Inactive	<a href="#">View</a> <a href="#">Print</a>
03/29/2019	MDC Provider 1 (Default All Jurisdictions)	MDC Provider 1 (Default All Jurisdictions)	Signed and paper copy on file	Rejected	Submitted	HCBS Setting	MDC Provider 1 (Default All Jurisdictions)	Inactive	<a href="#">View</a> <a href="#">Print</a>
03/29/2019	DHMH	DHMH	Signed and paper copy on file		Submitted	HCBS Setting	MDC Provider 1 (Default All Jurisdictions)	Inactive	<a href="#">View</a> <a href="#">Print</a>
04/02/2020	TCC (Default All Jurisdictions)	DHMH	Signed and paper copy on file		Clarification Requested	Institutional Setting	TBD	Inactive	<a href="#">View</a> <a href="#">Print</a>

**MDC Enrollment Packet**

Enrolled In	Last Modified Date	Last Modified By	Enrollment Type	Primary MDC Provider Agency	Status	Actions
MDC	04/02/2020	Admin, MDH MDC	Initial	MDC Provider 1 (Default All Jurisdictions)	Rejected	<a href="#">Details</a>
MDC	04/08/2019	DHMH, dhmhmdadministrator1	Initial	MDC Provider 1 (Default All Jurisdictions)	Accepted	<a href="#">Details</a>
	03/29/2019	Admin, MDH MDC	Initial	MDC Provider 1 (Default All Jurisdictions)	Rejected	<a href="#">Details</a>

Figure 35-MDC Freedom of Choice and MDC Enrollment Packet



### Assessment & Plan of Care

- Here, MDC Providers may access the **Assessment & POC Requests, interRAI Assessment, and Plan of Care.**
- Additionally, this module is where the MDC Provider will access the **ADCAPS** to **Add** a new ADCAPS (Assessment and Care Plans) for their participant and view the **Details** of existing ADCAPS that have been created by their location.
- See also the **Medical Day Care Provider Guide** located within <https://www.itsstraining.org/user-guides> for more detail on the ADCAPS process.

Requested Date	Requested By	Requested By Agency	Request Type	Agency Assigned	Triage Date	Due Date	Request Completion Date	Deactivation Date	Status	Actions
2/15/2017	DHMH: dhmhadministrator1	DHMH	Initial	LHD (Default All Jurisdictions)	01/11/2018	12/30/2017	N/A	N/A	Active	View

Figure 36-Assessment & POC Request

Assessments	Assessment Reference Date	Assessment Status	Request Type	Program Type	MDC Referral	RUG	Submitted Date	Active	Actions
interRAI-PEDS	N/A	In Progress	Initial		No	N/A	N/A	No	Summary Download
interRAI HC	11/01/2012	Submitted			No	SSA	07/14/2017	Yes	Summary Results
interRAI-PEDS	08/01/2017	Submitted	Initial		No	N/A	08/28/2017	No	Summary Results
interRAI-PEDS	07/31/2017	Submitted	Initial		Yes	N/A	08/28/2017	No	Summary Results
interRAI-PEDS	08/01/2017	Submitted	Initial		Yes	N/A	08/16/2017	No	Summary Results
interRAI-PEDS	08/01/2017	Submitted	Initial		No	N/A	08/14/2017	No	Summary Results
interRAI-PEDS	08/01/2017	Submitted	Initial		Yes	N/A	08/08/2017	No	Summary Results
interRAI-PEDS	N/A	Discarded			No	N/A	N/A	No	Summary
interRAI-PEDS	N/A	Discarded			No	N/A	N/A	No	Summary

Figure 37-interRAI Assessment list view

Assessments	Assessment Reference Date	Assessment Status	Request Type	Program Type	MDC Referral	RUG	Submitted Date	Active	Actions
interRAI HC	04/29/2019	Submitted	Initial		Yes	PA1	04/30/2019	Yes	Summary Results

Figure 38-Add interRAI Assessment

**NOTE:** Assigned Primary MDC Providers may **Add** an interRAI Assessment for clients that are not enrolled or pending in Community First Choice (CFC).

## MDC PROVIDER ACCESS TO PARTICIPANT RECORDS

Home

Clients

My Lists

Alerts

Assignments

Reports

Client Details

Peter Test

ID: 1730221ET330200 DOB: 07/03/1991

MFP Eligible: N/A

Client

Assessment & POC Request

interRAI Assessment

Plan of Care

MDC Discharge Planning

MDC MDH 257B

Applications

DDA Eligibility

Assessment & Plan of Care

Level of Care

Assessment & POC — List

Collapse All

Last Modified Date	Last Modified By	Start Date	Staff	POC Type	Status	Active	Actions
11/16/2017	DHMH, dhmhadministrator1	11/16/2017	AssessorRoles Test	Initial	Submitted	No	<a href="#">View</a> <a href="#">Print</a>
07/14/2017	DHMH, dhmhadministrator1	07/14/2017	lhassessor1 LHD	Initial	Submitted	No	<a href="#">View</a> <a href="#">Print</a>
11/21/2017	System Administrator	11/16/2017	AssessorRoles Test	Initial	Discarded	No	<a href="#">View</a> <a href="#">Print</a>
11/21/2017	System Administrator	11/06/2017	lhassessor2 LHD	Initial	Discarded	No	<a href="#">View</a> <a href="#">Print</a>

Figure 39-Plan of Care

Home

Clients

My Lists

Alerts

Assignments

Reports

Client Details

Lorraine Preuat

ID: 11100770L771200 DOB: 01/01/2010

MFP Eligible: N/A

Client

Case Management

Programs

MDC Discharge Planning

MDC MDH 257B

Applications

DDA Eligibility

Assessment & Plan of Care

Level of Care

Financial & Overall Decision

Letters

Assessment & POC — List

Expand All

Assessment & POC Request

interRAI Assessment

Plan of Care

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
Initial-Revised	01/24/2020		11/21/2019	N/A		N/A	In Progress	Inactive	<a href="#">Details</a> <a href="#">Print</a>
Initial	01/24/2020	Additional	12/31/2019	01/24/2020		N/A	Complete	Active	<a href="#">Details</a> <a href="#">Print</a>

Figure 40-ADCAPS

### Level of Care

- Here, MDC Providers may access the **Level of Care Request**, **NF Level of Care**, and **CPAS Level of Care**
- By selecting the [View](#) hyperlink, users may be re-directed to the detail view of the related form.

Home

Clients

My Lists

Alerts

Assignments

Reports

Client Details

astest2 client2

ID: 1529555SA557100 DOB: 05/02/1975

MFP Eligible: N/A

CO Waiver Registry Applicant

Client

Case Management

Programs

MDC Discharge Planning

MDC MDH 257B

Applications

DDA Eligibility

Assessment & Plan of Care

Level of Care

Financial & Overall Decision Letters

Global Referrals

Level of Care — Summary

Expand All

Level of Care Request

Requested Date	Requested By	Request Type	Request Completion Date	Request Completed By	Status	Deactivated By	Deactivation Date	Deactivation Reason	Actions
01/22/2020	DHMH, dhmhmdcadministrator1	CPAS	01/22/2020	UCA, ucanurse1	Inactive	N/A	N/A	N/A	<a href="#">View</a>

NF Level of Care

Create Date	Effective Date	Status	Verification Required?	Active	Actions
04/04/2019	N/A	Denied By UCA Nurse	No	No	<a href="#">View</a>
04/04/2019	N/A	Referred to UCA Physician	No	No	<a href="#">View</a>
04/04/2019	04/05/2019	Approved By UCA Physician	No	No	<a href="#">View</a>
10/24/2018	N/A	Discarded	No	No	<a href="#">View</a>
01/22/2020	N/A	Discarded	No	No	<a href="#">View</a>

CPAS Level of Care

Create Date	Effective Date	Status	Verification Required?	Active	Actions
01/22/2020	01/22/2020	Approved By UCA Nurse	No	Yes	<a href="#">View</a>

Figure 41-Level of Care list view

### Financial & Overall Decision

- Here, MDC Providers may access the **Overall Decision** forms for the MDC Waiver Program.
- By selecting the View hyperlink, users may be re-directed to the detail view of the related form.

Home

Clients

My Lists

Alerts

Assignments

Reports

Client Details

astest2 client2

ID: 152955SA57100 DOB: 05/02/1975

MFP Eligible: N/A

CO Waiver Registry Applicant

Client

Case Management

Programs

MDC Discharge Planning

MDC MDH 257B Applications

DDA Eligibility

Assessment & Plan of Care

Level of Care

Financial & Overall Decision

Letters

Financial and Overall Decision — List

Collapse All

Overall Decision

Last Modified By	Last Modified	Program Type	Decision	Status	Active/Inactive	Actions
System Administrator	04/22/2019	MDC	Approve	Submitted	Active	<a href="#">View</a>
System Administrator	04/23/2019	MDC	Approve	Submitted	Inactive	<a href="#">View</a>
System Administrator	04/23/2019	MDC	Approve	Submitted	Inactive	<a href="#">View</a>
System Administrator	04/23/2019	MDC	Approve	Submitted	Inactive	<a href="#">View</a>
System Administrator	04/23/2019	MDC	Approve	Submitted	Inactive	<a href="#">View</a>
System Administrator	04/23/2019	MDC	Approve	Submitted	Inactive	<a href="#">View</a>
System Administrator	04/23/2019	MDC	Approve	Submitted	Inactive	<a href="#">View</a>
System Administrator	04/23/2019	MDC	Approve	Submitted	Inactive	<a href="#">View</a>
System Administrator	04/22/2019	MDC	Approve	Submitted	Inactive	<a href="#">View</a>

Figure 42-Overall Decision list view

### Letters

- Here, MDC Providers may access formal letters and notifications that have been generated and sent to the participant.
- By selecting the View hyperlink, users may be re-directed to a .pdf version of the formal letter.

Home

My Clients

My Lists

Alerts

Assignments

Reports

Client Details

Amy DemoMK

ID: 1549311MA118110 DOB: 05/14/1983

MFP Eligible: N/A

Client

Case Management

Programs

MDC Discharge Planning

MDC MDH 257B

Applications

DDA Eligibility

Assessment & Plan of Care

Level of Care

Financial & Overall Decision

Letters

Global Referrals

Letters — List

Collapse All

MDC Letters

Status	Letter Date	Actions
AERS MDC Approval for Developmental Disabilities Waiver Participants Letter		
Submitted	04/15/2019	<a href="#">View</a>
AERS MDC Approval Notice		
Submitted	04/11/2019	<a href="#">View</a>
MDC Initial Denial Notice		
Submitted	04/30/2019	<a href="#">View</a>

Discard History

Figure 43-Letters list view

## II. Viewing Participant Records as Unassigned MDC Provider

As the system of record, LTSSMaryland captures and maintains records for participants. Medical Day Care Providers have access to these records within LTSSMaryland. If the MDC Provider is no longer actively assigned to a participant, they will retain access to forms that were created by their MDC Location over the duration of their active assignment.

MDC Provider Admin, MDC Provider Staff, MDC Provider Intake, and MDC Provider Nurse roles that are associated with an MDC Provider Location that is unassigned from a participant will have access to the following modules within the participant record.

### A. Participant Search

1. Login to LTSSMaryland.org
2. Select the **Clients** tab at the top navigation header of the landing page
3. Enter known participant data to search for and then access the **Client Summary**
4. Once the desired search criteria are entered, upon selecting **Cases**, the system will display the following information columns for participants that meet the search criteria:


Client ID	Last Name	First Name	Date Of Birth	Jurisdiction	Facility	SSN#	Current MA#	Primary Phone#	Program Enrollment	Actions
1529555SA57100	client2	astest2	05/02/1975	Unavailable	Unavailable	***-**-5555	22545678945	Unavailable	Unavailable	<a href="#">Client Summary</a>
1409755SA577130	client5	astest5	04/30/1977	Unavailable	Unavailable	***-**-7555		Unavailable	Unavailable	<a href="#">Client Summary</a>

Figure 44-Participant Search

- **Client ID**
  - Unique identification number associated with the participant in LTSSMaryland
- **Last Name**
  - Last Name of the participant as of the current system date
- **First Name**
  - First Name of the participant as of the current system date
- **Date of Birth**
  - Participant's DOB in *MM/DD/YYYY* format
- **Jurisdiction**
  - *Unavailable* to the unassigned MDC Provider user
- **Facility**
  - *Unavailable* to the unassigned MDC Provider user
- **SSN#**
  - Last four digits of the participant's Social Security number in *\*\*\*-\*\*-xxxx* format
- **Current MA#**
  - MA number selected as the *Current MA #* within the Client Profile
- **Primary Phone #**
  - *Unavailable* to the unassigned MDC Provider user

- **Program Enrollment**
  - *Unavailable* to the unassigned MDC Provider user
- **Actions**
  - Hyperlink that re-directs the user to the Client Summary page

## B. Client Summary

1. Once the desired participant has been found within the **Client** tab search, the user may select the Client Summary hyperlink to navigate to the participant's record.
2. Select the expand arrow icon  within the **Client** option on the left navigation.
3. Select **Client Summary** to view the following data elements:

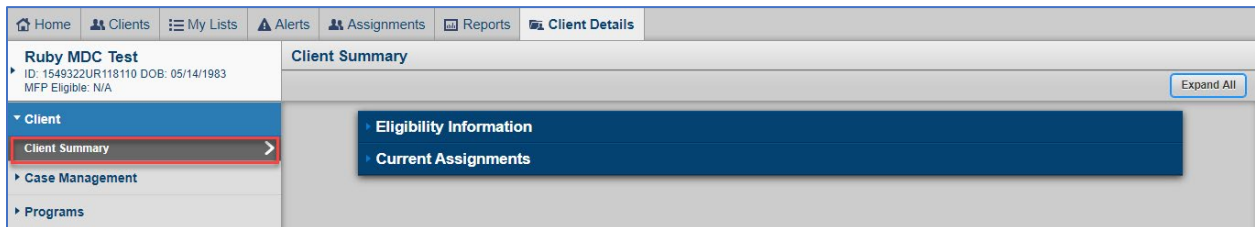


Figure 45-Client Summary

- **Eligibility Information**
  - Displays *Medicaid Eligibility, Level of Care, and MFP Eligibility*
  - MDC Provider users may select the **View Coverage Group Details** or **View Special Program Code Details** buttons to be re-directed to a .pdf version of the “Quick Reference Guide to Medical Care Program Coverage Groups and HealthChoice Eligibility” or “Special Program Code List”

**Eligibility Information**

**Medicaid Eligibility**

Current MA # 22545678945

**Eligibility Span** [View Coverage Group Details](#)

Coverage Group	Start Date	End Date	LTC/Community
C13	02/24/2019	04/06/2020	Community

**Special Program Code** [View Special Program Code Details](#)

Special Program	Start Date	End Date	Disenrollment Reason	Disenrollment Source
MDC	04/01/2019	12/27/2019		

**Level of Care**

LOC Type	Status	Effective Date	UCA Validation Date
CPAS LOC	Approved By UCA Nurse	01/22/2020	01/22/2020

**MFP Eligibility**

MFP Eligible?	N/A	Current MFP Participant?	No
---------------	-----	--------------------------	----

Figure 46-Eligibility Information summary view

- **Current Assignments**
  - Displays active *Agency Assignments* and *Staff Assignments*
  - MDC Provider users may select the View History hyperlink to see the details of the Agency Assignment. From that view, the user may select the View hyperlink to see details of the Provider assignment.

**Current Assignments**

**Agency Assignments**

Assignment Type	Provider	Assignment Date	Action
Primary MDC Provider	MDC Provider 2 (Default All Jurisdictions)	05/01/2019	<a href="#">View History</a>
Additional MDC Provider	MDC Provider 5 (Default All Jurisdictions)	05/18/2020	<a href="#">View History</a>

**Staff Assignments**

Assignment Type	Date Assigned	Staff Name	Agency	Phone Number	Email
No data available in table					

Figure 47-Current Assignments summary view

## MDC PROVIDER ACCESS TO PARTICIPANT RECORDS

Agency Selection						
<a href="#">Collapse All</a>						
▼ Primary Medical Day Care Provider Assignment						
Create Date	Initiated By	Assignment Date	Expiration Date	MDC Provider	Selection Status	Actions
03/24/2020	DHMH, dhmhmdcadministrator1	04/07/2020	N/A	MDC Test Agency Location5	Active	<a href="#">View</a>
02/28/2020	Admin, MDH MDC	02/28/2020	N/A	MDC Test Agency Location1	Inactive	<a href="#">View</a>
02/28/2020	Admin, MDH MDC	02/28/2020	N/A	MDC Provider 1 (Default All Jurisdictions)	Inactive	<a href="#">View</a>
06/07/2019	DHMH, dhmhmdcadministrator1	06/07/2019	N/A	MDC Provider 1 (Default All Jurisdictions)	Inactive	<a href="#">View</a>
11/20/2018	DHMH, dhmhmdcadministrator1	11/28/2018	N/A	MDC Provider 5 (Default All Jurisdictions)	Inactive	<a href="#">View</a>
▼ Additional Medical Day Care Provider Assignment						
Create Date	Initiated By	Assignment Date	Expiration Date	MDC Provider	Selection Status	Actions
02/28/2020	Admin, MDH MDC	02/28/2020	N/A	MDC Test Agency Location2	Inactive	<a href="#">View</a>
02/28/2020	Admin, MDH MDC	02/28/2020	N/A	MDC Test Agency Location4	Inactive	<a href="#">View</a>

Figure 48-Agency Assignment History view

**Medical Day Care Provider Selection — Primary MDC Provider Assignment**
Status: Active
[View](#)

[Back to List](#)

**Medical Day Care Provider Assignment**

**Medical Day Care Provider Selection**


Medical Day Care Provider: \*\* MDC Test Agency - MDC Test Agency Location5 - 456767600  
☐ Assigning hospital and nursing home admissions  
Assignment Date:

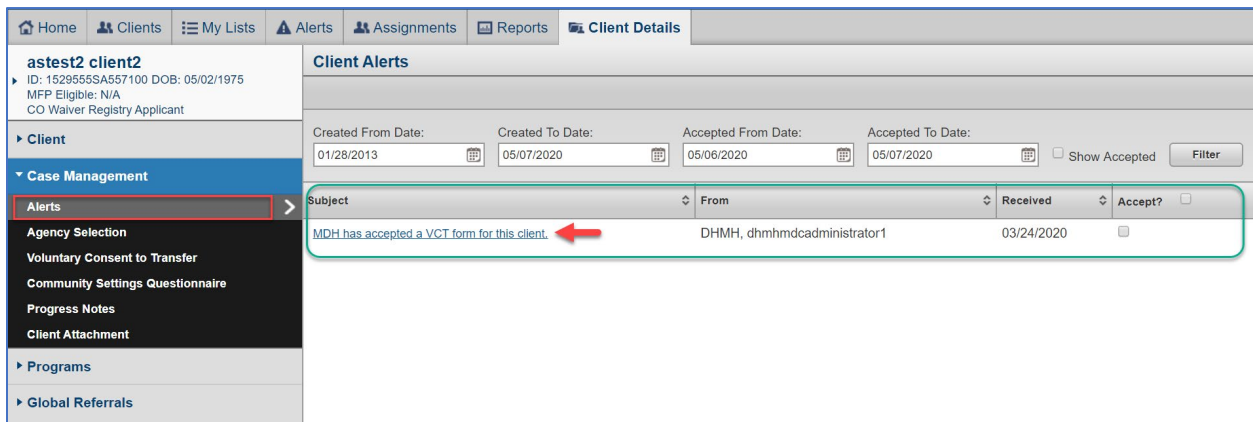
**Reason for Transfer \*\***

☐ Client moved to new region/jurisdiction  
☒ Requested by client  
☐ Other

Figure 49-Provider Assignment detail view

### C. Case Management

1. Once the desired participant has been found within the **Client** tab search, the user may select the Client Summary hyperlink to navigate to the participant's record.
2. Select the expand arrow icon  within the **Case Management** option on the left navigation.
3. Within the Case Management module, MDC Providers will be able to access the following features and functions:
  - **Alerts**
    - A consolidated list of participant-specific alerts that have been sent to the MDC Provider location associated with the logged-in user.
    - By selecting the hyperlink of the *Subject*, the user will be re-directed to the related form.



**astest2 client2**  
ID: 1529555SA557100 DOB: 05/02/1975  
MFP Eligible: N/A  
CO Waiver Registry Applicant

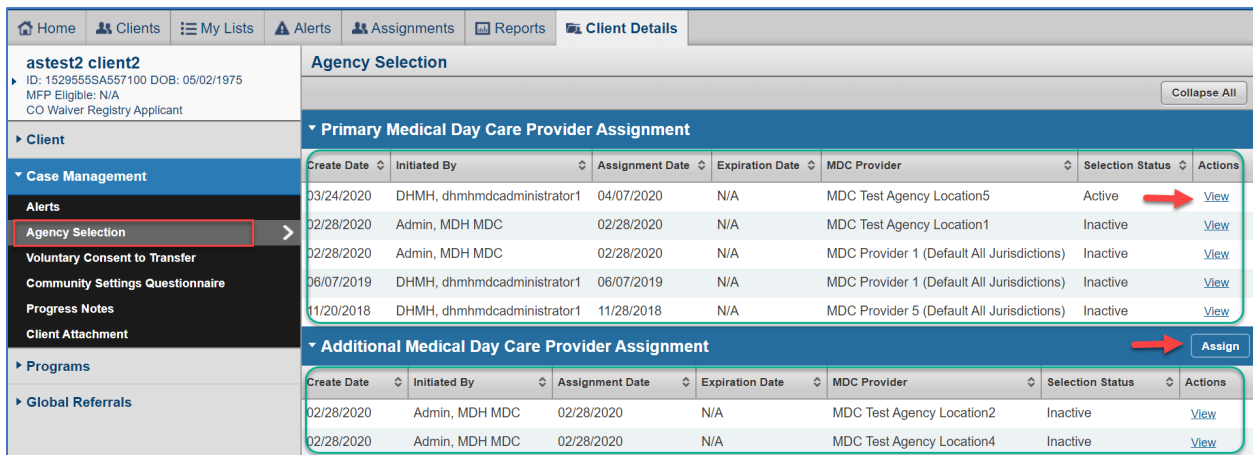
**Client Alerts**

Created From Date: 01/28/2013 Created To Date: 05/07/2020 Accepted From Date: 05/06/2020 Accepted To Date: 05/07/2020 ☐ Show Accepted

Subject	From	Received	Accept?
<a href="#">MDH has accepted a VCT form for this client.</a>	DHMH, dhmhmdcadministrator1	03/24/2020	<input type="checkbox"/>

Figure 50-Alerts list view

- **Agency Selection**
  - Displays detailed information and history of the participant's *Primary Medical Day Care Provider Assignment* and *Additional Medical Day Care Provider Assignment*
  - By selecting the View hyperlink, users may view assignment details.



**astest2 client2**  
ID: 1529555SA557100 DOB: 05/02/1975  
MFP Eligible: N/A  
CO Waiver Registry Applicant

**Agency Selection**

**Primary Medical Day Care Provider Assignment**

Create Date	Initiated By	Assignment Date	Expiration Date	MDC Provider	Selection Status	Actions
03/24/2020	DHMH, dhmhmdcadministrator1	04/07/2020	N/A	MDC Test Agency Location5	Active	<a href="#">View</a>
02/28/2020	Admin, MDH MDC	02/28/2020	N/A	MDC Test Agency Location1	Inactive	<a href="#">View</a>
02/28/2020	Admin, MDH MDC	02/28/2020	N/A	MDC Provider 1 (Default All Jurisdictions)	Inactive	<a href="#">View</a>
06/07/2019	DHMH, dhmhmdcadministrator1	06/07/2019	N/A	MDC Provider 1 (Default All Jurisdictions)	Inactive	<a href="#">View</a>
11/20/2018	DHMH, dhmhmdcadministrator1	11/28/2018	N/A	MDC Provider 5 (Default All Jurisdictions)	Inactive	<a href="#">View</a>

**Additional Medical Day Care Provider Assignment**

Create Date	Initiated By	Assignment Date	Expiration Date	MDC Provider	Selection Status	Actions
02/28/2020	Admin, MDH MDC	02/28/2020	N/A	MDC Test Agency Location2	Inactive	<a href="#">View</a>
02/28/2020	Admin, MDH MDC	02/28/2020	N/A	MDC Test Agency Location4	Inactive	<a href="#">View</a>

Figure 51-Agency Selection list view



### Voluntary Consent to Transfer

- If the MDC Provider user's location submitted a form in the past, this can be viewed.
- By selecting the View hyperlink, the user will view form details; and, by selecting the Print hyperlink, the user will be able to print the form.
- MDC Providers that are not currently assigned to a participant may **Add** a new Voluntary Consent to Transfer form.
- See also the **Medical Day Care Provider Guide** located within <https://www.itsstraining.org/user-guides> for more detail on the Voluntary Consent to Transfer form.

Home

Clients

My Lists

Alerts

Assignments

Reports

Client Details

astest2 client2

ID: 1529555SA557100 DOB: 05/02/1975

MFP Eligible: N/A

Client

Case Management

Alerts

Agency Selection

Voluntary Consent to Transfer

Community Settings Questionnaire

Client Attachment

Programs

Voluntary Consent To Transfer - List

Add

Provider Transferring to	Anticipated Start Date	Last Modified Date	Last Modified By	Provider Transferring from	Status	Signature Status	Actions
MDC Test Agency Location5	04/01/2019	03/24/2020	DHMH, dhmmmdcadadministrator1	MDC Test Agency Location1	Accepted	Not signed	<div>View</div> <div>Print</div>

Figure 52-Voluntary Consent to Transfer list view

### Community Settings Questionnaire

- Displays a list of *Day* Community Settings Questionnaires

Home

Clients

My Lists

Alerts

Assignments

Reports

Client Details

astest2 client2

ID: 1529555SA557100 DOB: 05/02/1975

MFP Eligible: N/A

Community Settings Questionnaire

Collapse All

Client

Day

Create Date	Last Modified	Last Modified By	Meets Definition of a Community Setting?	Determined By	Program Group	Provider Name	Provider Number	Provider Location	Status	Active	Actions
05/07/2020	05/07/2020	Test 5, MDC Provider Admin			MDC	MDC Provider 5 (Default All Jurisdictions)	505050550	2108 W. Preston Street, Baltimore, MD 21201	Pending MDC Program Review	Inactive	

Case Management

Alerts

Agency Selection

Voluntary Consent to Transfer

Community Settings Questionnaire

Client Attachment

Programs

Figure 53-Community Settings Questionnaire list view

### ▪ Client Attachments

- MDC Provider Admin, MDC Provider Staff, and MDC Provider Nurse user roles may access the following Client Attachments categories:

- Application
- Exceptions Forms
- Financial Documents
- Guardian of Person
- Guardian of Property
- Housing Documents
- Medicaid Card
- Medical Day Care Services
- Medical Documentation
- Other
- Power of Attorney
- Power of Attorney (for Medical Decisions)
- Power of Attorney (Other)
- REM Documents
- Social Security Card

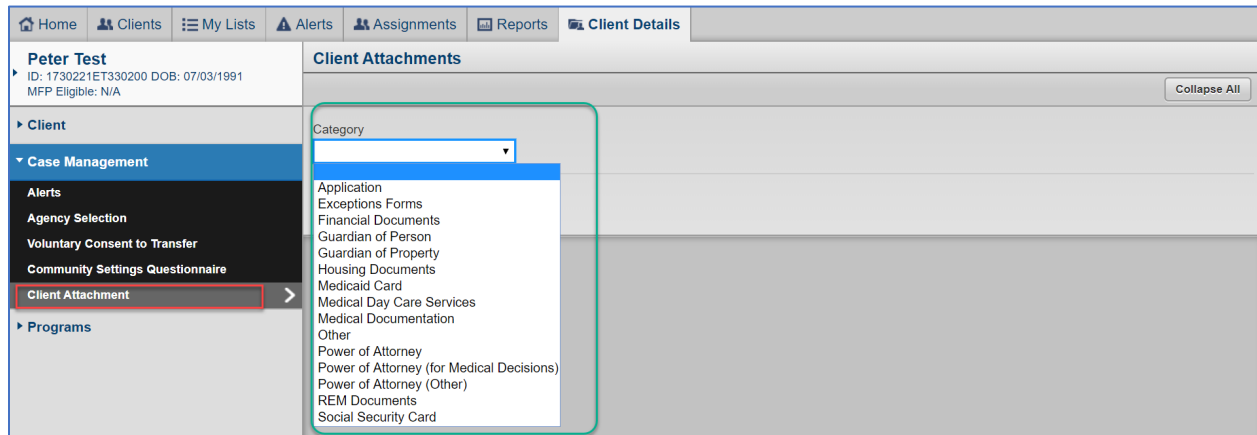



Figure 54-Client Attachment list view

- If the MDC Provider user's location uploaded an attachment in the past, it may be viewed here, regardless of their MDC Location's assignment status.

## D. Programs

- Once the desired participant has been found within the **Client** tab search, the user may select the Client Summary hyperlink to navigate to the participant's record.
- Select the expand arrow icon  within the **Programs** option on the left navigation.
- Within the Programs module, MDC Providers will be able to access the following features and functions:
  - **MDC Discharge Planning**
    - If the MDC Provider user's location submitted a form in the past, this can be viewed.
    - By selecting the View hyperlink, the user will view form details; and, by selecting the Print hyperlink, the user will be able to print the form.

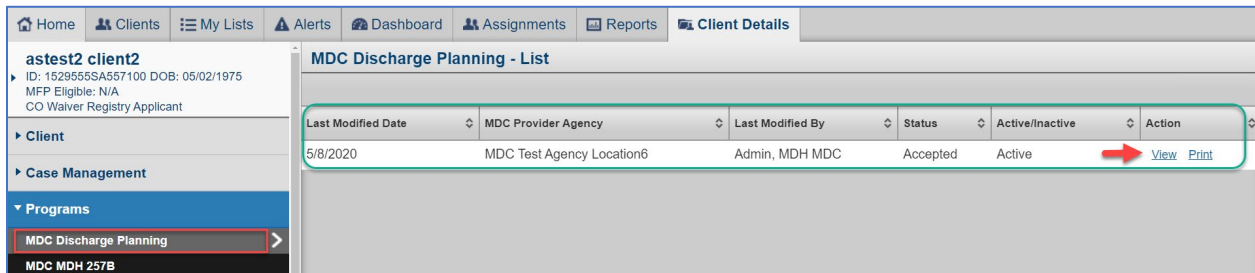


Figure 55-MDC Discharge Planning

- **MDC MDH 257B**
  - If the MDC Provider user's location submitted a form in the past, this can be viewed.
  - By selecting the View hyperlink, the user will view form details; and, by selecting the Print hyperlink, the user will be able to print the form.

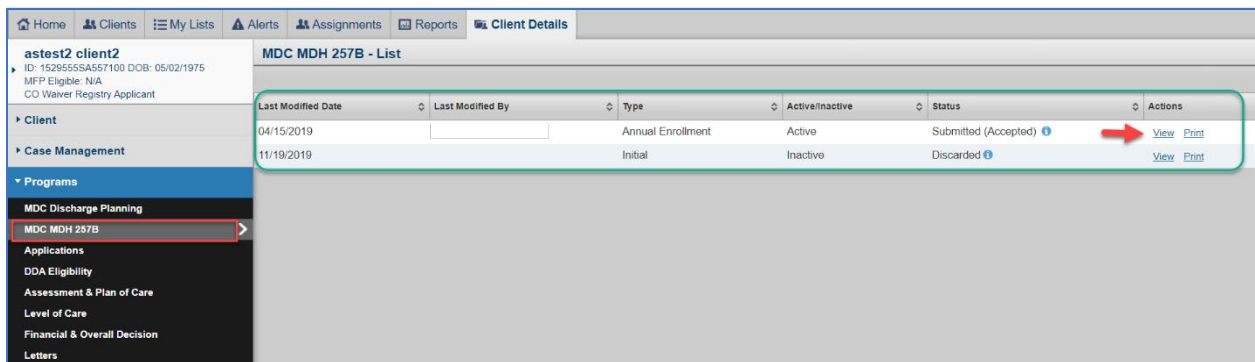


Figure 56-MDC MDH 257B

## Applications

- If the MDC Provider user's location submitted an **MDC Freedom of Choice** form or **MDC Enrollment Packet** in the past, they may be viewed.
- By selecting the View hyperlink, the user will view form details; and, by selecting the Print hyperlink, the user will be able to print the form.

Home	Clients	My Lists	Alerts	Assignments	Reports	Client Details
Applications — List						
Collapse All						
Client	Application					
Case Management	MDC Freedom of Choice Forms					
Programs	Last Modified Date	Created By Agency	Last Modified By Agency	Signature Status	Enrollment Packet Decision	Status
MDC Discharge Planning	01/09/2020	A CARING HAND MEDICAL	A CARING HAND MEDICAL	Signed and paper copy on file	Submitted	HCBS Setting
MDC MDH 257B						A CARING HAND MEDICAL
Applications						Inactive
DDA Eligibility						
Assessment & Plan of Care						
Letters						
MDC Enrollment Packet						
Enrolled In	Last Modified Date	Last Modified By	Enrollment Type	Primary MDC Provider Agency	Status	Actions
CFC, CP	01/09/2020	Milhous, Jo	Initial	A CARING HAND MEDICAL		

Figure 57-MDC Freedom of Choice and MDC Enrollment Packet

## Assessment & Plan of Care

- If the MDC Provider user's location submitted an **ADCAPS** in the past, it may be viewed.
- By selecting the Details hyperlink, the user will view form details; and, by selecting the Print hyperlink, the user will be able to print the form.

Home	Clients	My Lists	Alerts	Assignments	Reports	Client Details
Assessment & POC — List						
Expand All						
Client	Assessment & POC Request					
Case Management	interRAI Assessment					
Programs	Plan of Care					
MDC Discharge Planning	Adult Day Care Assessment and Planning System (ADCAPS)					
MDC MDH 257B	ADCAPS Type	Create Date	Provider Type	Effective Date	Submit Date	MDH Decision
Applications	120 Day	02/21/2020	Primary	02/21/2020	02/21/2020	N/A
DDA Eligibility	Initial	10/22/2019	Primary	10/22/2019	10/23/2019	02/21/2020
Assessment & Plan of Care	120 Day-Revised	02/21/2020		02/21/2020	N/A	N/A
Letters						

Figure 58-ADCAPS