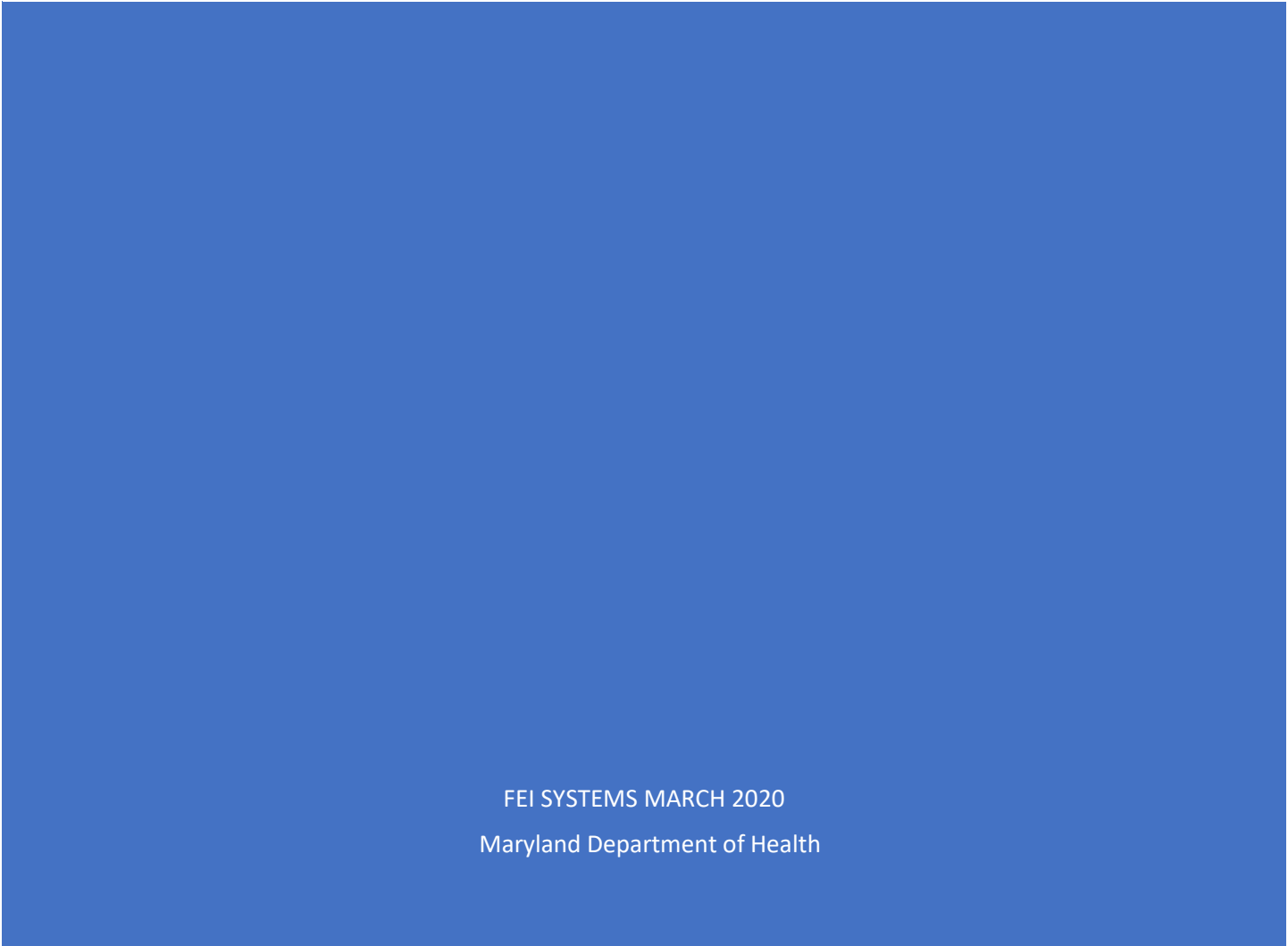




SERVICE NOTIFICATIONS FOR PROVIDER PORTAL USERS



FEI SYSTEMS MARCH 2020
Maryland Department of Health

Contents

1	<i>LTSSMaryland</i> Provider Portal and Service Notifications	4
1.1	Common Terms and Definitions	4
1.1.1	Process Overview	6
1.2	Getting Started with Provider Portal	7
1.2.1	Adding Additional Agency Admin and/or Billing Admin staff profiles in the <i>LTSSMaryland</i> Provider Portal	7
1.2.2	Logging into the <i>LTSSMaryland</i> Provider Portal	8
2	Alerts	10
2.1	View Alerts	10
2.1.1	Client Assignments Alerts	11
2.2	Archive Alerts	12
3	Reports	13
3.1	Current Approved Plans Report	13
3.1.1	User Roles	13
3.1.2	Search Report (Inputs)	13
3.1.3	View Report (Outputs)	16
3.1.4	Export Report	37
3.2	Approved Plans History Report	39
3.2.1	User Roles	39
3.2.2	Search Report (Inputs)	39
3.2.3	View Report (Outputs)	42
3.2.4	Export Report	62
4	Help and Contacts	31

Figure 1-Process Overview	6
Figure 2-LTSSMaryland Sign In	8
Figure 3-Choose a site	8
Figure 4-LTSSMaryland Login	9
Figure 5-Go To Provider Portal	9
Figure 6-Provider Alerts	10
Figure 7-Example Alert Message for a new Plan of Service	11
Figure 8-Example Alert Message for a Plan of Service with revisions.....	11
Figure 9-Example Alert Message for Provider removed from a Plan of Service	11
Figure 10-Client Assignment Alert Details	12
Figure 11-Archiving Alerts	12
Figure 12-Plan of Service Current Approved Plans Report	14
Figure 13-Current Approved Plans Report Search Parameters.....	15
Figure 14-Provider Location within the report output	16
Figure 15-Provider Location as selected in the report input	16
Figure 16-Provider Location displayed in Plan of Service	17
Figure 17-Provider Number within the report output.....	17
Figure 18-Provider Number as selected in the report input.....	18
Figure 19-Provider Number as displayed in Provider Profile	18
Figure 20-Client ID within the report output.....	19
Figure 21-Client ID report input	19
Figure 22-Client ID displayed in Client Profile	20
Figure 23-Client MA# within the report output.....	21
Figure 24-Client MA# report input	21
Figure 25-Client MA# displayed in Client Profile	22
Figure 26-Client First Name within the report output.....	23
Figure 27-Client First Name report input.....	23
Figure 28-Client First Name displayed in Client Profile.....	24
Figure 29-Client Last Name within report output.....	24
Figure 30-Client Last Name report input	25
Figure 31-Client Last Name displayed in Client Profile	25
Figure 32-MA Eligible within report output.....	26
Figure 33-MA Eligible displayed in Client Profile	26
Figure 34-Enrolled Program within the report output.....	27
Figure 35-Enrolled Program(s) displayed in Client Profile	27
Figure 36-POS Type within the report output	28
Figure 37-POS Type displayed in Service Plans list	28
Figure 38-Plan of Service status within the report output	29
Figure 39-Plan of Service Status as selected in the report input	29
Figure 40-Plan of Service Status displayed in Service Plans list	30
Figure 41-Effective Date within the report output	30
Figure 42-Effective Date displayed in Service Plans list	31
Figure 43-End Date within the report output.....	31
Figure 44-End Date displayed in Service Plans list	32
Figure 45-Service Type within the report output	32
Figure 46-Service Type displayed in Plan of Service	33
Figure 47-POS Service within the report output.....	33
Figure 48-POS Service selection in report input	34
Figure 49-POS Service displayed in Plan of Service.....	34
Figure 50-MDH Approved Units within the report output	35
Figure 51-Units displayed in Plan of Service	35
Figure 52-Frequency within the report output.....	36
Figure 53-Frequency displayed in Plan of Service	36
Figure 54-Export Options	37
Figure 55-View exported file	38

Figure 56-Plan of Service Approved Plans History Report	39
Figure 57-Approved Plans History Report Search Parameters	41
Figure 58-Provider Location within report output.....	42
Figure 59-Provider Location selection in the report input.....	42
Figure 60-Provider location displayed in Plan of Service	43
Figure 61-Provider Number within the report output.....	43
Figure 62-Provider Number as selected in report input	44
Figure 63-Provider Number displayed in Provider Profile	44
Figure 64-Client ID within report output.....	45
Figure 65-Client ID in report input.....	45
Figure 66-Client ID displayed in Client Profile	46
Figure 67-Client MA# within the report output.....	46
Figure 68-Client MA# report input	47
Figure 69-Client MA# displayed in Client Profile	47
Figure 70-Client First Name within the report output	48
Figure 71-Client First Name report input.....	48
Figure 72-Client First Name displayed in Client Profile.....	48
Figure 73-Client Last Name within report output.....	49
Figure 74-Client Last Name report input	49
Figure 75-Client Last Name displayed in Client Profile	49
Figure 76-MA Eligible within the report output	50
Figure 77-MA Eligible displayed in Client Profile	50
Figure 78-Enrolled Program within the report output.....	51
Figure 79-Enrolled Program(s) displayed in Client Profile	51
Figure 80-POS Type within the report output	52
Figure 81-POS Type displayed in Service Plan list.....	52
Figure 82-Plan of Service status within report output.....	53
Figure 83-Plan of Service status selection in report input	53
Figure 84-Plan of Service status displayed in Service Plan list	54
Figure 85-Effective Date within the report output	54
Figure 86-Effective Date report inputs	55
Figure 87-Effective Date displayed in Service Plans list.....	55
Figure 88-End Date within report output	56
Figure 89-End Date displayed in Service Plans list.....	56
Figure 90-Service Type within the report output	57
Figure 91-Service Type displayed in Plan of Service	57
Figure 92-POS Service within report output.....	58
Figure 93-POS Service selection in report input	59
Figure 94-POS Service displayed in Plan of Service.....	59
Figure 95-MDH Approved Units within report output.....	60
Figure 96-Units displayed in Plan of Service	60
Figure 97-Frequency within the report output.....	61
Figure 98-Frequency displayed in Plan of Service	61
Figure 99-Export Option	62
Figure 100-View exported file	30
Figure 101-Training Information and Webinars	31
Figure 102-Help Contacts	31

1 *LTSSMaryland* Provider Portal and Service Notifications

LTSSMaryland Provider Portal is an interface for Home and Community-Based Service (HCBS) providers to view client information, bill for the services provided, and ensure accurate and timely payment.

Providers that are authorized for Personal Assistance Services, Environmental Assessments, and/or Home Delivered Meals will receive alerts when there is an initiation, revision, or termination of services.

These alerts will be sent for participants enrolled in the Community Options (CO) Waiver, Increased Community Services (ICS), Community First Choice (CFC), and Community Personal Assistance Services (CPAS). When a participant's Plan of Service (POS) is submitted by the assigned Supports Planner and approved by MDH, the Provider agency affected by the change in the participant's services will receive notice.

1.1 Common Terms and Definitions

Acronym	Description
Admin Provider	A user role for Providers in Provider Portal. This role can create and manage staff profiles and edit and manage services.
Billing Provider	A user role in Provider Portal. Billing Providers may carry out administrative tasks apart from entering new staff provider profiles.
Code of Maryland Regulations (COMAR)	The official compilation of all administrative regulations issued by agencies of the State of Maryland. Agency providers are legally responsible for following guidance set forth in COMAR.
Community First Choice (CFC)	Maryland's Community First Choice program provides community services and supports to enable older adults and people with disabilities to live in their own homes. (COMAR 10.09.84)
Community Personal Assistance Services (CPAS)	Maryland's Community Personal Assistance Services program provides community services and supports to enable older adults and people with disabilities to live in their own homes. (COMAR 10.09.20)
Community Options (CO)	Maryland's Home and Community-Based Options Waiver provides community services and supports to enable older adults and people with physical disabilities to live in their own homes. (COMAR 10.09.54)
Daily Personal Assistant Services (DPAS)	Service type that is approved within a participant's POS. MDH will pay a flat rate for each pre-authorized day of service over 12 hours if there is a Daily Rate listed for that day on the Participant's Plan of Service.
Environmental Assessment (EA)	Service type that is approved within a participant's POS. An on-site environmental assessment of a home or residence where the participant lives or will live as a participant; and on a form approved by the Program.
EVV	Electronic Visit Verification. Example: Duration-Based services require Clock-In and Clock-Out confirmation utilizing IVR.
Home Delivered Meals (HDM)	A Service type that is approved within a participant's POS. Up to two meals per day may be delivered to a participant as a part of the CFC, CO, or ICS Programs.
Increased Community Service Program (ICS)	Maryland's Increased Community Services program allows eligible individuals in nursing facilities to return to the community and receive specific waiver services and certain Medicaid services to support them in their homes and communities. (COMAR 10.09.81)

SERVICE NOTIFICATIONS FOR PROVIDER PORTAL USERS

Local Health Department (LHD)	Locality of the State of Maryland responsible for public health issues. A local health department is in Baltimore City and each of the twenty-three Maryland counties.
Maryland Department of Health (MDH)	An Agency of the State of Maryland responsible for public health issues. The Department is led by a secretary who is a member of the Cabinet of the Governor of Maryland.
Non EVV	Services that do not require Electronic Visit Verification (EVV). Examples: Unit-Based and Cost-Based Services.
Participant	Any person enrolled in CFC, CPAS, CO, or ICS programs. Note: LTSS and PP system may use the term, "Client".
Personal Assistance Services (PAS)	Service type provided to a single participant at a given time, meaning that the staff provider is authorized to bill for one participant at one time.
Plan of Service (POS)	The POS is a document that describes the Participant's needs and goals, and the services that MDH authorizes to meet the Participant's needs and goals. The POS include important information about the Participant, the Agency Provider, the Supports Planner, and the services authorized by MDH.
Service	EVV or Non- EVV Service that is billable in Provider Portal (PP)
Shared Attendant Services (SAS)	Service type provided when two participants are living together and choose to have one staff provider working with both participants at the same time.
Supports Planning Agency (SPA)	Agency of supports planners who assist applicants and participants with accessing Medicaid and non-Medicaid funded home and community-based services and supports. SPA user roles have access to PP to view client records and services.

1.1.1 Process Overview

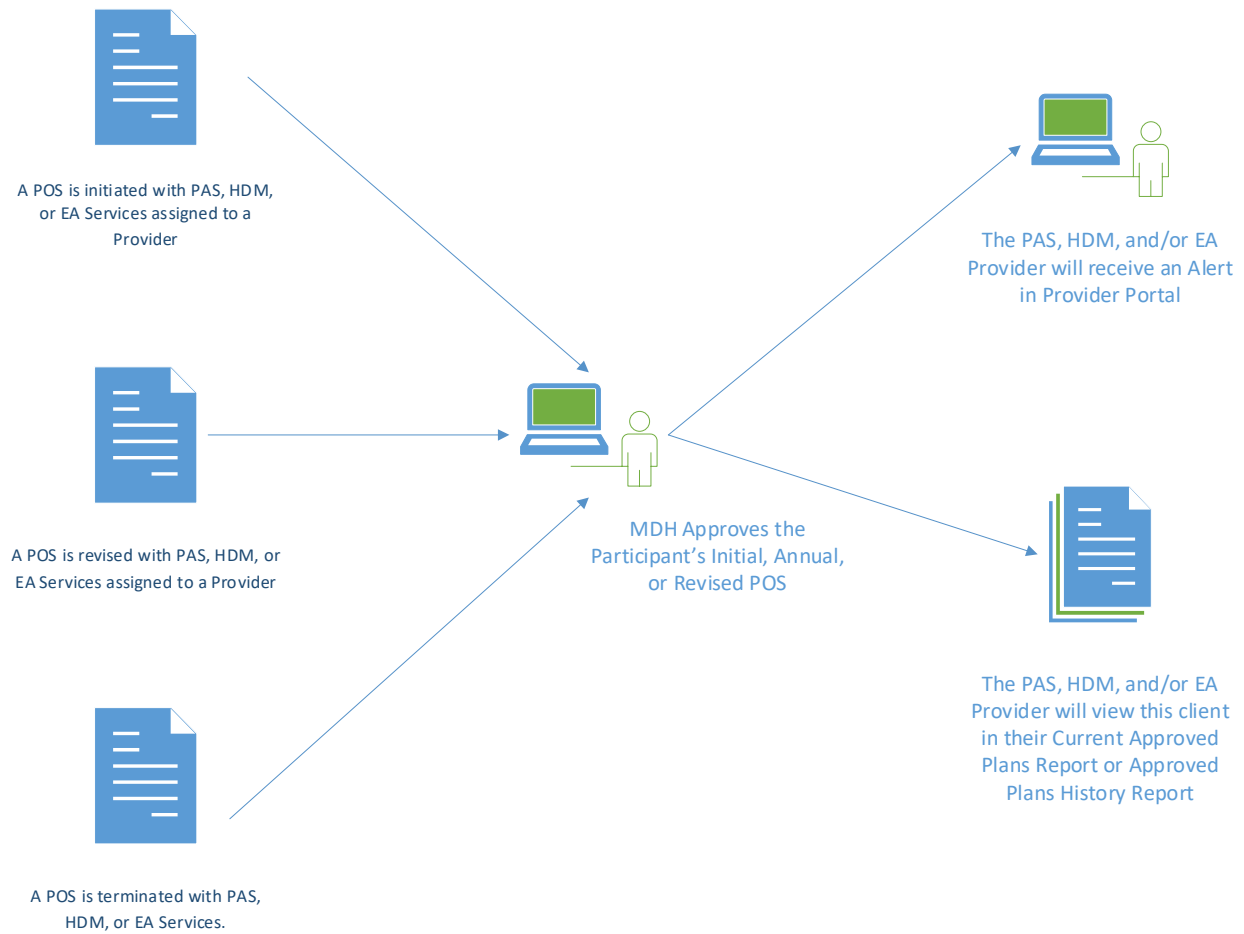


Figure 1-Process Overview

1.2 Getting Started with Provider Portal

To register your Provider Agency to use the *LTSSMaryland* Provider Portal, contact the technical help desk at ISASHelpDesk@LTSSMaryland.org or 1-855-463-5877 to create an administrator account.

You will need to provide the following information:

- Your name
- Your email address
- Provider agency phone number
- Provider agency name
- Provider agency provider number
- Provider agency FEIN
- Provider agency program eligibility (e.g. CO, CFC, ICS or CPAS)

Communication on username and instructions to set password will be sent to the registered email address.

1.2.1 Adding Additional Agency Admin and/or Billing Admin staff profiles in the *LTSSMaryland* Provider Portal

To set up additional Agency Admin and/or Billing Admin profiles in the *LTSSMaryland* Provider Portal, the Agency administrator should complete the below steps:

- Create a new Staff Profile in the *LTSSMaryland* Provider Portal with the appropriate role
- Contact the help desk at ISASHelpDesk@LTSSMaryland.org or 1-855-463-5877 for a username to be assigned to the user

1.2.2 Logging into the LTSSMaryland Provider Portal

Steps to Login:

- The *LTSSMaryland* Provider Portal website URL is **https://LTSSMaryland.org**
 - Enter the Username and Password and select **Sign In**
- Important:** Do NOT share your username or password with anyone

Figure 2-LTSSMaryland Sign In

- Choose the **LTSS/ISAS Live (2014 New)**

Figure 3-Choose a site

- The login page will automatically pre-populate your username and associated Provider Agency and Location based on your Staff Profile. Then select **Login**.

LTSSMaryland

You are entering a Health Insurance Portability and Accountability Act (HIPAA) & Health Information Technology for Economic and Clinical Health (HITECH) Act compliant database housing protected health information (PHI). The HIPAA and HITECH regulations apply to covered entities (MDH) and also extend to business associates (agencies and contracted vendors). To maintain your compliance with the Acts' requirements relating to privacy, confidentiality, and security of PHI, please read the HIPAA information under the My Info link.

The most up-to-date information regarding HIPAA Privacy and Security and the HITECH ACT can also be found on MDH's website at:
<http://health.maryland.gov/hipaa/Pages/home.aspx>

login

User Name
 amy.duvall

On Behalf Of
 Amy Duvall (Meals on Wheels of Central Maryland)
 [Admin Provider]

Agency
 Meals on Wheels of Central Maryland Inc

Location
 Meals on Wheels of Central Maryland Inc - MEALS O...

Login

Figure 4-LTSSMaryland Login

- Navigate to **Account** in the top right header and select **Go To Provider Portal**.

LTSSMaryland

Menu Account

Home Alerts

Announcement Collapse All

02/21/20

To All LTSS/Provider Portal Users:

We will be performing the February maintenance on the LTSS/Provider Portal website next weekend for an estimated time from Friday, February 28th from 9:00 p.m. – Sunday, March 1st at 9:00 a.m. (36 hours). We will follow up next week with the February issue of the LTSSMaryland Monthly Spotlight describing the latest upcoming system changes.

Thank you for your patience and understanding as we work to continue improving the LTSS/Provider Portal systems.

MDH

Go To Provider Portal

Authorize

Sign Out

Figure 5-Go To Provider Portal

2 Alerts

Upon login to Provider Portal, users will land on the Home page of Provider Portal. The **Alerts** tab is located on the top header of the page. Here, Admin Provider and Billing Provider roles will find important notifications regarding Client Assignments.

2.1 View Alerts

1. Login to LTSSMaryland and navigate to Provider Portal
2. Select Alerts in the top header
3. Users may filter and search alerts by: Date, Status, or Type
 - **From Date**
 - Defaults to 60 days prior to the current system date
 - Cannot be more than 60 days prior to the **To Date**
 - **To Date**
 - Defaults to the current system date
 - Cannot be more than 60 days from the **From Date**
 - **Status**
 - Defaults to select **Active** alerts only
 - **Active** alerts are new alerts that have not been marked by the user to *Archive*
 - **Archived** alerts are alerts that have been acknowledge, reviewed, and marked to *Archive* by the user
 - **Type**
 - Defaults to the alert type that is applicable to the user and their agency location's authorized Provider Portal Services
 - For all PAS, HDM, and/or EA Provider roles, the Alert type, **Client Assignment** will be available for selection

The screenshot displays the 'Alerts' section of the Provider Portal. The top navigation bar includes 'Provider Portal', 'Home', 'Alerts' (highlighted with a red box), and 'Services'. Below this is a dark header with the word 'ALERTS'. The main content area is titled 'SEARCH ALERTS' and contains several filter sections: 'From Date' (12/26/2019), 'To Date' (02/24/2020), 'Status' (Active selected, Archived unselected), and 'Type' (Client Assignments selected). At the bottom are 'Reset' and 'Search' buttons. A red arrow points to the 'Search' button.

Figure 6-Provider Alerts

2.1.1 Client Assignments Alerts

Admin and Billing Provider Roles of Locations that are authorized for Personal Assistant Services, Home Delivered Meals, and/or Environmental Assessments shall receive notifications when:

1. The provider is authorized for services in a participant's new Plan of Service.

▼ Client Assignments 1			
<input type="checkbox"/>	Date	Details	Actions
<input type="checkbox"/>	3/6/20	A new Plan of Service with the effective date of 03/06/2020 has been approved for client, EAClient001 Biniam for Environmental Assessment.	Details

Figure 7-Example Alert Message for a new Plan of Service

2. The services for which a provider is authorized have been revised.

▼ Client Assignments 1			
<input type="checkbox"/>	Date	Details	Actions
<input type="checkbox"/>	3/6/20	Plan of Service for DPASA Client Biniam, for whom Daily Personal Assistance - Shared Attendent was provided has revisions effective 12/01/2019. Please contact the Supports Planner if there are questions.	Details

Figure 8-Example Alert Message for a Plan of Service with revisions

3. The provider has been removed from a participant's Plan of Service or the Plan of Service is no longer active.

▼ Client Assignments 2			
<input type="checkbox"/>	Date	Details	Actions
<input type="checkbox"/>	3/6/20	Current Plan of Service for Client014 Biniam, for whom Personal Assistance Agency was provided, ends on 03/12/2020. Please contact the Supports Planner if there are questions.	Details

Figure 9-Example Alert Message for Provider removed from a Plan of Service

NOTE: When a **Provisional** Plan of Service is approved, the assigned Provider(s) will not receive a Service Notification.

Upon selection of the **Details** button next to the alert message, a new tab will populate to the Client Profile of the participant.

▼ Client Assignments 2			
<input type="checkbox"/>	Date	Details	Actions
<input type="checkbox"/>	3/6/20	Current Plan of Service for Client014 Biniam, for whom Personal Assistance Agency was provided, ends on 03/12/2020. Please contact the Supports Planner if there are questions.	Details
<input type="checkbox"/>	3/6/20	A new Plan of Service with the effective date of 03/06/2020 has been approved for client, Client014 Biniam for Personal Assistance Agency.	Details

Figure 10-Client Assignment Alert Details

NOTE: If the Provider is not actively assigned to the participant as of the current system date, the Provider user will not be able to access the Client's record from the Alert message link.

2.2 Archive Alerts

Users may archive alerts that are no longer needed to display on the Alerts page. Once archived, these alerts can be viewed by selecting and searching the Status, **"Archived"**.

1. Select the checkbox to the left of the desired alert message(s)
2. Click the **Archive Selected** button

				Archive Selected
▼ Client Assignments 2				
<input type="checkbox"/>	Date	Details	Actions	
<input type="checkbox"/>	3/6/20	Current Plan of Service for Client014 Biniam, for whom Personal Assistance Agency was provided, ends on 03/12/2020. Please contact the Supports Planner if there are questions.	Details	
<input type="checkbox"/>	3/6/20	A new Plan of Service with the effective date of 03/06/2020 has been approved for client, Client014 Biniam for Personal Assistance Agency.	Details	

Figure 11-Archiving Alerts

3 Reports

Provider users can utilize Plan of Service Reports to determine which CO, CFC, CPAS, and/or ICS participants have been assigned to their location(s) to receive services at any point in time.

The Current Approved Plans Report enables users to view services that should soon be initiated, are ongoing or have recently ended. The Approved Plans History Report allows users to view services that were authorized up to the current system date by filtering the report by effective dates.

3.1 Current Approved Plans Report

This report is intended for Providers that are authorized for Personal Assistance Services, Home Delivered Meals, and/or Environmental Assessments as a part of the CO, CFC, CPAS, and ICS Programs/Waiver only.

The report provides a list of participants that have a Plan of Service that have become *inactive within the last 30 days of the current system date*, as well as participants who have a Plan of Service that *will become active in the future*.

3.1.1 User Roles

User Group	User Roles
MDH	Provider Enrollment Admin, Provider Enrollment Staff, ISAS Admin, ISAS Staff, MDH Admin
Providers	Admin Provider, Billing Provider

3.1.2 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 Provider Portal
2. Select the View hyperlink next to **Plan of Service-Current Approved Plans Report**

Provider Portal	Home	Alerts	Services	Clients	Providers	Reports	Help	Feedback	Amy PAS Provider (On beh...
REPORTS									
Category	Name							Actions	
Claims	Provider Portal Claims Report							View	
Claims	Remittance Advice Report							View	
DDA - Provider Portal	DDA State Payment Report							View	
EVV - Provider Portal	EVV Services Overlap Report							View	
EVV - Provider Portal	EVV Services Rendered Report							View	
EVV - Provider Portal	ISAS - Provider Staff Report							View	
EVV - Provider Portal	Services Rendered Report Advanced							View	
Plan of Services	Plan of Service - Approved Plans History Report							View	
Plan of Services	Plan of Service - Current Approved Plans Report							View	

Figure 12-Plan of Service Current Approved Plans Report

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

- **Agency Name/FEIN**
 - Defaults to the name of the Agency to which the user is associated
 - Required to search
- **Provider Locations**
 - Defaults to the name of the Location(s) to which the user is associated
 - Required to search
- **Service**
 - Displays Service types and associated billing code for which the user's location is authorized to provide for CO, CFC, CPAS, or ICS program/waivers:
 1. Environmental Assessment- W5512
 2. Home Delivered Meals- W5516
 3. Personal Assistant Services- W5519
 4. Shared Attendant- W5521
 5. Personal Assistant Services-W5527
 6. Shared Attendant- W5528
 7. Daily Personal Assistant Services- W5532
 8. Daily Shared Attendant- W5533
 9. Daily Personal Assistance-W5534
 10. Daily Shared Attendant- W5535
 - Multi-select
 - Defaults to **Select All**
 - Required to search
- **Plan of Service Status**
 - Filter for viewing participants with Plan of Service in the **Active** or **Inactive** status
 - Multi-Select
 - Defaults to **Select All**
 - Required to search

- **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 if searching by participant first name
 - Optional
- **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 if searching by participant last name
 - Optional
- **Client ID/MA #**
 - Users may enter the specific Client ID or MA#
 - Must enter the exact Client ID or MA# to return results if searching by Client ID or MA #Optional

Agency Name/FEIN	<input type="text" value="Amy Agency"/>	Provider Locations	<input type="text" value="Amy PAS Provider - 131313113"/>	<input type="button" value="View Report"/>
Service	<input type="text" value="Personal Assistant Services - W5519"/>	Plan of Service Status	<input type="text" value="Active, Inactive"/>	
Client First Name	<input type="text"/>	Client Last Name	<input type="text"/>	
Client ID/MA#	<input type="text"/>			

Figure 13-Current Approved Plans Report Search Parameters

3.1.3 View Report (Outputs)

Once the user enters desired search parameters and selects View Report, the Current Approved Plans Report will display a list of participants with details associated to their approved Plan of Service.

The list of report data displayed, it's corresponding search inputs, and a reference of the location of the report data within Provider Portal are below:

1. Provider Location

- Name of user's Provider Location, as selected in the Provider Locations search parameter

Agency Name/FEIN: HDM Provider Locations: AdminHDMBiniamBaltimore - 000000

Service: Environmental Assessment - W5512 Plan of Service Status: Active, Inactive

Client First Name: Client Last Name: Client ID/MA#: Date Created: 3/8/2020 12:05:11 PM

Plan of Service - Current Approved Plans Report

Search Criteria

Client Last Name

Client First Name

Client ID/MA#

Agency Name/FEIN HDM

Provider Locations AdminHDMBiniamBaltimore - 000000101, BillingHDMBiniamMontgomery - 000000500, EA Location Puryear - 123456776, EA Provider Only - 578864476, EA_All_Jurisdictions (Bin2) - 000000200, HDM Location Puryear - 756767776, HDM Provider Only - 777777776, HDM_All_Jurisdictions (Bin2) - 000000600, HDMCarrol - 812789312, HDMKent - 912080890

Service Environmental Assessment - W5512, Home Delivered Meals - W5516, Personal Assistant Services - W5519, Shared Attendant - W5521, Personal Assistant Services - W5527, Shared Attendant - W5528, Daily Personal Assistant Services - W5532, Daily Shared Attendant - W5533, Daily Personal Assistance - W5534, Daily Shared Attendant - W5535

Plan of Service Status Active, Inactive

Total Number of Records Returned 16

PROVIDER		CLIENT					
Provider Location	Provider Number	Client ID	Client MA#	Client First Name	Client Last Name	MA Eligible	Enrolled Program
AdminHDMBiniamBaltimore	000000101	2110000LC201200	00000000012	Client036	Biniam	NO	
AdminHDMBiniamBaltimore	000000101	2110006LC101200	00000000007	Client031	Biniam	NO	
AdminHDMBiniamBaltimore	000000101	2110006LC101200	00000000007	Client031	Biniam	NO	

Figure 14-Provider Location within the report output

Agency Name/FEIN: HDMBiniamAgency Provider Locations: 1 AdminHDMBiniamBaltimore - 000000

Service: Home Delivered Meals - W5516 Plan of Service Status: AdminHDMBiniamBaltimore - 000000101

Client First Name: Client Last Name: Client ID/MA#: Date Created: 3/8/2020 12:05:11 PM

Figure 15-Provider Location as selected in the report input

SERVICE NOTIFICATIONS FOR PROVIDER PORTAL USERS

CLIENT INFORMATION FOR BINIAM, CLIENT036

CLIENT PROFILE

SERVICE PLANS

CLIENT ATTACHMENTS

Client LTSS ID #: 2110000LC201200
Current MA#:
POS/PCP Program: CO
Enrolled In:
MA Eligible: No
Waiver:

PLAN OF SERVICE

Back to List
Print
Expand All

OVERVIEW INFORMATION
SERVICES

POS Service	Service Type	Provider Name	Units	Frequency	Rate	Annual
Home Delivered Meals	Community First Choice	AdminHDMBiniamBaltimore	6 items per week	16 weeks	\$6.3600	\$610.56

Comments:

EMERGENCY BACKUP PLANS
ADDRESS TO RECEIVE SERVICES
DECISION
SIGNATURES

Figure 16-Provider Location displayed in Plan of Service

2. Provider Number

- Provider's unique identification number associated with the Provider Location, as selected in the Provider Locations search parameter

Agency Name/FEIN: HDM
Provider Locations: AdminHDMBiniamBaltimore - 00000
Service: Environmental Assessment - W5512
Plan of Service Status: Active, Inactive
Client First Name:
Client Last Name:
Client ID/MA#:

Date Created: 3/8/2020 12:05:11 PM

Plan of Service - Current Approved Plans Report

Search Criteria
Client Last Name
Client First Name
Client ID/MA#
Agency Name/FEIN
Provider Locations
Service
Plan of Service Status
Total Number of Records Returned

HDM
AdminHDMBiniamBaltimore - 000000101, BillingHDMBiniamMontgomery - 000000500, EA Location Puryear - 123456776, EA Provider Only - 578864476, EA_All_Jurisdictions (Bin2) - 000000200, HDM Location Puryear - 756767776, HDM Provider Only - 777777776, HDM_All_Jurisdictions (Bin2) - 000000600, HDMCarrol - 812789312, HDMKent - 912080890
Environmental Assessment - W5512, Home Delivered Meals - W5516, Personal Assistant Services - W5519, Shared Attendant - W5521, Personal Assistant Services - W5527, Shared Attendant - W5528, Daily Personal Assistant Services - W5532, Daily Shared Attendant - W5533, Daily Personal Assistance - W5534, Daily Shared Attendant - W5535
Active, Inactive
16

PROVIDER		CLIENT					
Provider Location	Provider Number	Client ID	Client MA#	Client First Name	Client Last Name	MA Eligible	Enrolled Program
AdminHDMBiniamBaltimore	000000101	2110000LC201200	00000000012	Client036	Biniam	NO	
AdminHDMBiniamBaltimore	000000101	2110006LC101200	00000000007	Client031	Biniam	NO	
AdminHDMBiniamBaltimore	000000101	2110006LC101200	00000000007	Client031	Biniam	NO	

Figure 17-Provider Number within the report output

SERVICE NOTIFICATIONS FOR PROVIDER PORTAL USERS

Agency Name/FEIN	HDMBiniamAgency	Provider Locations	AdminHDMBiniamBaltimore - 0000
Service	Home Delivered Meals - W5516	Plan of Service Status	<input checked="" type="checkbox"/> AdminHDMBiniamBaltimore - 000000101 2
Client First Name		Client Last Name	
Client ID/MA#			

1 of 1

Figure 18-Provider Number as selected in the report input

PROVIDER PROFILE

AGENCY INFORMATION

Agency Name: **HDMBiniamAgency**
Status: **Active**

LOCATION INFORMATION

Location Name: AdminHDMBiniamBaltimore
Program Type:
Provider Type Code:
Enrollment Status:

Provider FEIN: **2**
Provider Number: **000000101**
List of Speciality Codes:

COS	COS Description	Spans Start Date	Spans End Date

Figure 19-Provider Number as displayed in Provider Profile

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 participant's record in Provider Portal
- Hyperlink is unavailable if the participant is not actively assigned to the Provider user's Location as of the current system date
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

Agency Name/FEIN: HDM Provider Locations: AdminHDMBiniamBaltimore - 000000

Service: Environmental Assessment - W5512 Plan of Service Status: Active, Inactive

Client First Name: Client Last Name:

Client ID/MA#:

Date Created: 3/8/2020 12:05:11 PM

Plan of Service - Current Approved Plans Report

Search Criteria

Client Last Name

Client First Name

Client ID/MA#

Agency Name/FEIN: HDM

Provider Locations: AdminHDMBiniamBaltimore - 000000101, BillingHDMBiniamMontgomery - 000000500, EA Location Puryear - 123456776, EA Provider Only - 578864476, EA_All_Jurisdictions (Bin2) - 000000200, HDM Location Puryear - 756767776, HDM Provider Only - 777777776, HDM_All_Jurisdictions (Bin2) - 000000600, HDMCarrol - 812789312, HDMKent - 912080890

Service: Environmental Assessment - W5512, Home Delivered Meals - W5516, Personal Assistant Services - W5519, Shared Attendant - W5521, Personal Assistant Services - W5527, Shared Attendant - W5528, Daily Personal Assistant Services - W5532, Daily Shared Attendant - W5533, Daily Personal Assistance - W5534, Daily Shared Attendant - W5535

Plan of Service Status: Active, Inactive

Total Number of Records Returned: 16

PROVIDER		CLIENT					
Provider Location	Provider Number	Client ID	Client MA#	Client First Name	Client Last Name	MA Eligible	Enrolled Program
AdminHDMBiniamBaltimore	000000101	2110000LC201200	00000000012	Client036	Biniam	NO	
AdminHDMBiniamBaltimore	000000101	2110006LC101200	00000000007	Client031	Biniam	NO	
AdminHDMBiniamBaltimore	000000101	2110006LC101200	00000000007	Client031	Biniam	NO	

Figure 20-Client ID within the report output

Agency Name/FEIN: HDMBiniamAgency Provider Locations: AdminHDMBiniamBaltimore - 000000

Service: Home Delivered Meals - W5516 Plan of Service Status: AdminHDMBiniamBaltimore - 000000101

Client First Name: Client Last Name:

Client ID/MA#:

1 of 1

Figure 21-Client ID report input

CLIENT INFORMATION FOR BINIAM, CLIENT036

CLIENT PROFILE

SERVICE PLANS

CLIENT ATTACHMENTS

3

Client LTSS ID #: 2110000LC201200

Current MA#:

POS/PCP Program: CO

Enrolled In:

MA Eligible: No

Waiver:

PLAN OF SERVICE

[Back to List](#)
[Print](#)
[Expand All](#)

OVERVIEW INFORMATION

SERVICES

POS Service	Service Type	Provider Name	Units	Frequency	Rate	Annual
Home Delivered Meals	Community First Choice	AdminHDMBiniamBaltimore	6 items per week	16 weeks	\$6.3600	\$610.56
Comments:						

EMERGENCY BACKUP PLANS

ADDRESS TO RECEIVE SERVICES

DECISION

SIGNATURES

Figure 22-Client ID displayed in Client Profile

4. Client MA#

- Participant's Medical Assistance number as of the current system date
- Blank if the participant is not actively assigned to the Provider user's Location as of the current system date
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

Agency Name/FEIN: HDM Provider Locations: AdminHDMBiniamBaltimore - 000000

Service: Environmental Assessment - W5512 Plan of Service Status: Active, Inactive

Client First Name: Client Last Name:

Client ID/MA#:

Date Created: 3/8/2020 12:05:11 PM

Plan of Service - Current Approved Plans Report

Search Criteria

Client Last Name

Client First Name

Client ID/MA#

Agency Name/FEIN: HDM

Provider Locations: AdminHDMBiniamBaltimore - 000000101, BillingHDMBiniamMontgomery - 000000500, EA Location Puryear - 123456776, EA Provider Only - 578864476, EA_All_Jurisdictions (Bin2) - 000000200, HDM Location Puryear - 756767776, HDM Provider Only - 777777776, HDM_All_Jurisdictions (Bin2) - 000000600, HDMCarrol - 812789312, HDMKent - 912080890

Service: Environmental Assessment - W5512, Home Delivered Meals - W5516, Personal Assistant Services - W5519, Shared Attendant - W5521, Personal Assistant Services - W5527, Shared Attendant - W5528, Daily Personal Assistant Services - W5532, Daily Shared Attendant - W5533, Daily Personal Assistance - W5534, Daily Shared Attendant - W5535

Plan of Service Status: Active, Inactive

Total Number of Records Returned: 16

PROVIDER		CLIENT					
Provider Location	Provider Number	Client ID	Client MA#	Client First Name	Client Last Name	MA Eligible	Enrolled Program
AdminHDMBiniamBaltimore	000000101	2110000LC201200	00000000012	Client036	Biniam	NO	
AdminHDMBiniamBaltimore	000000101	2110006LC101200	00000000007	Client031	Biniam	NO	
AdminHDMBiniamBaltimore	000000101	2110006LC101200	00000000007	Client031	Biniam	NO	

Figure 23-Client MA# within the report output

Agency Name/FEIN: HDMBiniamAgency Provider Locations: AdminHDMBiniamBaltimore - 000000

Service: Home Delivered Meals - W5516 Plan of Service Status: AdminHDMBiniamBaltimore - 000000101

Client First Name: Client Last Name:

Client ID/MA#:

1 of 1

Figure 24-Client MA# report input

CLIENT INFORMATION FOR BINIAM, CLIENT036

CLIENT PROFILE

SERVICE PLANS

CLIENT ATTACHMENTS

Client LTSS ID #: 2110000LC201200 4

Current MA#: 12345A6789

POS/PCP Program: CO

Enrolled In:

MA Eligible: No

Waiver:

PLAN OF SERVICE

[Back to List](#)
[Print](#)
[Expand All](#)

OVERVIEW INFORMATION

SERVICES

POS Service	Service Type	Provider Name	Units	Frequency	Rate	Annual
Home Delivered Meals	Community First Choice	AdminHDMBiniamBaltimore	6 items per week	16 weeks	\$6.3600	\$610.56
Comments:						

EMERGENCY BACKUP PLANS

ADDRESS TO RECEIVE SERVICES

DECISION

SIGNATURES

Figure 25-Client MA# displayed in Client Profile

5. 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

Agency Name/FEIN: HDM Provider Locations: AdminHDMBiniamBaltimore - 000001

Service: Environmental Assessment - W5512 Plan of Service Status: Active, Inactive

Client First Name: Client Last Name:

Client ID/MA#:

Date Created: 3/8/2020 12:05:11 PM

Plan of Service - Current Approved Plans Report

Search Criteria

Client Last Name

Client First Name

Client ID/MA#

Agency Name/FEIN: HDM

Provider Locations: AdminHDMBiniamBaltimore - 000000101, BillingHDMBiniamMontgomery - 000000500, EA Location Puryear - 123456776, EA Provider Only - 578864476, EA_All_Jurisdictions (Bin2) - 000000200, HDM Location Puryear - 756767776, HDM Provider Only - 777777776, HDM_All_Jurisdictions (Bin2) - 000000600, HDMCarrol - 812789312, HDMKent - 912080890

Service: Environmental Assessment - W5512, Home Delivered Meals - W5516, Personal Assistant Services - W5519, Shared Attendant - W5521, Personal Assistant Services - W5527, Shared Attendant - W5528, Daily Personal Assistant Services - W5532, Daily Shared Attendant - W5533, Daily Personal Assistance - W5534, Daily Shared Attendant - W5535

Plan of Service Status: Active, Inactive

Total Number of Records Returned: 16

PROVIDER		CLIENT					
Provider Location	Provider Number	Client ID	Client MA#	Client First Name	Client Last Name	MA Eligible	Enrolled Program
AdminHDMBiniamBaltimore	000000101	2110000LC201200	00000000012	Client036	Biniam	NO	
AdminHDMBiniamBaltimore	000000101	2110006LC101200	00000000007	Client031	Biniam	NO	
AdminHDMBiniamBaltimore	000000101	2110006LC101200	00000000007	Client031	Biniam	NO	

Figure 26-Client First Name within the report output

Agency Name/FEIN: HDMBiniamAgency Provider Locations: AdminHDMBiniamBaltimore - 000001

Service: Home Delivered Meals - W5516 Plan of Service Status: AdminHDMBiniamBaltimore - 000000101

Client First Name: Client Last Name:

Client ID/MA#:

Date Created: 3/8/2020 12:05:11 PM

Figure 27-Client First Name report input

SERVICE NOTIFICATIONS FOR PROVIDER PORTAL USERS

CLIENT INFORMATION FOR BINIAM, CLIENT036

CLIENT PROFILE

SERVICE PLANS

CLIENT ATTACHMENTS

Client LTSS ID #: 2110000LC201200
Current MA#:
POS/PCP Program: CO
Enrolled In:
MA Eligible: No

Waiver:

CLIENT PROFILE

Expand All

▼ CLIENT DEMOGRAPHIC OVERVIEW

Client Name: Biniam, Client036

MA#:

Current Address: 1000 Georgia Avenue, Baltimore, MD 20000

DOB: 01/01/2010

Age: 10

Primary Phone #: (301) 000-0000

Guardian of Person:

Figure 28-Client First Name displayed in Client Profile

6. 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

Agency Name/FEIN: HDM
Provider Locations: AdminHDMBiniamBaltimore - 000001
Service: Environmental Assessment - W5512
Plan of Service Status: Active, Inactive
Client First Name:
Client Last Name:
Client ID/MA#:

Date Created: 3/8/2020 12:05:11 PM

Plan of Service - Current Approved Plans Report

Search Criteria

Client Last Name
Client First Name
Client ID/MA#
Agency Name/FEIN: HDM
Provider Locations: AdminHDMBiniamBaltimore - 00000101, BillingHDMBiniamMontgomery - 000000500, EA Location Puryear - 123456776, EA Provider Only - 578864476, EA_All_Jurisdictions (Bin2) - 000000200, HDM Location Puryear - 756767776, HDM Provider Only - 777777776, HDM_All_Jurisdictions (Bin2) - 000000600, HDMCarrol - 812789312, HDMKent - 912080890
Service: Environmental Assessment - W5512, Home Delivered Meals - W5516, Personal Assistant Services - W5519, Shared Attendant - W5521, Personal Assistant Services - W5527, Shared Attendant - W5528, Daily Personal Assistant Services - W5532, Daily Shared Attendant - W5533, Daily Personal Assistance - W5534, Daily Shared Attendant - W5535
Plan of Service Status: Active, Inactive
Total Number of Records Returned: 16

PROVIDER		CLIENT					
Provider Location	Provider Number	Client ID	Client MA#	Client First Name	Client Last Name	MA Eligible	Enrolled Program
AdminHDMBiniamBaltimore	000000101	2110000LC201200	00000000012	Client036	Biniam	NO	
AdminHDMBiniamBaltimore	000000101	2110006LC101200	00000000007	Client031	Biniam	NO	
AdminHDMBiniamBaltimore	000000101	2110006LC101200	00000000007	Client031	Biniam	NO	

Figure 29-Client Last Name within report output

SERVICE NOTIFICATIONS FOR PROVIDER PORTAL USERS

Agency Name/FEIN	HDM	Provider Locations	AdminHDMBiniamBaltimore - 000C
Service	Environmental Assessment - W55	Plan of Service Status	Active, Inactive
Client First Name		Client Last Name	
Client ID/MA#			

1 of 1

Figure 30-Client Last Name report input

CLIENT INFORMATION FOR BINIAM, CLIENT036					
<div>CLIENT PROFILE</div> <div>SERVICE PLANS</div> <div>CLIENT ATTACHMENTS</div>	Client LTSS ID #: 2110000LC201200	Current MA#:	POS/PCP Program: CO	Enrolled In:	MA Eligible: No
	Waiver:				
	<div>CLIENT PROFILE</div> <div>Expand All</div>				
<div>CLIENT DEMOGRAPHIC OVERVIEW</div> <div> <div>Client Name: Biniam, Client036</div> <div>MA#:</div> <div>Current Address: 1000 Georgia Avenue, Baltimore, MD 20000</div> <div>DOB: 01/01/2010</div> </div> <div> <div>Age: 10</div> <div>Primary Phone #: (301) 000-0000</div> <div>Guardian of Person:</div> </div>					

Figure 31-Client Last Name displayed in Client Profile

7. MA Eligible

- If the participant is eligible for Medical Assistance as of the current system date, the report will display “YES”
- If the participant is no longer eligible for Medical Assistance as of the current system date, the report will display “NO”
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

Agency Name/FEIN: Provider Locations: Service: Plan of Service Status: Client First Name: Client Last Name: Client ID/MA#:

Date Created: 3/8/2020 12:05:11 PM

Plan of Service - Current Approved Plans Report

Search Criteria
Client Last Name
Client First Name
Client ID/MA#
Agency Name/FEIN HDM
Provider Locations AdminHDMBiniamBaltimore - 000000101, BillingHDMBiniamMontgomery - 000000500, EA Location Puryear - 123456776, EA Provider Only - 578864476, EA_All_Jurisdictions (Bin2) - 000000200, HDM Location Puryear - 756767776, HDM Provider Only - 777777776, HDM_All_Jurisdictions (Bin2) - 000000600, HDMCarrol - 812789312, HDMKent - 912080890
Service Environmental Assessment - W5512, Home Delivered Meals - W5516, Personal Assistant Services - W5519, Shared Attendant - W5521, Personal Assistant Services - W5527, Shared Attendant - W5528, Daily Personal Assistant Services - W5532, Daily Shared Attendant - W5533, Daily Personal Assistance - W5534, Daily Shared Attendant - W5535
Plan of Service Status Active, Inactive
Total Number of Records Returned 16

PROVIDER		CLIENT					
Provider Location	Provider Number	Client ID	Client MA#	Client First Name	Client Last Name	MA Eligible	Enrolled Program
AdminHDMBiniamBaltimore	000000101	2110000LC201200	00000000012	Client036	Biniam	NO	
AdminHDMBiniamBaltimore	000000101	2110006LC101200	00000000007	Client031	Biniam	NO	
AdminHDMBiniamBaltimore	000000101	2110006LC101200	00000000007	Client031	Biniam	NO	

Figure 32-MA Eligible within report output

CLIENT INFORMATION FOR BINIAM, CLIENT036

CLIENT PROFILE
 Client LTSS ID #: **2110000LC201200** Current MA#: POS/PCP Program: **CO** Enrolled In: **MA Eligible: No**
 Waiver:

SERVICE PLANS
CLIENT PROFILE

CLIENT DEMOGRAPHIC OVERVIEW
 Client Name: **Biniam, Client036** MA#: Current Address: **1000 Georgia Avenue, Baltimore, MD 20000** DOB: **01/01/2010**
 Age: **10** Primary Phone #: **(301) 000-0000** Guardian of Person:

Figure 33-MA Eligible displayed in Client Profile

8. Enrolled Program

- Lists the Programs in which the participant is enrolled as of the current system date
- For concurrently enrolled participants, each program will be listed and separated by commas
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

Agency Name/FEIN: Provider Locations: Service: Plan of Service Status: Client First Name: Client Last Name: Client ID/MA#:

Date Created: 3/8/2020 12:05:11 PM

Plan of Service - Current Approved Plans Report

Search Criteria
 Client Last Name
 Client First Name
 Client ID/MA#
 Agency Name/FEIN: HDM
 Provider Locations: AdminHDMBiniamBaltimore - 000000101, BillingHDMBiniamMontgomery - 000000500, EA Location Puryear - 123456776, EA Provider Only - 578864476, EA_All_Jurisdictions (Bin2) - 000000200, HDM Location Puryear - 756767776, HDM Provider Only - 777777776, HDM_All_Jurisdictions (Bin2) - 000000600, HDMCarroll - 812789312, HDMKent - 912080890
 Service: Environmental Assessment - W5512, Home Delivered Meals - W5516, Personal Assistant Services - W5519, Shared Attendant - W5521, Personal Assistant Services - W5527, Shared Attendant - W5528, Daily Personal Assistant Services - W5532, Daily Shared Attendant - W5533, Daily Personal Assistance - W5534, Daily Shared Attendant - W5535
 Plan of Service Status: Active, Inactive
 Total Number of Records Returned: 16

PROVIDER		CLIENT					
Provider Location	Provider Number	Client ID	Client MA#	Client First Name	Client Last Name	MA Eligible	Enrolled Program
AdminHDMBiniamBaltimore	000000101	2110000LC201200	00000000012	Client036	Biniam	NO	
AdminHDMBiniamBaltimore	000000101	2110006LC101200	00000000007	Client031	Biniam	NO	
AdminHDMBiniamBaltimore	000000101	2110006LC101200	00000000007	Client031	Biniam	NO	

Figure 34-Enrolled Program within the report output

CLIENT INFORMATION FOR BINIAM, CLIENT036

CLIENT PROFILE
 Client LTSS ID #: **2110000LC201200** Current MA#: POS/PCP Program: **CO** Enrolled In: **CO** MA Eligible: **No**
 Waiver:

SERVICE PLANS
CLIENT PROFILE Expand All

CLIENT DEMOGRAPHIC OVERVIEW
 Client Name: **Biniam, Client036** MA#: Current Address: **1000 Georgia Avenue, Baltimore, MD 20000** DOB: **01/01/2010**
 Age: **10** Primary Phone #: **(301) 000-0000** Guardian of Person:

Figure 35-Enrolled Program(s) displayed in Client Profile

9. POS Type

- Displays the type of Plan of Service that has been approved: Initial, Annual, or Revised
- When the hyperlink is selected by the user, a new tab will open to the participant's record in Provider Portal
- Hyperlink is unavailable if the participant is not actively assigned to the Provider user's Location as of the current system date
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

NOTE: Provisional Plans are not captured within this Report

Agency Name/FEIN: HDM Provider Locations: AdminHDMBiniamBaltimore - 000001
 Service: Environmental Assessment - W5512 Plan of Service Status: Active, Inactive
 Client First Name: Client Last Name: Client ID/MA#:
 Date Created: 3/8/2020 12:05:11 PM

Plan of Service - Current Approved Plans Report

Search Criteria
 Client Last Name
 Client First Name
 Client ID/MA#
 Agency Name/FEIN: HDM
 Provider Locations: AdminHDMBiniamBaltimore - 00000101, BillingHDMBiniamMontgomery - 000000500, EA Location Puryear - 123456776, EA Provider Only - 578864476, EA_All_Jurisdictions (Bin2) - 000000200, HDM Location Puryear - 756767776, HDM Provider Only - 777777776, HDM_All_Jurisdictions (Bin2) - 000000600, HDMCarroll - 812789312, HDMKent - 912080890
 Service: Environmental Assessment - W5512, Home Delivered Meals - W5516, Personal Assistant Services - W5519, Shared Attendant - W5521, Personal Assistant Services - W5527, Shared Attendant - W5528, Daily Personal Assistant Services - W5532, Daily Shared Attendant - W5533, Daily Personal Assistance - W5534, Daily Shared Attendant - W5535
 Plan of Service Status: Active, Inactive
 Total Number of Records Returned: 16

PLAN OF SERVICE				SERVICES			
POS Type	Active	Effective Date	End Date	Service Type	POS Service	MDH Approved Units	Frequency
Initial	Inactive	03/01/2020	03/01/2020	Community First Choice	Home Delivered Meals	5 items	15 weeks
Annual	Inactive	03/01/2020	03/01/2020	Community First Choice	Home Delivered Meals	5 items	5 weeks
Annual	Inactive	03/01/2020	03/01/2020	Community First Choice	Home Delivered Meals	14 items	52 weeks

Figure 36-POS Type within the report output

CLIENT INFORMATION FOR BINIAM, CLIENT036

CLIENT PROFILE: Client LTSS ID #: 2110000LC201200 Current MA#: POS/PCP Program: CO Enrolled In: MA Eligible: No
 Waiver:

SERVICE PLANS

Program Type	Date Created	Service Plan Type	Effective Date	End Date	Status	Active	Actions
CO	12/27/2019	Initial	03/01/2020		Approved	Active	Details
CO	12/27/2019	Initial	03/01/2020	03/01/2020	Approved	Inactive	Details

Figure 37-POS Type displayed in Service Plans list

10. Active

- Status of the Plan of Service as of the current system date
- This report is defaulted to sort by this column, with all participants with an “Active” Plan of Service listed first, then participant with an “Inactive” Plan of Service listed second
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

Agency Name/FEIN

HDM

Provider Locations

AdminHDMBinlamBaltimore - 00000

View Report

Service

Environmental Assessment - W5512

Plan of Service Status

Active, Inactive

Client First Name

Client Last Name

Client ID/MA#

1 of 1

Date Created: 3/8/2020 12:05:11 PM

Plan of Service - Current Approved Plans Report

Search Criteria

Client Last Name

Client First Name

Client ID/MA#

Agency Name/FEIN

Provider Locations

Service

Plan of Service Status

Total Number of Records Returned

HDM

AdminHDMBinlamBaltimore - 000000101, BillingHDMBinlamMontgomery - 000000500, EA Location Puryear - 123456776, EA Provider Only - 578864476, EA_All_Jurisdictions (Bin2) - 000000200, HDM Location Puryear - 756767776, HDM Provider Only - 777777776, HDM_All_Jurisdictions (Bin2) - 000000600, HDMCarrol - 812789312, HDMKent - 912080890

Environmental Assessment - W5512, Home Delivered Meals - W5516, Personal Assistant Services - W5519, Shared Attendant - W5521, Personal Assistant Services - W5527, Shared Attendant - W5528, Daily Personal Assistant Services - W5532, Daily Shared Attendant - W5533, Daily Personal Assistance - W5534, Daily Shared Attendant - W5535

Active, Inactive

16

PLAN OF SERVICE				SERVICES			
POS Type	10 Active	Effective Date	End Date	Service Type	POS Service	MDH Approved Units	Frequency
Initial	Inactive	03/01/2020	03/01/2020	Community First Choice	Home Delivered Meals	5 items	15 weeks
Annual	Inactive	03/01/2020	03/01/2020	Community First Choice	Home Delivered Meals	5 items	5 weeks
Annual	Inactive	03/01/2020	03/01/2020	Community First Choice	Home Delivered Meals	14 items	52 weeks

Figure 38-Plan of Service status within the report output

Agency Name/FEIN	HDM	Provider Locations	AdminHDMBiniamBaltimore - 000C
Service	Environmental Assessment - W55	Plan of Service Status	Active, Inactive
Client First Name		Client Last Name	
Client ID/MA#			

Figure 39-Plan of Service Status as selected in the report input

SERVICE NOTIFICATIONS FOR PROVIDER PORTAL USERS

CLIENT INFORMATION FOR BINIAM, CLIENT036

CLIENT PROFILE

Client LTSS ID #: 2110000LC201200

Current MA#:

POS/PCP Program: CO

Enrolled In:

MA Eligible: No

Waiver:

SERVICE PLANS

CLIENT ATTACHEMENTS

Program Type	Date Created	Service Plan Type	Effective Date	End Date	Status	Active	Actions
CO	12/27/2019	Initial	03/01/2020		Approved	10 Active	Details
CO	12/27/2019	Initial	03/01/2020	03/01/2020	Approved	Inactive	Details

Figure 40-Plan of Service Status displayed in Service Plans list

11. Effective Date

- Date that the approved Plan of Service was effective or will be effective
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

Agency Name/FEIN: HDM

Provider Locations: AdminHDMBiniamBaltimore - 000000

View Report

Service: Environmental Assessment - W5512

Plan of Service Status: Active, Inactive

Client First Name:

Client Last Name:

Client ID/MA#:

Date Created: 3/8/2020 12:05:11 PM

Plan of Service - Current Approved Plans Report

Search Criteria

Client Last Name

Client First Name

Client ID/MA#

Agency Name/FEIN: HDM

Provider Locations: AdminHDMBiniamBaltimore - 000000101, BillingHDMBiniamMontgomery - 000000500, EA Location Puryear - 123456776, EA Provider Only - 578964476, EA_All_Jurisdictions (Bin2) - 000000200, HDM Location Puryear - 756767776, HDM Provider Only - 777777776, HDM_All_Jurisdictions (Bin2) - 000000600, HDMCarroll - 812789312, HDMKent - 912080890

Service: Environmental Assessment - W5512, Home Delivered Meals - W5516, Personal Assistant Services - W5519, Shared Attendant - W5521, Personal Assistant Services - W5527, Shared Attendant - W5528, Daily Personal Assistant Services - W5532, Daily Shared Attendant - W5533, Daily Personal Assistance - W5534, Daily Shared Attendant - W5535

Plan of Service Status: Active, Inactive

Total Number of Records Returned: 16

PLAN OF SERVICE				SERVICES			
POS Type	Active	Effective Date	End Date	Service Type	POS Service	MDH Approved Units	Frequency
Initial	Inactive	03/01/2020	03/01/2020	Community First Choice	Home Delivered Meals	5 items	15 weeks
Annual	Inactive	03/01/2020	03/01/2020	Community First Choice	Home Delivered Meals	5 items	5 weeks
Annual	Inactive	03/01/2020	03/01/2020	Community First Choice	Home Delivered Meals	14 items	52 weeks

Figure 41-Effective Date within the report output

SERVICE NOTIFICATIONS FOR PROVIDER PORTAL USERS

CLIENT INFORMATION FOR BINIAM, CLIENT036

CLIENT PROFILE

Client LTSS ID #: 2110000LC201200

Current MA#:

POS/PCP Program: CO

Enrolled In:

MA Eligible: No

Waiver:

SERVICE PLANS

CLIENT ATTACHMENTS

Program Type	Date Created	Service Plan Type	Effective Date	End Date	Status	Active	Actions
CO	12/27/2019	Initial	03/01/2020		Approved	Active	Details
CO	12/27/2019	Initial	03/01/2020	03/01/2020	Approved	Inactive	Details

Figure 42-Effective Date displayed in Service Plans list

12. End Date

- Date that the approved Plan of Service will end
- Blank if Plan of Service does not have an end date as of the current system date
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

Agency Name/FEIN: HDM

Provider Locations: AdminHDMBiniamBaltimore - 00000

View Report

Service: Environmental Assessment - W5512

Plan of Service Status: Active, Inactive

Client First Name:

Client Last Name:

Client ID/MA#:

1 of 1

Date Created: 3/8/2020 12:05:11 PM

Plan of Service - Current Approved Plans Report

Search Criteria

Client Last Name

Client First Name

Client ID/MA#

Agency Name/FEIN: HDM

Provider Locations: AdminHDMBiniamBaltimore - 000000101, BillingHDMBiniamMontgomery - 000000500, EA Location Puryear - 123456776, EA Provider Only - 578864476, EA_All_Jurisdictions (Bin2) - 000000200, HDM Location Puryear - 756767776, HDM Provider Only - 777777776, HDM_All_Jurisdictions (Bin2) - 000000600, HDMCarroll - 812789312, HDMKent - 912080890

Service: Environmental Assessment - W5512, Home Delivered Meals - W5516, Personal Assistant Services - W5519, Shared Attendant - W5521, Personal Assistant Services - W5527, Shared Attendant - W5528, Daily Personal Assistant Services - W5532, Daily Shared Attendant - W5533, Daily Personal Assistance - W5534, Daily Shared Attendant - W5535

Plan of Service Status: Active, Inactive

Total Number of Records Returned: 16

PLAN OF SERVICE				SERVICES			
POS Type	Active	Effective Date	End Date	Service Type	POS Service	MDH Approved Units	Frequency
Initial	Inactive	03/01/2020	03/01/2020	Community First Choice	Home Delivered Meals	5 items	15 weeks
Annual	Inactive	03/01/2020	03/01/2020	Community First Choice	Home Delivered Meals	5 items	5 weeks
Annual	Inactive	03/01/2020	03/01/2020	Community First Choice	Home Delivered Meals	14 items	52 weeks

Figure 43-End Date within the report output

SERVICE NOTIFICATIONS FOR PROVIDER PORTAL USERS

CLIENT INFORMATION FOR BINIAM, CLIENT036

CLIENT PROFILE

Client LTSS ID #: **2110000LC201200**
Current MA#:
POS/PCP Program: **CO**
Enrolled In:
MA Eligible: **No**

Waiver:

SERVICE PLANS

CLIENT ATTACHMENTS

SERVICE PLANS

Program Type	Date Created	Service Plan Type	Effective Date	End Date	Status	Active	Actions
CO	12/27/2019	Initial	03/01/2020		Approved	Active	Details
CO	12/27/2019	Initial	03/01/2020	12	Approved	Inactive	Details

Figure 44-End Date displayed in Service Plans list

13. Service Type

- Name of the Service Type that is noted in the Plan of Service
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

Agency Name/FEIN: HDM

Provider Locations: AdminHDMBiniamBaltimore - 000000

View Report

Service: Environmental Assessment - W5512

Plan of Service Status: Active, Inactive

Client First Name:

Client Last Name:

Client ID/MA#:

Date Created: 3/8/2020 12:05:11 PM

Plan of Service - Current Approved Plans Report

Search Criteria

Client Last Name

Client First Name

Client ID/MA#

Agency Name/FEIN: HDM

Provider Locations: AdminHDMBiniamBaltimore - 000000101, BillingHDMBiniamMontgomery - 000000500, EA Location Puryear - 123456776, EA Provider Only - 578964476, EA_All_Jurisdictions (Bin2) - 000000200, HDM Location Puryear - 756767776, HDM Provider Only - 777777776, HDM_All_Jurisdictions (Bin2) - 000000600, HDMCarroll - 812789312, HDMKent - 912080890

Service: Environmental Assessment - W5512, Home Delivered Meals - W5516, Personal Assistant Services - W5519, Shared Attendant - W5521, Personal Assistant Services - W5527, Shared Attendant - W5528, Daily Personal Assistant Services - W5532, Daily Shared Attendant - W5533, Daily Personal Assistance - W5534, Daily Shared Attendant - W5535

Plan of Service Status: Active, Inactive

Total Number of Records Returned: 16

PLAN OF SERVICE				SERVICES			
POS Type	Active	Effective Date	End Date	Service Type	POS Service	MDH Approved Units	Frequency
Initial	Inactive	03/01/2020	03/01/2020	Community First Choice	Home Delivered Meals	5 items	15 weeks
Annual	Inactive	03/01/2020	03/01/2020	Community First Choice	Home Delivered Meals	5 items	5 weeks
Annual	Inactive	03/01/2020	03/01/2020	Community First Choice	Home Delivered Meals	14 items	52 weeks

Figure 45-Service Type within the report output

SERVICE NOTIFICATIONS FOR PROVIDER PORTAL USERS

CLIENT INFORMATION FOR BINIAM, CLIENT036

CLIENT PROFILE

Client LTSS ID #: 2110000LC201200

Current MA#: 12345A6789

POS/PCP Program: CO

Enrolled In:

MA Eligible: No

Waiver:

SERVICE PLANS

PLAN OF SERVICE

Back to List

Print

Expand All

CLIENT ATTACHMENTS

OVERVIEW INFORMATION

SERVICES

POS Service	Service Type	Provider Name	Units	Frequency	Rate	Annual
Home Delivered Meals	Community First Choice	AdminHDMBiniamBaltimore	6 items per week	16 weeks	\$6.3600	\$610.56

Comments:

EMERGENCY BACKUP PLANS

ADDRESS TO RECEIVE SERVICES

DECISION

SIGNATURES

Figure 46-Service Type displayed in Plan of Service

14. POS Service

- Service Name that is noted in the Plan of Service
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

NOTE: In instances where the Provider is assigned to more than one service in the Plan of Service, the participant's Plan of Service records will display multiple times in the report

Agency Name/FEIN: HDM

Provider Locations: AdminHDMBiniamBaltimore - 000000

View Report

Service: Environmental Assessment - W5512

Plan of Service Status: Active, Inactive

Client First Name:

Client Last Name:

Client ID/MA#:

Date Created: 3/8/2020 12:05:11 PM

Plan of Service - Current Approved Plans Report

Search Criteria

Client Last Name

Client First Name

Client ID/MA#

Agency Name/FEIN: HDM

Provider Locations: AdminHDMBiniamBaltimore - 000000101, BillingHDMBiniamMontgomery - 000000500, EA Location Puryear - 123456776, EA Provider Only - 578864476, EA_All_Jurisdictions (Bin2) - 000000200, HDM Location Puryear - 756767776, HDM Provider Only - 777777776, HDM_All_Jurisdictions (Bin2) - 000000600, HDMCarroll - 812789312, HDMKent - 912080890

Service: Environmental Assessment - W5512, Home Delivered Meals - W5516, Personal Assistant Services - W5519, Shared Attendant - W5521, Personal Assistant Services - W5527, Shared Attendant - W5528, Daily Personal Assistant Services - W5532, Daily Shared Attendant - W5533, Daily Personal Assistance - W5534, Daily Shared Attendant - W5535

Plan of Service Status: Active, Inactive

Total Number of Records Returned: 16

PLAN OF SERVICE				SERVICES			
POS Type	Active	Effective Date	End Date	Service Type	POS Service	MDH Approved Units	Frequency
Initial	Inactive	03/01/2020	03/01/2020	Community First Choice	Home Delivered Meals	5 items	15 weeks
Annual	Inactive	03/01/2020	03/01/2020	Community First Choice	Home Delivered Meals	5 items	5 weeks
Annual	Inactive	03/01/2020	03/01/2020	Community First Choice	Home Delivered Meals	14 items	52 weeks

Figure 47-POS Service within the report output

SERVICE NOTIFICATIONS FOR PROVIDER PORTAL USERS

Agency Name/FEIN Provider Locations

14 Service Plan of Service Status

Client First Name

Client ID/MA#

- ☒ (Select All)
- ☒ Environmental Assessment - W5512
- ☒ Home Delivered Meals - W5516
- ☒ Personal Assistant Services - W5519
- ☒ Shared Attendant - W5521
- ☒ Personal Assistant Services - W5527
- ☒ Shared Attendant - W5528
- ☒ Daily Personal Assistant Services - W5532
- ☒ Daily Shared Attendant - W5533
- ☒ Daily Personal Assistance - W5534
- ☒ Daily Shared Attendant - W5535

Figure 48-POS Service selection in report input

CLIENT INFORMATION FOR BINIAM, CLIENT036

CLIENT PROFILE Client LTSS ID #: **2110000LC201200** Current MA#: **12345A6789** POS/PCP Program: **CO** Enrolled In: **MA Eligible: No**

Waiver:

SERVICE PLANS **PLAN OF SERVICE**

CLIENT ATTACHMENTS

14

POS Service **Service Type** **Provider Name** **Units** **Frequency** **Rate** **Annual**

Home Delivered Meals	Community First Choice	AdminHDMBiniamBaltimore	6 Items per week	16 weeks	\$6.3600	\$610.56
----------------------	------------------------	-------------------------	------------------	----------	----------	----------

Comments:

EMERGENCY BACKUP PLANS

ADDRESS TO RECEIVE SERVICES

DECISION

SIGNATURES

Figure 49-POS Service displayed in Plan of Service

15. MDH Approved Units

- The units that are approved by MDH for the associated POS Service
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

Agency Name/FEIN: HDM Provider Locations: AdminHDMBiniamBaltimore - 000001

Service: Environmental Assessment - W5512 Plan of Service Status: Active, Inactive

Client First Name: Client Last Name:

Client ID/MA#:

Date Created: 3/8/2020 12:05:11 PM

Plan of Service - Current Approved Plans Report

Search Criteria

Client Last Name

Client First Name

Client ID/MA#

Agency Name/FEIN HDM

Provider Locations AdminHDMBiniamBaltimore - 00000101, BillingHDMBiniamMontgomery - 000000500, EA Location Puryear - 123456776, EA Provider Only - 578864476, EA_All_Jurisdictions (Bin2) - 000000200, HDM Location Puryear - 756767776, HDM Provider Only - 777777776, HDM_All_Jurisdictions (Bin2) - 000000600, HDMCarroll - 812789312, HDMKent - 912080890

Service Environmental Assessment - W5512, Home Delivered Meals - W5516, Personal Assistant Services - W5519, Shared Attendant - W5521, Personal Assistant Services - W5527, Shared Attendant - W5528, Daily Personal Assistant Services - W5532, Daily Shared Attendant - W5533, Daily Personal Assistance - W5534, Daily Shared Attendant - W5535

Plan of Service Status Active, Inactive

Total Number of Records Returned 16

PLAN OF SERVICE				SERVICES			
POS Type	Active	Effective Date	End Date	Service Type	POS Service	MDH Approved Units	Frequency
Initial	Inactive	03/01/2020	03/01/2020	Community First Choice	Home Delivered Meals	5 items	15 weeks
Annual	Inactive	03/01/2020	03/01/2020	Community First Choice	Home Delivered Meals	5 items	5 weeks
Annual	Inactive	03/01/2020	03/01/2020	Community First Choice	Home Delivered Meals	14 items	52 weeks

Figure 50-MDH Approved Units within the report output

CLIENT INFORMATION FOR BINIAM, CLIENT036

CLIENT PROFILE

Client LTSS ID #: 2110000LC201200 Current MA#: 12345A6789 POS/PCP Program: CO Enrolled In: MA Eligible: No

Waiver:

SERVICE PLANS

PLAN OF SERVICE

Back to List Print Expand All

OVERVIEW INFORMATION

SERVICES

POS Service	Service Type	Provider Name	Units	Frequency	Rate	Annual
Home Delivered Meals	Community First Choice	AdminHDMBiniamBaltimore	6 items per week	16 weeks	\$6.3600	\$610.56

Comments:

EMERGENCY BACKUP PLANS

ADDRESS TO RECEIVE SERVICES

DECISION

SIGNATURES

Figure 51-Units displayed in Plan of Service

16. Frequency

- The frequency of the associated POS Service
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

Agency Name/FEIN: HDM Provider Locations: AdminHDMBiniamBaltimore - 000001

Service: Environmental Assessment - W5512 Plan of Service Status: Active, Inactive

Client First Name: Client Last Name:

Client ID/MA#:

Date Created: 3/8/2020 12:05:11 PM

Plan of Service - Current Approved Plans Report

Search Criteria

Client Last Name

Client First Name

Client ID/MA#

Agency Name/FEIN HDM

Provider Locations AdminHDMBiniamBaltimore - 00000101, BillingHDMBiniamMontgomery - 000000500, EA Location Puryear - 123456776, EA Provider Only - 578864476, EA_All_Jurisdictions (Bin2) - 000000200, HDM Location Puryear - 756767776, HDM Provider Only - 777777776, HDM_All_Jurisdictions (Bin2) - 000000600, HDMCarroll - 812789312, HDMKent - 912080890

Service Environmental Assessment - W5512, Home Delivered Meals - W5516, Personal Assistant Services - W5519, Shared Attendant - W5521, Personal Assistant Services - W5527, Shared Attendant - W5528, Daily Personal Assistant Services - W5532, Daily Shared Attendant - W5533, Daily Personal Assistance - W5534, Daily Shared Attendant - W5535

Plan of Service Status Active, Inactive

Total Number of Records Returned 16

PLAN OF SERVICE				SERVICES			
POS Type	Active	Effective Date	End Date	Service Type	POS Service	MDH Approved Units	Frequency
Initial	Inactive	03/01/2020	03/01/2020	Community First Choice	Home Delivered Meals	5 items	15 weeks
Annual	Inactive	03/01/2020	03/01/2020	Community First Choice	Home Delivered Meals	5 items	5 weeks
Annual	Inactive	03/01/2020	03/01/2020	Community First Choice	Home Delivered Meals	14 items	52 weeks

Figure 52-Frequency within the report output

CLIENT INFORMATION FOR BINIAM, CLIENT036

CLIENT PROFILE: Client LTSS ID #: 2110000LC201200 Current MA#: 12345A6789 POS/PCP Program: CO Enrolled In: MA Eligible: No

Waiver:

SERVICE PLANS

PLAN OF SERVICE

Back to List Print Expand All

OVERVIEW INFORMATION

SERVICES

POS Service	Service Type	Provider Name	Units	Frequency	Rate	Annual
Home Delivered Meals	Community First Choice	AdminHDMBiniamBaltimore	6 items per week	16 weeks	\$6.3600	\$610.56

Comments:

EMERGENCY BACKUP PLANS


ADDRESS TO RECEIVE SERVICES

DECISION

SIGNATURES

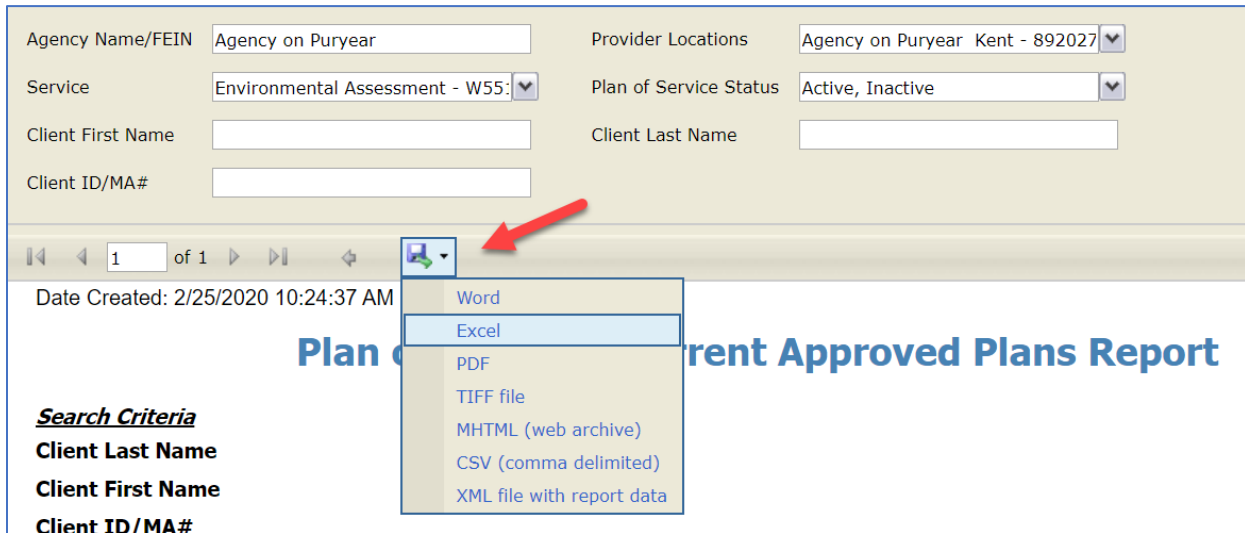
Figure 53-Frequency displayed in Plan of Service

3.1.4 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



The screenshot shows a report interface with the following fields:

- Agency Name/FEIN: Agency on Puryear
- Provider Locations: Agency on Puryear Kent - 892027
- Service: Environmental Assessment - W55
- Plan of Service Status: Active, Inactive
- Client First Name:
- Client Last Name:
- Client ID/MA#:

The navigation bar shows "1 of 1" and an export icon. The export options menu is open, listing:

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

The report title is "Plan of Service - Current Approved Plans Report". The date created is "2/25/2020 10:24:37 AM".

Search Criteria

- Client Last Name
- Client First Name
- Client ID/MA#

Figure 54-Export Options

Once the user has selected their desired export option, the system will invoke a new report tab with the exported file accessible at the bottom of the screen

Agency Name/FEIN
Agency on Puryear

Provider Locations
Agency on Puryear Kent - 892027

Service
Environmental Assessment - W55:

Plan of Service Status
Active, Inactive

Client First Name

Client Last Name

Client ID/MA#

1 of 1

Date Created: 2/25/2020 10:24:37 AM

Figure 55-View exported file

3.2 Approved Plans History Report

This report is intended for the use of Providers that are authorized for Personal Assistance Services, Home Delivered Meals, and/or Environmental Assessments as a part of the CO, CFC, CPAS, and ICS Programs/Waivers only.

The report provides a list of participants with approved Plans of Service, where the user's Location is or has been assigned to a service, within a given date range.

3.2.1 User Roles

User Group	User Roles
MDH	Provider Enrollment Admin, Provider Enrollment Staff, ISAS Admin, ISAS Staff, MDH Admin
Providers	Admin Provider, Billing Provider

3.2.2 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 Provider Portal
2. Select the View hyperlink next to **Plan of Service- Approved Plans History Report**

Provider Portal	Home	Alerts	Services	Clients	Providers	Reports	Help	Feedback		Amy PAS Provider (On beh...
REPORTS										
Category	Name		Actions							
Claims	Provider Portal Claims Report		View							
Claims	Remittance Advice Report		View							
DDA - Provider Portal	DDA State Payment Report		View							
EVV - Provider Portal	EVV Services Overlap Report		View							
EVV - Provider Portal	EVV Services Rendered Report		View							
EVV - Provider Portal	ISAS - Provider Staff Report		View							
EVV - Provider Portal	Services Rendered Report Advanced		View							
Plan of Services	Plan of Service - Approved Plans History Report		View							
Plan of Services	Plan of Service - Current Approved Plans Report		View							

Figure 56-Plan of Service Approved Plans History Report

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

- **Effective Date From**
 - Searches for approved Plans of Service based on their effective date
 - Defaults to 30 days prior to the current system date
- **Effective Date To**
 - Searches for approved Plans of Service based on their effective date
 - Defaults to the current system date
 - Date Range between Effective Date From and Effective Date To cannot exceed a one (1) year span; however, the user may search approved Plans of Service for previous years

TIP: To view records for more than one (1) year, the user may create more than one report. Once they have exported each report, those files may be combined into one comprehensive report for multiple years.

- **Agency Name/FEIN**
 - Defaults to the name of the Agency to which the user is associated
 - Required to search
- **Provider Locations**
 - Defaults to the name of the Location(s) to which the user is associated
 - Required to search
- **Service**
 - Displays Service types and associated billing code for which the user's location is authorized to provide for CO, CFC, CPAS, or ICS program/waivers:
 1. Environmental Assessment- W5512
 2. Home Delivered Meals- W5516
 3. Personal Assistant Services- W5519
 4. Shared Attendant- W5521
 5. Personal Assistant Services-W5527
 6. Shared Attendant- W5528
 7. Daily Personal Assistant Services- W5532
 8. Daily Shared Attendant- W5533
 9. Daily Personal Assistance-W5534
 10. Daily Shared Attendant- W5535
 - Multi-select
 - Defaults to **Select All**
 - Required to search
- **Plan of Service Status**
 - Filter for viewing participant with Plans of Service in the **Active** or **Inactive** status
 - Multi-Select
 - Defaults to **Select All**
 - Required to search

- **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 if searching by participant's first name
 - Optional
- **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 if searching by participant's last name
 - Optional
- **Client ID/MA #**
 - Users may enter the specific Client ID or MA#
 - Must enter the exact Client ID or MA# to return results if searching by Client ID or MA #
 - Optional

Effective Date From	<input type="text" value="1/25/2020 12:00:00 AM"/>	Effective Date To	<input type="text" value="2/25/2020 12:00:00 AM"/>	<div>View Report</div>
Agency Name/FEIN	<input type="text" value="Agency on Puryear"/>	Provider Locations	<input type="text" value="Agency on Puryear Kent - 892027"/>	
Service	<input type="text" value="Environmental Assessment - W55"/>	Plan of Service Status	<input type="text" value="Active, Inactive"/>	
Client First Name	<input type="text"/>	Client Last Name	<input type="text"/>	
Client ID/MA#	<input type="text"/>			

Figure 57-Approved Plans History Report Search Parameters

3.2.3 View Report (Outputs)

Once the user enters desired search parameters and selects View Report, the Approved Plans History Report will display a list of participants with details associated to their approved Plan of Service.

The list of report data displayed, it's corresponding search inputs, and a reference of the location of the report data within Provider Portal are below:

1. Provider Location

- Name of user's Provider Location, as selected in the Provider Locations search parameter

Date Created: 3/8/2020 2:21:22 PM

Plan of Service - Approved Plans History Report

Search Criteria

Date From: 1/1/2019 12:00:00 AM
 Date To: 1/1/2020 12:00:00 AM

Client Last Name:
 Client First Name:
 Client ID/MA#:

Agency Name/FEIN: HDM
 Provider Locations: AdminHDMBiniamBaltimore - 000000101, BillingHDMBiniamMontgomery - 000000500, EA Location Puryear - 123456776, EA Provider Only - 578864476, EA_All_Jurisdictions (Bin2) - 000000200, HDM Location Puryear - 756767776, HDM Provider Only - 777777776, HDM_All_Jurisdictions (Bin2) - 000000600, HDMCarrol - 812789312, HDMKent - 912080890

Service: Environmental Assessment - W5512, Home Delivered Meals - W5516, Personal Assistant Services - W5519, Shared Attendant - W5521, Personal Assistant Services - W5527, Shared Attendant - W5528, Daily Personal Assistant Services - W5532, Daily Shared Attendant - W5533, Daily Personal Assistance - W5534, Daily Shared Attendant - W5535

Plan of Service Status: Active, Inactive

Total Number of Records Returned: 96

PROVIDER		CLIENT					
Provider Location	Provider Number	Client ID	Client MA#	Client First Name	Client Last Name	MA Eligible	Enrolled Program
AdminHDMBiniamBaltimore	000000101	1110005LC101201	00000000015	Client038	Biniam	NO	
AdminHDMBiniamBaltimore	000000101	1119418ET123100	10000000018	EAClient005	Biniam	YES	WOA
AdminHDMBiniamBaltimore	000000101	2110002LC201200		Client040	Biniam	NO	CS

Figure 58-Provider Location within report output

Effective Date From: 2/8/2020 12:00:00 AM Effective Date To: 3/8/2020 12:00:00 AM View Report

Agency Name/FEIN: HDM 1 Provider Locations: AdminHDMBiniamBaltimore - 000000101

Service: Environmental Assessment - W5512 Plan of Service Status: (Select All)

Client First Name: Client Last Name:

- ☒ AdminHDMBiniamBaltimore - 000000101
- ☒ BillingHDMBiniamMontgomery - 000000500
- ☒ EA Location Puryear - 123456776
- ☒ EA Provider Only - 578864476
- ☒ EA_All_Jurisdictions (Bin2) - 000000200
- ☒ HDM Location Puryear - 756767776
- ☒ HDM Provider Only - 777777776
- ☒ HDM_All_Jurisdictions (Bin2) - 000000600

Client ID/MA#:

- ☐ AdminHDMBiniamBaltimore - 000000101
- ☐ BillingHDMBiniamMontgomery - 000000500
- ☐ EA Location Puryear - 123456776
- ☐ EA Provider Only - 578864476
- ☐ EA_All_Jurisdictions (Bin2) - 000000200
- ☐ HDM Location Puryear - 756767776
- ☐ HDM Provider Only - 777777776
- ☐ HDM_All_Jurisdictions (Bin2) - 000000600

Figure 59-Provider Location selection in the report input

SERVICE NOTIFICATIONS FOR PROVIDER PORTAL USERS

CLIENT INFORMATION FOR BINIAM, CLIENT036

CLIENT PROFILE

CLIENT ATTACHMENTS

SERVICE PLANS

Client LTSS ID #: 2110000LC201200
Current MA#:
POS/PCP Program: CO
Enrolled In:
MA Eligible: No
Waiver:

PLAN OF SERVICE

Back to List
Print
Expand All

OVERVIEW INFORMATION
SERVICES

POS Service	Service Type	Provider Name	Units	Frequency	Rate	Annual
Home Delivered Meals	Community First Choice	AdminHDMBiniamBaltimore	6 items per week	16 weeks	\$6.3600	\$610.56

Comments:

EMERGENCY BACKUP PLANS
ADDRESS TO RECEIVE SERVICES
DECISION
SIGNATURES

Figure 60-Provider location displayed in Plan of Service

2. Provider Number

- Provider's unique identification number associated with the Provider Location, as selected in the Provider Locations search parameter

Date Created: 3/8/2020 2:21:22 PM

Plan of Service - Approved Plans History Report

Search Criteria

Date From 1/1/2019 12:00:00 AM
Date To 1/1/2020 12:00:00 AM
Client Last Name
Client First Name
Client ID/MA#
Agency Name/FEIN HDM
Provider Locations AdminHDMBiniamBaltimore - 000000101, BillingHDMBiniamMontgomery - 000000500, EA Location Puryear - 123456776, EA Provider Only - 578864476, EA_All_Jurisdictions (Bin2) - 000000200, HDM Location Puryear - 756767776, HDM Provider Only - 777777776, HDM_All_Jurisdictions (Bin2) - 000000600, HDMCarroll - 812789312, HDMKent - 912080890
Service Environmental Assessment - W5512, Home Delivered Meals - W5516, Personal Assistant Services - W5519, Shared Attendant - W5521, Personal Assistant Services - W5527, Shared Attendant - W5528, Daily Personal Assistant Services - W5532, Daily Shared Attendant - W5533, Daily Personal Assistance - W5534, Daily Shared Attendant - W5535
Plan of Service Status Active, Inactive
Total Number of Records Returned 96

PROVIDER		CLIENT					
Provider Location	Provider Number	Client ID	Client MA#	Client First Name	Client Last Name	MA Eligible	Enrolled Program
AdminHDMBiniamBaltimore	000000101	1110005LC101201	00000000015	Client038	Biniam	NO	
AdminHDMBiniamBaltimore	000000101	1119418ET123100	10000000018	EAClient005	Biniam	YES	WOA
AdminHDMBiniamBaltimore	000000101	2110002LC201200		Client040	Biniam	NO	CS

Figure 61-Provider Number within the report output

SERVICE NOTIFICATIONS FOR PROVIDER PORTAL USERS

Effective Date From	2/8/2020 12:00:00 AM	Effective Date To	3/8/2020 12:00:00 AM	View Report
Agency Name/FEIN	HDM	Provider Locations	AdminHDMBiniamBaltimore - 0000	
Service	Environmental Assessment - W55:	Plan of Service Status	<div style="border: 1px solid black; padding: 5px;"> <input checked="" type="checkbox"/> (Select All) <input checked="" type="checkbox"/> AdminHDMBiniamBaltimore - 000000101 2 <input checked="" type="checkbox"/> BillingHDMBiniamMontgomery - 000000500 <input checked="" type="checkbox"/> EA Location Puryear - 123456776 <input checked="" type="checkbox"/> EA Provider Only - 578864476 <input checked="" type="checkbox"/> EA_All_ Jurisdictions (Bin2) - 000000200 <input checked="" type="checkbox"/> HDM Location Puryear - 756767776 <input checked="" type="checkbox"/> HDM Provider Only - 777777776 <input checked="" type="checkbox"/> HDM_All_ Jurisdictions (Bin2) - 000000600 </div>	
Client First Name		Client Last Name		
Client ID/MA#				

Figure 62-Provider Number as selected in report input

PROVIDER DETAILS
✕

PROVIDER PROFILE

AGENCY INFORMATION

Agency Name: **HDMBiniamAgency** Status: Active

LOCATION INFORMATION

Location Name: AdminHDMBiniamBaltimore Program Type: Provider Type Code: Enrollment Status:

Provider FEIN: 2 Provider Number: **000000101** List of Speciality Codes:

COS	COS Description	Spans Start Date	Spans End Date

Figure 63-Provider Number displayed in Provider Profile

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 participant's record in Provider Portal
- Hyperlink is unavailable if the participant is not actively assigned to the Provider user's Location as of the current system date
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

Date Created: 3/8/2020 2:21:22 PM

Plan of Service - Approved Plans History Report

Search Criteria

Date From 1/1/2019 12:00:00 AM
Date To 1/1/2020 12:00:00 AM
Client Last Name
Client First Name
Client ID/MA#
Agency Name/FEIN HDM
Provider Locations AdminHDMBiniamBaltimore - 000000101, BillingHDMBiniamMontgomery - 000000500, EA Location Puryear - 123456776, EA Provider Only - 578864476, EA_All_Jurisdictions (Bin2) - 000000200, HDM Location Puryear - 756767776, HDM Provider Only - 777777776, HDM_All_Jurisdictions (Bin2) - 000000600, HDMCarroll - 812789312, HDMKent - 912080890
Service Environmental Assessment - W5512, Home Delivered Meals - W5516, Personal Assistant Services - W5519, Shared Attendant - W5521, Personal Assistant Services - W5527, Shared Attendant - W5528, Daily Personal Assistant Services - W5532, Daily Shared Attendant - W5533, Daily Personal Assistance - W5534, Daily Shared Attendant - W5535
Plan of Service Status Active, Inactive
Total Number of Records Returned 96

PROVIDER		CLIENT					
Provider Location	Provider Number	3 Client ID	Client MA#	Client First Name	Client Last Name	MA Eligible	Enrolled Program
AdminHDMBiniamBaltimore	000000101	1110005LC101201	00000000015	Client038	Biniam	NO	
AdminHDMBiniamBaltimore	000000101	1119418ET123100	10000000018	EAClient005	Biniam	YES	WOA
AdminHDMBiniamBaltimore	000000101	2110002LC201200		Client040	Biniam	NO	CS

Figure 64-Client ID within report output

Effective Date From: 2/8/2020 12:00:00 AM
Agency Name/FEIN: HDM
Service: Environmental Assessment - W5512
Client First Name:
3 Client ID/MA#:

Effective Date To: 3/8/2020 12:00:00 AM
Provider Locations: AdminHDMBiniamBaltimore - 000000101
Plan of Service Status: Active, Inactive
Client Last Name:

Figure 65-Client ID in report input

SERVICE NOTIFICATIONS FOR PROVIDER PORTAL USERS

CLIENT INFORMATION FOR BINIAM, CLIENT036

CLIENT PROFILE

SERVICE PLANS

CLIENT ATTACHMENTS

3

Client LTSS ID #: 2110000LC201200

Current MA#:

POS/PCP Program: CO

Enrolled In: CO

MA Eligible: No

Waiver:

CLIENT PROFILE

Expand All

▼ CLIENT DEMOGRAPHIC OVERVIEW

Client Name: Biniam, Client036

MA#:

Current Address: 1000 Georgia Avenue, Baltimore, MD 20000

DOB: 01/01/2010

Age: 10

Primary Phone #: (301) 000-0000

Guardian of Person:

Figure 66-Client ID displayed in Client Profile

4. Client MA#

- Participant's Medical Assistance number as of the current system date
- Blank if the participant is not actively assigned to the Provider user's Location as of the current system date
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

Date Created: 3/8/2020 2:21:22 PM

Plan of Service - Approved Plans History Report

Search Criteria

Date From

1/1/2019 12:00:00 AM

Date To

1/1/2020 12:00:00 AM

Client Last Name

Client First Name

Client ID/MA#

Agency Name/FEIN

Provider Locations

Service

Plan of Service Status

Total Number of Records Returned

HDM

AdminHDMBiniamBaltimore - 000000101, BillingHDMBiniamMontgomery - 000000500, EA Location Puryear - 123456776, EA Provider Only - 578864476, EA_All_Jurisdictions (Bin2) - 000000200, HDM Location Puryear - 756767776, HDM Provider Only - 777777776, HDM_All_Jurisdictions (Bin2) - 000000600, HDMCarrol - 812789312, HDMKent - 912080890

Environmental Assessment - W5512, Home Delivered Meals - W5516, Personal Assistant Services - W5519, Shared Attendant - W5521, Personal Assistant Services - W5527, Shared Attendant - W5528, Daily Personal Assistant Services - W5532, Daily Shared Attendant - W5533, Daily Personal Assistance - W5534, Daily Shared Attendant - W5535

Active, Inactive

96

PROVIDER		CLIENT					
Provider Location	Provider Number	Client ID	Client MA#	Client First Name	Client Last Name	MA Eligible	Enrolled Program
AdminHDMBiniamBaltimore	000000101	1110005LC101201	00000000015	Client038	Biniam	NO	
AdminHDMBiniamBaltimore	000000101	1119418ET123100	10000000018	EAClient005	Biniam	YES	WOA
AdminHDMBiniamBaltimore	000000101	2110002LC201200		Client040	Biniam	NO	CS

Figure 67-Client MA# within the report output

SERVICE NOTIFICATIONS FOR PROVIDER PORTAL USERS

Effective Date From	<input type="text" value="2/8/2020 12:00:00 AM"/>	Effective Date To	<input type="text" value="3/8/2020 12:00:00 AM"/>	View Report
Agency Name/FEIN	<input type="text" value="HDM"/>	Provider Locations	<input type="text" value="AdminHDMBiniamBaltimore - 000C"/>	
Service	<input type="text" value="Environmental Assessment - W55"/>	Plan of Service Status	<input type="text" value="Active, Inactive"/>	
Client First Name	<input type="text"/>	Client Last Name	<input type="text"/>	
Client ID/MA#	<input type="text"/>			

Figure 68-Client MA# report input

CLIENT PROFILE

SERVICE PLANS

CLIENT ATTACHMENTS

CLIENT INFORMATION FOR BINIAM, CLIENT036
✕

Client LTSS ID #: 2110000LC201200 4 Current MA#: 12345A6789 POS/PCP Program: CO Enrolled In: MA Eligible: No
Waiver:

PLAN OF SERVICE

[Back to List](#)
[Print](#)
[Expand All](#)

OVERVIEW INFORMATION

SERVICES

POS Service	Service Type	Provider Name	Units	Frequency	Rate	Annual
Home Delivered Meals	Community First Choice	AdminHDMBiniamBaltimore	6 items per week	16 weeks	\$6.3600	\$610.56

Comments:

EMERGENCY BACKUP PLANS

ADDRESS TO RECEIVE SERVICES

DECISION

SIGNATURES

Figure 69-Client MA# displayed in Client Profile

5. 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

Date Created: 3/8/2020 2:21:22 PM

Plan of Service - Approved Plans History Report

Search Criteria

Date From 1/1/2019 12:00:00 AM
Date To 1/1/2020 12:00:00 AM

Client Last Name
Client First Name
Client ID/MA#
Agency Name/FEIN HDM
Provider Locations AdminHDMBiniamBaltimore - 000000101, BillingHDMBiniamMontgomery - 000000500, EA Location Puryear - 123456776, EA Provider Only - 578864476, EA_All_Jurisdictions (Bin2) - 000000200, HDM Location Puryear - 756767776, HDM Provider Only - 777777776, HDM_All_Jurisdictions (Bin2) - 000000600, HDMCarrol - 812789312, HDMKent - 912080890

Service Environmental Assessment - W5512, Home Delivered Meals - W5516, Personal Assistant Services - W5519, Shared Attendant - W5521, Personal Assistant Services - W5527, Shared Attendant - W5528, Daily Personal Assistant Services - W5532, Daily Shared Attendant - W5533, Daily Personal Assistance - W5534, Daily Shared Attendant - W5535

Plan of Service Status Active, Inactive

Total Number of Records Returned 96

PROVIDER		CLIENT					
Provider Location	Provider Number	Client ID	Client MA#	Client First Name	Client Last Name	MA Eligible	Enrolled Program
AdminHDMBiniamBaltimore	000000101	1110005LC101201	00000000015	Client038	Biniam	NO	
AdminHDMBiniamBaltimore	000000101	1119418ET123100	10000000018	EAClient005	Biniam	YES	WOA
AdminHDMBiniamBaltimore	000000101	2110002LC201200		Client040	Biniam	NO	CS

Figure 70-Client First Name within the report output

Effective Date From: 2/8/2020 12:00:00 AM
Agency Name/FEIN:
Service: Environmental Assessment - W55:

Effective Date To: 3/8/2020 12:00:00 AM
Provider Locations: All Locations
Plan of Service Status: Active, Inactive

Client First Name: 5
Client ID/MA#:

Client Last Name:

View Report

Figure 71-Client First Name report input

CLIENT INFORMATION FOR BINIAM, CLIENT036

CLIENT PROFILE

SERVICE PLANS

CLIENT ATTACHMENTS

Client LTSS ID #: 2110000LC201200
Waiver:

Current MA#: 5
Age: 10

POS/PCP Program: CO
Primary Phone #: (301) 000-0000

Enrolled In:
Guardian of Person:

MA Eligible: No
DOB: 01/01/2010

Figure 72-Client First Name displayed in Client Profile

6. 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

Date Created: 3/8/2020 2:21:22 PM

Plan of Service - Approved Plans History Report

Search Criteria

Date From 1/1/2019 12:00:00 AM
Date To 1/1/2020 12:00:00 AM

Client Last Name
Client First Name
Client ID/MA#
Agency Name/FEIN HDM
Provider Locations AdminHDMBiniamBaltimore - 000000101, BillingHDMBiniamMontgomery - 000000500, EA Location Puryear - 123456776, EA Provider Only - 578864476, EA_All_Jurisdictions (Bin2) - 000000200, HDM Location Puryear - 756767776, HDM Provider Only - 777777776, HDM_All_Jurisdictions (Bin2) - 000000600, HDMCarrol - 812789312, HDMKent - 912080890

Service Environmental Assessment - W5512, Home Delivered Meals - W5516, Personal Assistant Services - W5519, Shared Attendant - W5521, Personal Assistant Services - W5527, Shared Attendant - W5528, Daily Personal Assistant Services - W5532, Daily Shared Attendant - W5533, Daily Personal Assistance - W5534, Daily Shared Attendant - W5535

Plan of Service Status Active, Inactive

Total Number of Records Returned 96

PROVIDER		CLIENT					
Provider Location	Provider Number	Client ID	Client MA#	Client First Name	Client Last Name	MA Eligible	Enrolled Program
AdminHDMBiniamBaltimore	000000101	1110005LC101201	00000000015	Client038	Biniam	NO	
AdminHDMBiniamBaltimore	000000101	1119418ET123100	10000000018	EAClient005	Biniam	YES	WOA
AdminHDMBiniamBaltimore	000000101	2110002LC201200		Client040	Biniam	NO	CS

Figure 73-Client Last Name within report output

Effective Date From
Effective Date To

Agency Name/FEIN
Provider Locations

Service
Plan of Service Status

Client First Name
Client Last Name

Client ID/MA#

Figure 74-Client Last Name report input

CLIENT INFORMATION FOR BINIAM, CLIENT036

CLIENT PROFILE

SERVICE PLANS

CLIENT ATTACHMENTS

Client LTSS ID #: 2110000LC201200
Current MA#:
POS/PCP Program: CO
Enrolled In:
MA Eligible: No

Waiver:

CLIENT PROFILE

CLIENT DEMOGRAPHIC OVERVIEW

Client Name: Biniam, Client036
MA#:
Current Address: 1000 Georgia Avenue, Baltimore, MD 20000
DOB: 01/01/2010

Figure 75-Client Last Name displayed in Client Profile

7. MA Eligible

- If the participant is eligible for Medical Assistance as of the current system date, the report will display “YES”
- If the participant is no longer eligible for Medical Assistance as of the current system date, the report will display “NO”
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

Date Created: 3/8/2020 2:21:22 PM

Plan of Service - Approved Plans History Report

Search Criteria

Date From 1/1/2019 12:00:00 AM
Date To 1/1/2020 12:00:00 AM
Client Last Name
Client First Name
Client ID/MA#
Agency Name/FEIN HDM
Provider Locations AdminHDMBiniamBaltimore - 000000101, BillingHDMBiniamMontgomery - 000000500, EA Location Puryear - 123456776, EA Provider Only - 578864476, EA_All_Jurisdictions (Bin2) - 000000200, HDM Location Puryear - 756767776, HDM Provider Only - 777777776, HDM_All_Jurisdictions (Bin2) - 000000600, HDMCarrol - 812789312, HDMKent - 912080890
Service Environmental Assessment - W5512, Home Delivered Meals - W5516, Personal Assistant Services - W5519, Shared Attendant - W5521, Personal Assistant Services - W5527, Shared Attendant - W5528, Daily Personal Assistant Services - W5532, Daily Shared Attendant - W5533, Daily Personal Assistance - W5534, Daily Shared Attendant - W5535
Plan of Service Status Active, Inactive
Total Number of Records Returned 96

PROVIDER		CLIENT					
Provider Location	Provider Number	Client ID	Client MA#	Client First Name	Client Last Name	MA Eligible	Enrolled Program
AdminHDMBiniamBaltimore	000000101	1110005LC101201	00000000015	Client038	Biniam	NO	
AdminHDMBiniamBaltimore	000000101	1119418ET123100	10000000018	EAClient005	Biniam	YES	WOA
AdminHDMBiniamBaltimore	000000101	2110002LC201200		Client040	Biniam	NO	CS

Figure 76-MA Eligible within the report output

CLIENT INFORMATION FOR BINIAM, CLIENT036

CLIENT PROFILE

Client LTSS ID #: **2110000LC201200** Current MA#: POS/PCP Program: **CO** Enrolled In: **MA Eligible: No**

Waiver:

SERVICE PLANS

CLIENT PROFILE Expand All

CLIENT DEMOGRAPHIC OVERVIEW

Client Name: **Biniam, Client036** MA#: Current Address: **1000 Georgia Avenue, Baltimore, MD 20000** DOB: **01/01/2010**

Age: **10** Primary Phone #: **(301) 000-0000** Guardian of Person:

Figure 77-MA Eligible displayed in Client Profile

8. Enrolled Program

- Lists the Programs in which the participant is enrolled as of the current system date
- For concurrently enrolled participants, each program will be listed and separated by commas
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

Date Created: 3/8/2020 2:21:22 PM

Plan of Service - Approved Plans History Report

Search Criteria

Date From 1/1/2019 12:00:00 AM
Date To 1/1/2020 12:00:00 AM
Client Last Name
Client First Name
Client ID/MA#
Agency Name/FEIN HDM
Provider Locations AdminHDMBiniamBaltimore - 000000101, BillingHDMBiniamMontgomery - 000000500, EA Location Puryear - 123456776, EA Provider Only - 578864476, EA_All_Jurisdictions (Bin2) - 000000200, HDM Location Puryear - 756767776, HDM Provider Only - 777777776, HDM_All_Jurisdictions (Bin2) - 000000600, HDMCarrol - 812789312, HDMKent - 912080890
Service Environmental Assessment - W5512, Home Delivered Meals - W5516, Personal Assistant Services - W5519, Shared Attendant - W5521, Personal Assistant Services - W5527, Shared Attendant - W5528, Daily Personal Assistant Services - W5532, Daily Shared Attendant - W5533, Daily Personal Assistance - W5534, Daily Shared Attendant - W5535
Plan of Service Status Active, Inactive
Total Number of Records Returned 96

PROVIDER		CLIENT					
Provider Location	Provider Number	Client ID	Client MA#	Client First Name	Client Last Name	MA Eligible	Enrolled Program
AdminHDMBiniamBaltimore	000000101	1110005LC101201	00000000015	Client038	Biniam	NO	
AdminHDMBiniamBaltimore	000000101	1119418ET123100	10000000018	EAClient005	Biniam	YES	WOA
AdminHDMBiniamBaltimore	000000101	2110002LC201200		Client040	Biniam	NO	CS

Figure 78-Enrolled Program within the report output

CLIENT INFORMATION FOR BINIAM, CLIENT036
✕

CLIENT PROFILE

 SERVICE PLANS

 CLIENT ATTACHMENTS

Client LTSS ID #: **2110000LC201200** Current MA#: POS/PCP Program: **CO** 8 Enrolled In: **CO** MA Eligible: **No**
 Waiver:

CLIENT PROFILE
Expand All

▼ CLIENT DEMOGRAPHIC OVERVIEW

Client Name: **Biniam, Client036**

MA#:

Current Address: **1000 Georgia Avenue, Baltimore, MD 20000**

DOB: **01/01/2010**

Age: **10**

Primary Phone #: **(301) 000-0000**

Guardian of Person:

Figure 79-Enrolled Program(s) displayed in Client Profile

9. POS Type

- Displays the type of Plan of Service that has been approved: Initial, Annual, or Revised
- When the hyperlink is selected by the user, a new tab will open to the participant's record in Provider Portal
- Hyperlink is unavailable if the participant is not actively assigned to the Provider user's Location as of the current system date
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

NOTE: Provisional Plans are not captured within this Report

Date Created: 3/8/2020 2:21:22 PM

Plan of Service - Approved Plans History Report

Search Criteria

Date From 1/1/2019 12:00:00 AM
Date To 1/1/2020 12:00:00 AM
Client Last Name
Client First Name
Client ID/MA#
Agency Name/FEIN HDM
Provider Locations AdminHDMBiniamBaltimore - 000000101, BillingHDMBiniamMontgomery - 000000500, EA Location Puryear - 123456776, EA Provider Only - 578864476, EA_All_Jurisdictions (Bin2) - 000000200, HDM Location Puryear - 756767776, HDM Provider Only - 777777776, HDM_All_Jurisdictions (Bin2) - 000000600, HDMCarrol - 812789312, HDMKent - 912080890
Service Environmental Assessment - W5512, Home Delivered Meals - W5516, Personal Assistant Services - W5519, Shared Attendant - W5521, Personal Assistant Services - W5527, Shared Attendant - W5528, Daily Personal Assistant Services - W5532, Daily Shared Attendant - W5533, Daily Personal Assistance - W5534, Daily Shared Attendant - W5535
Plan of Service Status Active, Inactive
Total Number of Records Returned 96

PLAN OF SERVICE				SERVICES			
POS Type	Active	Effective Date	End Date	Service Type	POS Service	MDH Approved Units	Frequency
Initial	Active	11/01/2019		Community First Choice	Home Delivered Meals	10 items	40 weeks
Annual	Active	04/02/2019		Community First Choice	Home Delivered Meals	8 items	50 weeks
Annual	Active	12/19/2019		Community First Choice	Home Delivered Meals	1 item	10 weeks
Annual	Active	11/28/2019		Community First Choice	Home Delivered Meals	2 items	2 weeks
Initial	Active	12/26/2019		Community First Choice	Home Delivered Meals	14 items	52 weeks
Revised	Active	12/01/2019		Community First Choice	Home Delivered Meals	1 item	2 weeks

Figure 80-POS Type within the report output

CLIENT INFORMATION FOR BINIAM, CLIENT036

CLIENT PROFILE

Client LTSS ID #: **2110000LC201200** Current MA#: POS/PCP Program: **CO** Enrolled In: MA Eligible: **No**
 Waiver:

SERVICE PLANS

Program Type	Date Created	Service Plan Type	Effective Date	End Date	Status	Active	Actions
CO	12/27/2019	Initial	03/01/2020		Approved	Active	Details
CO	12/27/2019	Initial	03/01/2020	03/01/2020	Approved	Inactive	Details

Figure 81-POS Type displayed in Service Plan list

10. Active

- Status of the Plan of Service as of the current system date
- This report is defaulted to sort by this column, with all participants with an “Active” Plan of Service listed first, then participants with an “Inactive” Plan of Service listed second
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

Date Created: 3/8/2020 2:21:22 PM

Plan of Service - Approved Plans History Report

Search Criteria

Date From 1/1/2019 12:00:00 AM
Date To 1/1/2020 12:00:00 AM
Client Last Name
Client First Name
Client ID/MA#
Agency Name/FEIN HDM
Provider Locations AdminHDMBiniamBaltimore - 000000101, BillingHDMBiniamMontgomery - 000000500, EA Location Puryear - 123456776, EA Provider Only - 578864476, EA_All_Jurisdictions (Bin2) - 000000200, HDM Location Puryear - 756767776, HDM Provider Only - 777777776, HDM_All_Jurisdictions (Bin2) - 000000600, HDMCarrol - 812789312, HDMKent - 912080890
Service Environmental Assessment - W5512, Home Delivered Meals - W5516, Personal Assistant Services - W5519, Shared Attendant - W5521, Personal Assistant Services - W5527, Shared Attendant - W5528, Daily Personal Assistant Services - W5532, Daily Shared Attendant - W5533, Daily Personal Assistance - W5534, Daily Shared Attendant - W5535
Plan of Service Status Active, Inactive
Total Number of Records Returned 96

PLAN OF SERVICE				SERVICES			
POS Type	Active	Effective Date	End Date	Service Type	POS Service	MDH Approved Units	Frequency
Initial	Active	11/01/2019		Community First Choice	Home Delivered Meals	10 items	40 weeks
Annual	Active	04/02/2019		Community First Choice	Home Delivered Meals	8 items	50 weeks
Annual	Active	12/19/2019		Community First Choice	Home Delivered Meals	1 item	10 weeks
Annual	Active	11/28/2019		Community First Choice	Home Delivered Meals	2 items	2 weeks
Initial	Active	12/26/2019		Community First Choice	Home Delivered Meals	14 items	52 weeks
Revised	Active	12/01/2019		Community First Choice	Home Delivered Meals	1 item	2 weeks

Figure 82-Plan of Service status within report output

Effective Date From: 2/8/2020 12:00:00 AM Effective Date To: 3/8/2020 12:00:00 AM View Report

Agency Name/FEIN: HDM Provider Locations: AdminHDMBiniamBaltimore - 0000

Service: Environmental Assessment - W5512 Plan of Service Status: Active, Inactive

Client First Name: Client Last Name: (Select All) ☒ Active ☒ Inactive

Client ID/MA#:

Figure 83-Plan of Service status selection in report input

SERVICE NOTIFICATIONS FOR PROVIDER PORTAL USERS

CLIENT INFORMATION FOR BINIAM, CLIENT036

CLIENT PROFILE

Client LTSS ID #: 2110000LC201200

Current MA#:

POS/PCP Program: CO

Enrolled In:

MA Eligible: No

Waiver:

SERVICE PLANS

CLIENT ATTACHMENTS

SERVICE PLANS

Program Type	Date Created	Service Plan Type	Effective Date	End Date	Status	Active	Actions
CO	12/27/2019	Initial	03/01/2020		Approved	10 Active	Details
CO	12/27/2019	Initial	03/01/2020	03/01/2020	Approved	Inactive	Details

Figure 84-Plan of Service status displayed in Service Plan list

11. Effective Date

- Date that the approved Plan of Service was effective or will be effective
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

Date Created: 3/8/2020 2:21:22 PM

Plan of Service - Approved Plans History Report

Search Criteria

Date From

1/1/2019 12:00:00 AM

Date To

1/1/2020 12:00:00 AM

Client Last Name

Client First Name

Client ID/MA#

Agency Name/FEIN

Provider Locations

Service

Plan of Service Status

Total Number of Records Returned 96

HDM

AdminHDMBiniamBaltimore - 000000101, BillingHDMBiniamMontgomery - 000000500, EA Location Puryear - 123456776, EA Provider Only - 578864476, EA_All_Jurisdictions (Bin2) - 000000200, HDM Location Puryear - 756767776, HDM Provider Only - 777777776, HDM_All_Jurisdictions (Bin2) - 000000600, HDMCarrol - 812789312, HDMKent - 912080890

Environmental Assessment - W5512, Home Delivered Meals - W5516, Personal Assistant Services - W5519, Shared Attendant - W5521, Personal Assistant Services - W5527, Shared Attendant - W5528, Daily Personal Assistant Services - W5532, Daily Shared Attendant - W5533, Daily Personal Assistance - W5534, Daily Shared Attendant - W5535

Active, Inactive

PLAN OF SERVICE				SERVICES			
POS Type	Active	Effective Date	End Date	Service Type	POS Service	MDH Approved Units	Frequency
Initial	Active	11/01/2019		Community First Choice	Home Delivered Meals	10 items	40 weeks
Annual	Active	04/02/2019		Community First Choice	Home Delivered Meals	8 items	50 weeks
Annual	Active	12/19/2019		Community First Choice	Home Delivered Meals	1 item	10 weeks
Annual	Active	11/28/2019		Community First Choice	Home Delivered Meals	2 items	2 weeks
Initial	Active	12/26/2019		Community First Choice	Home Delivered Meals	14 items	52 weeks
Revised	Active	12/01/2019		Community First Choice	Home Delivered Meals	1 item	2 weeks

Figure 85-Effective Date within the report output

SERVICE NOTIFICATIONS FOR PROVIDER PORTAL USERS

11

Effective Date From

2/8/2020 12:00:00 AM

11

Effective Date To

3/8/2020 12:00:00 AM

View Report

Agency Name/FEIN

Provider Locations

All Locations

Service

Environmental Assessment - W55

Plan of Service Status

Active, Inactive

Client First Name

Client Last Name

Client ID/MA#

Figure 86-Effective Date report inputs


CLIENT INFORMATION FOR BINIAM, CLIENT036									
CLIENT PROFILE	Client LTSS ID #: 2110000LC201200		Current MA#:	POS/PCP Program: CO	Enrolled In:	MA Eligible: No			
	Waiver:								
SERVICE PLANS	SERVICE PLANS								
CLIENT ATTACHME NTS	Program Type	Date Created	Service Plan Type	Effective Date	End Date	Status	Active	Actions	
	CO	12/27/2019	Initial	11 03/01/2020		Approved	Active	Details	
	CO	12/27/2019	Initial	03/01/2020	03/01/2020	Approved	Inactive	Details	

Figure 87-Effective Date displayed in Service Plans list

12. End Date

- Date that the approved Plan of Service will end
- Blank if Plan of Service does not have an end date as of the current system date
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

Date Created: 3/8/2020 2:21:22 PM

Plan of Service - Approved Plans History Report

Search Criteria

Date From 1/1/2019 12:00:00 AM
Date To 1/1/2020 12:00:00 AM
Client Last Name
Client First Name
Client ID/MA#
Agency Name/FEIN HDM
Provider Locations AdminHDMBiniamBaltimore - 000000101, BillingHDMBiniamMontgomery - 000000500, EA Location Puryear - 123456776, EA Provider Only - 578864476, EA_All_Jurisdictions (Bin2) - 000000200, HDM Location Puryear - 756767776, HDM Provider Only - 777777776, HDM_All_Jurisdictions (Bin2) - 000000600, HDMCarroll - 812789312, HDMKent - 912080890
Service Environmental Assessment - W5512, Home Delivered Meals - W5516, Personal Assistant Services - W5519, Shared Attendant - W5521, Personal Assistant Services - W5527, Shared Attendant - W5528, Daily Personal Assistant Services - W5532, Daily Shared Attendant - W5533, Daily Personal Assistance - W5534, Daily Shared Attendant - W5535
Plan of Service Status Active, Inactive
Total Number of Records Returned 96

PLAN OF SERVICE				SERVICES			
POS Type	Active	Effective Date	12 End Date	Service Type	POS Service	MDH Approved Units	Frequency
Initial	Active	11/01/2019		Community First Choice	Home Delivered Meals	10 items	40 weeks
Annual	Active	04/02/2019		Community First Choice	Home Delivered Meals	8 items	50 weeks
Annual	Active	12/19/2019		Community First Choice	Home Delivered Meals	1 item	10 weeks
Annual	Active	11/28/2019		Community First Choice	Home Delivered Meals	2 items	2 weeks
Initial	Active	12/26/2019		Community First Choice	Home Delivered Meals	14 items	52 weeks
Revised	Active	12/01/2019		Community First Choice	Home Delivered Meals	1 item	2 weeks

Figure 88-End Date within report output

CLIENT INFORMATION FOR BINIAM, CLIENT036								
CLIENT PROFILE	Client LTSS ID #: 2110000LC201200 Current MA#: POS/PCP Program: CO Enrolled In: MA Eligible: No							
	Waiver:							
SERVICE PLANS	SERVICE PLANS							
CLIENT ATTACHMENTS	Program Type	Date Created	Service Plan Type	Effective Date	End Date	Status	Active	Actions
	CO	12/27/2019	Initial	03/01/2020		Approved	Active	Details
	CO	12/27/2019	Initial	03/01/2020	12 03/01/2020	Approved	Inactive	Details

Figure 89-End Date displayed in Service Plans list

13. Service Type

- Name of the Service Type that is noted in the Plan of Service
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

Date Created: 3/8/2020 2:21:22 PM

Plan of Service - Approved Plans History Report

Search Criteria

Date From 1/1/2019 12:00:00 AM
Date To 1/1/2020 12:00:00 AM
Client Last Name
Client First Name
Client ID/MA#
Agency Name/FEIN HDM
Provider Locations AdminHDMBiniamBaltimore - 000000101, BillingHDMBiniamMontgomery - 000000500, EA Location Puryear - 123456776, EA Provider Only - 578864476, EA_All_Jurisdictions (Bin2) - 000000200, HDM Location Puryear - 756767776, HDM Provider Only - 777777776, HDM_All_Jurisdictions (Bin2) - 000000600, HDMCarrol - 812789312, HDMKent - 912080890
Service Environmental Assessment - W5512, Home Delivered Meals - W5516, Personal Assistant Services - W5519, Shared Attendant - W5521, Personal Assistant Services - W5527, Shared Attendant - W5528, Daily Personal Assistant Services - W5532, Daily Shared Attendant - W5533, Daily Personal Assistance - W5534, Daily Shared Attendant - W5535
Plan of Service Status Active, Inactive
Total Number of Records Returned 96

PLAN OF SERVICE				SERVICES			
POS Type	Active	Effective Date	End Date	13 Service Type	POS Service	MDH Approved Units	Frequency
Initial	Active	11/01/2019		Community First Choice	Home Delivered Meals	10 items	40 weeks
Annual	Active	04/02/2019		Community First Choice	Home Delivered Meals	8 items	50 weeks
Annual	Active	12/19/2019		Community First Choice	Home Delivered Meals	1 item	10 weeks
Annual	Active	11/28/2019		Community First Choice	Home Delivered Meals	2 items	2 weeks
Initial	Active	12/26/2019		Community First Choice	Home Delivered Meals	14 items	52 weeks
Revised	Active	12/01/2019		Community First Choice	Home Delivered Meals	1 item	2 weeks

Figure 90-Service Type within the report output

CLIENT INFORMATION FOR BINIAM, CLIENT036

CLIENT PROFILE

Client LTSS ID #: 2110000LC201200

Current MA#: 12345A6789

POS/PCP Program: CO

Enrolled In:

MA Eligible: No

Waiver:

SERVICE PLANS

PLAN OF SERVICE

Back to List

Print

Expand All

CLIENT ATTACHMENTS

> OVERVIEW INFORMATION

□ SERVICES

POS Service	Service Type	Provider Name	Units	Frequency	Rate	Annual
Home Delivered Meals	13 Community First Choice	AdminHDMBiniamBaltimore	6 items per week	16 weeks	\$6.3600	\$610.56
Comments:						

> EMERGENCY BACKUP PLANS

> ADDRESS TO RECEIVE SERVICES

> DECISION

> SIGNATURES

Figure 91-Service Type displayed in Plan of Service

14. POS Service

- Name of the Service Name that is noted in the Plan of Service
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

NOTE: In instances where the Provider is assigned to more than one service in the Plan of Service, the participant's Plan of Service records will display multiple times in the report.

Date Created: 3/8/2020 2:21:22 PM

Plan of Service - Approved Plans History Report

Search Criteria

Date From 1/1/2019 12:00:00 AM
Date To 1/1/2020 12:00:00 AM
Client Last Name
Client First Name
Client ID/MA#
Agency Name/FEIN HDM
Provider Locations AdminHDMBiniamBaltimore - 000000101, BillingHDMBiniamMontgomery - 000000500, EA Location Puryear - 123456776, EA Provider Only - 578864476, EA_All_Jurisdictions (Bin2) - 000000200, HDM Location Puryear - 756767776, HDM Provider Only - 777777776, HDM_All_Jurisdictions (Bin2) - 000000600, HDMCarrol - 812789312, HDMKent - 912080890
Service Environmental Assessment - W5512, Home Delivered Meals - W5516, Personal Assistant Services - W5519, Shared Attendant - W5521, Personal Assistant Services - W5527, Shared Attendant - W5528, Daily Personal Assistant Services - W5532, Daily Shared Attendant - W5533, Daily Personal Assistance - W5534, Daily Shared Attendant - W5535
Plan of Service Status Active, Inactive
Total Number of Records Returned 96

PLAN OF SERVICE				SERVICES			
POS Type	Active	Effective Date	End Date	Service Type	14 POS Service	MDH Approved Units	Frequency
Initial	Active	11/01/2019		Community First Choice	Home Delivered Meals	10 items	40 weeks
Annual	Active	04/02/2019		Community First Choice	Home Delivered Meals	8 items	50 weeks
Annual	Active	12/19/2019		Community First Choice	Home Delivered Meals	1 item	10 weeks
Annual	Active	11/28/2019		Community First Choice	Home Delivered Meals	2 items	2 weeks
Initial	Active	12/26/2019		Community First Choice	Home Delivered Meals	14 items	52 weeks
Revised	Active	12/01/2019		Community First Choice	Home Delivered Meals	1 item	2 weeks

Figure 92-POS Service within report output

SERVICE NOTIFICATIONS FOR PROVIDER PORTAL USERS

Effective Date From

Effective Date To

Agency Name/FEIN

Provider Locations

14
Service

☒ (Select All)
☒ Environmental Assessment - W5512
☒ Home Delivered Meals - W5516
☒ Personal Assistant Services - W5519
☒ Shared Attendant - W5521
☒ Personal Assistant Services - W5527
☒ Shared Attendant - W5528
☒ Daily Personal Assistant Services - W5532
☒ Daily Shared Attendant - W5533
☒ Daily Personal Assistance - W5534
☒ Daily Shared Attendant - W5535

Plan of Service

Client First Name

Client ID/MA#

Figure 93-POS Service selection in report input

CLIENT INFORMATION FOR BINIAM, CLIENT036

CLIENT PROFILE

Client LTSS ID #: 2110000LC201200

Current MA#: 12345A6789

POS/PCP Program: CO

Enrolled In:

MA Eligible: No

Waiver:

SERVICE PLANS

PLAN OF SERVICE

Back to List

Print

Expand All

OVERVIEW INFORMATION

SERVICES

POS Service	Service Type	Provider Name	Units	Frequency	Rate	Annual
Home Delivered Meals	Community First Choice	AdminHDMBiniamBaltimore	6 items per week	16 weeks	\$6.3600	\$610.56

Comments:

EMERGENCY BACKUP PLANS

ADDRESS TO RECEIVE SERVICES

DECISION

SIGNATURES

Figure 94-POS Service displayed in Plan of Service

15. MDH Approved Units

- The units that are approved by MDH for the associated POS Service
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

Date Created: 3/8/2020 2:21:22 PM

Plan of Service - Approved Plans History Report

Search Criteria

Date From 1/1/2019 12:00:00 AM
Date To 1/1/2020 12:00:00 AM
Client Last Name
Client First Name
Client ID/MA#
Agency Name/FEIN HDM
Provider Locations AdminHDMBiniamBaltimore - 000000101, BillingHDMBiniamMontgomery - 000000500, EA Location Puryear - 123456776, EA Provider Only - 578864476, EA_All_Jurisdictions (Bin2) - 000000200, HDM Location Puryear - 756767776, HDM Provider Only - 777777776, HDM_All_Jurisdictions (Bin2) - 000000600, HDMCarrol - 812789312, HDMKent - 912080890
Service Environmental Assessment - W5512, Home Delivered Meals - W5516, Personal Assistant Services - W5519, Shared Attendant - W5521, Personal Assistant Services - W5527, Shared Attendant - W5528, Daily Personal Assistant Services - W5532, Daily Shared Attendant - W5533, Daily Personal Assistance - W5534, Daily Shared Attendant - W5535
Plan of Service Status Active, Inactive
Total Number of Records Returned 96

PLAN OF SERVICE				SERVICES			
POS Type	Active	Effective Date	End Date	Service Type	POS Service	15 MDH Approved Units	Frequency
Initial	Active	11/01/2019		Community First Choice	Home Delivered Meals	10 items	40 weeks
Annual	Active	04/02/2019		Community First Choice	Home Delivered Meals	8 items	50 weeks
Annual	Active	12/19/2019		Community First Choice	Home Delivered Meals	1 item	10 weeks
Annual	Active	11/28/2019		Community First Choice	Home Delivered Meals	2 items	2 weeks
Initial	Active	12/26/2019		Community First Choice	Home Delivered Meals	14 items	52 weeks
Revised	Active	12/01/2019		Community First Choice	Home Delivered Meals	1 item	2 weeks

Figure 95-MDH Approved Units within report output

CLIENT INFORMATION FOR BINIAM, CLIENT036							
CLIENT PROFILE	Client LTSS ID #: 2110000LC201200 Current MA#: 12345A6789 POS/PCP Program: CO Enrolled In: MA Eligible: No						
	Waiver:						
SERVICE PLANS	PLAN OF SERVICE Back to List Print Expand All						
CLIENT ATTACHMENTS	OVERVIEW INFORMATION						
	SERVICES						
	POS Service	Service Type	Provider Name	Units	Frequency	Rate	Annual
	Home Delivered Meals	Community First Choice	AdminHDMBiniamBaltimore	15 6 items per week	16 weeks	\$6.3600	\$610.56
	Comments:						
	EMERGENCY BACKUP PLANS						
CLIENT ATTACHMENTS	ADDRESS TO RECEIVE SERVICES						
	DECISION						
	SIGNATURES						

Figure 96-Units displayed in Plan of Service

16. Frequency

- The frequency of the associated POS Service
- Column may be sorted in ascending or descending order by selecting the arrows within the column label

Date Created: 3/8/2020 2:21:22 PM

Plan of Service - Approved Plans History Report

Search Criteria

Date From 1/1/2019 12:00:00 AM
Date To 1/1/2020 12:00:00 AM
Client Last Name
Client First Name
Client ID/MA#
Agency Name/FEIN HDM
Provider Locations AdminHDMBiniamBaltimore - 000000101, BillingHDMBiniamMontgomery - 000000500, EA Location Puryear - 123456776, EA Provider Only - 578864476, EA_All_Jurisdictions (Bin2) - 000000200, HDM Location Puryear - 756767776, HDM Provider Only - 777777776, HDM_All_Jurisdictions (Bin2) - 000000600, HDMCarrol - 812789312, HDMKent - 912080890
Service Environmental Assessment - W5512, Home Delivered Meals - W5516, Personal Assistant Services - W5519, Shared Attendant - W5521, Personal Assistant Services - W5527, Shared Attendant - W5528, Daily Personal Assistant Services - W5532, Daily Shared Attendant - W5533, Daily Personal Assistance - W5534, Daily Shared Attendant - W5535
Plan of Service Status Active, Inactive
Total Number of Records Returned 96


PLAN OF SERVICE				SERVICES			
POS Type	Active	Effective Date	End Date	Service Type	POS Service	MDH Approved Units	Frequency
Initial	Active	11/01/2019		Community First Choice	Home Delivered Meals	10 items	40 weeks
Annual	Active	04/02/2019		Community First Choice	Home Delivered Meals	8 items	50 weeks
Annual	Active	12/19/2019		Community First Choice	Home Delivered Meals	1 item	10 weeks
Annual	Active	11/28/2019		Community First Choice	Home Delivered Meals	2 items	2 weeks
Initial	Active	12/26/2019		Community First Choice	Home Delivered Meals	14 items	52 weeks
Revised	Active	12/01/2019		Community First Choice	Home Delivered Meals	1 item	2 weeks

Figure 97-Frequency within the report output

CLIENT INFORMATION FOR BINIAM, CLIENT036							
CLIENT PROFILE	Client LTSS ID #: 2110000LC201200 Current MA#: 12345A6789 POS/PCP Program: CO Enrolled In: MA Eligible: No						
	Waiver:						
SERVICE PLANS	PLAN OF SERVICE Back to List Print Expand All						
CLIENT ATTACHMENTS	OVERVIEW INFORMATION						
	SERVICES						
	POS Service	Service Type	Provider Name	Units	Frequency	Rate	Annual
	Home Delivered Meals	Community First Choice	AdminHDMBiniamBaltimore	6 items per week	16 weeks	\$6.3600	\$610.56
	Comments:						
	EMERGENCY BACKUP PLANS						
	ADDRESS TO RECEIVE SERVICES						
	DECISION						
	SIGNATURES						

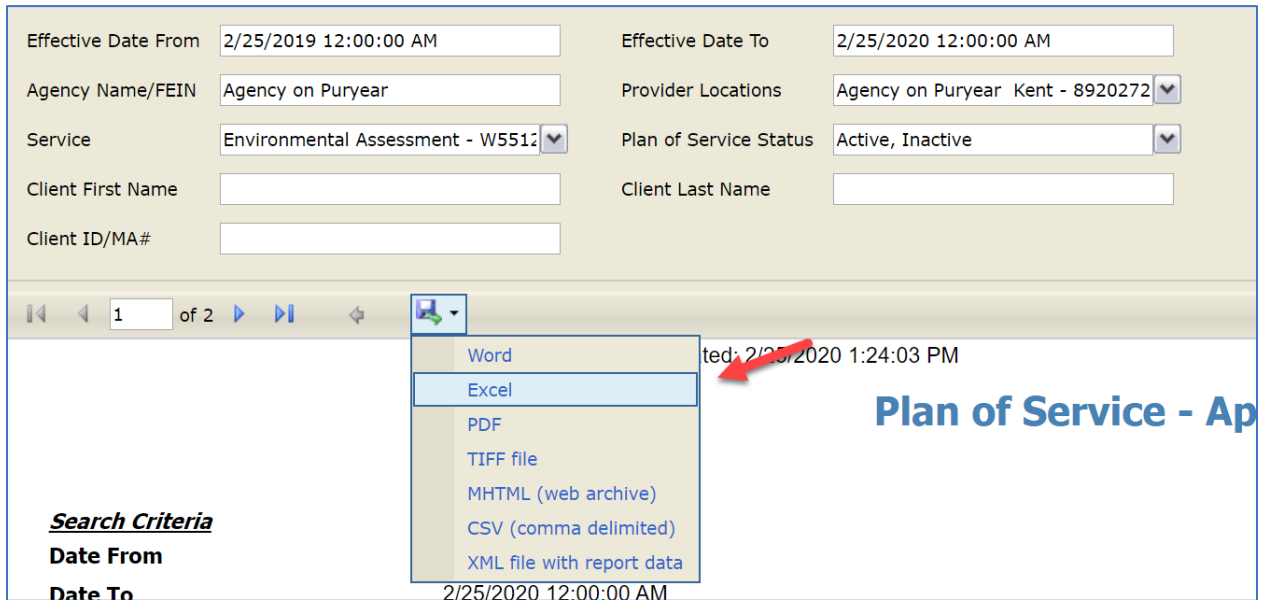
Figure 98-Frequency displayed in Plan of Service

3.2.4 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).



The screenshot displays a web application interface for generating reports. At the top, there are search criteria fields: 'Effective Date From' (2/25/2019 12:00:00 AM), 'Effective Date To' (2/25/2020 12:00:00 AM), 'Agency Name/FEIN' (Agency on Puryear), 'Provider Locations' (Agency on Puryear Kent - 8920272), 'Service' (Environmental Assessment - W5512), 'Plan of Service Status' (Active, Inactive), 'Client First Name', and 'Client Last Name'. Below these fields is a navigation bar with a '1 of 2' indicator and a set of icons. The 'Export' icon (a document with a download arrow) is highlighted, and a dropdown menu is open, listing the following options: Word, Excel (highlighted), PDF, TIFF file, MHTML (web archive), CSV (comma delimited), and XML file with report data. A red arrow points to the 'Excel' option. The main content area shows the title 'Plan of Service - Ap' and a timestamp 'ted: 2/25/2020 1:24:03 PM'. The 'Search Criteria' section is partially visible at the bottom left, showing 'Date From' and 'Date To' (2/25/2020 12:00:00 AM).

Figure 99-Export Option

Once the user has selected their desired export option, the system will invoke a new report tab with the exported file accessible at the bottom of the screen.

Effective Date From

2/25/2019 12:00:00 AM

Effective Date To

2/25/2020 12:00:00 AM

Agency Name/FEIN

Agency on Puryear

Provider Locations

Agency on Puryear Kent - 8920272

Service

Environmental Assessment - W5512

Plan of Service Status

Active, Inactive

Client First Name

Client Last Name

Client ID/MA#

1 of 2

Date Created: 2/25/2020 1:24:03 PM

Plan of Service - Appro

Search Criteria

Date From

2/25/2019 12:00:00 AM

Date To

2/25/2020 12:00:00 AM

Client Last Name

Client First Name

Client ID/MA#

Agency Name/FEIN

Agency on Puryear

Provider Locations

Agency on Puryear Kent - 892027276, Agency on Puryear St. Mary's - 657678976

Service

Environmental Assessment - W5512, Home Delivered Meals - W5516, Personal Assistant S

Plan of Service - A...

Figure 100-View exported file

4 Help and Contacts

1. Navigate to the **Help** tab
2. Select the Training Information and Webinars link to access the Service Notification Webinar via the “Webinars” tab on LTSSstraining.org

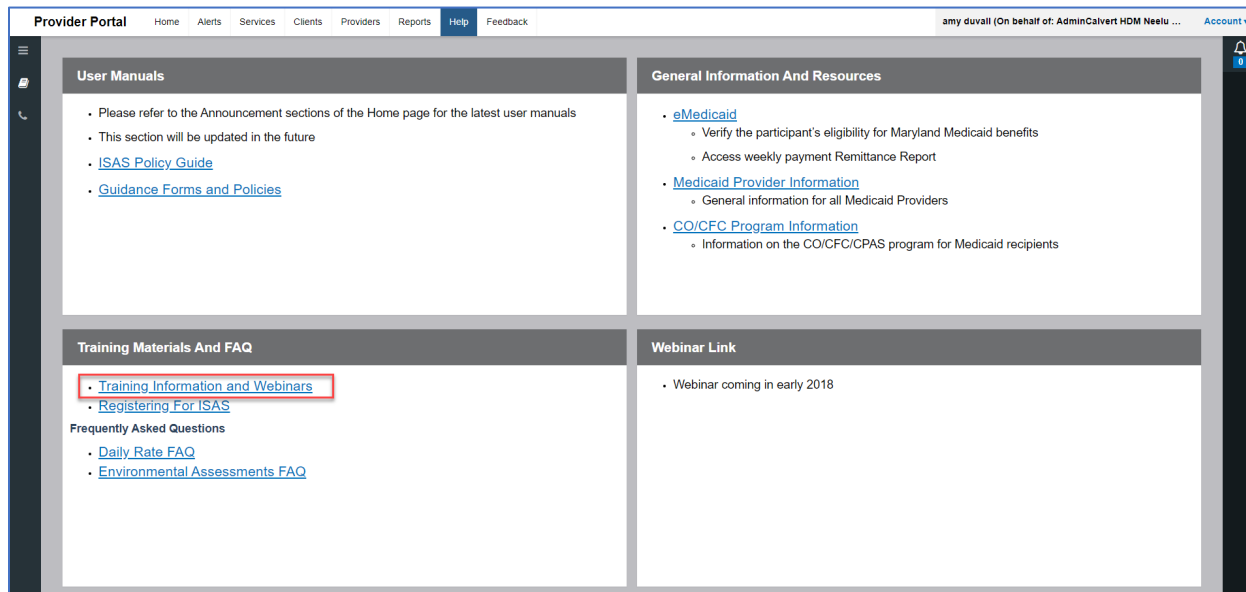


Figure 101-Training Information and Webinars

3. Select the  icon to view Contacts

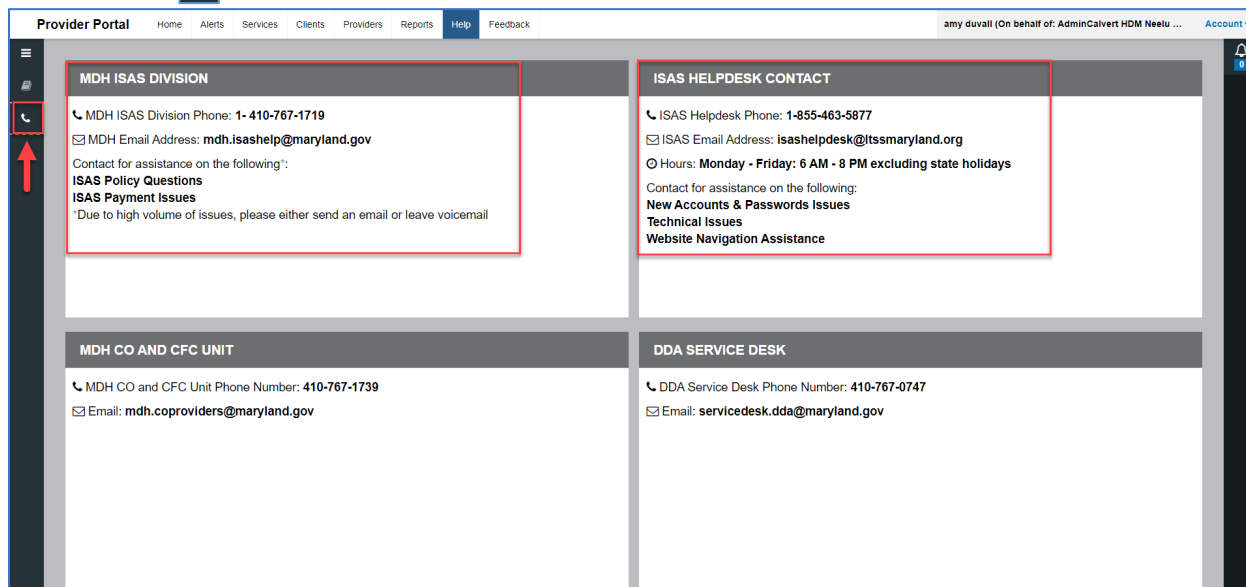


Figure 102-Help Contacts