Staff members will be assigned following current methods used for assignment. Once assigned the staff member will need to update the MLTC Program record to assign themselves as the Enrollment Provider.

Update Program Record

- Access the client record
- Add a Start time
- Go to Programs tab
- Enrollment Provider Subpage
- Stop timer

Pre-Release Tasks

Staff will need to conduct Pre-Release Research Tasks and conduct contact attempts before creating the CARES Referral.

Pre-Release Research Tasks

> Don't forget your timer when conducting and documenting the Pre-Release Research tasks
>
> Start/Stop Timer Tab

- Forms Tab
- All tasks need documentation on the Medicaid Waiver Timeline
    - 3008 Medical Certification Form
    - Possible LOC on file
    - Check DCF application
    - Check Medicaid application
    - Document the type of Waitlist Release Notice and the date sent
- Notes Tab
    - EMS Release Pre-Release Research tasks Note

Conduct Contact Attempts to confirm client interest

- **Attempt 1:** First contact attempt to confirm client interest
- Start/Stop Tab, record start time
- Notes Tab
    - Add a Note to document Contact Attempt 1
    - *Each contact attempt will have its own Note*
    - Start/Stop Tab, stop time
- **Attempt 2:** My Work > Notes > Follow-up Queue
    - Start/Stop Tab, start time
- Update Contact Attempt 1 Note to remove it from the queue
    - Document Contact attempt 2
- Start/Stop Tab, stop time
- **Attempt 3:** My Work > Note > Follow up Queue
    - Start/Stop Tab, start timer
- Update Contact attempt 2 Note to remove it from the queue
    - Document the outcome of the third contact attempt
        - Successful contact
            - Document the outcome of the successful contact and follow current documentation requirements for confirming client interest

- ▪ Unsuccessful Contact
  - Demographics tab to pull the Word Merge
  - Save No Contact Letter to a Note
- Start/Stop Tab
  - o Record Stop time

Update Program record

- Access the client record
- Make sure your timer is open
- Programs Tab
  - o MTLC Program Enrollment Record, update status
  - o Create the CARES Referral
- Forms Tab
  - o Update Medicaid Waiver Timeline Form to reflect status update and date Referral was sent to CARES
- ADRC will submit CARES Referral Packet using current methods and standards
- Start/Stop Timer Tab
  - o Stop Timer

If CARES Referral packet is sent back due to incompleteness

- Document in a Note the information requested by CARES
- Document in a Note the date the packet was resubmitted

Don't forget the Start/Stop Timer

Daily ADRCs will run the Clients with New LOC report from legacy CIRTS and complete tasks based on information provided on said report

- Fax the 2515 to DCF
- Document the 2515 by uploading it to a Note in eCIRTS
- Document the date of the assessment on the Medicaid Waiver Timeline Form
- Document the Staffing date on the Medicaid Waiver Timeline Form
- Document the date the 2515 was faxed to DCF on the Medicaid Waiver Timeline Form

Two to three times per month, the MLTC Program record will be updated in the background and ADRCs will receive an email to run specified reports that indicate actions that must be taken within eCIRTS.

- Programs Tab
  - o Update statuses of programs accordingly when MLTC = ACTV
- Forms Tab
  - o Update Medicaid Waiver Timeline to reflect ACTV date

Assessment Due Report will be correct despite CARES assessments occurring elsewhere; Assessment Due Report will be run from eCIRTS.