DOEA eCIRTS
Module 5-A
EMS Release Process
Reference Guide

Course Description

This module is designed to demonstrate tasks associated with the Statewide Medicaid Managed Care Long-Term Care Wait List / Enrollment Management System Release process handled by ADRCs. This module will focus on documenting the tasks such as conducting client interest contact attempts, documenting the Pre-Release tasks, and creating the CARES referral.

Prerequisites

- Layout and Navigation Video
- Searches Video
- Notes Video
- Ticklers Video
- Reports Video

Suggested Resources, Materials, and Credentials

- The Manual
- The Vizio
- Cliff Notes
- Login credentials and the link for the training site

Learning Outcomes

1. Locate assigned Client
2. Complete Pre-Release Research tasks
3. Conduct contact(s) to confirm interest
4. Update and Create Program Records

The EMS Release Process begins with the EMS Release date being added to the client record. ADRC staff is not responsible for adding this date. ADRC staff will begin their work on the client record after he/she has been assigned a specific client to assist through the process. The assignment process that links the staff member to specific clients will continue in its current form outside of eCIRTS for Phase 1.

Once the staff member has been assigned a client, the staff member will need to update the MLTC Program record to assign themselves as the Enrollment Provider.

Update the Program Record

- Access the client's record through the Quick or Advanced Search
- Navigate to Start/Stop Timer tab
    - Add a Start time to document your time that you spend on this record
- Navigate to Programs tab
    - Open MLTC Program record
    - Select Enrollment Provider Subpage
        - Update Program Enrollment Provider to self as Primary
- Go back to Start/Stop Timer tab
    - Record the stop time

Pre-Release Tasks

*ADRC worker will conduct **Pre-Release Research tasks** and **conduct contact attempts** to confirm client interest. These tasks can be conducted in any order, but documentation requirements must be fulfilled prior to CARES Referral creation.*

Pre-Release Research Tasks

- Access the client record through My Work Programs Queue, filter as needed
- Navigate to Start/Stop Timer tab
    - Record a Start time
- Navigate to the Forms tab
    - Add the Medicaid Waiver Timeline Form
    - *Review Type for Forms on page 320 in the manual*
    - *Status table for Forms on page 324 in the manual*
- Navigate to the Notes tab
    - Check for the 3008 as an uploaded form
    - Be sure to check legacy CIRTS too
- Navigate to the Forms tab
    - Document Date 3008 received on the Medicaid Waiver Timeline Form
    - Check legacy CIRTS for possible LOC on file

        - If no LOC found, or if LOC is greater than 90 days old, leave LOC field blank on Medicaid Waiver Timeline Form
    - Check DCF and Medicaid status outside of eCIRTS
    - Document dates for DCF application and approval/denial of Medicaid application on the Medicaid Waiver Timeline Form
    - Document on the Medicaid Waiver Timeline Form the type of Waitlist Release Notice and the date it was sent to the client
- Navigate to the Notes tab
    - Add a Note to summarize the Pre-Release Research tasks
    - *This note is explained in the manual on pages 193-194*
- Navigate to Start/Stop Timer
    - Record a Stop time
    - If you are continuing with this client, you do not need to stop the timer.

<u>Conduct Contact Attempts to Confirm Client Interest</u>

- Utilize the Quick or Advanced search to locate the client that you have been assigned
- Click on the Client from the list view results
- Demographics Tab
- Navigate to the Start/Stop Tab
    - Record a start time and reason for contact
- Navigate to the Notes Tab
    - Add a Note to document your first contact attempt (assume unsuccessful)
        - *Each contact attempt will be documented as its own note*
- Navigate to the Start/Stop Tab
    - Record a Stop time
- **Attempt 2:** Start on the My Work Dashboard
- Locate the Notes Queue
    - Follow-up Queue
    - Open existing Note
    - Select the View link at the right to access the client record

> The process for documenting contact attempts is in the manual on pages 175-177

- Land on Demographics page
    - Obtain contact information such as the phone number
- Navigate to the Start/Stop Tab
    - Record the Start time and reason for contact
- Use the open Note
    - Review the Note
    - Change the Status = Complete
    - *Note Status table on pages 313-315 in the Manual*
    - Save & Add Another – A New Note is created
    - Use the New Note to document the second contact attempt (assume unsuccessful)
- Navigate to the Start/Stop Tab

  - Record your Stop time
- **Attempt 3**: Start on the My Work Dashboard
- Locate the Notes Queue
  - Follow-up Queue
  - Open existing Note
  - Select the View link at the right to access the client record
- Land on Demographics page
  - Obtain contact information such as the phone number
- Navigate to the Start/Stop Tab
  - Record the Start time and reason for contact
- **Two Paths**: Unsuccessful Contact or Successful Contact
  - Unsuccessful Contact
    - Use the Open Note
      - Review the Note
      - Status = Complete
      - Save & Add Another
      - Document the third contact attempt
    - Navigate to Demographics Tab
      - Hover over Word Merge
      - Select No Contact Letter
      - Save to a Note
    - Navigate to the Start/Stop Tab
      - Record Stop Time
    - After the specified time required, typically 30 days, the Program record must be updated.
    - Navigate to Programs Tab
      - Update Status of MLTC Record to reflect Lost Contact
  - Successful Contact
    - Use the Open Note
      - Review the Note
      - Status = Complete
      - Save & Add Another Note
      - Document the successful outcome of the 3^{rd} contact attempt
        - This contact is used to confirm client interest. It could also be used to document discussions that need to occur with the client, such as verification of demographics, explaining what needs to be completed and submitted by the client, and so forth. Be sure to follow current documentation standards for conducting contact attempts.

<u>Update MLTC Program Record</u>

*After the **Pre-Release Research tasks** are complete and documented on the Medicaid Waiver Timeline Form and after the client has been contacted and **client interest has been confirmed**, then ADRC staff may update the MLTC Program Record and create the CARES Referral.*

- Make sure your Start/Stop Timer is active
- Navigate to the Programs Tab
    - Open the MLTC Program record
    - Update the status
    - Create a CARES Program Enrollment Record (CARES Referral)
    - *Creation of the CARES Referral is explained on pages 196-198 in the manual.*
- Navigate to the Forms Tab
    - Document the date the MLTC Record was updated
    - Document the date of sending the CARES Referral to CARES
- **ADRC Staff will continue to send the Referral Packet to CARES using the current methods and standards**
- Navigate to Start/Stop Timer Tab
    - Record stop time

Most of the following tasks will occur outside eCIRTS, but the events will be documented within eCIRTS.

- Any communication between CARES & ADRC will remain outside of eCIRTS.
    - If a packet was returned due to incompleteness,
    - ADRC staff would document in a Note the information requested by CARES.
    - They would also need to document in a Note when a completed packet was resubmitted to CARES.
- Daily ADRCs will run Report (Clients with New LOC) from legacy CIRTS
    - Will update the Medicaid Waiver Timeline Form in eCIRTS based on Report
        - Document the date CARES conducted the assessment on the Medicaid Waiver Timeline Form
        - Document the LOC Staffing date on the Medicaid Waiver Timeline Form
    - Fax 2515 to DCF
        - Document in a Note and upload a copy to the Note
        - Document date 2515 was faxed on Medicaid Waiver Timeline Form

Two to three times per month, ACHA says “yes” and BIT will import file into eCIRTS to automatically update the MLTC Program record to an Active status (or appropriate status) ADRCs will get an email to run a Report (examples: MLTC Enrollees Receiving...) to complete corresponding tasks, like terminating ADI or CCE enrollments, and document the date on the Medicaid Waiver Timeline Form

- Based on information from the Reports
    - Update Program Records
        - MLTC Program Record “automatically” updated to reflect active or other appropriate status.
        - Update other Program Records in accordance with an Active status for MLTC Program
    - Navigate to Forms tab
        - Update ACTV date on Medicaid Waiver Timeline Form

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

<u>Corresponding Page Numbers of tasks to the Training Manual</u>

Record Start and Stop Times… pages 73 -78

Update Enrollment Provider… pages 173 -175

Conduct Contact Attempts to Confirm Client interest…pages 175 - 180

Conduct Pre-Release Research tasks…pages 180 – 194

  Sending/Receiving the 3008 Medical Certification Form… pages 181-185

  Looking for LOC… pages 186-189

  Checking DCF and Medicaid Status…pages 190-192

  Document Waitlist Release Notice type and date sent…page 193

  Create EMS Release Note to summarize Pre-Release Research tasks…pages 193-194

Update the MLTC Program Record…pages 195 – 196

Create the CARES Referral…pages 196 – 198

<u>Other tasks that may be useful for the EMS Release Process</u>

Notes…pages 309-317

Duplicate a Form…pages 332-335